



Partners in Practice Success

## **Appointment Coordinator**

**Purpose:** The purpose of the Appointment Coordinator position is to efficiently and effectively manage patient flow to ensure patient satisfaction and practice profitability.

### **I. Scheduling Tasks**

- a. Manage restorative and hygiene schedules according to appointment scheduling guidelines to ensure all hours are scheduled efficiently and to daily goal.
- b. Confirm appointments according to office guidelines.
- c. Manage cancellations by using communications skills to motivate the patient to keep his/her appointment. If the patient cancels or breaks an appointment, reschedule the patient or track them using the delayed treatment system.
- d. Greet all patients upon arrival courteously and personally.
- e. Take primary responsibility for front desk coverage.
- f. Complete Patient Information Form for each new patient and emergency patient.
- g. Prepare for and participate in daily huddle by providing information regarding “today’s schedule”, new patients, restorative blocks and marketing information.

### **II. Administrative Tasks**

- a. Take primary responsibility for answering the phone before the third ring each and every time.
- b. Retrieve, distribute and respond to messages from the answering machine or service.
- c. Send welcome letters/packets to new patients within 24 hours.
- d. Prepare referral thank you notes for doctor daily.
- e. Manage all correspondence regarding new patients and scheduling.
- f. Manage a tickler system to increase productivity by capturing incomplete treatment.
- g. Accurately maintain patient records.

## **II. Administrative Tasks (cont.)**

- h. Organize and maintain filing system for quick retrieval of information.
- i. Organize desk space to promote image of quality.

## **III. Financial Tasks**

- j. Take responsibility for collecting “time-of service” fees. Provide receipts, walk out statements or super bills for each patient.
- k. Accurately record all financial transactions.
- l. Provide backup support for the Financial Administrator by making financial arrangements for fees under \$\_\_\_\_\_.

## **IV. Marketing Tasks**

- m. Actively market the practice by asking patients of record for referrals.
- n. Actively market the practice in the community.
- o. Encourage patients to accept treatment by using effective verbal skills.