

Position Title: New Patient Liaison  
Employee Status: Non-exempt  
Reports To: Beth Baker

**Job Summary:**

The New Patient Liaison represents the practice in all facets of patient services and have 4 primary responsibilities:

- building strong connections with new patients by handling as many new patientcalls, emails and chats as possible
- tracking, reporting and sharing key daily, weekly and monthly operating statistics
- managing the recall base and maximizing patient engagement to reduce unscheduled patients, increase patient referrals, and increase case starts • improving the patient experience and loyaltythrough follow-up and listening.

Additional, secondary responsibilities (as time permits) may include: greeting patients, answering existing patient phone calls, scheduling appointments, maintaining patient records and coordinating patient flow.

**KPIs:**

- Call conversion
- Cancellation/No-shows
- Over-the-counter collections
- Scheduling efficiency

**Michel Dental Core Values:**

**HONESTY-** We do the right thing for the right reasons. We tell the truth. We are accountable.

- We are honest with our time clock. We clock in and out for lunch and at the end of our day. If do not take a lunch due to extenuating circumstances it is noted in the time clock.
- If we make a mistake, we take ownership and take responsibility to correct it if possible.
- We are accountable for our own job performance and KPIs.

**CARING-** We make an effort to understand what the patient wants, and we are genuinely concerned for their comfort and well-being.

- We meet the patient where they are, even if this takes time away from our Scheduling Coordinator/New Patient Liaison position, i.e. helping patients fill out forms electronically, and being understanding if they cannot afford treatment.
- If a patient is fearful, we help them to find a solution that will make them feel at



ease.

- Be understanding when a patient has a preference for what clinician they see.
- We honor their request and adequately note it in their chart along with pop ups so all future staff are aware and can accommodate their request.

**TEAMWORK-** Each staff member is important. We know that working cohesively is critical to provide the best care for our patients.

- We understand that one job is not more important than another and that it takes each one of our jobs to keep the practice running. When we are in between patients or are done with our job, we help our teammates to complete the job by doing laundry, sterilization and asking our teammate what we can do to help them finish.
- We strive to help each other finish and leave at the same time for the day.
- We ensure that our operatories/desk are stocked and organized before we leave for the day. We do not put off for tomorrow because we do not know tomorrow may bring.
- If we have information that needs to be entered in for an appointment or we have informed a patient that we will get back to them, we make sure that this is done before leaving for the day and do not put off for tomorrow.
- We are self-aware. When we are talking with other teammates or when on our personal phones, we are aware that these conversations are better had that the end of the day or at break and can be perceived as unproductive and not helping the team.
- We understand that our role to the team is important and if we are not at work, that someone else has to do double the work. We are not absent from our jobs excessively and strive to set all our appointments on our time off.

**EXCELLENCE-** We strive to continually improve and to consistently work to the best of our abilities. We deliver quality service and results.

- Meet KPIs
- Take necessary CEs or training to perform our jobs to the best of our ability.
- We understand that our infection control standards are of utmost importance, and we are responsible for the safety of our patients and ourselves.
- We understand that our speech, behavior and appearance are a direct reflection of Michel Dental, and we strive to be excellent in and out of the office. Including how we speak about our teammates and the practice.

**WELCOMING-** We greet with a smile and open our doors to people of all walks of life.

- We speak well of each of our teammates and our patients. We are self-aware of what we are saying and where we are saying them.



- When answering the phone, we have a smile on our face. The tone of the human voice changes when smiling. It is readily perceivable to the caller, and it sets the tone for the rest of the call.

**RELATIONSHIPS-** We strive to form genuine and meaningful relationships that last.

- Co-workers and patients are the most important part of our jobs.
- We trust each other.
- We are trustworthy in our work ethic and work performance.
- We treat each other respectfully and collaborate to be devoted and provide excellent care to our patients.

### **Primary Responsibilities:**

Key performance measurements to be tracked by the Liaison (responsible person):

- 40 new patients per month from patient referrals (Liaison)
- Patient attrition of less than 63 patients per month (Liaison)
- Lead conversion rate of 60% or greater (Liaison)
- Tracks and reports sources of 95% of all new patients (Liaison)
- Hygiene re-appointment rate of 95% (Hygiene Coordinator)
- Restorative re-appointment rate of 80% (Dental Assistants)
- Reports to work at least 30 minutes prior to the start of the first appointment of the day.
- Runs the New Patient portion of the Morning Huddle and lets Dr and staff know of any concerns that patient may want addressed during appointment.
- Handles all new patient calls, emails, text and chats (when possible) to become a point of contact and be the voice for the practice to the new patient. Obtains all necessary information to schedule the patient(s) and obtain their insurance and insurance breakdown. Makes sure that all information for the appointment is entered into the appointment so all staff has the information. Makes sure that the insurance breakdown and history has been looked up and is available for their appointment.
- Audits the schedule 2 weeks before and again 2 days before to make sure that all new patient appointments have all of the necessary information for the appointment and that the insurance breakdown has been obtained.
- Audits all new patients from the month before to make sure they were entered correctly to be done before the 1st of every month.
- That their name and preferred name is entered and correct
- That address is formatted correctly
- That there is a cell phone and email when available
- That there is not a second provider listed unless the patient has a pop up stating that they only want to see a specific hygienist
- That the first visit date and consent date are correct



- That there is a referral source and if necessary that there is only one referral source
- Complete KPI Spreadsheet (monthly)
- Complete WOR report (weekly)
- Sends welcome letters to all new patients (if time permits). A sample of this could be:  
I enjoyed speaking with you today and Dr. Michel/Dr. Baltazar and our team look forward to welcoming you to our office on (date and time). We have reserved this appointment just for you. Please remember to go to our website [www.micheldental.com](http://www.micheldental.com) to complete your health history prior to your appointment time.
- Sends thank you letters to all patient referral sources.
- Completes Weekly Operations Report (WOR) and KPI Tracking Spreadsheet (monthly).
- Works with Local Marketing Leader to coordinate New Patient Referral Contests and charity partnerships, including notification of patients of these efforts.
- Leads recall / re-appointment efforts by utilizing custom text messages (with photos) and phone calls and by following the weekly Recare Reactivation system. This includes documenting all calls in Dental Intelligence (if possible) or the patient's office journal.

January - RS

February - TU

March - VW

April - XYZ

May - RS

June - TU

July - VW

August - XYZ

September - RS

October - TU

November - VW



December - XYZ

**Secondary Responsibilities (as time permits):**

- Confirms the schedule 48 hours in advance from 8 am to 10 am each day (Monday's schedule is confirmed on Thursdays) for all Sleep and TMJ patients and while working in Silver Lake. Monitors the automatic communication system and scheduling email.
- Reminds patients of premedication and marks accordingly in the schedule of reminder.
- Balances visit slips for the last patients of the day 15 minutes after their appointments start to process for day end.
- Schedules and adjusts patient appointments to maximize the patient care and reach practice profit target. Manages the daily, weekly, and monthly calendar to meet the practice production and collection goals.
- Establishes, maintains and keeps patient files and records up to date (i.e. address, phone number, insurance information, etc.).
- Communicates with patients regarding financial options. Reconciles financial records by receiving and recording patient payments as needed to help assist
- Treatment Plan Coordinator.
- Prepares correspondence, memos, condolence letters, and other documents, as requested by doctor.
- Uses computer, fax, or courier service to transmit information or documents when requested.
- Performs necessary duties associated with checking patients in and out. Record treatment information in the patient's chart. Enter type of treatment planned for the next appointment, and the amount of chair time, doctor time and assistant time needed.
- Registers new patients, provides necessary paperwork (welcome letter, HIPAA documents), and insures all required documents are completed by the patient (When the Patient Care Coordinator is not available.).
- Educates patients, as necessary, regarding insurance, their responsibility and basic terminology.
- Answer all calls on the 2nd ring when available.
- Once a week works from Silver Lake location to help give support to the Scheduling Coordinator.
- Makes sure that the hygiene schedule is full before leaving for the day.
- Is back up for Patient Care Coordinator when they are gone.

**Knowledge/Skills/Abilities:**

- Knowledge of appointment coordinator procedures.
- 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.
- Maintain confidence with the patient regarding abilities of doctor(s) and staff.
- 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 greet visitors professionally and courteously.

#### **Education / Experience:**

- High school diploma or equivalent
- Minimum of 3 year(s) relevant experience in the dental profession

#### **Physical and Environmental Requirements:**

- May be required to lift up to 30 lbs.
- Active movement throughout the day: sitting, walking, standing, squatting, bending, stooping, reaching, etc. (not a sedentary position).
- Vision: close vision, depth perception, and ability to adjust focus.
- Hearing: able to satisfactorily communicate with patients, doctor, and other staff members to ensure that verbal communication is clearly understood, or a satisfactorily-equivalent method of communication.
- Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or operate equipment.
- May be required to administer first aid or CPR.
- Occasional exposure to toxic or caustic chemicals and radiation.
- Exposure to moderate noise levels.
- Exposure to hectic, fast-paced, high anxiety environments.
- Additional or different duties may be assigned occasionally at employer's discretion.

