

## Job Descriptions to Achieve Practice Goals

**Treatment Coordinator**– *Tracks potential patients and manages new patient exam and case presentation to achieve a conversion rate of 70 percent or better.*

- Communicates with will-call-back list to sell the practice; follows observation patients and schedules their appointments
- Presents exam summary, payment options and financial contract
- Arranges referrals; communicates diagnostic findings to referring dentists
- Coordinates communications and marketing efforts to increase professional referrals
- May also be responsible for covering telephones, taking new patient phone calls, confirming new patient, consultation, and observation appointments, and other administrative or marketing tasks

**Scheduling Coordinator**– *Creates and manages scheduling system to move patients smoothly through active and retention treatment, and maintain a no-show rate under three to five percent.*

- Creates a scheduling system based on a model day designed to achieve practice goals
- Schedules patient appointments, controls cancellations and no-shows, ensures patient satisfaction with scheduling and appointment availability
- Schedules doctor and staff meetings, trainings, events, vacations
- Conducts the morning meeting review of daily schedule
- May also be responsible for maintaining the organization of the front desk and reception area, and other administrative tasks

**Financial Coordinator**– *Tracks each patient financially through orthodontic treatment and ensures that the delinquency rate does not exceed three to five percent.*

- Evaluates patient financial data to establish credit terms within practice guidelines
- Monitors patient contract receivables, including insurance payments, to maximize cash flow and practice profitability
- Performs delinquent account collection activities
- May also be responsible for general office bookkeeping, covering telephones, mail distribution, and other administrative tasks

**Clinical Coordinator**– *Manages clinical patient care to ensure patient satisfaction and treatment compliance, and achieve an on-time completion of treatment rate of 95 percent or better.*

- Manages scheduling of clinical staff, implements clinical staff training program
- Controls the flow of patients through treatment to minimize number of patients beyond treatment time, schedules retention patients
- Ensures accuracy of clinic charges, manages patient incentive program
- Confirms appliance fabrication and quality, archives records, orders supplies, organizes operator and lab areas, oversees hazard control, exposure control and waste management programs
- May also be responsible for patient appreciation activities, communication with patients and families, and other administrative tasks