Dental Office Manager Daily Checklist
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Opening Procedures:
[ ] Unlock the office and ensure all systems are operational.
[ ] Review the day's schedule, confirming patient appointments and staff availability.
[ ] Check voicemail, emails, and online inquiries for patient messages.

Staff Coordination:
[ ] Conduct a brief morning meeting to communicate the day's priorities and address any concerns.
[ ] Assign tasks and responsibilities to clinical and administrative staff.
[ ] Address any staffing adjustments or coverage needs.

Patient Management:
[ ] Greet patients as they arrive and assist with check-in procedures.
[ ] Ensure patients are informed about any delays or changes in the schedule.
[ ] Monitor the patient waiting area for cleanliness and comfort.

Appointment Coordination:
[ ] Monitor the schedule throughout the day to prevent overbooking or gaps.
[ ] Assist with managing emergencies, cancellations, or last-minute changes.
[ ] Coordinate with dental assistants to ensure efficient patient flow.

Financial Management:
[ ] Review patient accounts to ensure accurate billing and insurance processing.
[ ] Assist patients with questions about their bills or insurance coverage.
[ ] Process payments, provide receipts, and update financial records.

Office Maintenance:
[ ] Conduct regular walkthroughs to ensure office cleanliness and tidiness.
[ ] Address any issues with equipment, lighting, or facilities.
[ ] Monitor compliance with infection control protocols.

Communication:
[ ] Respond promptly to patient inquiries, concerns, or feedback.
[ ] Communicate any updates, policy changes, or announcements to the team.
[ ] Foster a positive and supportive environment for staff and patients.

This Dental Office Manager Daily Checklist was created by Connecteam - the easiest way to manage your employees in one place
Inventory Management:
[ ] Monitor inventory levels of dental supplies, including restocking as needed.
[ ] Manage office supplies to prevent shortages and maintain an organized workspace.
[ ] Schedule equipment maintenance and repairs as required.

End-of-Day Procedures:
[ ] Coordinate with staff to close the office at the end of the day.
[ ] Ensure patient records are updated and securely stored.
[ ] Review the next day’s schedule and make necessary preparations.

Document and Reporting:
[ ] Document any patient interactions, incidents, or notable events.
[ ] Compile patient feedback, testimonials, and suggestions.
[ ] Prepare daily reports summarizing patient flow, financial transactions, and other metrics.