

Schedule 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 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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# GENERAL DESCRIPTION

## Purpose

In a dental practice, the schedule coordinator is the hub of administrative activity in the practice and is responsible for ensuring a steady stream of patient traffic through efficient schedule management. Additionally, holding this role means that you will often be the first person to interact with patients and visitors in the practice. The schedule coordinator must act as an ambassador for the practice by creating a welcoming atmosphere, ensuring warm, professional interactions with every visitor, and maintaining a comfortable and inviting reception area. Your appearance, manners, knowledge, and helpfulness reflect on the entire practice.

## Primary Objectives

The schedule coordinator’s primary objectives are to

* be the first to answer the phone when it rings
* properly route phone calls throughout the office to ensure production efficiency
* ensure the daily schedule stays running on time and efficiently
* ensure patient appointments that have been properly confirmed and that patients arrive to the office on time
* ensure patients have completed all required paperwork, have had their questions answered, and are ready for treatment on time
* provide patients with a positive impression of the practice
* coordinate with the back office when running behind

## Required Skills

The schedule coordinator position requires the following skills:

* Strong verbal and written communication skills
* Superior interpersonal and customer service skills
* Ability to get along well with others
* An honest and friendly demeanor
* Intermediate typing proficiency
* Intermediate knowledge of Office Suite software, general office equipment, and general computer operation
* Ability to study and learn quickly
* Patience and composure with the ability to stay calm during a crisis
* Ability to accurately handle money
* Ability to be resourceful and proactive in solving issues that may arise

## Facilities and Equipment Required

It is recommended that the schedule coordinator have access to

* a reception/desk area where equipment and administrative papers are not easily viewed by patients
* computer equipment that includes management and scheduling software (along with any instructional books or user manuals)
* a good telephone system with headphones
* office brochures
* patient intake forms
* a comfortable reception and seating area
* updated magazines and reading materials
* an area for children
* credit card payment processors if payments are made at reception
* a lock box for checks and cash
* a TV with educational video loops

## Supervisory Responsibilities

The schedule coordinator holds no supervisory responsibilities.

## Physical Demands

The schedule coordinator must be able to

* remain in a stationary position 80% 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 schedule coordinator monitors success using the following key performance indicator[[1]](#footnote-1) (KPI):

* Percentage of kept appointments relative to the number of scheduled appointments

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

## Primary Duties

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

* Serves as a hostess by greeting, welcoming and assisting patients and visitors and ensuring their comfort
* Ensures patients and visitors are promptly serviced or kept informed at 15-minute intervals when delays occur
* Assists patients in completing any necessary forms
* Ensures that medical histories and other data is updated in the patient record
* Responds to routine questions and provides general information
* Maintains and running the front desk and waiting area
* Answers, screens, and forwards incoming calls in an efficient manner
* Always offers callers the opportunity to leave a message when their intended contact is unavailable
* Takes and relays messages
* Checks and distributes messages left on the office voicemail
* Changes and confirms appointments to keep a full and efficient schedule
* Sends letters to patients when due
* Uses good judgment, tact, diplomacy, and proper etiquette at all times
* Maintains a professional and enthusiastic image
* Receives, sorts, and distributes mail while eliminating junk
* Signs for packages
* Ensures out-going mail is properly prepared and picked up as anticipated
* Keeps track of important developments and notifies interested staff
* Is a resource for accurate information about what is going on throughout the practice
* Provides administrative support via data entry, typing, filing and photocopying, assistance with mail-outs and catering, etc.
* Orders and coordinates printing of stationery, business cards, promotional flyers, etc.
* Runs errands as required
* Works with the doctor to maintain a calendar of important dates and events
* Works with the office manager to schedule staff meetings, holidays, etc. on the calendar
* Keeps the office equipment stocked with paper, toner, ink, etc.
* Coordinates building maintenance
* Has a firm grasp of privacy policies and disclosure laws and exercises the utmost discretion
* Maintains confidentiality for all patients by keeping names and information removed from public view and refraining from discussing confidential information where it can be heard by unauthorized parties
* Maintains security by following procedures and controlling access
* Maintains an up-to-date job description containing all reception duties, policies, and procedures

## 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.

The schedule coordinator understands and enforces all related patient confidentiality rules and best practices.

# 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

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

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)