Dental front desk daily checklist

22 October 2026 | Adapt duties and timing to your practice.

Practice: _____ Date / shift: _____

Reception owner: _____ Manager / backup: _____

When	Task / completion check	Owner / backup	Done / exception
Opening	Review schedule changes and missing administrative steps.	_____ _____	_____
Opening	Review approved messages; assign open items and next actions.	_____ _____	_____
Opening	Confirm phone routing, coverage gaps and escalation contact.	_____ _____	_____
Huddle	Agree known exceptions and protected work blocks.	_____ _____	_____
Arrival	Complete authorized check-in; route questions needing help.	_____ _____	_____
Call / message	Follow approved script; record outcome and follow-up owner.	_____ _____	_____
Schedule change	Apply booking rules; confirm and document the outcome.	_____ _____	_____
Assigned block	Complete only the insurance, payment or admin work assigned.	_____ _____	_____
Checkout	Complete authorized steps; confirm next administrative action.	_____ _____	_____
Break / shift	Confirm cover for reception, calls and unresolved work.	_____ _____	_____
Closing	Review open work and deadlines; obtain handover acceptance.	_____ _____	_____
Closing	Complete assigned reconciliation; secure records; check call route.	_____ _____	_____

Handover - one owner for every open item

Approved work reference / category: _____

Next action: _____

Owner and backup: _____ Due / escalation point: _____

Accepted by / time: _____

Use initials and time, or mark N/A with a reason. Keep patient details and passwords out of this sheet. Use approved systems for the working record. Clinical concerns follow the practice's clinician-approved process.

Original editorial template. Manager review required before use; no practitioner review claimed.

Full checklist and fictional handover example are included in the accompanying article.