

Front Office Daily Checklist

Date: _____ Completed By: _____

1. Opening Office

- ☐ Open Office (TV, Jump Pad, music and doors)
- ☐ Check Voicemails, emails, DI chat and adjust schedule as needed
- ☐ Check Lobby and Front bathroom for trash and/or replacement of supplies.

2. Appointment Management

- ☐ Confirm tomorrow's schedule and print if needed
- ☐ Review cancellations/no-shows and update patient charts
- ☐ Send reminders for next-day Op appointments
- ☐ Flag any double-bookings or unresolved scheduling issues

3. Financials & Billing

- ☐ Print and review daily report
- ☐ Balance credit card terminal vs Open Dental Receipts
- ☐ Collect and log any patient balances discussed or not collected

4. Patient Records & Charts

- ☐ Ensure all patient charts are completed
- ☐ Scan and file any documents received today
- ☐ Verify insurance info was updated as needed

5. Office Communication

- ☐ Respond to all voicemails and emails (morning, lunch and close of day)
- ☐ Update team on any critical messages or patient issues
- ☐ Log any referrals or specialist communications

6. General Office Tasks

- ☐ Clean and sanitize front desk and lobby areas and Guest Bathroom
- ☐ Restock front desk supplies (forms, pens, masks, etc.)
- ☐ Shred confidential documents as needed

7. Final Lock-Up

- ☐ Check all lights off (except required night lights)
- ☐ All TV's, music and jump pad turned off
- ☐ Chairs/toy area sanitized
- ☐ Front doors are locked