ClinicOps

FREE CHECKLIST

Medical Office Opening and Closing Checklist

One page for the opening, one for the close, one for the week: the building, the exam rooms, the vaccine unit, the front desk and the records, signed every day.

The whole-office opening and close for a practice of 1 to 10 providers: page 2 opening, page 3 close, page 4 weekly and what goes wrong, page 5 log and score. The front desk cash count is in the free Front Desk End of Day Checklist.

36°F to 46°F

the range a vaccine refrigerator must hold at all times; read min and max at the start of every workday
CDC toolkit, Jul 2026

40%

front office staff turnover in 2022 (33% for clinical support): next year's opener may be new
MGMA, Aug 2023

Monthly

visual inspection for every portable fire extinguisher, plus a yearly maintenance check
29 CFR 1910.157(e)

Start here: set it up in 15 minutes

1. Fill your times on pages 2 and 3: opening time, the time phones must ring at the desk, closing time. Never write alarm codes or passwords on any page.
2. Name an opener, a closer and a verifier by role, each with a backup (table below). A sheet nobody verified counts as not done.
3. Make it yours once (cross out what does not apply, add your equipment), print a week of pages 2 and 3, and score page 5 every two weeks at the staff meeting. Keep vaccine temperature logs 3 years (CDC).

Who opens, who closes and who verifies

Practice	Opens (first two in)	Closes (last two out)	Verifier
1 to 2 providers	Front desk lead and the early medical assistant	Front desk and the last medical assistant	Office manager or owner, rotating weekly
3 to 5 providers	One front desk and one clinical opener	One front desk and one clinical closer	Office manager; clinical lead owns the vaccine unit
6 to 10 providers	One opener per pod, plus the clinical lead	One closer per pod, plus a manager walk-through	Office manager; vaccine coordinator and backup in writing

These sheets hold no patient information and never should: no names, chart numbers or dates of birth.

The opening: 20 minutes before the doors open

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

BLOCK 1: BUILDING AND SAFETY, BEFORE ANYONE ELSE COMES IN

- [ ] **Alarm disarmed with your own code; doors, windows and the back entrance show no sign of entry.**
  Any sign of entry: do not go in. Call 911 and the manager first (page 4).
- [ ] **Lights and heating or cooling on; waiting room, restrooms and halls clean and dry.**
- [ ] **Exit routes and exit doors clear of boxes, carts and deliveries, and open from the inside without a key.**
  29 CFR 1910.37(a)(3): exit routes must be free and unobstructed, even temporarily.

BLOCK 2: CLINICAL ROOMS AND THE VACCINE UNIT

- [ ] **Vaccine refrigerator and freezer: min and max read and logged below before any vaccine is used.**
  CDC: check and record min and max at the start of each workday. Out of range: see page 4 first.
- [ ] **Each exam room stocked to its list; 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 and the AED status light showing ready.**
  Pads and battery dates are on the weekly page.
- [ ] **Eyewash station unobstructed, where the practice uses corrosive chemicals.**
  29 CFR 1910.151(c): quick drenching or flushing within the work area.
- [ ] **Point-of-care test controls run as the test maker requires before the first patient test.**
  Only if you run waived tests on site.

Unit	Min	Max	Now	Time	Initials	In range?
Refrigerator (36°F to 46°F)						
Freezer (-58°F to +5°F)						

BLOCK 3: FRONT DESK, PHONES AND THE DAY

- [ ] **Workstations, card terminal and printers log in; the EHR is up.**
  EHR down: start the downtime plan and use last night's printed schedule.
- [ ] **Phones off the answering service; a test call rings at the desk by the opening time: _____**
  Write the real time on the log; the score on page 5 counts late days.
- [ ] **Overnight messages, portal and fax sorted; urgent clinical items handed to the clinical lead.**
- [ ] **Today's schedule checked; unconfirmed patients called; open slots offered to the waitlist.**
  A gap filled before the first patient is a visit, not an empty slot.
- [ ] **Huddle at _____: who is out, yesterday's carried items, today's gaps and risks.**

The close: the last 20 minutes

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

BLOCK 1: EXAM ROOMS, SHARPS AND WASTE

- [ ] **Work surfaces that may have been contaminated since the last cleaning are decontaminated with an approved disinfectant.**
  29 CFR 1910.1030(d)(4)(ii)(A): at the end of the work shift.
- [ ] **Full sharps containers closed and moved to the waste area; regulated waste bags closed.**
  1910.1030(d)(4)(iii)(A)(3): close before removal. Never push down or reach in.
- [ ] **Specimens handed to the courier or stored as the lab instructs; the pickup is logged.**
- [ ] **No food or drink in any refrigerator, cabinet or counter that holds specimens or blood.**
  29 CFR 1910.1030(d)(2)(x).
- [ ] **Medication and sample cabinets and prescription pads locked; controlled substances in their locked cabinet.**
  21 CFR 1301.75(b): a securely locked, substantially constructed cabinet.
- [ ] **Vaccine units shut, plugs secure, DO NOT UNPLUG signs in place; current temperature logged if your thermometer has no min and max.**
  CDC: without a min and max display, read it at the start and the end of the workday.

BLOCK 2: THE FRONT DESK (THE DETAIL IS IN THE END OF DAY CHECKLIST)

- [ ] **Drawer counted and deposit locked by two people; every visit has a final status.**
  The five-block front desk close, with the cash sheet, is in the free End of Day Checklist.
- [ ] **Tomorrow's schedule saved or printed; unconfirmed patients contacted.**
- [ ] **Main line forwarded to the answering service and tested from a cell phone.**

BLOCK 3: SCREENS, PAPER AND THE BUILDING

- [ ] **Every workstation locked or logged off.**
  45 CFR 164.310(c): workstation security.
- [ ] **Printer, fax and copier trays empty; paper with patient information shredded or locked away.**
  45 CFR 164.530(c): reasonable safeguards for paper too.
- [ ] **Equipment off except vaccine units, servers and anything labeled to stay on.**
- [ ] **Exit routes clear; windows and doors locked; thermostat set; lights off; alarm set at _____**
  The last person out writes the time.

The weekly page

Week of	Done by	Verified by	Day it is done

- [ ] **Vaccine temperature data reviewed for trends; stock rotated so the earliest expiry is in front; expired doses removed.**
  CDC: review temperature data and rotate stock at least weekly.
- [ ] **Supplies counted against the par list for each room; orders placed.**
- [ ] **Expiry sweep: medications, samples, test kits and emergency kit items.**
- [ ] **AED pads and battery, oxygen level (if kept) and emergency kit seal checked; dates written on the tag.**
  Follow the maker's schedule for each item.
- [ ] **Eyewash flushed as its maker directs; first aid kit restocked.**
  29 CFR 1910.151(b): first aid supplies readily available.
- [ ] **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, 1910.157(e)(3).
- [ ] **The downtime packet is printed and current: schedule template, blank forms, phone list.**
- [ ] **Key and alarm code holders list is current; codes changed when anyone leaves.**
  45 CFR 164.310(a): facility access controls.
- [ ] **Opening and closing sheets for the week are all signed and verified; misses carried to the staff meeting.**
  The score on page 5 starts here.

When the opening or the close goes wrong

When this happens	Do this
Signs of a break-in at opening	Do not go in. Call 911, then the manager. Once police clear it, list missing devices or paper records and tell the privacy officer the same day. Breach response checklist.
The vaccine unit reads out of range	Do not use or discard the vaccines. Label them DO NOT USE: TEMPERATURE EXCURSION, keep them at the right temperature, tell the vaccine coordinator, and record date, time and readings (CDC).
Power went out overnight	Read the data logger before opening the unit door; follow the excursion steps if needed; check phones, servers and the alarm panel.
The opener is out and nobody has a key	The backup key holder opens. If nobody can open on time, phones stay on the answering service with a message and the manager calls the first hour's patients.
The EHR is down at opening	Start the downtime plan and work from last night's printed schedule. EHR downtime procedures.
Phones are stuck on the answering service	Call the phone vendor, switch on the overflow route, and write the real live time on the log.
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.

The two-week log

One line a day, filled from the sheets by the verifier. Write the real time the phones rang at the desk, not the planned one.

Day	Opened by	Phones live at	Unit read at start (Y/N)	Opening signed (Y/N)	Close signed (Y/N)	Items missed
Day 1						
Day 2						
Day 3						
Day 4						
Day 5						
Day 6						
Day 7						
Day 8						
Day 9						
Day 10						

Your open-and-close score

Worked example: a 4-provider family practice, two weeks, illustrative numbers. The usual opener was off on two Mondays and the backup did not know the phone step.

Line	How to work it out	Worked example	Yours
A. Days open	Count	10	
B. Openings signed and verified	Count of Y	8	
C. Days phones were live on time	Count	7	
D. Closes signed and verified	Count of Y	9	
E. Days the unit was read at the start	Count of Y	9	
F. Items missed, all sheets	Total	6	
G. Calls in your first hour	Phone report average	30	
H. Minutes late, on late days	Average of the late days	15	
I. First-hour calls missed	(A minus C) x H x G / 60	23	
J. Share of first-hour calls missed	I / (A x G)	7.7%	
K. Vaccine stock in the unit ($)	Your last order value	$8,000	
L. Days that stock sat unread	A minus E	1	

Line J compares with the goal one health system set for all calls: 10% or lower to voicemail, after finding some clinics above 50% (MGMA, 2023). Lines I and J are a ClinicOps calculation from your own inputs.

Read your grade

Holding	B, D, E equal A; F 3 or fewer	Keep rotating openers; the manager spot-checks one opening a month.
Slipping	B, D or E short 1 or 2; F 4 to 10	Find the day or person behind the misses; pair them with the verifier for two weeks.
Broken	E short 3+, D short 3+, or F over 10	The manager runs the opening and the close with the team this week, line by line.

Grades are ClinicOps thresholds, not a regulatory standard. The worked example scores Slipping: two unsigned openings and one unread day.

Why each line is there, with the rules in full: the opening and closing checklist guide on clinicops.us.

Sources

Every figure and rule here was checked against the original source on Nov 18, 2026. Rules and figures change: confirm anything time-sensitive on the source page.

1. CDC, Vaccine Storage and Handling Toolkit: ranges, daily min and max, weekly review, 3-year logs, excursions (Jul 2026). cdc.gov/vaccines/hcp/downloads/storage-handling-toolkit.pdf

2. 29 CFR 1910.1030, bloodborne pathogens: surfaces, sharps containers, food (eCFR, current to Nov 13, 2026). ecfr.gov/current/title-29/section-1910.1030

3. 29 CFR 1910.37(a)(3) exit routes; 1910.151 first aid and eyewash; 1910.157(e) fire extinguishers (eCFR, current to Nov 13, 2026). ecfr.gov/current/title-29/section-1910.157

4. 21 CFR 1301.75(b), storage of controlled substances (eCFR, current). ecfr.gov/current/title-21/section-1301.75

5. 45 CFR 164.310(a) and (c), facility access and workstation security; 164.530(c), safeguards (eCFR, current to Nov 13, 2026). ecfr.gov/current/title-45/section-164.310

6. MGMA, Practice Operations data report (2022 data): turnover 40% front office, 33% clinical support (Aug 2023). mgma.com/getkaiasset/ef6e357a-412b-41de-848f-a1b506b4261b/MGMA-PracticeOperati

7. MGMA, Valley View phone article: over 50% of calls to voicemail at some clinics; goal 10% or lower (Sep 26, 2023). mgma.com/articles/enhancing-patient-access-by-empowering-front-desk-staff-thro

Where this checklist stops

The checklist makes the opening and the close 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 watch the vaccine unit at 2 a.m.; a data logger with an alarm can.**
- **It does not set par levels, key holders or who may refund. Those are controls you decide once and review.**

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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