



## JOB DESCRIPTION FOR APPOINTMENT COORDINATOR

### Appointment Scheduling

1. Greet patients upon arrival, and assist them by providing appropriate forms and writing materials. Give assistance, if necessary, in filling them out. Represent our office positively throughout this encounter and work to create a comfortable and relaxed, yet professional and competent feel to the front office. Make sure the patient charts are in the proper place, and promptly indicate to the doctor and other appropriate staff when the next patient has arrived. Promptly update schedule changes and coordinate patient flow. Monitor when a patient is late. When a patient is five minutes late, follow up with a phone call. Consult with doctor or other staff to decide on rescheduling or changing the proposed treatment for the day. Consult with doctor on appropriate course of action after failed appointment, late arrival, or late cancellation (less than 24 hour notice).
2. See that the doctor and hygiene appointment hours are completely filled according to daily goals, in accordance with the appointment guidelines. Use appropriate reports in computer for unscheduled treatment.
3. Send appointment reminder cards on (*insert day of week*) for the following week's schedule.
4. Schedule "next appointment" for patients before they leave.
5. See that the phone is answered before the third ring at all times. Collect and respond to messages left on the answering machine. Make sure appropriate message is on machine, example: lunch, staff meeting, holiday etc.
6. See that the sensitive material is not left exposed at the front desk. Obey HIPAA rules.
7. Maintain and use tickler file and delayed treatment file.
8. Follow up on all broken appointments, keep ready call list, and fill broken and cancelled appointments.
9. Track patients through the recall system. Maintain the recall system. Contact patients who are late for preventive maintenance according to office protocol. Attempt in every way possible to minimize patients "falling through the cracks."
10. Copy the daily schedule at the end of each previous day, and bring to huddle the next morning.
11. Supply doctor(s) with a copy of the next day's schedule before the doctor(s) leaves.
12. Notify patients when pre-estimates come back and schedule appointments after making proper financial arrangements.

13. Keep appointment scheduler in computer up to date. Enter or change all time off, vacations and holidays. Re-schedule any appointments that need to be changed.
14. Assure that every patient's HIPAA forms and consent forms are signed and up to date.
15. Prepare in advance treatment consent forms, including surgical, endodontic, and general consents. Distribute pre-surgical instructions, prescriptions and consents when directed to do so by the dentist.

### **Financial Control**

1. Enter charges for dental services into the computer. Check each charting for logic, accuracy, and correct totaling.
2. Request and collect money "over the counter" for each patient, and issue receipts or walk out statements, as appropriate, as patient leaves.
3. See that each transaction is posted to the computer system accurately.
4. Enter new insurance information in computer and call for verification and benefit information.
5. Be familiar with the office financial policy and be capable of attending a treatment conference and making a financial arrangement with a patient according to office financial policy.

### **Office Procedures**

1. Unlock front door.
2. Turn music on in morning and off at closing.
3. Manage office music system. Select small group of acceptable channels or stations and advise staff.
4. Set thermostats to appropriate setting at closing.
5. Attend morning huddle each clinic day.
6. Record chart entries from phone or in-person conversations when appropriate.
7. Be responsible for the appearance of the reception area and front desk. Check reception area at least twice daily. Pick up debris left by patients. Put away any toys left by children. Straighten magazines.

8. Monitor the condition of the patient bathroom. Check at least twice daily and correct any cleanliness issues.
9. Assemble charts for schedule, two days in advance. Have Hygienist review hygiene schedule and charts. Have designated assistant review doctors' schedules and charts.
10. Maintain the patient chart filing system and re-file charts and forms.
11. When a change in the schedule affects the doctor's weekly list of charts to prepare for treatment conferences, treatment plans and films to be read, promptly (before the end of the day) revise the doctor's list and place or remove the appropriate chart in the designated place on the doctor's desk.
12. See that all necessary forms for the next workday are ready before closing the office, and that all backlog paperwork is completed before closing the office on Friday.
13. Maintain back-up on computer, insert new tape daily and give previous tape to doctor to take home.
14. Keep running total of office production for doctor and hygienist and post on board each morning. Mark bonus days on calendar.
15. Do monthly new patient report by the 10<sup>th</sup> of each month, for the previous month and give to the doctor.
16. Maintain the office computer network. Maintain computer software at all work stations. Act as primary liaison between office and network support and between office and the computer company.
17. Manage professional attire for all staff who routinely work in the front office area. Arrange for selection and purchase of outfits from a suitable vendor as needed.
18. Help manage flex plan claims for staff and doctor as needed.
19. Manage the answering machine daily. Assure that the message is context appropriate.
20. Arrange emergency back-up coverage for dentist when dentist is on vacation.
21. Manage doctor charts for treatment plans, treatment conferences, letters and phone calls.
22. Manage the office background music and periodically check that it is working through the office phone system.
23. Manage the office phone system and arrange repairs and service when needed.
24. Read the local newspaper for news pertinent to patients of record. Send congratulatory, sympathy, and other cards when appropriate.

## **Marketing and Continuing Care**

1. Market the practice internally and externally, help encourage patients to proceed with dental care, and support necessary treatment.
2. Be responsible for completing the telephone information slip on all new patients and emergency patients, and bring these slips to the appropriate huddle each day.
3. Send welcome letters to new patients. Send thank you cards, coffee mugs or letters to referral sources. Send sympathy or congratulatory cards to patients of the office, as appropriate.
4. Maintain the recall system. Run reports, send recall cards and make calls as needed. Send letters to inactive patients.

## **Clinical Duties**

1. Assist the dental assistant or doctor with crown insertions or other procedures as needed.
2. Keep CPR certification current. Keep OSHA and HIPAA training current.
3. Order and supervise the placement of oxygen and nitrous oxide tanks from vendor when informed of the need by the dentist.