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Treatment 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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# INTRODUCTION

The treatment coordinator holds a sales position, also known as the case-acceptance position. A treatment coordinator “closes,” or assists the doctor in closing, the doctor’s recommended treatment plans. This position assumes responsibility of the entire patient base and works toward having all patients complete their treatment plans.

## Understanding Your Role

Your role in the completion of a patient’s proposed treatment plan consists of the following steps:

1. A proper patient welcome and introduction to the practice
2. An explanation of the practice’s financial policies
3. The doctor’s exam
4. The doctor’s diagnosis and resulting treatment plan presentation
5. The selling of services to the patient, known as “closing”
6. The proper “handoff” of the patient from the doctor to the person responsible for making financial arrangements for the service(s) to be provided

The treatment coordinator is involved in each step of this process and, therefore, serves a vital role in the practice.

# GENERAL DESCRIPTION

## Purpose

The purpose of the treatment coordinator role is to assist patients in reaching their dental goals by smoothly moving them through case acceptance and treatment processes for the dental services that they need.

## Primary Objectives

The treatment coordinator’s primary objectives are to

* establish and maintain a trusting and supportive relationship with patients
* educate patients on their treatment options and the benefits of treatment
* help patients overcome their financial and emotional concerns of treatment
* schedule patients to begin treatment

## Required Skills

The treatment coordinator position requires the following skills:

* Excellent verbal and written communication skills
* Superior interpersonal and customer service skills
* Excellent listening skills
* Time management skills
* Self-motivation
* Empathy for the needs of others
* A professional demeanor
* An enthusiasm for helping people through dentistry
* A good general understanding of dental procedures
* Self-confidence
* Good organizational skills

## Facilities and Equipment Required

It is recommended that the treatment coordinator have access to

* a private office or conference room
* a computer with contact management software, email, telephone, etc.,
* visual tools such as models, flip charts, and other materials for explaining dental procedures and anatomy
* digital and/or intraoral camera equipment as appropriate to the practice

## Supervisory Responsibilities

The treatment coordinator holds no supervisory responsibilities.

## Physical Demands

The treatment coordinator must be able to

* remain in a stationary position 60% 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 treatment coordinator monitors success by watching two key performance indicators[[1]](#footnote-1) (KPIs):

* Case acceptance rate
* Amount of dollars presented

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

## Primary Duties

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

* Works with office administration by
  + scheduling and confirming appointments for patient consultations
  + ensuring that new patients have received new patient information and health history forms in advance of initial visit
  + pre-qualifying patients
  + maintaining up-to-date patient health records
  + ensuring x-rays and other information are received prior to patient arrival
  + making follow-up appointments as necessary
* Maintains patient relationships by
  + establishing a trusting and supportive relationship with new patients
  + listening attentively to patients
  + understanding patient treatment plans, needs, and goals
  + dealing with any difficult patients
  + calling patients after difficult procedures to ensure they are comfortable
  + tracking patients who have pending and incomplete treatment
  + bringing patients back in for additional consultations as necessary
  + following up with patients via letters, telephone calls, etc.
  + asking patients for referrals
  + sending thank-you notes to referral sources
  + scheduling patients to arrive within 10 days of referral or initial contact
* Works directly with the doctor by
  + coordinating the day’s patients
  + assisting with exams (as directed by the doctor)
  + supporting doctor presentations for recommended treatment plans
  + preparing written treatment plans per doctor instructions
  + notifying the doctor of important developments
  + meeting with the doctor to improve production lines and office systems
* Maximizes the sales/number of services closed by
  + establishing the patient’s goals and major motivating factor for treatment
  + establishing the patient’s budget
  + using digital photos, intraoral photos, models, etc. to educate patients
  + educating patients about crowns, bridges, implants, etc., as applicable
  + informing patients about the benefits, risks, and costs of various treatments
  + selling the skills of the dentist
  + emphasizing the value of the needed services in relation to the cost
  + ensuring that patients start treatment within 10 days of case acceptance
* Understands applicable financial needs of patients and the practice by
  + discussing dental insurance benefits when applicable
  + ensuring pre-authorization from insurance companies is obtained, if needed
  + presenting fees and giving estimates for treatment
  + answering questions related to treatments and fees
  + documenting financial arrangements/commitments to pay
  + adhering to all company financial policies
* Ensures the continued success of the practice by
  + obtaining the high percentage of case acceptance as possible
  + monitoring implementation of treatment plans
  + ensuring patients receive the treatment and service they were promised
  + sending updates on referred cases to enhance referral doctor relationships
  + placing courtesy calls to obtain feedback from patients to ensure the doctor and referring doctor are working together as a team
  + taking responsibility for the entire patient base
  + keeping a current job description, including details of successful actions
  + practicing one’s skills to stay sharp
  + taking advantage of continuing education opportunities to improve skills

As patient needs differ from day-to-day and by patient-to-patient, an ideal treatment coordinator understands these responsibilities and proactively works to set and obtain goals related to 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.

The treatment 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

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

Employee Signature

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| --- |
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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)