

Treatment Coordinator

Role Expectations

POSITION OVERVIEW

The Treatment Coordinator is responsible for presenting treatment plans, guiding patients through financial options, coordinating care across multiple appointments, and ensuring that patients understand and commit to recommended treatment. This role requires a thorough familiarity with the practice, the doctor's treatment philosophy, and the full range of treatment options and alternatives offered. The Treatment Coordinator must be able to connect with patients on a personal level, recognize individual personalities, and adjust communication accordingly. This role directly affects production, case acceptance, and patient retention.

KEY RESPONSIBILITIES

- Develop a thorough understanding of the practice, the doctor's treatment philosophy, and all treatment options and alternatives offered.
- Following the doctor's examination and treatment discussion with the patient, receive the treatment plan from the doctor and review it fully before discussing with the patient.
- Be familiar with the ideal treatment plan as well as alternatives and options.
- Assess the patient's personality and communication style, and present information in a manner that fits the individual.
- Present the treatment plan to the patient using available visual aids including X-rays, intraoral photos, scans, and physical models to support understanding.
- Be able to explain the number of required visits, the overall treatment timeline, and the expected length of each appointment.
- Address patient questions and concerns with patience and honesty, deferring clinical questions to the treating provider when appropriate.
- Discuss treatment cost, review insurance benefits with patients, and provide accurate out-of-pocket estimates.
- Present and coordinate all available payment and financing options, including any third-party financing plans offered by the practice.
- Communicate with insurance companies regarding pre-authorizations for major treatment.
- Schedule multi-appointment treatment plans in a manner that supports patient compliance and maximizes chair utilization.
- Follow up with patients who have unscheduled or pending treatment, documenting all contact attempts in the system.
- Maintain accurate and up-to-date records of case acceptance, pending treatment, and production-related data in the practice management system.

- Track and report case acceptance rates to the Office Manager or practice owner on a regular basis.
- Coordinate with clinical staff to stay aligned on treatment plans and patient status.
- Support the front desk team during scheduling and patient check-out as needed.
- Participate in team huddles and case review meetings as required by the practice.

PROFESSIONALISM STANDARDS

- Arrive on time and prepared for all scheduled shifts and patient consultations.
- Maintain professional appearance consistent with the practice dress code policy.
- Communicate with patients, colleagues, and providers in a respectful manner at all times.
- Handle all patient interactions, including difficult financial or treatment conversations, with composure.
- Maintain strict confidentiality of all patient information in accordance with HIPAA regulations and practice privacy policies.
- Represent the practice's values and standards in every patient-facing interaction.