**JOB TITLE: Insurance Coordinator**

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

**JOB SUMMARY:**

The Insurance/Collections Coordinator assists patients with insurance benefits and communicates with insurance companies regarding claims. Works with patients to resolve financial challenges and maintains a healthy aging accounts receivable.

**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
* Study insurance plans used most frequently with patients to understand the various nuances to communicate more effectively
* Document basic insurance information in the patient’s file for quick reference
* Process and submits insurance claims daily
* Monitor and follows-up on outstanding claims
* Provide the appointment coordinator with patient names and amounts due so effective collection over the counter can take place during the day
* Identify 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 before or at the time of the appointment
* Record all financial discussions with patients in their file
* Contact patients who have not kept their financial agreement within a 5-day grace period to collect payment following the financial plan
* Prepare and mails patients’ statements each month on a regular billing cycle
* Make collection calls
* Solidify the financial agreement with the patient, such as payment amount and schedule
* Follow through with correspondence regarding collection when unable to contact the patient on the telephone
* Prepare and send uncollected accounts to collections or small claims court with employer approval and follow through as needed
* Represent employer in small claims court, if necessary
* Monitor patients whom collection agencies have contacted
* Send information as requested by insurance companies such as x-rays, charting, narratives, and other documentation for processing the claim when applicable
* Provide insurance predetermination documentation to patients, contacts the patient to make financial arrangements, and schedules treatment
* Correspond with insurance companies to resolve payment delays, requests for additional information, or to discuss denied treatment coverage
* Handle all inquiries concerning insurance daily

**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: Ability to satisfactorily communicate with patients, the Doctor, and other staff members to ensure verbal communication is clearly understood, or a satisfactorily-equivalent communication method
* 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.***

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