ClinicOps

FREE CHECKLIST

Dental Office Daily Checklist

The opening, every patient, the close and the week: sterilizers, waterlines, the amalgam separator, operatories, phones and the schedule, signed every day.

The whole dental office for 1 to 10 dentists, in order: the opening, between patients with the sterilizer load log, the close, the weekly page and its logs, what to do when a line fails, and a two-week score. The front desk cash count is in the free End of Day Checklist.

Weekly

minimum spore test for every sterilizer, plus every load that holds implantable items
CDC checklist, 2016

500 CFU/mL

the most heterotrophic bacteria allowed in treatment water; untreated units cannot reliably meet it
CDC, 2024

12.9%

average cancellation rate in 2025 across 8,500+ practices; no-shows 6.9%
Planet DDS, 2026 (vendor platform data)

Start here: set it up in 15 minutes

1. **Fill your times on pages 2 and 4: opening, phones live, closing. List your sterilizers and units by name on pages 3 and 5. Never write alarm codes or passwords on any page.**
2. **Name an opener, a closer and a checker by role, each with a backup, and an infection control lead for the weekly page (table below). A sheet nobody checked counts as not done.**
3. **Cross out what you do not have (no amalgam placed or removed: skip the separator lines; no controlled substances stocked: skip that line), print two weeks, and score the two-week log at the staff meeting.**

Who opens, who closes and who checks

Office	Opens (first two in)	Closes (last two out)	Checks and initials
1 dentist	Front desk lead and the first assistant in	Front desk and the last assistant out	Office manager or dentist, weekly rotation
2 to 3 dentists	One front desk and one clinical opener	One front desk and one clinical closer	Office manager; infection control lead owns the weekly page
4 or more dentists	One opener per clinical team, plus sterilization	One closer per team, plus a manager walk-through	Office manager; infection control lead and backup named in writing

These sheets hold no patient information and never should: no names, chart numbers or dates of birth. The reasoning behind every line is in the dental office daily checklist guide.

The opening: 30 minutes before the first patient

Date	Opened by (role and initials)	Time in	Checked by

BLOCK 1: BUILDING AND EQUIPMENT

- [ ] **Alarm off with your own code; no sign of entry; exit routes and doors clear and open from the inside.**
  29 CFR 1910.37(a)(3): exit routes free and unobstructed, even temporarily. Sign of entry: do not go in; call 911 and the manager.
- [ ] **Compressor and vacuum on and running normally; drains or checks done as each maker directs.**
- [ ] **Dental units on, with the waterline treatment product in place as the unit or product maker directs.**
  CDC: untreated units cannot reliably keep water at 500 CFU/mL or less. A long morning flush is not a substitute.

BLOCK 2: STERILIZATION AND OPERATORIES

- [ ] **Yesterday's sterilizer log complete: every load has its mechanical and chemical result and initials.**
  CDC checklist: logs for each sterilizer cycle current, with results from each load.
- [ ] **The current week's spore test result filed for every sterilizer (or the test day is on the calendar).**
  CDC: at least weekly, and with every load holding implantable items.
- [ ] **Operatories set: barriers on, PPE stocked, sharps container upright and below its fill line.**
  29 CFR 1910.1030(d)(4)(iii)(A)(2): upright, replaced routinely, never allowed to overfill.
- [ ] **Emergency kit sealed; oxygen (if kept) and the AED showing ready; eyewash unobstructed.**
  29 CFR 1910.151(c): eyewash where eyes may be exposed to corrosive materials.

BLOCK 3: FRONT DESK, PHONES AND THE DAY

- [ ] **Phones off the answering service; a test call rings at the desk by: _____ Actual: _____**
  Write the real time, not the planned one. Late phones are the first lost bookings of the day.
- [ ] **Overnight messages returned oldest first; emergency messages to the dentist before the first patient.**
  Routing by tier: script 7 of the free Dental Front Desk Phone Scripts.
- [ ] **The day's schedule checked: gaps, emergency times held, unconfirmed patients called, open times offered to the short-notice list.**
- [ ] **Huddle at _____ with three lists: recare due, diagnosed treatment not yet scheduled, patients without a next visit.**

Between every patient

Date	Clinical lead	Front desk lead	Checked by

- [ ] **Clinical contact surfaces: barrier changed, or cleaned and disinfected with an EPA-registered hospital disinfectant, after each patient.**
  CDC: intermediate-level (tuberculocidal) disinfectant if visibly contaminated with blood.
- [ ] **Handpieces, scalers and air and water syringes run to discharge water and air for 20 to 30 seconds after each patient.**
  CDC 2003: to flush out patient material that may have entered the lines.
- [ ] **Instruments to sterilization in a closed container; each load read for time, temperature and pressure, its chemical indicator checked and logged below.**
  CDC 2003: monitor each load with mechanical and chemical indicators.
- [ ] **Packs labeled with sterilizer, load number and date; any pack whose indicator did not change goes back for reprocessing.**
  CDC checklist: packs are not used if indicators show inadequate processing.
- [ ] **Front desk: next visit booked before each patient leaves; the visit's payment taken at checkout; cancellations offered to the short-notice list within the hour.**
- [ ] **Front desk: missed calls returned within the hour; the next day's patients confirmed by: _____**

STERILIZER LOAD LOG (ONE LINE PER LOAD)

Sterilizer	Load #	Time out	Time, temp, pressure OK (Y/N)	Chemical indicator OK (Y/N)	Implant items (Y/N)	Initials

A load with an implantable item gets its own spore test (CDC checklist). Keep the logs as long as your state requires.

The close: the last 20 minutes

Date	Closed by (role and initials)	Time out	Checked by

BLOCK 1: INSTRUMENTS, LINES AND WASTE

- [ ] **Every instrument processed, packaged and logged; no load left in a sterilizer; the day's load log signed.**
- [ ] **Work surfaces that may have been contaminated since the last cleaning decontaminated.**
  29 CFR 1910.1030(d)(4)(ii)(A): at the end of the work shift.
- [ ] **Evacuation lines and chair-side traps cleaned with a cleaner the maker approves; trap contents into the amalgam recycling container.**
  40 CFR 441.30(b): no waste amalgam down the drain; no oxidizing or acidic line cleaners (pH under 6 or over 8) where amalgam wastewater goes to the sewer.
- [ ] **Full sharps containers closed and moved to the waste area; regulated waste closed.**
  1910.1030(d)(4)(iii)(A)(3): closed immediately before removal.
- [ ] **Controlled substances, if you stock them, in their locked cabinet; prescription pads locked away.**
  21 CFR 1301.75(b): a securely locked, substantially constructed cabinet.
- [ ] **Units, compressor, vacuum and water shut down as each maker directs.**

BLOCK 2: FRONT DESK AND THE BUILDING

- [ ] **Day close: payments counted and the deposit prepared by two people; every visit has a final status.**
  The money close step by step: the free Front Desk End of Day Checklist.
- [ ] **Next day's schedule saved or printed; unconfirmed patients contacted; emergency times still held.**
- [ ] **Main line forwarded to the answering service and tested from a cell phone.**
- [ ] **Every workstation locked or logged off; paper with patient information shredded or locked away.**
  45 CFR 164.310(c) workstation security; 164.530(c) safeguards for paper.
- [ ] **Exits clear; doors and windows locked; alarm set at _____**
  The last person out writes the time.

The weekly page

Week of	Infection control lead	Backup	Day it is done

- [ ] **Spore test run in every sterilizer (and with any load holding implantable items); result logged below when it comes back.**
  CDC 2003: monitor sterilizers at least weekly with a biological indicator and a matching control.
- [ ] **Waterline treatment, shock treatment and water testing done on the maker's schedule; results logged below.**
  CDC: monitor water quality as the maker of the unit or treatment product recommends.
- [ ] **Amalgam separator inspected as its manual directs; logged below with date, who and result.**
  40 CFR 441.30(a)(1)(iv) and 441.50(b)(1). Exempt if you never place or remove amalgam (441.10).
- [ ] **First week of the month: every fire extinguisher visually inspected and the tag initialed.**
  29 CFR 1910.157(e)(2) monthly; the annual maintenance date stays on the tag, (e)(3).
- [ ] **Emergency kit drug dates, oxygen level and AED pads and battery checked; supplies counted against par; expiry sweep.**
  Follow each maker's schedule.
- [ ] **Front desk: recare list worked, diagnosed treatment not yet scheduled reviewed with the dentist, next week's open hygiene times offered.**
  Letters for overdue patients: the free Dental Recare Letter Templates.

SPORE TEST LOG

Sterilizer	Date run	Result date	Pass or fail	Initials

WATERLINE LOG

Unit or operatory	Treatment done (date)	Test date	Result (CFU/mL)	Initials

AMALGAM SEPARATOR LOG (KEEP 3 YEARS: 40 CFR 441.50(B))

Date	Who inspected	Result	Container changed or pickup (date, facility)	Follow-up

When a line fails

What to do, in order, and the source. Your state dental board can add to these: confirm its rules for sterilization logs and records.

When this happens	Do this	Source
A spore test comes back positive	Take the sterilizer out of service; review loading, packaging and the mechanical and chemical results; retest with biological, mechanical and chemical indicators. Repeat negative and readings normal: back in service.	CDC 2003, VI.F.8
The repeat spore test is also positive	Do not use the sterilizer until it has been inspected or repaired. Recall, as far as possible, and reprocess everything processed since the last negative spore test.	CDC 2003, VI.F.9
A chemical indicator did not change	Do not use those instruments. Reprocess the pack and check the load's time, temperature and pressure.	CDC summary, 2016
A boil-water advisory is issued	Do not deliver public water through the dental unit or use it for treatment, rinsing or handwashing. When it is lifted, disinfect the lines as the unit maker recommends.	CDC 2003, VIII.B
A water test is over 500 CFU/mL	Treat the unit as its maker directs and retest right after treatment. A unit that keeps failing may need new lines.	CDC, 2024
The amalgam separator is not working	Repair or replace it no later than 10 business days after you find the fault. Log the date, who did the work and the make and model.	40 CFR 441.30(a)(1)(v); 441.50(b)(4)
Someone has a sharps injury	Wash the site, tell the dentist at once and follow your written exposure control plan. Exposure control plan template.	29 CFR 1910.1030
Signs of a break-in at opening	Do not go in. Call 911, then the manager. Once cleared, list missing devices or paper records and tell the privacy officer the same day.	Our standard
The opener is out and the phones are not live	The backup key holder opens; until then the answering service takes calls and the manager calls the first hour's patients.	Our standard
The closer has to leave early	The backup runs the close line by line and signs it. A close nobody signed counts as not done.	Our standard

The two-week log

One line a day, filled from the sheets and the load log by the checker.

Day	Opening signed (Y/N)	Close signed (Y/N)	Loads run	Loads logged	Hygiene patients	Left with next visit	Cancelled visits	Refilled
Day 1								
Day 2								
Day 3								
Day 4								
Day 5								
Day 6								
Day 7								
Day 8								
Day 9								
Day 10								

Your daily checklist score

Worked example: a two-dentist general practice, two sterilizers, two weeks, illustrative numbers. ClinicOps calculation from your own log.

Line	How to work it out	Worked example	Yours
A. Days open	Count	10	
B. Openings signed and checked	Count of Y	9	
C. Closes signed and checked	Count of Y	10	
D. Loads logged, share	Loads logged divided by loads run	96 of 100 (96%)	
E. Sterilizer-weeks with no spore test	Sterilizers x weeks, minus tests logged	1	
F. Hygiene patients reappointed	Left with next visit divided by hygiene patients (Planet DDS 2025 average: 63%)	112 of 160 (70%)	
G. Cancellations refilled	Refilled divided by cancellations	13 of 22 (59%)	
H. Chair hours left empty	(Cancellations minus refilled) x your average visit length in hours	9 x 1.0 = 9	
I. Production in those hours	H x your production per chair hour (your reports)	9 x $250 = $2,250	

Read your grade

Holding	**E is 0; D 98% or more; B and C equal A**	**Keep rotating openers; the manager spot-checks one opening and one close a month.**
Slipping	**E is 0; D under 98%, or B or C short 1 or 2**	**Find the day or person behind the misses; pair them with the checker for two weeks.**
Broken	**E is 1 or more, or B or C short 3 or more**	**A sterilizer ran a week unmonitored or the routine has stopped: fix the spore test day, owner and backup within five working days, then rerun the score.**

Grades are ClinicOps thresholds, not a regulatory standard. The worked example grades Broken on line E alone, though the rest is holding.

Sources

Every figure and rule here was checked against its original source for this edition (v1.0, Nov 19, 2026). Rules and figures change: confirm anything time-sensitive on the source page.

1. CDC, Infection Prevention Checklist for Dental Settings: spore test at least weekly and with implant loads; logs for each cycle; indicators in each pack; surfaces after each patient (Mar 2016). cdc.gov/dental-infection-control/media/pdfs/Infection-Prevention-Checklist-for

2. CDC, Summary of Infection Prevention Practices in Dental Settings (Oct 2016). cdc.gov/dental-infection-control/media/pdfs/2024/07/safe-care2.pdf

3. CDC, Guidelines for Infection Control in Dental Health-Care Settings (MMWR RR-17): 20 to 30 second discharge; load monitoring; positive spore test; boil-water advisory (2003, still current CDC guidance). cdc.gov/mmwr/preview/mmwrhtml/rr5217a1.htm

4. CDC, Dental Unit Water Quality and Best Practices for Dental Unit Water Quality: 500 CFU/mL or less; monitoring per the maker; treat and retest (May 15, 2024). cdc.gov/dental-infection-control/hcp/dental-ipc-faqs/best-practices-dental-uni

5. 40 CFR 441.10, 441.30 and 441.50, dental office amalgam rule: inspection, 10 business day repair, pH 6 to 8 line cleaners, 3-year records (current). law.cornell.edu/cfr/text/40/441.30

6. 29 CFR 1910.1030 bloodborne pathogens; 1910.37(a)(3) exit routes; 1910.151(c) eyewash; 1910.157(e) extinguishers (current). law.cornell.edu/cfr/text/29/1910.1030

7. 21 CFR 1301.75(b), storage of controlled substances (current). law.cornell.edu/cfr/text/21/1301.75

8. 45 CFR 164.310(a) and (c), facility access and workstation security; 164.530(c), safeguards (current). law.cornell.edu/cfr/text/45/164.310

9. Planet DDS, 2026 Dental Industry Outlook Deep Dive: 2025 cancellations 12.9%, no-shows 6.9%, hygiene reappointment 63% (vendor platform data, 8,500+ practices) (May 2026). planetdds.com/wp-content/uploads/2026/05/PDDS-2026-DSO-Outlook-DeepDive-051526

Next: the calls that fill the open times this checklist finds are scripted in the free Dental Front Desk Phone Scripts.

Where this checklist stops

The checklist makes the day repeatable. Here is what paper cannot do for you:

- **It cannot open the door: it works only if a named person runs it and someone else reads the log.**
- **It cannot see inside the sterilizer or the waterlines. Spore tests and water tests can, on a schedule someone owns.**
- **It does not set par levels, key holders or who may handle money. Those are controls you decide once and review.**
- **It cannot remind anyone that the spore test day was missed. A recurring task board with an owner and a backup can.**

Fix one system: Practice Controls: an SOP library a new hire can run on day one, a recurring task board, license and compliance calendars, and the cash controls that stop leakage.

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