



Dental Nightly Closing Checklist 2026: Security & Daily Reconciliation

Front Desk & Patient Records

Tasks related to daily patient scheduling, updating patient files, and finalizing all clinical notes for the day.

Completed Patient Files

- ☐ All clinical notes signed by provider
- ☐ All diagnostic images attached to charts
- ☐ All consent forms scanned and uploaded
- ☐ All follow-up appointments scheduled

Date of Closing

Unresolved Patient Queries

Notes on Pending Patient Calls

Write something...

Front Desk Coordinator Sign-off

Financial Reconciliation & Daily Deposit

Procedures for balancing the daily ledger, reconciling credit card transactions, and preparing the bank deposit.

Reconciliation Date

Enter date...

Total Daily Cash Collected

Enter a number...

Total Daily Credit Card Transactions

Enter a number...

Total Daily Check/Insurance Payments

Enter a number...

Discrepancy Amount (if any)

Enter a number...

Payment Method Audit Completed

- ☐ Cash Counted
- ☐ Credit Card Terminal Balanced
- ☐ Checks Verified
- ☐ Daily Deposit Slip Prepared

Upload Daily Transaction Report

 Upload File

Office Manager Verification

Clinical Area Shutdown

Steps for cleaning treatment rooms, preparing instruments for sterilization, and managing dental unit maintenance.

Treatment Rooms Cleared

- ☐ Operatory 1
- ☐ Operatory 2
- ☐ Operatory 3
- ☐ Consultation Room

Dental Unit Water Lines Status

- ☐ Flushed and Disinfected
- ☐ Ready for Morning Setup
- ☐ Requires Maintenance

Equipment Issues Noted

Write something...

Shutdown Completion Time

Enter time...

Clinician/Lead Assistant Verification

Inventory & Supply Management

Final checks on essential supply levels and documenting any depleted items that need immediate reordering.

Supplies Reordered Today

- ☐ Dental Anesthetics
- ☐ Composite Resins
- ☐ Sterilization Pouches
- ☐ Personal Protective Equipment (PPE)
- ☐ Dental Impression Material
- ☐ Handpiece Lubricant

Low Stock Alerts

Write something...

Total Reorder Value (\$)

Enter a number...

Purchase Order Receipt

 Upload File

Inventory Manager Verification

Sterilization & Infection Control Closing

Completion of sterilization cycles, cleaning of autoclaves, and disposal of biohazardous waste for the day.

Sterilization Equipment Status

- ☐ Autoclave/Sterilizer cycle completed and dried
- ☐ Ultrasonic cleaner cleaned and rinsed
- ☐ Handpieces cleaned and lubricated
- ☐ All sterilization pouches inspected for integrity

Biological Indicator (Spore Test) Result

- ☐ Passed
- ☐ Failed - Followed Emergency Protocol
- ☐ Not Performed Today

Disinfectant Log Note

Write something...

Sterilization Log Completion Date

Enter date...

Sterilization Technician Signature

Upload Sterilization Log Photo

 Upload File

Facility Security & Safety

Ensuring all windows and doors are locked, alarms are set, and sensitive patient information is secured.

Security Checklist Verification

- ☐ All exterior doors and windows are locked
- ☐ Alarm system has been armed
- ☐ Safe/Vault is closed and locked
- ☐ All sensitive patient files/records are secured
- ☐ Office lights and non-essential electronics are turned off

Security Incident Notes

Write something...

Closing Manager Signature

Time of Final Building Lockdown

Enter time...

Date of Completion

Enter date...

Utilities & Equipment Power-Down

Verifying that all non-essential dental equipment, computers, and lights are turned off to conserve energy and ensure safety.

Equipment Power-Down Checklist

- ☐ Dental Autoclave/Sterilizer Off
- ☐ Compressor & Vacuum System Off
- ☐ X-Ray Units Powered Down
- ☐ Computer Terminals & Monitors Off
- ☐ Dental Chair Units Deactivated
- ☐ Room Lights & Overhead Lights Off

Main Building Power Status

- ☐ All Systems Secured
- ☐ Anomalies Detected

Unresolved Equipment Issues

Write something...

Closing Staff Signature

< Previous

> Next

✓ Finish

🔗 Generate Sample Report