



Dental Staff Performance Review Checklist 2026: Competency & Goal Setting

Employee Information & Review Overview

Basic details including employee name, role, review period, and summary of the previous year's performance.

Employee Full Name

Write something...

Employee Role

- ☐ Dentist
- ☐ Dental Hygienist
- ☐ Dental Assistant
- ☐ Front Desk Coordinator
- ☐ Office Manager

Review Date

Enter date...

Review Period Start Date

Enter date...

Review Period End Date

Enter date...

Review Summary Overview

Write something...

Employee Signature

Core Clinical Competency Assessment

Evaluation of technical skills, sterilization adherence, chairside manner, and clinical accuracy specific to the staff member's role.

Infection Control Protocol Adherence

- ☐ Exceeds Standards
- ☐ Meets Standards
- ☐ Needs Improvement
- ☐ Unsatisfactory

Clinical Skills Mastery

- ☐ Instrument Sterilization
- ☐ Radiograph/X-Ray Positioning
- ☐ Impression/Scanning Accuracy
- ☐ Aseptic Technique
- ☐ Equipment Setup & Breakdown

Clinical Error Rate (Monthly Average)

Enter a number...

Clinical Competency Observations

Write something...

Clinical Supervisor Verification

Patient Interaction & Communication

Assessment of patient greeting protocols, empathy, clarity in explaining procedures, and management of patient anxiety.

Communication Strengths Observed

- ☐ Clear explanation of treatment plans
- ☐ Empathetic response to patient anxiety
- ☐ Effective use of positive body language
- ☐ Active listening skills
- ☐ Professional telephone etiquette

Patient Satisfaction Rating (Internal Audit)

- ☐ Exceeds Expectations
- ☐ Meets Expectations
- ☐ Needs Improvement
- ☐ Unsatisfactory

Specific Feedback on Patient Interactions

Write something...

Identified Communication Gaps

Write something...

Observation Date

Enter date...

Operational Efficiency & Workflow

Review of punctuality, adherence to dental office protocols, room turnover speed, and contribution to daily practice flow.

Adherence to Daily Opening/Closing Protocols

- ☐ Exceeds Expectations
- ☐ Meets Expectations
- ☐ Needs Improvement
- ☐ Unsatisfactory

Workflow Strengths Observed

- ☐ Efficient Room Turnover
- ☐ Proactive Instrument Preparation
- ☐ Accurate Supply Restocking
- ☐ Seamless Patient Transitions

Average Patient Turnover Time (Minutes)

Enter a number...

Observations on Workflow Bottlenecks

Write something...

Specific Area for Efficiency Improvement

Write something...

Compliance & Safety Adherence

Verification of strict adherence to OSHA, HIPAA, and infection control standards, and accuracy in maintaining patient records.

Infection Control Compliance Check

- ☐ Sterilization Autoclave Logs Completed
- ☐ PPE Usage Protocols Followed
- ☐ Surface Disinfection Protocols Observed
- ☐ Sharps Disposal Procedures Followed

HIPAA Privacy Compliance Rating

- ☐ Exceeds Standards
- ☐ Meets Standards
- ☐ Needs Improvement
- ☐ Unsatisfactory

Last Safety Training Completed Date

Enter date...

Identified Compliance Gaps & Corrective Actions

Write something...

Compliance Officer Verification

Administrative & Documentation Accuracy

Evaluation of charting precision, dental software usage, insurance coding accuracy, and task completion within the practice management system.

Software Proficiency Areas

- ☐ Patient Scheduling
- ☐ Digital X-Ray/Imaging Management
- ☐ Insurance Claims Processing
- ☐ Billing & Payment Posting
- ☐ Electronic Health Records (EHR)

Documentation Accuracy Rating

- ☐ Exceptional
- ☐ Proficient
- ☐ Needs Improvement
- ☐ Unsatisfactory

Notes on Charting Errors or Discrepancies

Write something...

Error Rate Percentage

Enter a number...

Last Documentation Audit Date

Enter date...

Reviewer Verification

Professionalism & Team Collaboration

Assessment of communication with dental colleagues, attitude during high-stress periods, and contribution to a positive workplace culture.

Core Collaboration Competencies

- ☐ Maintains positive attitude during high-volume shifts
- ☐ Communicates effectively with clinical and admin staff
- ☐ Assists teammates without being prompted
- ☐ Follows internal communication protocols
- ☐ Handles interpersonal conflicts professionally

Overall Teamwork Rating

- ☐ Exceeds Expectations
- ☐ Meets Expectations
- ☐ Needs Improvement
- ☐ Unsatisfactory

Specific Examples of Team Contributions

Write something...

Areas for Behavioral Improvement

Write something...

Manager Signature

Review of 2025 Goals & Achievements

A retrospective look at whether previously set objectives were met and identifying key successes during the past year.

Completed Objectives

- ☐ All previous goals met
- ☐ Partial goals met
- ☐ Some goals deferred
- ☐ New challenges encountered

Summary of Key Achievements

Write something...

Analysis of Unmet Objectives

Write something...

Percentage of Annual Goals Accomplished

Enter a number...

Supporting Documentation or Certifications

 Upload File

2026 Goal Setting & Development Plan

Definition of new SMART goals, identification of necessary training or continuing education, and professional growth milestones for the upcoming year.

Goal Target Completion Date

Enter date...

Primary Professional Goal 2026

Write something...

Action Plan & Required Resources

Write something...

Required Training/CE Categories

- ☐ Clinical Skills
- ☐ Software/Technology Training
- ☐ Patient Communication
- ☐ Compliance & Safety
- ☐ Leadership & Management

Priority Level

- ☐ High
- ☐ Medium
- ☐ Low

Employee Acknowledgment

Final Sign-off & Acknowledgement

Formal space for manager comments, employee feedback, and signatures to validate the performance review process.

Date of Review

Enter date...

Manager's Final Comments

Write something...

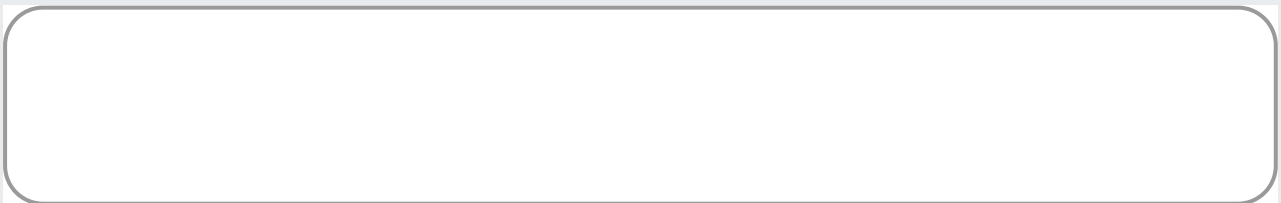
Employee Feedback & Comments

Write something...

Review Status

- ☐ Completed
- ☐ Pending Follow-up
- ☐ Requires Re-evaluation

Manager Signature



Employee Signature

Upload Signed PDF Copy



Upload File

< Previous

> Next

🏁 Finish



Generate Sample Report