



SMART DENTAL  
COMPLIANCE & TRAINING



# Practice Manager Log Book

Practice Name

Practice Manager Name

Log Book Start Date

End Date

# Contents

<b>1</b>	<b>Daily Tasks</b>	Page 2
<b>2</b>	<b>Weekly Tasks</b>	Page 58
<b>3</b>	<b>Monthly Tasks</b>	Page 86
<b>4</b>	<b>Annual Tasks</b>	Page 88
<b>5</b>	<b>Practice Spot Check</b>	Page 90
<b>Practice Manager Essential Resources</b>		
✓	Business Plan	
✓	Action Plan	
✓	Team Meeting Template	
✓	Staff One-to-One Form	
✓	Top Tips for Practice Managers	
✓	Staff Personnel File Document Checklist	
✓	Compliance Task Checklist	

# Daily Tasks Log Sheet



# Practice Manager Daily Tasks

WEEK COMMENCING:

DAILY TASKS	MON	TUE	WED	THU	FRI	SAT	SUN
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Go through practice emails and answer any enquiries							
Ensure daily back up of all computers are in place							
Manage appointment book and practice recall/referral systems							
<b>Finance</b>							
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<b>Patient Management</b>							
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Update staff schedule according to any changes							
Update staff holidays according to any changes							
<b>Add your own tasks</b>							



# Daily To-Dos

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# Daily To-Dos

TOP THREE THINGS

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3.

IF I HAVE TIME

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# Weekly Tasks Log Sheet



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# Practice Manager Weekly Tasks

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Cross check all practice logs and compliance logbooks							
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# Monthly Tasks Log Sheet



# Practice Manager Monthly Tasks

YEAR COMMENCING:

RESPONSIBILITY	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
<b>Administration</b>												
Order sundries and stationery												
Keep the patient information leaflets, practice brochures and other patient communications up-to-date												
<b>Compliance</b>												
Keep all practice documentation up-to-date, including policies, insurances, procedures and handbooks. Update monthly Compliance tasks												
<b>Finance</b>												
Monitor UDA & UOA's ensuring targets are met												
Generate monthly financial reports such as profit and loss for use in financial budgeting, monitoring and planning												
Check monthly standing orders and finance payments against the monthly bank statements												
Monthly practice reports financial, compliance, business, marketing												
Analyse monthly referral report, case start report and a new patient reports provided by the treatment coordinator or receptionist												
<b>Staff Management</b>												
Organise Monthly Team Meeting												
Administering staff payroll, payment salaries and record keeping												
Prepare information for associate pay schedules including monthly records of UDAs, lab bills etc												
Advertising vacancies, selecting candidates for interview, obtaining references, participating in or conducting interviews as appropriate for all practice staff and payroll of support staff												
<b>Add your own tasks</b>												





# Annual Tasks Log Sheet



# Practice Manager Annual Tasks

YEAR COMMENCING:

PRACTICE MANAGEMENT ANNUAL LOGS	2019	2020
<b>Compliance</b>		
Carry out annual CQC compliance audit		
Carry out annual audits (Annual Stock Control Audit)		
Maintain equipment & manage reactive repairs in line with recommendations		
Complete all outstanding compliance tasks		
<b>Finance</b>		
Reconcile end of year banking		
Review year end finances and create budget from the new year		
<b>Staff Management</b>		
Coordinate arrangements for appraisal, carry out annual appraisals		
Arrange refresher and update training for medical emergencies and CPR for all staff		
Conduct annual staff survey		
Review yearly staff performance		
<b>Add your own tasks</b>		



# Practice Spot Check Log Sheet



# Practice Manager Spot Check

DATE COMPLETED:

TASKS	YES	NO	COMMENTS
<b>Surgery Spot Check</b>			
Surgery logbook is filled out accurately			
Surgery is clean, tidy and free from clutter			
No expired stock present within the surgery			
Surgery is not over stocked			
PPE for patient is available			
Sharps bin is wall mounted and away from the floor			
All waste is segregated according to clinical and non-clinic bins			
<b>Decontamination Room Spot Check</b>			
Decontamination room is clean and tidy			
There is a clear flow of dirty to clean area with appropriate signages			
All equipment is in working order, annual servicing has been carried out			
All instruments are pouched, dated and signed			
Handpiece oil is present in the clean area and labelled			
Dirty and clean transportation boxes are available			
PPE is available			
<b>Reception Area Spot Check</b>			
Reception desk is clean and tidy, free from clutter			
All patient confidential information is locked away			
Computers are password protected			
Telephones are working			
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# Practice Manager Spot Check

DATE COMPLETED:

TASKS	YES	NO	COMMENTS
<b>Surgery Spot Check</b>			
Surgery logbook is filled out accurately			
Surgery is clean, tidy and free from clutter			
No expired stock present within the surgery			
Surgery is not over stocked			
PPE for patient is available			
Sharps bin is wall mounted and away from the floor			
All waste is segregated according to clinical and non-clinic bins			
<b>Decontamination Room Spot Check</b>			
Decontamination room is clean and tidy			
There is a clear flow of dirty to clean area with appropriate signages			
All equipment is in working order, annual servicing has been carried out			
All instruments are pouched, dated and signed			
Handpiece oil is present in the clean area and labelled			
Dirty and clean transportation boxes are available			
PPE is available			
<b>Reception Area Spot Check</b>			
Reception desk is clean and tidy, free from clutter			
All patient confidential information is locked away			
Computers are password protected			
Telephones are working			
No pending voicemails are present			
Medical history, consent forms are present for the patient			
Patient information folder is present			
Patient signages are available to view			



# Practice Manager Spot Check

DATE COMPLETED:

TASKS	YES	NO	COMMENTS
<b>Surgery Spot Check</b>			
Surgery logbook is filled out accurately			
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Telephones are working			
No pending voicemails are present			
Medical history, consent forms are present for the patient			
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Patient signages are available to view			





## **Additional Resources**



# Business Plan

<div>Company Name/Industry</div>	
<div>Staff Management</div> <div>1</div>	
<div>Marketing</div> <div>3</div>	<div>2</div> <div>Finance</div>
<div>Practice Plan</div> <div>5</div>	<div>4</div> <div>Compliance</div>
<div>New Acquisition</div> <div>7</div>	<div>6</div> <div>Patient Journey</div>
	<div>8</div> <div>KPI's</div>



# Action Plan

<b>1. IDENTIFY TASK</b>	<b>3. CHECK YOUR SCHEMES</b> (space, cash, helpers, equipment, material expertise/ systems)
<b>2. LIST STEPS TO COMPLETE</b> (delegate task if necessary)	<b>4. LIST DUE DATES FOR TASK</b> (don't forget to set google calendar and phone reminders)

**IF YOU COMPLETE A SIMPLER TASK IN FUTURE MAKE NOTES OF THINGS YOU COULD DO BETTER,  
OR LIST SOMETHING NEW YOU WANT TO TACKLE**



# Team Meeting Template

<b>PRACTICE:</b>		<b>ATTENDEES:</b>
<b>MEETING FACILITATOR:</b>		
<b>DATE:</b>		

TOPICS	DISCUSSION POINTS	ACTIONS
Finance	<ul style="list-style-type: none"> <li>Review Profit &amp; Loss report</li> <li>Review monthly financial reports</li> <li>TCO Conversion rate/report</li> <li>Review average daily production of fee-earners</li> </ul>	
Marketing	<ul style="list-style-type: none"> <li>Review marketing plan</li> <li>Review current promotions</li> <li>Discuss Online reviews</li> <li>Discuss upcoming social media connections and engagement</li> </ul>	
Patient Journey	<ul style="list-style-type: none"> <li>Discuss online booking</li> <li>Discuss booking through telephone, front desk and TCO</li> <li>Review end of treatment conversation</li> <li>Discuss high value treatments</li> </ul>	
Operational Management	<ul style="list-style-type: none"> <li>Discuss Governance and compliance</li> <li>Upcoming compliance activities</li> <li>Patient Compliant discuss</li> <li>Accident/Incident reported</li> </ul>	
Staff Performance	<ul style="list-style-type: none"> <li>Review team performance</li> <li>Upcoming training courses</li> <li>Discuss sickness and attendance</li> <li>Discuss any health &amp; safety issues</li> </ul>	



# Staff One-to-One Form

<b>EMPLOYEE NAME:</b>	<b>DATE:</b>

<b>Key achievements since last one-to-one</b>	
<b>Priorities / Areas of focus for next month</b>	
<b>Issues / Concerns / Points to raise</b>	
<b>Key Successes / Development Needs / Review of Actions from last meeting</b>	

## Actions from this meeting

<b>ACTION</b>	<b>BY WHEN</b>

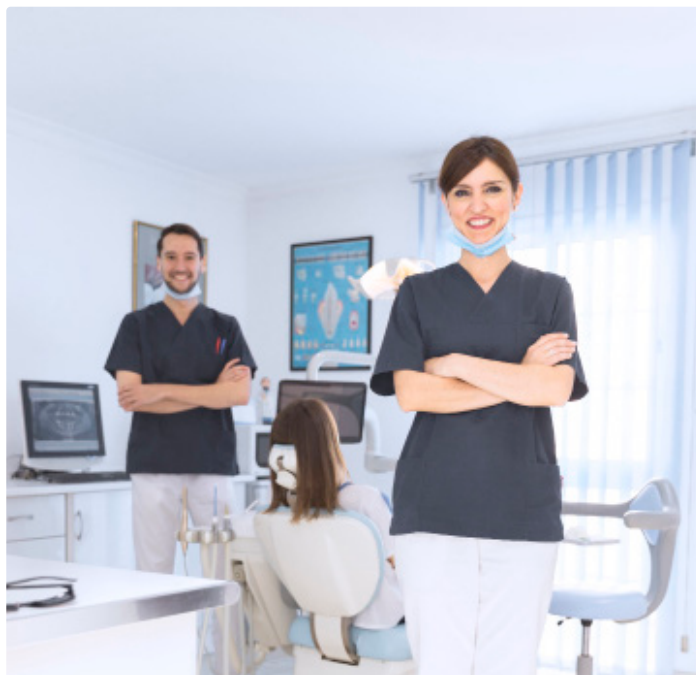
By signing this performance management form, both parties acknowledge that they have read and discussed the contents of the form.

Employee Signature	Date
Manager Signature	Date



# Top Tips For New Practice Managers

Each day in the life of a practice manager is different and you never know what is going to land on your desk or come through your door from one day to the next. This is what makes it both exciting and challenging. As a new practice manager, you would need many useful tips to succeed in this role. Here are few:



- ✓ Plan, Organise and Do. Planning your day, week and month is vital as a practice manager. Use the logs and add additional tasks to plan your time efficiently
- ✓ Build a good relationship with your team. Communicate and engage your team. Allocate 121 time with each team member to have formal and informal conversations, this can be extremely challenging. Send calendar invites and stick to them
- ✓ Employ other professionals to give your business strength. Whether it is your accountant, banker, solicitor or even a compliance manager.
- ✓ Build a rapport with your patients, especially your new patients. Show your patients that you have a positive overview of the way your practice operates. Your enthusiasm will generate trust and confidence
- ✓ Design and implement workable systems for all areas of the practice, from answering the phone, to invoicing, to dealing with complaints.
- ✓ Allow a follow up time for every task, it's very easy to get distracted with the endless to do list, however following up issues is very important
- ✓ Zone your diary, this will allow you to give undivided attention to pending tasks
- ✓ Invest time in hiring exceptional team members. They will be a major factor in the success of your business
- ✓ Act as a role model to your team. Be punctual and attentive. Show off your organisation skills
- ✓ Finally, invest in your yourself. Take up a Practice management training course. This will give you the confidence to carry out your role more professionally



# Staff Personnel

## File Document Checklist

DATE:	
REVIEW DATE:	



- ✓ Proof of Identification  
Personal details – name, address, date of birth, emergency contact, tax code and NI number
- ✓ Professional Certifications - GDC, Indemnity
- ✓ Employment history
- ✓ Disclosure checks – DBS Number
- ✓ Employment Contract
- ✓ Immunisation History
- ✓ Absence details
- ✓ Training Record – Clinical Staff Safeguarding Level 2 , Non – Clinical staff Level 1
- ✓ Health & Safety Issues (Needlestick Injuries)
- ✓ Disciplinary action
- ✓ Adoption leave policy
- ✓ Annual leave (holiday) policy
- ✓ Confidentiality policy
- ✓ Disciplinary procedure
- ✓ Equality policy
- ✓ Flexible working policy
- ✓ Grievance procedure
- ✓ Maternity and parental leave and pay policy
- ✓ Sickness and injury absence policy
- ✓ Underperformance and whistleblowing policy



# Compliance Tasks Checklist



DATE COMPLETED:

- ☐ Review your operational and regulatory practice policies, Make sure all policies are read by staff members. All policies must have a review date and should be updated regularly
- ☐ Make sure all audits are carried out according to their intervals. Some of the main audits are; cross infection, record keeping, radiography, pre-acceptance waste audit
- ☐ Annual risk assessments include, fire, legionella, health & safety, sharps
- ☐ Make sure all daily, weekly, monthly and annual logs are completed. Most important being the emergency drugs, oxygen, defibrillator and first aid
- ☐ All equipment must be PAT tested. Servicing of autoclave, washer disinfectors and compressors is vital
- ☐ Radiography equipment should have critical examination reports and servicing schedules
- ☐ Oxygen cylinder must be serviced
- ☐ Regular fire drills must be carried out
- ☐ Fire extinguishers should be serviced annually
- ☐ Staff personnel file should be reviewed and updated
- ☐ Annual cross infection and medical emergency training must be carried out
- ☐ Have a robust procedure for taking and demonstrating patient consent
- ☐ Have appropriate signage within the practice
- ☐ Carry out regular spot checks in order to ensure important tasks are being completed

\*Please note this list is not exhaustive and only includes some of the CQC requirements





# Yearly Calendar

July							August							September						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
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7	8	9	10	11	12	13	4	5	6	7	8	9	10	8	9	10	11	12	13	14
14	15	16	17	18	19	20	11	12	13	14	15	16	17	15	16	17	18	19	20	21
21	22	23	24	25	26	27	18	19	20	21	22	23	24	22	23	24	25	26	27	28
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October							November							December						
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Notes



# Staff Attendance Tracker

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# All-In-One Dental Management Portal

**Smart Dental Compliance & Training**  
**Your One Stop Solution to Dental Business Needs**



Tailor Made Practice  
Management Spreadsheets



Over 200+ categorised  
compliance templates



Professionally managed  
activity calendar



Enjoyable verified  
CPD courses



Resourceful HR  
management templates

**Monthly Subscription starts  
from just £99 per practice**

**Don't miss the opportunity to  
signup from 17th May 2019**



## All-In-One Dental Management Portal

**Launching our state of art all-in-one management portal,  
which provides an easy solution to your dental  
management needs**

### **The exclusive features includes:**

- ✓ Interactive Compliance Dashboard indicating your Practice Compliance Health
- ✓ Professionally managed activity calendar
- ✓ Over 200+ Categorised Compliance Templates
- ✓ Guideline to both mandatory and recommended compliance annual activities
- ✓ Enjoyable Verified CPD courses
- ✓ Resourceful HR management templates
- ✓ Tailor Made Practice Management Spreadsheets



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