

Duties

Proficiencies

Receptionist

Primary Duties

1. Open the Office (10 min. early, check e-mail, voice mail).
2. Create checklist and all claims (at beginning of shift).
3. Setup/verify "doctor patient" insurance.
4. Greet each patient with a smile - Make a connection!
5. Monitor flow/schedule of ALL patients (call patient 5 min. if not arrived).
6. Answer the phone and monitor e-mail.
office.
8. Confirmation Phone Call and Pt e-mail & text reminders
9. Be a patient advocate!

Secondary Receptionist duties (if you get to them)

****If the coordinator is busy or not working, also do the coordinator's duties****

Complete Assistant Checklists.

Manage mail.

Tetris the schedule & confirm appointments two days in advance.

Create and call labs for pickup.

Check NEA program for claims that need attachments daily.

Prepare forms for new patients before they come.

Gather/enter new patient information (forms, picture, etc).

Keep front entrance/reception/beverage bar area clean.

Keep magazines, organized, subscribed, and filtered.

Clean/keep patient bathroom tidy & smelling good

Maintain the copier & inventory administrative supplies.

Resolve account questions or forward them to our "billing company"

Keep ASAP list.

Send recall and confirmation post cards & e-mails.

Front Desk Training Overview

Answer the Phone

Taking Payment

Check Patient In

Check Patient Out

Verify Insurance & 2nd Check

Termed Insurance Check

Memorize 3 different types of ins. Be able to setup and identify

Check Email

Open Office, Turn on Equipment, Door & Alarm

Collect & Enter New Patient Information

Follow Patient Interaction Quality Monitoring program

Phone System & Queues

Set up Text Messaging

Complete Dental Charting

Treatment Plan

Efficient Scheduling

Lab Case Setup and Processing

Sell and Record Products

Setup Membership Plan with Quote and Treatment Plan

Multiple tx Plan Options

Set up Payment Plans & Save Credit Card on File

Mail, Shipping of Items

Burn/Email Conebeam and/or X-rays

Provider Transfer & Guarantee Work Form

Add Picture to Patient Chart

Appointment Confirmations (Phone, Email, & Text)

Recall Postcards

NEA Attachments

Enter Metrics into Team Portal

Look for Insurance Red Flags (pano+bw = fmx, fl-, etc)

Send Claims

Review Apex Reports

Creating all checklists

Intra Office Chat

Red Flag Checklist

Comm log important info pertaining to patient account

Learn to utilize & navigate the office portal

Prepare Morning Huddle form for next day

Coordinator

Primary Duties

1. Setup/verify "hygiene patient" insurance.
2. *Monitor flow of Hygiene - Be present at exam
3. *Close Treatment Plans: educate about insurance, utilize all payment/financial options
4. Answer the phone & monitor e-mail.

Secondary Duties (if you get to them)

5. Complete Hygiene Checklists.
6. Quadrant II projects (task list, checklists).
7. Assist with additional projects as delegated by office manager.
8. Review Handbook/CE.

Office Manager

Additional Duties

Delegate tasks, reports, & anything else from this list as you see fit

Review Team Daily an Monthly checklists and hygiene reports. Summarize to doctors

With direction of doctors, help evaluate team members and provide them regular feedback

Coordinate collection accounts with Corporate

***Calm and retain upset patients

Meet, train, and motivate current PIC leaders at least 2x month

Attend monthly corporate meetings

Attend at least part of the doctors meeting

Manage all time off requests

Typing letters and correspondence

Coordinate baby gifts, flowers, sympathy cards, birthday party planning

Keep a current list of all employees, contact info & birthdays

Maintain office calendar, when office is closed, & keep birthdays updated

Coordinate new team member training

Head up office décor for holidays

Retain Office Debit Card (buy lunch, movie tickets, Wal-Mart card, office décor, etc)

Order food for team meetings

Coordinate maintenance shipping & tracking

Monitor CPR expiration for office

Coordinate quarterly team performance evaluations

Create deposits daily or 2x a week

Draw & contact winners for "No Cavity Kids Club"

Help identify training opportunities for team meeting

***Cultivate relationships with team members of trust and friendship

Bank Deposits

New Team Member Training

Track & Mail Repair items

Update provider schedules in Open Dental

Become an expert at reviewing accounts

Become an expert at navigating the portal

Performance Reviews