



Protocols and Procedures Checklist

These are the critical systems of a dental practice.
Each should be clearly documented.

Excellent Patient Experience

- Communication Skills
- Scheduling 101
- Greeting as the patient enters
- Patient Cancellations
- Emergency Appointments
- Paperwork
- Operatory Hand-off
- Reviewing Health History
- Treatment Planning/Charting
- Consent forms
- Hand-off to Admin
- Case Presentation
- Pre-appointing
- New Patient Experience

Office Communication

- Practice Vision
- Morning Huddle
- Team Meetings
- Daily messaging
- Team Building

Hygiene Department

- Hygiene Philosophy
- Written Perio Protocol
- Recall systems

Restorative Department

- Clinical Efficiency
- X-rays/Intra-oral picture Protocol
- Delayed Treatment
- Inventory Control
- Sterilization/Infection control

Practice Management

- Daily/Monthly Goals
- Doctor Production Goals
- Hygiene Production Goals
- Scheduling
- Statistical/Trend Tracking
- Developing New Systems
- Overhead Management
- Referral System
- Job Descriptions
- HIPAA compliance/training
- OSHA compliance/training
- Practice Safeguards
- Chart Deactivation

Marketing

- Internal Mktg plan
- External Mktg plan
- Tracking referral sources
- Practice Promotion
- Social Media

Financial/Collections

- Financial Policy
- Written Financial Arrangements
- Collection Systems
- Collection Agency
- Insurance Management
- Claim tracking/processing
- End of Day/Month
- Petty Cash

Human Resources

- Hiring
- Termination
- Vacation/PTO tracking
- Performance Reviews
- Personnel files