**JOB TITLE: Financial Coordinator**

**EXEMPT STATUS: Not Exempt REPORTS TO:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**JOB SUMMARY:**

* Helps make quality dentistry financially available to patients
* Communicates with patients regarding their treatment plan
* Helps identify the best way to finance the recommended treatment
* Makes appropriate financial arrangements with patients

**QUALIFICATIONS:**

An individual must fulfill each essential duty as listed below to perform this job successfully.

**ESSENTIAL DUTIES:** (Edit the following duties as appropriate for your practice. Prioritize in order of importance.)

* Adhere to enhanced infection control protocols and PPE requirements to reduce transmission of COVID-19
* Monitor outstanding claims, calling on claims 30 days or more overdue
* Call on delinquent accounts
* Prepare daily bank deposit
* Prepare a financial action plan by reviewing the patients for the next day and determining their financial needs and status, be prepared to collect monies due
* Run all requested reports
* Process EOB’s and requests for additional information
* Research insurance benefits and prepare estimates on treatment diagnosed before discussing financial arrangements with patients
* If a patient is returning for a consult, provide information to Doctor two days in advance of the appointment
* Determine patient’s insurance carrier, insurance guidelines, and patient’s share of the cost
* Collect all patient portion at the time of service
* Send e-claims or paper claims daily
* Document financial arrangements in the patient file
* Schedule financial arrangements after the exam and consultation and before treatment
* Obtain a signed financial agreement if you decide to offer the patient; specify the number of payments and due dates. Monitor payments
* Record all financial verbal discussions with the patient in their file
* Post all payments, send additional statements as needed
* Present a treatment plan, using models and diagrams, and provide related literature
* Bill secondary insurance
* Prepare a treatment planning schedule, book the first appointment and arrange for subsequent hygiene appointments
* Be prepared to quantify referral sources, units diagnosed; units accepted; percent accepted; units completed; actual production compared to monthly goals on monitor reports.
* Run reports for computer back up

**RECARE PATIENTS:** *(update list as necessary)*

* Check patient’s file for any incomplete treatment two days before recare
* Verify patient file has accurate insurance information
* Go over treatment to date with the patient and assess attitude toward any incomplete treatment
* Update health history
* Estimate costs of today’s treatments
* Make yourself available to recalculate financial arrangements as needed
* Contact patients when pre-authorization is received and proceed with scheduling
* Call on outstanding treatment plans

**KNOWLEDGE/SKILLS/ABILITIES:** (Update list as necessary)

* 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
* Has a positive attitude about the practice, the services provided, and the products sold
* Increases knowledge and skills through self-study and by attending courses and seminars
* Has dependable job attendance and can be relied on the follow through with assigned tasks

**EDUCATION AND EXPERIENCE:**

* High school diploma or equivalent. This position requires years of experience in the dental profession.

**SPECIAL REQUIREMENTS/CERTIFICATIONS/LICENSES:** (Enter your state requirements)

**PHYSICAL REQUIREMENTS:** (Americans with Disability Act) Employees must meet the physical demands described here needed to perform the essential functions of this job successfully. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is required:

* May be required to lift up to lbs
* Sedentary position: may be required to sit for long periods
* 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

***Employers may assign additional or different duties at their discretion.***

**Employee Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**