

TREATMENT COORDINATOR DAILY DUTIES

Being an excellent communicator is a vital skill for the treatment coordinator. Patients will have a better understanding of recommended treatment, allowing for well informed decisions. The treatment coordinator will oversee complete cycle of clinical diagnosis to a patient with a clear financial agreement to pay for treatment. As a member of the team, the assistant will be expected to assist with patient inquiries, insurance questions, and facilitate with general front office duties.

DAILY DUTIES

Consultation Management

- Conduct or assist patient consultation as directed by doctor.
- Prepare financial treatment plans, calculate fees based on fee schedules and present plan options to patient.
- Make all financial arrangements with patient after doctor has left the consultation.
- Assist patients with financing options, insurance questions and treatment concerns.
- Maintain and use tickler file and delayed treatment file.
- Record chart entries from phone or in-person conversations when appropriate.
- Manage charts for treatment plans, treatment conferences, letters and phone calls.

Patient Management

- If indicated, set up appointment for patient with specialist or general dentist. Coordinate with specialist's or general dentist's office and send and pertinent information and documents.
- Treatment coordinator should know whether patient has scheduled treatment, scheduled with specialist or general dentist, deferred recommended treatment and be aware of what the next step is and when it will occur.
- Schedule patient for treatment at the appropriate time after the specialist or general dentist has completed treatment.
- Take phone calls from patients or specialists/general dentists who have questions about treatment.

Insurance

- Notify patients when pre-estimates come back and schedule appointments after making proper financial arrangements.
- Assist insurance coordinator to update insurance information on all patients at all times and posting correct treatment codes for billing.
- Verify patients benefit eligibility and dental treatment history.

Office Participation

- Be an active participant in staff meetings and morning huddle.
- Assist front office team and handle phone calls when required.
- Liaise with financial coordinator and scheduling coordinator, as needed.

CLOSING DUTIES

- Verify all necessary notes are entered for each consultation completed during that day.
- Review the next day to see how the patient load looks and do any preparation necessary needed for treatment presentations.
- Check in with team-members to see if anything needs to be completed before leaving.
- Prepare workstation to ensure a fresh start to the next day and follow office closing procedures.

WEEKLY/MONTHLY DUTIES

- Meet with doctor or office manager on a regular basis to review schedule, significant information and items that need attention.
- Work with scheduling coordinator for regular follow contact to patients to attempt to get them scheduled for unscheduled treatment.