

JOB DESCRIPTION: Treatment Coordinator

Job Title: Treatment Coordinator

Reports to: Dentist

VISION

The Treatment Coordinator's main job responsibility is to clearly explain treatment options and related costs. The Treatment Coordinator is a liaison between the doctor and the patient and assists in the gathering of information in the new patient experience, as well as coordinating a treatment plan with the doctor and presenting it to the patient. They are knowledgeable about the treatment and timelines, and they are prepared to negotiate financial arrangements with the clients. The Treatment Coordinator provides a calm and warm environment for patients who are otherwise anxious and concerned about how to afford dentistry. They also coordinate, as needed, with other offices who share in the care of patients, making sure referrals and correspondence are received and followed up on.

The Treatment Coordinator may also be responsible for some internal accounting duties that support the practice's goals for profitability. They must be able to communicate well. In fact, the Treatment Coordinator must be the best communicator in the practice. The number one responsibility of all employees is patient care and meeting patient needs. This guide outlines responsibilities that must be accomplished daily, weekly, and monthly. Additional responsibilities may be required, as needed.

KNOWLEDGE, SKILLS, AND ABILITIES

- In-depth knowledge of dentistry and ability to describe procedures in simple language
- Superb communication skills
- Familiarity with computer systems
- Customer service skills
- Self-directed
- Excellent telephone skills
- Influencing/negotiation skills
- Organizational skills
- Familiarity with ADA codes
- Creative problem-solving skills
- Keen understanding of scheduling and financial systems
- Ability to function within a team environment as a supportive and positive contributor
- Ability to work independently

KEY GOALS/BENCHMARKS OF ROLE

(Using the Spear Practice Solutions Analytics Platform, where applicable)

- Daily, monthly, and yearly production and collection goals achieved
- Meets monthly and quarterly case acceptance and completion ratios for significant treatment
- Maintains appropriate A/R ratio and A/R breakdown according to the Annual Plan goals for the practice
- Positive patient reviews of the patient experience
- No-show and cancellation percentage less than 5%

RESPONSIBILITIES

Job Specific

- Be present during comprehensive exams to understand patient treatment needs.
- When necessary, be present during re-care exams to understand patient treatment needs.
- Ensure patients understand their treatment plan.
- Handle objections to proposed treatment.
- Present case fees and financial options to patients to facilitate the decision to say "yes."
- Present or co-present the treatment plan and consent.
- Educate patients, as necessary, regarding their dental benefits.
- Determine dental benefit eligibility, limitations, and payment estimates necessary to facilitate financial arrangements.
- Ensure patients are up-to-date on their financial obligations.

Practice Management

- Maintain the consultation room in a neat, orderly, and welcoming manner.
- Assist in maintaining and developing systems such as checklists to verify workflow and streamline patient care.
- Ask satisfied patients for a referral/online testimonial.
- Write or call patients that made a special impact on the office thanking them for being a patient.
- Complete Daily 5 checklist for your role each day.
- Complete all assigned tasks in the Action Center of the Spear Practice Solutions Analytics Platform.

Teamwork/Cross-Training

- All front office team members need to look for projects to stay busy during slow periods.
- Proactively communicate with the back office so they know any changes in the patient's financial status.
- Participate in huddles by providing vital information for customer service and case acceptance.
- Be prepared for Perfect Day meeting by reviewing the day's patients with outstanding treatment needs and presenting to the team.
- Fully utilize administrative time to prepare for the next day.
- Embody the practice philosophy in all actions and decisions.
- Assist in maintaining the reception area and front office in a neat, orderly, and welcoming condition.
- Assist the clinical team in cleaning the rest of the office (trash, floors, restrooms, instruments, etc.).

EQUIPMENT USED

Includes but is not limited to:

- Telephones
- Calculators
- Practice management software, digital imaging/photos, and computer software including MS Excel and Word
- Printers and scanners

LEADERSHIP/SELF-DIRECTION RESPONSIBILITY

It is expected that the Treatment Coordinator will perform any function asked of them knowing that they will never be asked to do anything that is illegal, immoral, or unethical. We stand by the vision of the organization to provide an atmosphere of continuous learning and of mutual support where everyone bands together as a team to provide the utmost in care to our patients while honoring each other.