

Treatment Coordinator

Job Summary

The Treatment Coordinator manages the holistic new patient process, from initial call through enrollment. The Treatment Coordinator promotes and sells the practice to prospective clients, and is responsible for meeting production goals for enrollment of new patients.

The Treatment Coordinator represents the practice in all facets of patient services, which may include: greeting patients, answering the telephone, scheduling appointments, maintaining patient records and coordinating patient flow.

The Treatment Coordinator communicates finances with the patient and works with insurance companies, as needed, to make sure orthodontic treatment is financially available to patients, communicates with patients regarding their treatment plan, determines the best option for financing the recommended treatment, and arranges appropriate financial plans with patients.

New Patient Duties

- Registers new patients, provides necessary paperwork (welcome letter, HIPPA documents), and ensures all required documents are completed by the patient. Inputs all information into computer.
- Confirms all new patient exams and observation recall appointments.
- Ensures that all new patient paperwork is complete and information is correctly entered into system.
- Introduces the new patient to the practice, demonstrates the value of treatment and the practice, and gives the new patient a tour.
- Provides patient information to the doctor prior to the exam.
- Assists the doctor during the new patient exam by documenting exam notes and treatment recommendations.
- Answers questions and explains treatment to new patient to gain enrollment.
- Maintains systems for communicating and following-up with patients who are not ready for treatment.
- Creates strategies for gaining enrollment on all patients who have declined to begin treatment.
- Schedules initial treatment appointments for enrolled patients.
- Prepares and sends all post-exam letters to patients/parents and general dentists.
- Generates statistical reports of initial visits, observation enrollments, treatment enrollments, and related financials.
- Tracks and reports on status of new patient enrollment in relation to practice goals.
- Manages designated marketing programs such as outreach to dental professionals, contests, and promotions.
- Organizes all activities related to school outreach programs.

Scheduling/Receptionist Duties

- Answers telephone, routes calls, provides information, and takes messages in accordance with practice procedures.
- Provides training, as needed, for other staff involved in phone contact.
- Uses computer, fax, or courier service to transmit information or documents when requested.
- Greets visitors and patients entering the practice and alerts appropriate staff of patient arrivals.
- Performs necessary duties associated with checking patients in and out. Record treatment information in the patient's chart. Enter type of treatment planned for the next appointment, and the amount of chair time, doctor time and assistant time needed.
- Monitors the schedule regularly, adjusts the schedule as necessary, and reschedules patients as needed.
- Schedules and adjusts patient appointments to maximize the patient care and reach practice profit target. Manages the daily, weekly, and monthly calendar to meet the practice production and collection goals.
- Updates staff on the status of the current day's schedule and identifies scheduling gaps.
- Keeps staff and doctor informed of scheduling problems, issues or concerns
- Prepares correspondence, memos, condolence letters, and other documents, as requested by doctor.
- Helps coordinate lab deliveries with appointments.
- Establishes, maintains and keeps patient files and records up to date (i.e. address, phone number, insurance information, etc.).
- Works cooperatively with other administrative staff to maintain professional and well-kept reception and consultation areas. Maintains and stocks refreshment area. Waters the plants.

Financial Duties

- Verifies charts have complete insurance information.
- Researches insurance benefits and prepares estimates on treatment diagnosed prior to discussing financial arrangements.
- Coordinates patient financial arrangements according to the financial policy.
- Communicates with patients regarding finances. Reconciles financial records by receiving and recording patient payments.
- Maintains appropriate financial documentation, including signed financial agreements if financing treatment.
- Records patient financial discussions.
- Monitors payments to ensure treatment financing is followed through appropriately. Follows up with patients who do not meet their financial obligations.
- Prepares patient financial action plans.

- Identifies patients in the daily schedule who are a financial concern and schedules a time to conference with them.
- Works with patient to resolve account problems.
- Notes payment problems on patient chart.
- Reports uncollected accounts to collections or small claims court after obtaining employer's approval. Follows through as needed.
- Supervises patient accounts that have been turned over to collection agency.
- Creates and sends statements monthly on a regular billing cycle.
- Provides financial statements to the employer.

Education / Experience

- High school diploma or equivalent

Additional or different duties may be assigned occasionally at employer's discretion.