

Position Title: Silver Lake Scheduling Coordinator
Employee Status: Non-exempt
Reports To: Beth Baker

Job Summary:

The Appointment Coordinator represents the practice in all facets of patient services, which may include, but is not limited to; greeting patients, answering the telephone, scheduling appointments, maintaining patient records and coordinating patient flow.

Essential Duties:

- Is to report to work at least 30 minutes prior to the start of the first appointment of the day.
 - Leads the morning huddle -
 - lets Dr. know of any scheduling issues for the day
 - lets Dr know what production amount is scheduled that day
 - makes necessary adjustments as the Dr and team seem necessary to schedule
 - Checks to make sure all lab cases are here for the next day's schedule, is to be done prior to confirming appointments for next day.
 - Confirms the schedule 48 hours in advance between 8:00 am and 10:00 am every day and monitors the automatic communication system and scheduling email.
 - Reminds patients of premedication and marks accordingly in the schedule of reminder.
 - Puts up visit slips for next day an hour before the end of the day.
 - Hangs schedules for next day 45 minutes before the end of the day.
 - Balances visit slips for the last patients of the day 15 minutes after their appointments start to process for day end.
 - 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.
 - Establishes, maintains and keeps patient files and records up to date (i.e. address, phone number, insurance information, etc.).
 - Communicates with patients regarding financial options. Reconciles financial records by receiving and recording patient payments as needed.
 - Prepares correspondence, memos, condolence letters, and other documents, as requested by doctor.
 - Uses computer, fax, or courier service to transmit information or documents when requested.
 - 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.



- Registers new patients, provides necessary paperwork (welcome letter, HIPAA documents), and insures all required documents are completed by the patient.
- Sends welcome letters to all new patients.
- Sends thank you letters to all patient referral sources.
- Weekly follows the Recare Reactivation system and documents all calls in the patient's office journal.

January - IJ

February - KL

March - MN

April - OPQ

May - IJ

June - KL

July - MN

August - OPQ

September - IJ

October - KL

November - MN

December - OPQ

- Educates patients, as necessary, regarding insurance, their responsibility and basic terminology.
- Answer all calls on the 2nd ring when available.
- Makes sure that the hygiene schedule is full before leaving for the day.
- Reports to Practice Administrator the first week of the month the following information for the previous month:
 - # of patients that changed or broke their appointment
 - # of patients that were able to keep scheduled



- # of emergency patients
- # of overdue patients contacted
- # of patients that were able to get schedule as a result of calling them
- Monitors the schedule regularly, adjusts the schedule as necessary, and reschedules patients as needed.
- Coordinates patient financial arrangements according to the financial policy.
- Maintains appropriate financial documentation, including signed financial agreements if financing treatment.
- Presents the treatment plan, using models and diagrams, as necessary, and provides patient with related literature.
- Arranges the patient's treatment-planning schedule and books appointments.
- Estimates cost of treatment provided.
- Educates patients, as necessary, regarding insurance, their responsibility and basic terminology.
- Documents basic insurance information on the patient's chart for quick reference.
- Determines insurance eligibility, limitations and payment estimates necessary to facilitate financial arrangements.
- Processes and submits insurance claims daily.
- Gathers information for Treatment Plan Coordinator to submit predeterminations.
- Schedules and sends referrals as needed.
- Meets with Practice Administrator on a weekly basis to review clinical issues or to ask any questions that are needed answers to.

Knowledge/Skills/Abilities:

- Knowledge of appointment coordinator procedures.
- 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 situation.
- Ability to engender trust from the doctors, co-workers, and patients.
- Maintain confidence with the patient regarding abilities of doctor(s) and staff.
- 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.



- Ability to greet visitors professionally and courteously.

Education / Experience:

- High school diploma or equivalent
- Minimum of 3 year(s) relevant experience in the dental profession

Physical and Environmental Requirements:

- May be required to lift up to 30 lbs.
- Active movement throughout the day: sitting, walking, standing, squatting, bending, stooping, reaching, etc. (not a sedentary position).
- 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.
- May be required to administer first aid or CPR.
- 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.

