***Scheduling Coordinator***

**Duties and Responsibilities:**

• Greet all patients upon their arrival.

• Monitor the arrival of patients.  Call any patient that is 5 minutes late to determine their status and inform the clinical staff.

• Schedule all appointments and detail each procedure.

• Stabilize the production by scheduling the Ideal Day.  Meet the daily goal by scheduling appropriate times for Rocks, Sand and Water.

• Discuss the appointment guidelines with each new patient and patient of record who has not been responsible in the past.  Obtain a verbal commitment from the patient and record that this has been discussed on the front of the chart.

• Facilitate the production and scheduling portion of the morning huddle.

a) Production results from yesterday.

b) Status of today’s production goal.

c) Status of Rocks for the next 5 days.

d) Identify open time in schedule.

e) Determine where to place emergencies.

• Update addresses, telephone numbers and insurance information as the patients arrive.

• Prepare the daily schedule and include potential treatment (circled) to be reviewed in the morning huddle.

• Oversee the schedule during the day to insure that it runs smoothly.  Adjust the schedule as necessary.

a) Insure that there are open appointments in the day to provide flexibility.

• Insure that all diagnosed treatment that is not scheduled is placed in the tickler file for timely follow up.  Check this file daily and call each patient as they come due.

• Print route slips for next day’s schedule.

• Complete a telephone slip for each new patient and emergency patient

• E-Mail the welcome packet to all new patients entering the practice and requesting an exam.

• Monitor and track new patient phone calls and document referral sources and pertinent information.

• Insure that there is no open time in the schedule for the doctor and hygienist.

• Determine the status of the next continuing care visit for each hygiene patient seen during the day to insure no one is missed.

• If patient did not confirm via email or text, make confirmation phone calls.

• Generate report for patients that are past due for hygiene.  Send email/text and call as needed.

• Ensure that patients are aware of the cancellation policy.

• Oversee and train all appropriate staff members on the scheduling program/software.

• Coordinate with the Treatment Coordinator on scheduling new patients.

• Coordinate with Financial Coordinator to determine patients on the daily schedule with outstanding balances or patients in need of a financial consultation.

• Coordinate the scheduling of appointments for referrals generated from referring practices.

• Perform other tasks as assigned by the office manager and doctor(s).