

FRONT OFFICE *Rocks*®

The Leader in Dental Front Office Solutions & Training

Dental and Office Ordering Policy

- Ordering of dental supplies is to be done by one person assigned to do the ordering for the office. Other staff are responsible to pull tags or to notify the ordering person when things are needed or to make note of needing supplies on order sheet. Ordering needs to be done at least twice a month but attempt to not order more than once a week, in order to avoid paying additional shipping charges, etc..
- It is the responsibility of the supply order person to make sure that supplies are in our office on a timely manner and before they are needed. It is also their responsibility to make sure that our office is taking advantage of sales, bulk discounts, more economical prices, etc..
- The ordering budget is established to help guide the dollar amount that should be budgeted for the month for basic dental supplies. The budget is set at 5% of the production the month prior. The budget is set so that the person responsible for ordering has a guideline of the amount that can be spent and order accordingly, since week to week ordering may vary. Dental supplies can be ordered at the discretion of the person responsible as long as within the budget amount.
- The supplies should be ordered on the same day of the week so that all other staff know when the order will be placed and can make additions if needed. Other staff must give the ordering person the written request of anything in addition that they feel the office needs. It is the discretion of the ordering person if the requests can fit within the budget or not.
 - The request to the ordering person must state what it is that is needed/wanted
 - When it is needed or wanted by
 - Why it is needed or wanted and whether it is a request or a necessity
- The ordering person either orders the requested item(s) and returns the request to the person who submitted it with a note of when it will arrive or puts the request into the office manager's box for review during financial meeting. If the requested item is something that is not considered a "basic dental/office supply" then the employee can either submit directly to the office manager or if given to the office/dental supply order incorrectly, it can be rerouted to the office manager.
- If something special needs to be ordered or an order is placed with the approval of the doctor during the month, when entering it into the worksheet (explained below) then a comment can be attached to the date or the dollar amount, by right clicking on that box and selecting insert comment. Note what the product was and when/why approved by Doctor.
- Once supplies are ordered, the total amount needs to be entered into the Dental Supplies Worksheet found in Office Docs then Office Forms. Once the final order has been placed for the month, the worksheet needs to be printed and submitted to the office manager by the first of the next month for review.

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