**Treatment Coordinator Training Plan**

Packet includes: 30/60/90 game plan, positions checklist & scorecard

***Job Description:***Know and understand treatment numbers and become confident to discuss all financing options with the patient and become knowledgeable about procedures in the back office to alleviate possible patient concerns.

***Goal***: Become fully trained as a treatment coordinator, mastering all duties and tasks assigned within 90 days post-employment start date and during the duration of employment.

**Treatment Coordinator Checklist- 30/60/90 Day Plan to Be Proficient In**

1. Overall office duties
2. Scheduling and reports
3. Financial arrangements for patients needing treatment
4. Schedule preparation
5. Follow up on unsubmitted claims

**What each task includes:**

* Overall Office Duties
  + Answer the telephone with a **smile** by the second ring with script- assist schedule coordinator
    - New Patients
    - Screening calls for OM and Dr
  + Collect balances and co-pays on all patients
    - Goal is 95% collection percentage monthly
  + Submit Pre-Determinations
  + Specialty services supply orders
    - Confirm specialty procedures have all needed supplies two days out
* Scheduling and reports
  + New Patients script
  + Recare appointments, use script (pull reports accordingly)
  + Treatment patients, use script (pull reports accordingly)
  + Unscheduled appointments, use script (pull reports accordingly)
* Financial Arrangements for all patients needing treatment
  + Track treatment acceptance daily using the treatment tracker
  + Call on unscheduled treatment plans daily- goal to schedule 2 plans
* Schedule Preparation
  + Doctor’s schedule is scheduled to production goals and has a smooth flow
    - Use scheduling Dr. protocol
    - Use ideal Dr. treatment time
  + Call and track prescriptions
* Follow-up on unsubmitted claims
  + Send x-ray requests
  + Check external (Lighthouse, RevenueWell, Legwork, Yapi)

**Weekly**

* Unscheduled Treatment Calls – 2, 2, 2, letter follow-up
* Treatment tracker follow-up and reporting
* Formatting patient schedule to allow to New Patients, SRPs, etc.
* Specialty Correspondence Letters Incoming and Outgoing

**Monthly**

* Treatment tracker
* Follow-up on Pre-Determinations
* Expired monthly savings plan letters and renewals
* Reactivation of old patients
* Record voicemails for special events, holidays, etc.

**Treatment Coordinator Scorecard**

**30 Day Goals**

**Date for review: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

*Rate the following statements – 1 being strongly disagree, 5 being strongly agree*

Answer phones in accordance with the script.  
 1 2 3 4 5  
  
Clock in/clock out.  
 1 2 3 4 5  
  
Check the voicemail.  
 1 2 3 4 5  
  
Schedule - recare, treatment, and unscheduled patients.   
 1 2 3 4 5  
  
Help the scheduling coordinator with patient calls and appointments.  
 1 2 3 4 5  
  
Pull reports daily.   
 1 2 3 4 5  
  
Encourage patient referrals and reviews.  
 1 2 3 4 5  
  
Track referrals.  
 1 2 3 4 5  
  
Supply orders for specialty services.  
 1 2 3 4 5  
  
Call on unscheduled treatment plans daily.  
 1 2 3 4 5  
  
Ensure the next day’s schedule has production and meets goals.  
 1 2 3 4 5  
  
Organize and straighten the waiting room.   
 1 2 3 4 5  
  
Confirm next day appointments - confirm a full schedule.  
 1 2 3 4 5  
  
Prep for the morning huddle for the next day.  
 1 2 3 4 5

Areas I feel I excel:

Areas I feel I need extra help on:

Goal for next 30 days:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**60 Day Goals**

**Date for review:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

*Rate the following statements – 1 being strongly disagree, 5 being strongly agree*

Perform all 30 day tasks with no supervision.  
 1 2 3 4 5

Call and track prescriptions.   
 1 2 3 4 5

Submit pre-determinations.  
 1 2 3 4 5

Present financial agreements for all patients needing treatment.  
 1 2 3 4 5

Track treatment acceptance daily using a treatment tracker.  
 1 2 3 4 5

Follow up on unsubmitted claims.  
 1 2 3 4 5

Check external (Lighthouse, RevenueWell, Legwork, Yapi).  
 2 3 4 5

Keep track of specialty correspondence letters incoming and outgoing.  
 1 2 3 4 5

Areas I feel I excel:

Areas I feel I need extra help on:

Goal for next 30 days: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**90 Day Goals**

**Date for review:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

*Rate the following statements – 1 being strongly disagree, 5 being strongly agree*

Perform all 30 and 60 day tasks with no supervision.  
 1 2 3 4 5  
  
Collect balances and co-pays on all patients - 95% collections.  
 1 2 3 4 5  
  
Send x-ray requests.  
 1 2 3 4 5  
  
Record voicemails for special events, holidays, etc.   
 1 2 3 4 5  
  
Reactivate of old patients.  
 1 2 3 4 5  
  
Track expired monthly savings plan letters and renewals.   
 1 2 3 4 5

Areas I feel I excel:

Areas I feel I need extra help on:

Goal for next 30 days: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_