

Collections/Insurance Coordinator
Employee Status: Non-Exempt
Reports To: Beth Baker

Job Summary:

This is a customer service oriented position. The Collections Coordinator works with patients to resolve account problems and, when necessary, represents the practice in court. The Insurance Coordinator assists patients with insurance benefits and communicates with insurance companies regarding claims

KPIs:

- AR days
- % pf claims <30 days
- Collection 95% of production
- Over-the-counter collections

Michel Dental Core Values:

HONESTY- We do the right thing for the right reasons. We tell the truth. We are accountable.

- We are honest with our time clock. We clock in and out for lunch and at the end of our day. If do not take a lunch due to extenuating circumstances it is noted in the time clock.
- If we make a mistake, we take ownership and take responsibility to correct it if possible.
- We are accountable for our own job performance and KPIs.

CARING- We make an effort to understand what the patient wants, and we are genuinely concerned for their comfort and well-being.

- We meet the patient where they are, even if this takes time away from our position, i.e. helping patients fill out forms electronically, and being understanding if they cannot afford treatment.
- If a patient is fearful, we help them to find a solution that will make them feel at ease.
- Be understanding when a patient has a preference for what clinician they see. We honor their request and adequately note it in their chart along with pop ups so all future staff are aware and can accommodate their request."

TEAMWORK- Each staff member is important. We know that working cohesively is critical to provide the best care for our patients.

- We understand that one job is not more important than another and that it takes each one of our jobs to keep the practice running. When we are in between patients or are done with our job, we help our teammates to complete the job by doing laundry, sterilization and asking our teammate



what we can do to help them finish.

- We strive to help each other finish and leave at the same time for the day.
- We ensure that our operatories/desk are stocked and organized before we leave for the day. We do not put off for tomorrow because we do not know tomorrow may bring.
- If we have information that needs to be entered in for an appointment or we have informed a patient that we will get back to them, we make sure that this is done before leaving for the day and do not put off for tomorrow.
- We are self-aware. When we are talking with other teammates or when on our personal phones, we are aware that these conversations are better had that the end of the day or at break and can be perceived as unproductive and not helping the team.
- We understand that our role to the team is important and if we are not at work, that someone else has to do double the work. We are not absent from our jobs excessively and strive to set all our appointments on our time off.

EXCELLENCE- We strive to continually improve and to consistently work to the best of our abilities. We deliver quality service and results.

- Meet KPIs
- Take necessary CEs or training to perform our jobs to the best of our ability.
- We understand that our infection control standards are of utmost importance, and we are responsible for the safety of our patients and ourselves.
- We understand that our speech, behavior and appearance are a direct reflection of Michel Dental, and we strive to be excellent in and out of the office. Including how we speak about our teammates and the practice.

WELCOMING- We greet with a smile and open our doors to people of all walks of life.

- We speak well of each of our teammates and our patients. We are self-aware of what we are saying and where we are saying them.
- When answering the phone, we have a smile on our face. The tone of the human voice changes when smiling. It is readily perceivable to the caller, and it sets the tone for the rest of the call.

RELATIONSHIPS- We strive to form genuine and meaningful relationships that last. Co-workers and patients are the most important part of our jobs."

- We trust each other.
- We are trustworthy in our work ethic and work performance."
- We treat each other respectfully and collaborate to be devoted and provide excellent care to our patients.



Essential Duties:

- Provides the Scheduling Coordinator with patient names and amounts due so that effective collection over the counter can take place during the day by auditing routing slips for the week.
- Verifies insurance benefits and updates in the computer as needed while reviewing visit slips, and marks on visit slip for when insurance needs to be verified or if insurance has been terminated and new insurance needs to be collected.
- Identifies patients in the daily schedule who are a financial concern, notes payment problems on the patient's chart, and arranges a conference with them either prior to or at the time of the appointment.
- Contacts patients who have not kept their financial agreement within a 10-day grace period to collect payment in accordance with the financial plan.
- Prepares and mails patients' statements each month on the 15th and 30th billing cycle.
- Makes collection calls one day a week. Calls are to be made away from the front desk so calls can be confidential.
- Solidifies the financial agreement with the patient, such as payment amount and schedule.
- Follows through with correspondence regarding collection when unable to contact patient on the telephone.
- Prepares and sends uncollected accounts to collections or small claims court, with the employer's approval, and follows through as needed. Represents employer in Small Claims Court, if necessary.
- Monitors patients who have been turned over to a collection agency.
- Monitors and follow-up on outstanding claims that are over 30 days.
- Corresponds with insurance companies to resolve payment delays, requests for additional information, or to discuss treatment that has been denied coverage.
- Prepares patient financial action plans.
- Coordinates patient financial arrangements according to the financial policy.
- Maintains appropriate financial documentation, including signed financial agreements if financing treatment.
- Records patient financial discussions in the office journal.
- Monitors payments to ensure treatment financing is followed through appropriately.
- Inputs daily production and collections figures on computer.
- Balances charges and payments as well as cash on hand each day or as needed.
- Documents basic insurance information in the patient's chart for quick reference. Processes and submits insurance claims daily and sends statements daily for patients that have a remaining balance after insurance submits payment.
- Monitors and follows-up on outstanding claims weekly and/or as needed. Documents all follow-up in patients ledger under the claim.
- Sends information as requested by insurance companies such as x-rays, charting, narratives and



other documentation for processing the claim when applicable.

- Corresponds with insurance companies to resolve payment delays, requests for additional information, or to discuss treatment that has been denied.
- Handles all inquires concerning insurance and billing on a daily basis. Posts all insurance payments to patient accounts.
- Meets with Practice Administrator the day before all statements go out and keeps the Practice Administrator aware of what accounts are getting turned for collections, what accounts are at risk of being turned for collections and to review Aging Reports.
- Meets with Practice Administrator the first week of the month to report the following:
 - # of delinquent calls made
 - Amount of monies collected as a result of calls

Knowledge/Skills/Abilities:

- Knowledge of collection techniques and laws.
- Knowledge of English composition, grammar, spelling, and punctuation. Skilled in the use of standard office equipment including: telephones, calculators, copiers, fax, computers, and computer software (MS Excel, Word, Practice Management software).
- Ability to maintain composure and professionalism when exposed to stressful situations.
- Ability to engender trust from the doctors, co-workers, and patients. Ability to work cooperatively with management, staff, and patients.
- Ability to prioritize, organize, and complete tasks in a timely and independent manner.
- Ability to accept constructive criticism.
- Ability to understand and follow written and verbal instructions.
- Ability to collect data, establish facts, draw valid conclusions, and maintain confidentiality.
- Ability to communicate and express thoughts and ideas competently.
- Ability to quickly grasp relevant concepts regarding duties and responsibilities.

Education / Experience:

- High school diploma or equivalent
 - Minimum of six months to one year of related experience and/or training
- OR
- Equivalent combination of education and experience

Physical and Environmental Requirements:

- May be required to lift up to 50 lbs.
- Sedentary position: may be required to sit for long periods of time. Vision: close vision, depth perception, and ability to adjust focus.



- Hearing: able to satisfactorily communicate with patients, doctor, and other staff members to ensure that verbal communication is clearly understood, or a satisfactorily-equivalent method of communication.
- Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or operate equipment.
- Occasional exposure to toxic or caustic chemicals and radiation.
- Exposure to moderate noise levels.
- Exposure to hectic, fast-paced, high anxiety environments.
- Additional or different duties may be assigned occasionally at employer's discretion.

