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Accounts Coordinator  
Job Description

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*The following job description and job duties are intended as general information and guidelines only. They may or may not conform with all federal, state, and local laws, rules, and regulations or the frequent updates to such. They also may not conform or apply to the latest updates in dental procedures, equipment, use of equipment.*

*This job description is not a substitute for*

* *proper legal or other professional or regulatory advice*
* *knowledge of best equipment, equipment procedures, and handbooks*
* *technically proper practices of dentistry and patient care*
* *any other professional, equipment, or regulatory advice for specific procedures and/or situations, including compliance with all HIPPA, EPA, and OSHA laws and regulations*

*Before implementing anything in this job description, it is the sole responsibility of each practice, its owner(s), and its employees to consult with attorneys, applicable governing and regulatory boards, government agencies, and equipment manufacturers in order to obtain and ensure that they have a full understanding of all the laws, rules, and regulations governing their practice, as well as knowledge of the best equipment, equipment procedures, and dental procedures.*

*It is the responsibility of the practice owner to cross-check and verify the legality, permissibility, technical correctness, and applicability of all the following information, prior to implementation. All ePractice Manager job descriptions cover the essential basics of each job but cannot cover and fit the specific activities of every office, as each is unique. Therefore, you should use this job description as a template to edit, as needed* ***prior to implementation*** *to best fit your office.*

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# INTRODUCTION

The accounts coordinator creates a continuous flow of revenue for the practice by making proper financial arrangements with the patient to ensure payment is received for services delivered and by efficiently executing the billing and collections process in accordance with standard billing, collection, and insurance company procedures and applicable state and federal laws.

## Understanding Your Role

The following steps are involved in ensuring a patient receives and fully pays for a service:

* Introducing the patient to the practice and ensuring they feel welcome and comfortable
* Explaining the practice’s financial policies
* Completing the doctor’s exam
* Presenting the doctor’s diagnosis and resulting treatment plan presentation
* Properly “passing” the patient from the doctor to the person responsible for making financial arrangements for the service(s) to be provided
* Ensuring the patient is “closed” for the service(s)
* Making the financial payment arrangements
* Collecting the fee for the service(s) from the patient and/or insurance company

In a larger office or specialty practice, there is often a treatment coordinator, financial coordinator, and/or an implant coordinator who is present and involved in the above steps but will turn over all insurance matters to the accounts coordinator once the patient is treated.

# GENERAL DESCRIPTION

## Purpose

The purpose of the accounts coordinator role is to contribute to the financial viability of the practice by ensuring that the practice is properly and maximally paid for services rendered. The accounts coordinator also works with insurance companies as the patient’s advocate to ensure their services are correctly paid.

## Primary Objectives

The accounts coordinator’s primary objectives are to

* understand how insurance companies work and what they require
* understand the legal rights of the patient and insurance company
* understand all stipulations of the patient’s policy
* ensure patients know what their policies cover
* track patient claims and keep them informed, as needed, on claim activity
* make sure claims are paid on time
* make sure claims are not wrongfully denied
* understand how to handle denied claims with insurance companies
* ensure the insurance company follows their own rules and, as needed, state regulations

## Required Skills

The accounts coordinator position requires the following skills:

* Excellent verbal and written communication skills
* Superior interpersonal and customer service skills
* A professional demeanor
* Ability to study and learn quickly
* Ability to multitask
* Intermediate typing proficiency
* Intermediate knowledge of computers and office equipment
* Knowledge of and proficiency with the office’s practice management software
* Knowledge of ADA CDT coding and, if needed, ICD and CPT coding
* familiarity with dental and insurance terminology
* Knowledge of insurance processes
* Ability to accurately handle basic accounting procedures
* Ability to prioritize and work in an organized fashion
* Ability to remain calm and collected during difficult times to resolve crisis
* Ability to be determined, resourceful, and proactive in resolving conflicts and other issues that may arise

## Facilities and Equipment Required

It is recommended that the accounts coordinator have access to a

* private office or conference room
* computer with contact management software, email, telephone, etc.,

## Supervisory Responsibilities

The accounts coordinator holds no supervisory responsibilities.

## Physical Demands

The accounts coordinator must be able to

* remain in a stationary position 75% of the time
* occasionally move around to access file cabinets, office machinery, etc.
* constantly operate a computer and other office products, such as a copy machine, printer, and telephone system
* frequently and accurately communicate with patients and insurance companies who have inquiries about treatment provided and billing. Must be able to exchange accurate information in these situations.

## Hours

This is an hourly position with a minimum of 40 hours per week in the office Monday through Friday.

## Metrics

The accounts coordinator monitors success by watching key performance indicators[[1]](#footnote-1) (KPIs):

* Maintaining benchmarks per aging category for patient, insurance, and total balances

ePractice manager utilizes an accounts receivables tracking file for practices. The accounts coordinator’s responsibility is to post the aging category totals in their tracker monthly and complete a comparative analysis.

***Note****: See ePractice Manager’s webinar, Managing Accounts Receivable, for the use of the aged receivables tracker.*

## Primary Duties

The accounts coordinator has a wide variety of responsibilities. The following list summarizes some of these key responsibilities.

* Completes general duties by
  + maintaining excellent communication with patients, payers, and staff
  + explaining the practice’s financial policies to patients and answering any questions
  + running itemized statements as requested by patients and insurance companies
  + sending bills and/or statements to patients and claims to insurance companies in a timely and consistent manner
  + consistently following up and collecting on all insurance claims and patient accounts
  + ensuring that all accounts are consistently accurate and complete
  + checking the next day’s schedule to inform the schedule coordinator of patients from whom payments should be collected at time of service
  + documenting all collections data and patient accounts
  + ensuring fee schedules are kept up-to-date
  + receiving pre-authorization when needed and notifying patients upon receipt
  + confirming patient insurance coverage and keeping information up-to-date
  + maintaining accurate account aging records
  + tracking and resolving account discrepancies
  + monitoring and collecting all delinquent accounts via phone calls and letters
  + turning accounts over to a collection agency as needed
  + ensuring patients complete and sign all necessary credit agreements
  + ensuring a sufficient supply of all necessary forms
  + posting all payments and charges daily
  + recording the amount billed every week
  + recording the amount collected every week
  + tracking, graphing, and posting your statistics on a weekly and monthly basis
  + actively participating in morning huddles and staff meetings
  + maintaining patient confidentiality and adhering to HIPAA regulations
  + participating in continuing education courses and relevant tutorials to stay current on job-related knowledge, especially in the areas of insurance, billing and collections, coding, and your practice management software
  + maintaining and keeping an up-to-date job description
* Completes daily preparation duties at the end of each day to prep for the next day:
  + Prepares for existing patients by
    - going through the charts for patients scheduled the following day to determine which services are scheduled
    - determining if patients scheduled for the next day have insurance and if any information needs to be updated
    - checking each patient’s account balance due and determine why balances exist and what portion is pending insurance payment
    - thoroughly familiarizing oneself with each account
    - having all pertinent information ready for the following days morning huddle
    - if there is a balance that can be easily collected by the receptionist, noting the amount on the schedule
  + Prepares for new patients by
    - determining if the new patient’s insurance information has been provided. If not, alert the receptionist to collect this information
    - if needed, calling the new patient’s insurance provider to clarify coverages
    - having all pertinent information ready for the following day’s morning huddle

## Patient Confidentiality[[2]](#footnote-2)

Maintaining patient confidentiality is a serious matter affecting patient trust, and it is regulated under federal law. For this reason, great care must be taken to ensure that patient information is not made available to any unauthorized persons.

As the accounts coordinator, you will be in constant contact with patient information including dental and medical conditions and treatment, financial data, credit card and/or checking account numbers and personal contact information. It is vital that you comply with HIPAA regulations and industry best practices concerning maintaining the confidentiality of patient information.

# SIGNATURE

This job description has been authorized by the managing partner. The employee’s signature below constitutes their understanding of the requirements, essential functions, and duties of the positions. Job performance reviews will be conducted annually.

Employee Printed Name Date

|  |  |  |
| --- | --- | --- |
|  |  |  |

Employee Signature

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1. Key Performance Indicator (KPI) – a measurable value used to monitor some crucial factor of business operations, for example, the dollar value of services delivered. [↑](#footnote-ref-1)
2. Please refer to the ePM **General Staff Job Description** for information on patient confidentiality and its importance. [↑](#footnote-ref-2)