**JOB TITLE: Scheduling Coordinator**

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

**JOB SUMMARY:**

* Coordinate, integrate, and represent all facets of patient services.
* Meet and greet patients and make them feel welcomed and relaxed
* Answer the telephone
* Schedule appointments
* Communicate with patients regarding scheduling options
* Maintain patient records and coordinate patient flow
* Manage and control the daily, weekly, and monthly schedule to meet the practice production and collection goals
* Compile data and operate office equipment to maintain business records and reports

**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.
* Keep the doctor and the hygienist productively busy throughout the day
* Answer phones
* Review patient records for each day’s schedule, noting any outstanding treatment needs
* Schedule all appointments and detail procedure and time needed
* Stabilize production by scheduling according to practice guidelines
* Maximize time efficiency in scheduling by utilizing procedure codes to doctor time, assistant time, anesthesia, etc.
* Check that lab cases have been received the day before treatment
* Check messages before the morning huddle and update staff as to any changes
* Greet patients by name and update addresses, telephone numbers, and insurance information as appropriate
* Alert appropriate staff of patient arrivals
* Monitor the schedule throughout the day to ensure all runs smoothly
* Maintain a short call list to aid in filling last minute openings
* Check account balances of patients coming in and prepare to discuss any monies due
* Adhere to all safety and health regulations
* Determine the status of the following continuing care visit for each hygiene patient seen during the day to ensure no one is missing
* Note chronic last-minute cancellations in the patient’s file to prevent prescheduling the next hygiene visit.
* Keep staff and the doctor informed of the next available opening; time allotted for emergency patients
* Call any patient that is 5five minutes late to determine their status and inform the clinical staff
* Register new patients and provide necessary forms (welcome letter, patient information, and office policy)
* Keep patients informed of expected waiting time if the doctor is behind schedule
* Confirm appointments with patients two days in advance of an appointment
* Call insurance companies and update computer for all new patients and any changes

**PAPERWORK/RECORDING:** *(edit list as necessary)*

* Record treatment information in the patient’s chart and/or computer. Enter the type of treatment planned for the next appointment and the amount of chair time, doctor time, and assistant time needed. Dismiss patients.
* Place all non-scheduled, diagnosed treatments in the tickler file for follow up in one week
* Mail the welcome package to all new patients entering the practice and requesting an examination or direct them to your website to complete online paperwork
* Organize and maintain all file systems
* Collect patient portion of treatment due
* Create receipts for all patient transactions
* Keep the short-call opportunity list current
* Record broken appointment and last-minute cancellations in the patient file
* Complete daily monitors as requested by the practice
* Keep all patient records up-to-date
* Log all patient referrals

**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
* Ability to administer CPR and first aid
* Keeps informed and updated on OSHA regulations and HIPAA requirements
* 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 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

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

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