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Patient Coordinator   
Job Description

Revised February 2021

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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 HIPAA, 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 patient coordinator is typically the first verbal point of contact patients have with the office, and they help ensure patients understand every aspect of their dental care. Additionally, the patient coordinator works with the marketing coordinator to fine tune the practice’s outreach efforts, and they also work with others from referring practices.

## Understanding Your Role

Your role in ensuring a patient receives the best care consists of the following steps:

1. Be the first in line to answer the phone if not already on another call.
2. Properly welcome patients into the practice, making them feel welcome and comfortable.

# GENERAL DESCRIPTION

## Purpose

The purpose of the patient coordinator role is to assist patients in reaching their dental goals by smoothly moving them from initial contact through scheduling, consultation, and to the case presentation process. The patient coordinator gives special attention to those considering or inquiring about the practice or services in order to help them become patients and support them every step of the way.

## Primary Objectives

The patient coordinator’s primary objectives are to

* establish and maintain a trusting and supportive relationship with patients
* build the value of the patient’s experience and service(s)
* ensure patients feel well cared for
* take responsibility for the entire patient base
* maximize the doctor’s schedule and production time

## Required Skills

The patient coordinator position requires the following skills:

* Excellent verbal and written communication skills
* Superior interpersonal and customer service skills
* Excellent listening skills
* Empathy for the needs of others
* A professional demeanor
* An enthusiasm for helping people through dentistry
* A good general understanding of the dental profession
* Self-confidence
* Superior organizational skills
* A high level of ethics

## Facilities and Equipment Required

It is recommended that the patient coordinator have access to a

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

## Supervisory Responsibilities

The patient coordinator holds no supervisory responsibilities.

## Physical Demands

The patient coordinator must be able to

* remain in a stationary position 50% 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 who have inquiries about scheduling appointments

## Hours

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

## Metrics

The patient coordinator monitors success by watching the following key performance indicator[[1]](#footnote-1) (KPIs):

* Total number of new patient appointments on the schedule

An upward trend of this metrics on a graph would indicate that the patient coordinator is successfully meeting the objectives of the position and the needs of the practice. If these trends plateau or begin to decline, the patient coordinator would take action to determine the reason(s) for the decline and correct it/them.

## Primary Duties

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

* Completes general scheduling, confirmation, and communication duties by
  + checking messages each morning and following up with callers
  + consistently checking email
  + answering questions from patients about treatment over the phone
  + scheduling and rescheduling appointments
  + ensuring appointments are scheduled with the correct provider, that proper procedures are attached, and that the time length is correct
  + scheduling new patient appointments while gathering all information needed to help the initial appointment go smoothly
  + ensuring patients are scheduled and arrive within 10 days of referral or initial contact
  + calling to schedule patients with diagnosed and undone treatment
  + leaving voicemails and sending emails and text messages for appointments when a live person cannot be reached
  + developing expert phone skills to portray the office as friendly and competent
* Prepares for visits by
  + ensuring x-rays and other information have been received prior to patient arrival
  + ensuring new patients have received new patient information and health history forms in advance of initial visit
  + verifying patient insurance information is accurate and that their plans are active
* Welcomes patients by
  + greeting them on the telephone
  + communicating with an enthusiastic and friendly manner that sets the tone for the patient’s experience
* Completes additional duties by
  + taking responsibility for the entire patient base
  + meeting with the office manager as needed to improve coordination and office systems
  + maintaining a current job description including details of successful actions
  + taking advantage of continuing education opportunities to improve one’s skills
  + practicing one’s skills to further hone them

## 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 patient 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)