ClinicOps

FREE CHECKLIST

Dental Opening and Closing Checklist

Who does what at the open and the close, role by role and timed, with the power-down order and a two-week timing score.

The open and the close of a dental office, split by role so each person knows when to arrive, what is theirs and when they are done. The whole day, with the load log and the weekly logs, is in the free Dental Office Daily Checklist.

Paid
set-up and close-down are work time for non-exempt staff
29 CFR 785.11

72.9%
of new dental patient inquiries came by phone in 2023
Liine, 2024 (vendor data)

35.1%
of dentists were recruiting hygienists in Q3 2026
ADA HPI, 2026

Start here: set it up in 20 minutes

1. Write your times once from your first patient time and your closing time. Defaults assume a first patient at 8:00 a.m. and the door locked at 5:00 p.m.
2. Fill the roster below: a name and a backup for every role. Never write alarm codes or passwords on any page.
3. Run it for two weeks, log the real times on the timing log, then work the score at the staff meeting and fix the one line that made the close late.

The roster

Role	Name	Backup	Arrives	Leaves
Key holder (first in)			7:15	
Sterilization lead			7:15	Last patient + 30
Dental assistants			7:30	Last patient + 20
Hygienists			7:40	Last patient + 15
Front desk opener			7:30	
Front desk closer				Closing + 15
Checker (office manager)			7:50	
Last person out				After the walk

The opening, role by role

Times are ClinicOps defaults: overwrite them with yours. Arrival times are paid time for non-exempt staff (29 CFR 785.11). No patient information on any sheet. The reasoning behind every line: the guide on clinicops.us.

Date	First patient seated at (plan)	First patient seated at (real)	Checked by

KEY HOLDER: THE BUILDING

In by (7:15)	Done at (real time)	Initials	Backup if absent

- [ ] **Alarm off with your own code. Anything forced or open: do not go in; call 911, then the office manager.**
- [ ] **Walk the building: water under units or sinks, the temperature, anything moved overnight. Lights on.**
- [ ] **Exit routes and doors clear and opening from the inside.**
  29 CFR 1910.37(a)(3): exit routes free and unobstructed.

STERILIZATION LEAD: MACHINES AND SOLUTIONS

In by (7:15)	Done at (real time)	Initials	Backup if absent

- [ ] **Compressor and vacuum on and running normally; the compressor's air receiver drained if it has a manual drain.**
  29 CFR 1910.169(b)(2): receivers drained often enough that liquid never builds up. The maker sets how often.
- [ ] **Sterilizers on; a prevacuum sterilizer gets its air removal test before the first load when the maker calls for one.**
  CDC 2003: a sterilizer that fails the air removal test is not used until inspected and it passes.
- [ ] **Fresh cleaning and disinfecting solutions made up; the ultrasonic cleaner filled as its maker directs.**
  CDC 2003: fresh solution each day, the leftover discarded, the container left to dry.
- [ ] **Yesterday's load log complete, with the mechanical and chemical result for every load; the spore test day is on the calendar.**
  CDC checklist 2016: logs for each sterilizer cycle current, with results from each load.

DENTAL ASSISTANTS: OPERATORIES

In by (7:30)	Done at (real time)	Initials	Backup if absent

- [ ] **Each unit on, with the waterline treatment product in place as the unit or product maker directs.**
  CDC 2024: treat to 500 CFU/mL or less and follow the unit maker for maintenance and monitoring. A long morning flush does not fix biofilm (CDC 2003).
- [ ] **Barriers on; each operatory set for its first patient from the schedule; 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.
- [ ] **Assistant on the emergency rota: kit seal, oxygen level and the AED's ready light checked.**

FRONT DESK OPENER: PHONES AND THE DAY

In by (7:30)	Done at (real time)	Initials	Backup if absent

- [ ] **Overnight messages and the answering service report read first; anything urgent to the dentist before the huddle.**
- [ ] **Start bank counted with a second person; both initial it.**
- [ ] **Schedule read for gaps, held emergency times and unconfirmed patients; the short-notice list ready for the gaps.**
- [ ] **Phones off the answering service by _____. Test call from a cell phone rings at the desk. Real time: _____**
  Write the real time, not the planned one. Answering rules for the desk: how to answer the phone.

HYGIENISTS, THE HUDDLE AND THE CHECKER

In by (7:40)	Done at (real time)	Initials	Backup if absent

- [ ] **Hygienists: own operatory set; instrument cassettes counted for the whole day; the schedule read for the prep each visit needs.**
- [ ] **Huddle at _____ for 10 minutes: gaps to fill, emergency times held, anything the opening found.**
- [ ] **Checker reads this page and initials it before the first patient is seated.**
  A sheet nobody checked counts as not done.

The close, role by role

The close starts when each role's last patient is dismissed, not at closing time. Each role signs its own block and leaves when it is signed.

Date	Last patient dismissed at	Front door locked at	Checked next morning by

HYGIENISTS AND ASSISTANTS: THE OPERATORIES

Started at	Done at (real time)	Initials	Backup if absent

- [ ] **Clinical contact surfaces, dental unit surfaces and countertops cleaned and disinfected; barriers off.**
  CDC 2003: cleaning and disinfection of these surfaces at the end of daily work. 29 CFR 1910.1030(d)(4)(ii)(A): any surface contaminated since the last cleaning, at the end of the shift.
- [ ] **Instruments to sterilization in a closed container; nothing left soaking in an operatory.**
- [ ] **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 line cleaner below pH 6 or above 8 where amalgam water goes to the sewer.
- [ ] **Full sharps containers closed and moved to the waste area.**
  29 CFR 1910.1030(d)(4)(iii)(A)(3): closed immediately before removal.
- [ ] **Units, X-ray heads and cameras off; sensors in their holders; water bottles handled as the unit maker directs.**

STERILIZATION LEAD: THE LAST LOADS

Last load started at (cut-off _____)	Done at (real time)	Initials	Backup if absent

- [ ] **Every load read for time, temperature and pressure, its chemical indicator checked, logged and initialed.**
  CDC 2003: items from a load whose mechanical or chemical indicators show a problem are not used until reprocessed.
- [ ] **Nothing left in a chamber; any failed load reprocessed, not stored.**
- [ ] **Ultrasonic cleaner drained, rinsed and left to dry; leftover solutions discarded; containers left open to dry.**
  CDC 2003.
- [ ] **Sterilizers and compressor shut down as each maker directs; the air receiver drained if it is manual.**
  29 CFR 1910.169(b)(2).

FRONT DESK CLOSER: THE DAY CLOSE AND THE PHONES

Started at (closing time)	Done at (real time)	Initials	Backup if absent

- [ ] **Day close: payments taken at checkout counted and the deposit prepared by two people; every visit on the schedule has a final status.**
  The money close step by step: the free Front Desk End of Day Checklist.
- [ ] **Next day confirmed: unconfirmed patients contacted, emergency times still held, huddle lists printed.**
- [ ] **Main line forwarded to the answering service and tested from a cell phone.**
- [ ] **Every workstation locked or logged off; paper with patient information locked away or shredded.**
  45 CFR 164.310(c) workstation security.

Power-down and lockup, in order

The last person out walks the office in this order and initials each line. Your equipment makers' instructions win wherever they differ: write your model names in the third column once.

Last person out (initials)	Alarm set at (time)	Stays on overnight (list once)	To report in the morning

#	Equipment	Your model or note	What to do	Initials
1	Dental units and delivery water		Lines discharged; master off; water bottle per the unit maker (CDC 2024).	
2	Vacuum and evacuation lines		Lines cleaned; traps into the amalgam container; off (40 CFR 441.30(b)).	
3	Sterilizers and ultrasonic		Last load out and logged; ultrasonic drained and dried; off per maker.	
4	Compressor		Off; air receiver drained if manual (29 CFR 1910.169(b)(2)).	
5	Nitrous oxide and oxygen, if used		Valves closed and lines bled as the equipment maker directs.	
6	X-ray heads, sensors, cameras		Off; sensors in their holders; nothing left on a chair.	
7	Medication refrigerator, if any		LEAVE ON. Door closed; temperature read if you log it.	
8	Controlled substances, Rx pads		In the securely locked cabinet (21 CFR 1301.75(b)).	
9	Workstations		Locked or logged off; on if backups run overnight (45 CFR 164.310(c)).	
10	Lights, heat, windows, back door		Off or set back; locked; exits still clear for the morning.	
11	Alarm		Set with your own code; time below (45 CFR 164.310(a)(1)).	

When the opening or the close goes wrong

When this happens	Do this	Rule or source
The key holder is out sick	The backup key holder on the roster opens. Until someone is in, the answering service keeps the line and the manager calls the first hour's patients.	Our standard
The compressor or vacuum will not start	No handpiece or suction work until it runs. The dentist decides which visits can go ahead (exams, consults); the front desk calls the rest from the top of the schedule; log the service call.	Our standard
A sterilizer fails its air removal test	Do not use it until it is inspected and passes. Run loads in another sterilizer and tell the clinical team which packs are ready.	CDC 2003
The power went out overnight	Any load that was mid-cycle is reprocessed, not used. Check the medication refrigerator, the alarm, and that the phones still forward and ring back to the desk.	CDC 2003
An emergency patient runs the last hour late	The front desk closes on time at the front. One assistant and the sterilization lead stay; the manager approves the time and it is paid.	29 CFR 785.11
A load is still running at closing time	Someone stays until it ends and is logged. Then move the last-load cut-off earlier.	CDC checklist 2016
The alarm shows an open zone	Walk the zone. If it will not clear, call the alarm company and the manager before leaving; never leave it unarmed without the manager's say-so.	Our standard
A gas fitting leaks at shutdown	Close the cylinder or supply valve, air the room, tag the equipment out of use and call the gas supplier before the next clinical day.	Our standard
The closer is new or covering	They run the block line by line with the sheet and the checker reads it next morning. The backup's first close is supervised.	Our standard; cross-training matrix
A staff member leaves the practice	Delete their alarm code and collect keys on the last day; name a new backup on the roster the same week.	45 CFR 164.310(a)(1)

The two-week timing log

One line a day, filled by the checker from the opening and closing sheets. Use the real times, never the planned ones.

Day	Phones live: plan	Phones live: real	First patient: plan	First patient: real	Close done: plan	Alarm set: real	People on the close	Both sheets signed (Y/N)
Day 1								
Day 2								
Day 3								
Day 4								
Day 5								
Day 6								
Day 7								
Day 8								
Day 9								
Day 10								

Your opening and closing score

Worked example: a two-dentist general practice open 4 days a week, 48 weeks a year; two hygienists, two assistants, two front desk staff stay 15 minutes past plan every day. Illustrative numbers, not a client. ClinicOps calculation.

Line	How to work it out	Worked example	Yours
A. Days logged	Count	10	
B. Minutes phones went live late	Sum of (real minus plan) on late days	85 (on 2 days)	
C. Days the first patient was seated late	Count (feeds the grade)	3	
D. Closing minutes past plan	Sum of (alarm set minus close done plan) on late days	150	
E. People on the close (average)	Average of the column	6	
F. Extra closing hours, two weeks	D x E / 60	15	
G. Days open a year	Your calendar	192	
H. Extra closing hours a year	F x G / A	288	
I. Average hourly wage of those people	Your payroll; or BLS May 2025 medians: hygienist $47.16, assistant $23.11, receptionist $18.27	$29.51	
J. Yearly cost of the slow close	H x I (straight time)	$8,500	
K. If those minutes are overtime	J x 1.5 (hours over 40 in the week)	$12,750	
L. Hours a year with phones not live	B / 60 x G / A	27	

Read your grade

Holding	Phones and first patient late on 1 day or fewer; close past plan on 1 day or fewer; every sheet signed	Keep it: the checker spot-checks one opening and one close a month, and a backup runs one of each.
Slipping	Phones or first patient late on 2 or 3 days, or close past plan on 2 to 4 days	Find the role behind the misses (usually the last load or the deposit) and move its cut-off or its owner.
Broken	Phones or first patient late on 4 or more days, close past plan on 5 or more, or any unsigned day	The routine has stopped. Rewrite the times with the team, name the backups again and rerun the log for two weeks.

Grades are ClinicOps thresholds, not a regulatory standard. The worked example grades Broken on the close (past plan on all 10 days); its opening is Slipping (phones late on 2 days, first patient late on 3).

Sources

Every figure and rule here was checked against its original source for this edition (v1.0, Nov 20, 2026). Rules and figures change: confirm anything time-sensitive on the source page.

1. 29 CFR 785.11 (work suffered or permitted) and 785.24 (principal activities) (current). law.cornell.edu/cfr/text/29/785.11
2. DOL Fact Sheet 22, Hours Worked Under the FLSA (revised Jul 2008). dol.gov/agencies/whd/fact-sheets/22-flsa-hours-worked
3. DOL, Overtime: time and one-half over 40 hours a week (current). dol.gov/agencies/whd/overtime
4. BLS OEWS Table 1, median hourly wages: hygienists $47.16, assistants $23.11, receptionists $18.27 (May 2025). bls.gov/news.release/ocwage.t01.htm
5. Liine, Marketing Benchmark Report: Dentistry 2024 (vendor data, nearly 50,000 leads in 2023) (Feb 2024). liine.com/wp-content/uploads/dlm_uploads/2024/02/Dentistry-Marketing-Benchmark
6. ADA HPI, State of the U.S. Dental Economy Q3 2026: staff recruiting (Q3 2026). ada.org/-/media/project/ada-organization/ada/ada-org/files/resources/research/
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8. CDC, Infection Prevention Checklist for Dental Settings (Mar 2016). cdc.gov/dental-infection-control/media/pdfs/Infection-Prevention-Checklist-for
9. CDC, Dental Unit Water Quality (May 15, 2024). cdc.gov/dental-infection-control/hcp/summary/dental-unit-water-quality.html
10. 29 CFR 1910.169(b)(2) air receivers; 1910.1030; 1910.37(a)(3) (current). law.cornell.edu/cfr/text/29/1910.169
11. 40 CFR 441.30(b), dental amalgam and line cleaners (current). law.cornell.edu/cfr/text/40/441.30
12. 21 CFR 1301.75(b), storage of controlled substances (current). law.cornell.edu/cfr/text/21/1301.75
13. 45 CFR 164.310(a)(1) and (c), facility and workstation security (current). law.cornell.edu/cfr/text/45/164.310

Next steps

1. Print two weeks of the opening and closing pages, fill the roster and post it where the key holders and the closers will see it.
2. Pair it with the whole day: the between-patient lines, the sterilizer load log and the weekly spore test, waterline and amalgam logs are in the free Dental Office Daily Checklist.
3. Close the money the same way every night with the free Front Desk End of Day Checklist, and train each backup with the cross-training matrix.
4. Read the reasoning behind every line, with the sources, in the dental opening and closing checklist guide.

Where this checklist stops

The checklist makes the open and the close repeatable. Here is what paper cannot do for you:

- It cannot open the door or set the alarm: it works only when a named person and a named backup run each block.
- It cannot see the clock. Only the log shows whether phones went live and the close ended on time, and someone has to read it.
- It does not decide who holds keys and codes, the last-load cut-off or who may handle money. Those are controls you set once and review.
- It cannot remind anyone that a backup was never trained. A recurring task board with owners and dates 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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