

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.

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.