

Dental Front Desk Duties Checklist

Daily Tasks

- ☐ Greet patients warmly and professionally
- ☐ Confirm next-day appointments
- ☐ Answer phone calls and respond to voicemails
- ☐ Collect co-pays and balances
- ☐ Verify and update patient insurance information
- ☐ Ensure patient consent forms are signed
- ☐ Schedule appointments efficiently
- ☐ Maintain cleanliness and organization of front desk and lobby
- ☐ Prepare patient charts and route slips
- ☐ Process payments and issue receipts
- ☐ Handle walk-ins and emergencies
- ☐ Communicate schedule changes with clinical staff
- ☐ End-of-day financial reconciliation

Weekly Tasks

- ☐ Verify insurance eligibility for upcoming appointments
- ☐ Print and review weekly schedule
- ☐ Follow up on outstanding treatment plans
- ☐ Review and reschedule no-shows/cancellations
- ☐ Submit insurance claims and monitor rejections
- ☐ Order office and front desk supplies

Monthly Tasks

- ☐ Review accounts receivable and follow up on unpaid balances
- ☐ Send out recall/reminder notices
- ☐ Update patient contact information
- ☐ Analyze and report scheduling trends
- ☐ Staff meeting: Discuss workflow, challenges, and improvements
- ☐ Run month-end reports (production, collections, adjustments)