



## Dental Care for a Medically Complex Patient

As our life expectancy increases, the number of patients with complex medical needs continues to rise. With a larger aging population, co-morbidities are growing, and treatments are needed to manage them. At present, nearly two-thirds of adults over the age of 65 years have more than one medical condition. Data from 2021 shows that approximately 64.8% of adults over 18 have taken at least one prescription medication in the prior year, and the number of medicines used increases with age. Additional factors like poor health literacy, financial and resource access challenges, and inadequate social support, among others, contribute to the complexity of healthcare needs. Dental professionals need to be prepared to mitigate risks associated with their care and promote positive health outcomes.

### Medical history taking

One of the first steps in managing a medically complex patient is to take a thorough medical history to identify any ongoing illnesses, past surgeries, medications, or treatments that might affect a patient's safety when completing a dental procedure. It is important to consider how these factors may affect oral health or if they are risk factors for complications.

For example, patients with diabetes have a higher chance of developing periodontal disease, which can lead to pain, difficulty with normal chewing, tooth loss, and slowed healing. They may also suffer from dry mouth and increased glucose in the saliva, which makes them more prone to certain infections such as thrush. Poorly controlled diabetes further elevates this risk. Likewise, there is a documented link between oral health and cardiovascular health. While poor oral hygiene alone may not directly cause heart disease, individuals with oral health issues show higher rates of problems such as heart attack and stroke. Routine oral care should be prioritized, especially in patients with additional underlying cardiovascular risk factors.

Similarly, individuals with renal disease are also at risk of poor outcomes without proper oral care, especially if they are receiving dialysis or have had an organ transplant. Dialysis patients, for example, may be on blood-thinning medications that increase bleeding risks during dental procedures, while transplant recipients often take immunosuppressive drugs, making them more prone to infections. Patients with renal disease

requiring antibiotics may need dosage adjustments or special instructions for use. Likewise, patients with certain respiratory illnesses could be more prone to oral infections due to medications or be at higher risk of systemic infections if oral pathogens spread. These are only a few examples of how medical conditions and treatments can influence oral health and complicate dental care. Dentists play an important role in identifying symptoms that might suggest an undiagnosed or poorly managed condition. They can act as a link to further care before the conditions worsen.

### Avoiding medical emergencies

Caring for medically complex patients can be more challenging than treating otherwise healthy patients, and there are additional risks to consider. Medical emergencies are rare but can occur in any patient.

Patients with underlying issues like cardiovascular, renal, respiratory, or other diseases are at higher risk of complications like heart attack, stroke, poor healing, or issues with anesthesia. Special populations such as pediatric patients or pregnant individuals present additional challenges. Children with complex medical needs are, like adults, at higher risk of poor outcomes and may have impairments that affect their or their caregiver's ability to maintain good oral health outcomes. Similarly, pregnant patients may face additional precautions when receiving dental treatments. Extra care is required for these patient populations.

Dental professionals should be prepared for various scenarios, both emergent and those that arise later as complications, and understand the liability risks associated with caring for medically complex populations. They can reduce risk by strictly requiring clearance by an appropriate physician for dental procedures that involve anesthesia, surgery, or a significant risk of bleeding. This is relevant for patients with a history of or currently experiencing joint replacement, cardiac surgery, bleeding disorders, cancer treatment, and other significant medical conditions.

## Strategies for Risk Reduction

Several risk reduction strategies should be considered when preparing to care for medically complex patients.

### 1. Comprehensive Clinical Assessment

A thorough clinical workup of all patients is necessary for risk reduction when caring for medically complex patients. This includes obtaining detailed information from the patient or caregiver regarding their medical history, medications, past surgeries, family and social history, and other relevant details. It would be beneficial to cross-reference the information provided by the patient or their caregiver with other sources, such as medical records or pharmacy records, though this may not always be feasible. This information allows a dental provider to better assess pre-treatment needs, whether it includes obtaining a treatment clearance, addressing risks of poor outcomes or likelihood of complications, and creating a plan to proactively meet these concerns.

### 2. Patient Education and Communication

Effective patient education is also vital to ensure appropriate care for medically complex patients. Dentists should explain the risks and benefits of all procedures, offer alternative treatment options when applicable, and ensure patients are fully informed about what to expect. Empowering patients to be involved in their care will garner better adherence and compliance with the treatment and ensure better outcomes. Patients who receive thorough education will be better positioned to follow all care instructions, increasing the likelihood of a safe and effective intervention. Likewise, treatment follow-up should be clearly communicated with the patient. Medically complex patients may have other competing care needs or restrictions on routine aftercare methods. For example, a medically complex patient may have limited pain management strategies that they can safely use after a dental procedure. They may also be more prone to infections, so awareness of infection signs and follow-up would be paramount to avoid complications.

### 3. Proactive Emergency Planning

Proactive preparation for providing care can reduce risks associated with caring for medically complex patients. Dental providers and their teams should be trained and ready to recognize signs of emergencies and to initiate management or triage. Emergency management supplies and medications should be quickly accessible and regularly checked to ensure they are up-to-date and in

working order. Team members should be Cardiopulmonary Resuscitation (CPR) certified and understand their roles in seeking additional intervention, such as contacting and coordinating with emergency medical services.

### 4. Protocols and Documentation

Dental providers should plan to create protocols and procedures that address the many unique needs of medically complex patients. This can include guidelines around screening patients and ensuring that they are appropriate candidates for a dental procedure, risk reduction strategies to limit the likelihood of poor outcomes, staff training, ongoing professional development, identifying and managing medical emergencies, and more. All dental care team members should regularly participate in professional development and training to stay current with changes in medical care and emergency preparedness. Adequately preparing all team members can help ensure a more seamless resolution if and when emergencies arise. Additionally, thorough documentation of all procedures, interventions, and steps to reduce complications should be clear and maintained appropriately to avoid future liability concerns. Finally, providers should maintain adequate liability coverage for when any issues arise.

### 5. Liability Coverage

With the potential for higher risks associated with providing care to medically complex patient populations, dental providers should maintain appropriate liability coverage. Liability coverage will help ensure that dental professionals are protected in the event that issues arise, allowing them to focus on providing care and solutions to the patient and easing the stress of legal or liability concerns.

As the population of medically complex patients grows, all dental providers will be affected to some capacity and should thus be ready to care for these patients while minimizing risks. Safe and effective care can be ensured by completing a comprehensive clinical assessment, incorporating risk reduction strategies, giving clear patient education, and preparing for emergencies. Planning and ensuring all dental team members are appropriately trained and knowledgeable on practice protocols and guidelines can support positive patient health outcomes. Finally, accurate documentation and appropriate liability coverage can ease potential legal concerns if complications occur. Incorporating these strategies can help all dental professionals become well-prepared to care for medically complex patient populations.

## RISK REDUCTION STRATEGIES: AT A GLANCE

- ✓ Take a comprehensive clinical assessment, including their medical history, medications, past surgeries, and family and social history.
- ✓ Provide comprehensive patient education on the risks and benefits of all procedures, competing medical needs related to other diseases, and pain management. Offer alternative treatment options when applicable.
- ✓ Prepare the team to recognize early signs of emergencies and initiate management or triage.
- ✓ Make sure the clinic's emergency management supplies and medications are accessible, up-to-date, and in working order.
- ✓ Ask patients to provide clearance from their physician before the planned dental procedure.
- ✓ Document in detail all procedures, interventions, steps to reduce complications, and any incidents that may occur.

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