

Position Title: Treatment Plan Coordinator  
Employee Status: Exempt  
Reports To: Beth Baker

**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 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 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 team mates to complete the job by doing laundry, sterilization and asking our team mate 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 are stocked and organized before we leave for the day. We do not put off for tomorrow because there is a chance that our team mate will not have to take time out of patient time to stock and organize if I am gone.
- If we have information that ends 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 team mates or when on our personal phones, we are aware that sometimes these conversations are better to be 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 team mates 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 team mates and our patients. We are self-aware of what we are saying and where we are saying it.
- 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.

#### **Job Summary:**

- The Treatment Plan Coordinator insures quality dentistry is available to patients, communicates with patients regarding their treatment plan, determines the best option for financing the recommended treatment, and arranges appropriate financial plans with patients.

#### **Essential Duties:**

- KPI's
- Patient acceptance 85%
- Treatment acceptance 85%



- Follow-ups on unscheduled treatment 95%
- Necessary pre-determinations sent 100%
- Is to report to work at least 30 minutes prior to the start of the first appointment of the day.
- Presents the treatment plan, using models and diagrams, as necessary, and provides patient with related literature.
- Arranges the patient's treatment-planning schedule and books appointments.
- Estimates costs of treatment provided.
- Researches patient insurance benefits on diagnosed treatment.
- Coordinates patient financial arrangements according to the financial policy.
- Maintains appropriate financial documentation, including signed financial agreements if patient is financing dental treatment.
- Records patient financial discussions.
- Reviews patient visit slips for any incomplete treatment.
- Sends all predeterminations for both locations other than Scaling and Root
- Planning which should be done at the time treatment is reviewed.
- Provides insurance predetermination documentation to all patients if required, contacts the patient to make financial arrangements, and schedules treatment.
- Contacts patients when pre-authorization is received and proceeds with scheduling.
- Educates patients, as necessary, regarding insurance, their responsibility and basic terminology.
- 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 for both locations. Makes sure treatment and hygiene schedule is full before leaving at the end of the day and works with scheduling coordinators to make sure schedule is full and production goal is met.
- Once a week call all unscheduled outstanding treatment plans that were diagnosed the week before and the prior month and follows up with them by phone, email or text. Documents all conversations in the office journal and in the treatment notes.
- Answers phones, routes calls, provides information, and takes messages in accordance with practice procedures.
- Meets with Practice Administrator the first week of the month to review if there are correlations as to why patients have not scheduled treatment and to review treatment plan acceptance percentage.
- Provides coverage for Collections 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.

