

## Front Office Daily Operations Guide

*(weekly/monthly available upon request)*

### Purpose

This guide outlines the daily responsibilities of the administrative team to ensure efficient patient care, smooth practice operations, and exceptional customer service.

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**Start-of-Day Preparation: Complete these tasks before patient arrival.**

### Reception & Practice Readiness

- Clock in.
- Turn on all computers and equipment.
- Unlock entrance doors.
- Turn on fireplace (if applicable).
- Turn on lobby TV.
- Ensure reception and waiting areas are clean, organized, and welcoming.

### Review Voicemails

- Review overnight and weekend voicemails.
- Update schedules as needed.
- Return patient calls/texts promptly.
- Document communication in patient records.

**Verify Patient Information: Review the day's schedule and identify missing information needed for check-in.**

### Patient Information

- Email address
- Contact information
- Patient photo

### Required Documentation

- Incomplete forms
- Outstanding balances
- Financial arrangements for scheduled treatment
- Pre-medication requirements

## Minor Patients

### Confirm:

- Guardian attendance
- Consent forms
- Treatment plan approval
- Authorization for treatment

## Patient Communication Review

- Review messages from patient communication software.
- Respond appropriately and document communications.

## Morning Meeting Preparation

### Prepare information for the team, including:

- Schedule changes
- Patient concerns
- Special accommodations
- Outstanding treatment or financial notes

## New Patient Review

- Registration forms are complete.
  - Insurance information is entered.
  - X-rays have been received.
  - Necessary records are attached to the chart.
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## Upcoming Schedule Preparation (2–3 Days Ahead)

### Hygiene Schedule Management

- Fill open hygiene appointments.
- Ensure the following day's hygiene schedule is full before leaving.

### Doctor Schedule Management

- Fill open restorative appointments.
- Work to maximize doctor productivity and schedule efficiency.

### Financial Preparation

- Create money schedules for the following day.
- Verify expected patient payments and financial arrangements.

## Daily Responsibilities

### Patient Check-In

- Check in hygiene patients.
- Check in restorative patients.
- Verify patient information and balances.

### Patient Check-Out

- Collect payment for services rendered.
- Schedule future appointments.
- Review treatment recommendations.
- Confirm next steps with the patient.

### Treatment & Financial Coordination

- Present treatment plans.
- Discuss financial arrangements.
- Answer patient questions regarding treatment and payment options.

### Insurance & Pre-Authorization Management

- Manage pre-estimates and insurance submissions.
- Follow up on pending insurance information.

**Referral Management: all referral correspondence should be completed by end of day.**

### **Administrative Tasks**

- Scan correspondence into patient charts.

### **Clinical Team Follow-Up**

- Update odontogram.
- Enter chart notes.
- Change referral status to completed.

### **Claims Processing**

- Submit all claims generated during the current day.

### **Payment Processing (if not outsourced)**

#### **Apply and enter all available payments:**

- Personal checks
- EFT/credit card payments
- Postal mail payments

**Appointment Confirmation: review appointments 48 hours in advance.**

### **Contact Patients Who Have Not Confirmed**

- Call or message patients manually.
- Document confirmation status.

### **Restorative Appointments (2+ Hours)**

#### **Verify patient understanding of:**

- Scheduled procedure
- Estimated treatment time
- Amount due at appointment

### **Communication Management**

#### **Phone Calls**

- Answer incoming calls promptly and professionally.

#### **Patient Messaging System**

- Respond to all patient messages by end of day.

#### **Practice Email**

- Review and respond to all correspondence by end of day.

## Online Reputation Management

- Review Google feedback from patients seen on the previous working day.
  - Respond appropriately according to office guidelines.
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## End-of-Day Responsibilities

### Schedule Review

- Confirm the following day's hygiene schedule is optimized.
- Confirm the following day's doctor schedule is optimized.

### Patient Readiness Review

Verify all patients scheduled for the next day have:

- Completed forms
- Required records and x-rays
- Financial arrangements documented
- Pre-medication instructions noted
- Guardian consent confirmed (for minors)

### Communication Completion

Ensure:

- All patient messages are answered.
- All emails are answered.
- Outstanding voicemails have been addressed.

### Financial Completion

- Submit remaining claims.
- Post all available payments.
- Verify daily financial tasks are complete.

### Referral Completion

- Confirm all referral correspondence has been entered and processed.
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## Front Office Success Standards

Every day, the Front Office Team strives to:

- ✓ Deliver exceptional patient service
- ✓ Maintain accurate patient records
- ✓ Keep provider schedules productive and full
- ✓ Ensure financial arrangements are clearly communicated
- ✓ Respond to all patient communications by end of day
- ✓ Prepare proactively for future patient visits