

FRONT OFFICE *Rocks*®

The Leader in Dental Front Office Solutions & Training

Office Manager Checklist

**This form should be edited to match the responsibilities of the Office Manager in your office - additional lines can be added, as needed.*

Daily Tasks		
DAILY RESPONSIBILITIES	Notes	Done
Open appropriate resources on computer to run the day (i.e. software)		
Have morning huddle		
Confirm schedule and fix as needed		
Check in with each employee on the team		
Encourage and motivate team to increase production		
Verify notes/payments/adjustments entered during day by staff		
Hand issues as they arise		
Lead by example		
Update office statistics		
Run end of day		

Weekly Tasks		
WEEKLY RESPONSIBILITIES	Notes	Done
Monitor actual numbers for the month against the goal		
Meet with doctor to discuss and address issues		
Monitor online presence		

The information contained in this document is intended as information only and not as financial, accounting or legal advice.

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Post on social media		
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Monthly Tasks		
MONTHLY RESPONSIBILITIES	Notes	Done
Run end of month		
Test backup of server		
Hold staff meeting		
Ensure overdue recare calls made to all patients		
Send newsletter to patients		

****This is to be updated by the office manager to keep track of all that needs to be done****

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