**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: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_