

## Office Manager Job Description (Office Administrator)

**Purpose:** To assure that all the business aspects of the practice are functioning in an orderly and efficient manner. To manage the team, to enforce office policy, to train new team members regarding office policy. The Office Manager is to ensure a smooth and efficient patient flow. At all times, the Office Manager acts as an advocate for the practice owner.

1. In charge of daily production team meetings every morning or 15 minutes before patients are scheduled.
2. Ensures patients flow smoothly and efficiently through the office.
3. Makes up the graphs for the team and overall statistics (production, collection, new patients).
4. Monitors the productivity of the office via the graphs.
5. Performs the duties of Personnel Director.
6. Along with the doctor(s), performs the annual review with all team members.
7. Ensures the payroll is accurate and timely.
8. Originates Office Policy, with approval from doctor(s), and distributes to team members.
9. Acts as liaison between the team and doctor(s) for routine matters.
10. Monitors and ensures the organization is viable, expanding, and prosperous.
11. Coordinates all office hiring.
12. Acts as team trainer and coordinator of team training.
13. Supervise all personnel.
14. Handle team questions, concerns, and problems.
15. Keep personnel records current (attendance, performance evaluations, interview forms, disciplinary actions, etc.).
16. Handle unusual patient problems.
17. Review and redefine job descriptions.
18. Makes daily bank deposits of cash and checks received; balances to daysheet.
19. Know all of the front office job functions and fill in when necessary.
20. Coordinate and schedule team meetings.
21. Coordinate and schedule performance planning and reviews.
22. Coordinate vacation schedules.
23. Act as office supply source for inventory control and item ordering.
24. Receive and distribute mail.
25. Coordinate continuing education for each team member.
26. Coordinate office uniforms and dress code.
27. Encourage patient referrals and coordinate internal and external marketing
28. Oversee achievement of office goals on deadline.
29. Responsible for office petty cash.
30. Contribute to team spirit.
31. Carry out other front office duties as directed by doctor.

## Appointment Secretary Job Description (Receptionist)

Purpose: To handle the patient from the initial telephone contact until he or she comes into the office and finally leaves the office with another visit scheduled.

1. Answers phone with a smile.
2. Makes appointments.
3. Makes sure that new patients who are calling in to schedule an appointment are appropriately noted on the schedule book.
4. Ensures that any emergency patient is offered the immediate attention that he or she is requesting.
5. Sends reminders to all recall patients two weeks in advance of scheduled appointment.
6. Confirms the following day's schedule with the patients.
7. Keeps and uses and short notice "call list" to use in case of cancellation.
8. Daily reviews the appointment book and calculates the next day's scheduled production for comparison to office goal. Assures that sufficient production is booked to meet goal.
9. Pulls charts one or two days in advance to review recall information and recommended treatment from the treatment plan that has not been completed or appointed.
10. If there are no computers in the operatories, makes copies of schedule for each operatory and posts before patients begin to arrive for the day's schedule. (Do not post them where patients can see them.)
11. Arranges charts in appropriate order for the following day and has them ready in the designated place.
12. Patients that are "no shows" are called by five minutes after their scheduled appointment time to see if they are on their way. If not, then reschedule and enter NO SHOW along with the date in their chart.
13. Sees that patients wait no longer than 10 minutes before being seen, handling it with the chairside, the doctor, or whomever can get them in.
14. Keep your portion of the business office neat and organized.
15. Call in prescriptions to the pharmacy as requested by the doctor. Accurately note the date and exact prescription in the patient's chart before it is filed.
16. Order and maintain office supplies necessary for your duties.
17. Orders flowers, etc., for patients at the doctor's request.
18. Confirm all appointments contain the patient's name, daytime phone number, and exact procedure (tooth #, surface, code, etc.) to be performed.
19. Recall and reactivate inactive patients by getting them to make appointments and come in to resume their care.
20. Keep graph detailing percentage of appointments kept (daily, weekly, monthly).
21. Focus conversations with patients on the patient or dentistry.
22. Make notes in chart regarding broken appointments or late patients.
23. Maintain the number of broken appointments or late cancellations at acceptable level (doctor should have 5% or less, hygienist 8-10% or less).

24. Coordinate answering machine/service: beginning of day, lunch, end of day.
25. Screen doctor and team phone calls.
26. Distribute phone messages.
27. Manage patient records (create new patient chart, label, type letters, update address changes on chart, recall card, ledger or computer).
28. Use specific communication process to discourage broken appointments.
29. Coordinate and follow up patient referrals out of office.
30. Coordinate patient premedication and prescriptions.
31. Coordinate purge project, chart audit.
32. Inactivate patient chart, hygiene card, and ledger.
33. Call patients after difficult treatment.
34. Keep new patient tracking updated.
35. Coordinate public relations correspondence: send "thank-you for referral," "welcome," "new resident" letters, etc.
36. Turn office music system on/off.
37. Keep reception room neat, orderly, picked up.
38. Attend and contribute to daily morning meetings and team meetings.
39. Encourage patient referrals.
40. Make sure schedule runs smoothly and efficiently.
41. If there are no computers in the clinical area, alter the appointment sheets in the treatment rooms, lab, and doctor's area as changes occur during the work day.
42. Make all follow-up calls regarding broken and cancelled appointments.
43. Collect moneys as due from patient (stamp checks, write receipts for cash).
44. Alert assistants and hygienists of patient arrivals.
45. Assist patients as they fill out forms and give them all the necessary information. Ensure that patients do not leave any field blank.
46. Keep patients accurately informed of expected waiting time if the doctor is behind schedule.
47. See that the phone is answered before the third ring at all times.
48. Call labs for pick-ups; keep track of cases.
49. Make appointments, when possible, for patients referred to a specialist.

## Dental Assistant Job Description

**Purpose:** To provide the doctor with assistance in performing the procedures of treatment and to make the patient as comfortable as possible as the treatment is taking place.

1. Seat patients.
2. Take, develop, and mount X-rays.
3. Set up trays with appropriate instruments for each procedure.
4. Stock operatories.
5. Sterilize instruments and trays.
6. Assist in all dental procedures.
7. Write a complete description of the procedure in the patient's chart, with the initials and the date.
8. Chart the treatment plan as the doctor calls out the recommendations.
9. Explain as necessary dental treatment or procedures to the patient when questions are asked.
10. Take impressions.
11. Make temporaries.
12. Pour up impressions in stone.
13. Maintain the chemicals in the X-ray developer, chemiclave, and cold sterile.
14. Coronal polish as necessary.
15. Route patients considering treatment to the Financial Secretary for appropriate financial arrangements prior to beginning treatment.
16. Sells dentistry to the patient by being in communication; promote the treatment plan.
17. Responsible for maximizing the production scheduled for the day by keeping a watch on the treatment plan to see that all possible work that has financial arrangements is completed that day.
18. Responsible to keep the operatories on time so that the patients are seen on time. If running behind, the chairside will notify the receptionist who will in turn notify the next patient.
19. May help out in another section of the office during down time.
20. Make the patient's visit as comfortable as possible.
21. Turn on/off daily: X-ray machine, air compressor, lights, water, nitrous and oxygen tanks, suction system.
22. Set up treatment rooms.
23. Post schedules in treatment rooms that do not have computers.
24. Prepare charts.
25. Keep informed of current OSHA regulations for sterilization procedures.
26. Review schedule.
27. Attend and participate in morning meetings and team meetings.
28. Coordinate and record lab cases (in and out).
29. Oil hand pieces (afternoon/evening).
30. Disinfect handpieces and operatories after each patient.
31. Empty suction traps and run cleaner through suction weekly.
32. Empty trash.

33. Straighten lab.
34. Straighten sterilization room.
35. Ensure completion of charts.
36. Call patients after difficult treatment.
37. Clean impression trays.
38. Combine efficiency, productivity, and caring for patients in all actions.
39. Contribute to team spirit.
40. Perform four-handed assisting skills and delegated expanded duties.
41. Instruct and educate patients about clinical procedures.
42. Give post-operative instructions.
43. Focus conversations with patients on the patient or on dentistry.
44. Establish analgesia (nitrous oxide only).
45. Wear gloves, mask, and protective eyewear.
46. Manage inventory control with the goal of keeping it 6% of collections.
47. Order supplies.
48. Put supplies away.
49. Attend continuing education annually.
50. Assist team members.
51. Stay current on expanded duties.
52. Perform all expanded duties allowed by state law.
53. Encourage patient referrals.
54. Cross train in other areas of the practice.
55. Chart patients and record date, service, fee; and then initial.
56. Dismiss patients and complete their charts with services recorded for the day's treatment and information on next visit.

## Dental Hygienist Job Description

Purpose: To provide the patient with a thorough prophylaxis and to determine and treat the periodontal condition of the patient. The hygienist will also increase the patient's awareness of any negative conditions and uncompleted dental work that is evident by using diagrams and educating the patient through instruction of proper brushing and flossing techniques.

1. Greet the patient by name and seat the patient.
2. Check medical history, inquire about dental problems.
3. Take X-rays as necessary; develop and mount.
4. Check the patient for decay, missing teeth, oral lesions, and oral cancer screen.
5. Check to see that all previously recommended treatment has been completed.
6. Verbally indicate to the patient any dental conditions existing that the doctor may want to address.
7. Perform root planing, and sub-gingival curettage as necessary.
8. Administer nitrous oxide as requested by the doctor.
9. Enter all treatment and anesthesia on the patient's record and enter the date and your initials.
10. Be present to chart treatment as requested by doctor.
11. Set up the patient's six-month recall appointment. Allow patient to self-address their own reminder postcard. File card appropriately for mailing two weeks prior to appointment date.
12. Set up trays.
13. Sterilize instruments and trays.
14. Keep your area adequately stocked with supplies.
15. Keeps graphs charting STMP starts and Crown & Bridge treatment recommended.
16. Assist the doctor or other team members as time and schedule dictate.
17. Educate patients about daily home care.
18. Focus conversations with patients on the patient or on dentistry.
19. Take or update dental and medical health history.
20. Chart existing restorations for all new patients.
21. Perform prophylaxis, scaling, and polishing.
22. Place sealants.
23. Promote preventive periodontal procedures.
24. Promote quality restorative services.
25. Administer fluoride treatment.
26. Coordinate darkroom (solution and equipment upkeep).
27. Oversee recall system control: 70-80% recall.
28. Oversee hygiene inventory control (hygiene supplies, X-ray supplies, home care aids).
29. Use gloves, mask, and protective eyewear with every patient.
30. Maintain sterilization procedures for room after each patient.
31. Maintain hygiene equipment (ProphyJet, Cavitron, prophylaxis angle, etc.).
32. Maintain membership and attend dental hygiene association meetings.

33. Assist with practice marketing (school and community outreach presentations, etc.).
34. Contribute to team spirit.
35. Contribute to and attend daily morning meetings and team meetings.
36. Attend continuing education courses annually.
37. Encourage patient referrals.
38. Take blood pressure on patients when necessary.
39. Perio probe and chart existing or change in pocket depth.
40. Recommend perio consultation; refer when necessary.
41. Explain prevention to patients and parents of small children.
42. Reflect the doctor's philosophy in his practice.
43. Be aware of patient's treatment plan and need for complete dentistry.
44. Counsel patients on dental treatment previously recommended.
45. Recommend whitening teeth and make and deliver trays.

## Collections Secretary Job Description

Purpose: To collect all fees patient is responsible for paying. To provide the patient with a written estimate of the costs of the recommended treatment, collect the fees or patient portions and arrange payment plans as necessary.

1. Responsible for following the collection policy.
2. Reviews the schedule the two days prior to the patients visit to flag any problem accounts.
3. Responsible to make up a treatment plan estimate for the patient with accurate insurance estimation of benefits.
4. Sets up contracts when appropriate, giving the patient a contract card when applicable, otherwise noting the agreed upon arrangement on the Treatment Estimate Form. These arrangements are to be precisely written with dates payments are due and the amounts. A copy is to be sent home with the patient and the original to be kept in the patient's chart.
5. Collect fees due at each visit and collect delinquent amounts.
6. Monitors all accounts monthly. Delinquent accounts are those that no payment has been received within the previous 30 days. These patients are to be called asking when the office can expect to receive payment. If the patient can't be reached by phone, a collection letter is sent. Each contact should be documented on the computer by date with the patient's response. Use a computer automated or manual calendar to track your next date of contact with each patient. When 90 days past due the account is turned over to a collection agency.
7. Notifies patients whose insurance company has not paid in 45 days so that they can begin to pay per their agreement.
8. Upon approval of the doctor, the patient's balance on a 90-day and older delinquency will be adjusted off the account as a bad debt and entered onto the "collection ledger."
9. If a payment is received on an account that was previously adjusted off, then enter the payment and an offsetting equal charge to the patient's account.
10. Bad debt accounts should also be labeled as such on the front of the patient's chart.
11. Keep your portion of the business office clean and orderly.
12. Keep your work area well stocked with supplies.
13. Keep graph of collections (daily, weekly, monthly).
14. Get firm commitment date for payments from patient.
15. After 90 days, send registered letter of intent to take account to small claims court or collection agency.
16. Represent doctor in small claims court.

## Insurance Secretary Job Description

Purpose: To post charges and payments daily. To bill our insurance after each visit to ensure maximum benefit for the patient.

1. Accurately posts all charges and payments daily.
2. Ensures that the deposit record matches the payment received amount.
3. Insurance forms processed with appropriate X-rays after each visit, daily.
4. Keep a copy of the insurance claim in the patient's chart.
5. If an insurance claim is re-billed, note this and the date it is re-billed on the ledger.
6. Any correspondence or telephone conversations with patient should be noted in the chart.
7. Follow up on any claims that are over 30 days old.
8. When the insurance check is paid to the patient's account, check to see if a secondary coverage is to be billed.
9. Maintain and order necessary supplies.
10. Keep your portion of the business office clean and orderly.
11. Keep insurance carrier information updated in the computer files so that you can accurately estimate the patient's portion.
12. Be responsible for knowledge of patients' insurance benefits.
13. Print the insurance audit report and follow up with insurance companies.
14. File insurance daily.
15. Establish and update insurance benefits file for each patient chart or general file by employer.
16. Collect insurance forms, data, and signatures from patients.
17. Verify insurance coverage for new patients.
18. Post insurance checks received in the mail.
19. Review monthly statements with financial coordinator.
20. Answer insurance company inquiries.
21. Carry out other front office duties as delegated.
22. Attend and contribute to daily morning meetings and team meetings.
23. Encourage patient referrals.
24. Counsel patients with insurance coverage.
25. Prepare insurance reports.
26. Submit form to insurance company when treatment is complete.
27. Send picture of treatment area or diagnostic models with narrative when necessary.
28. Process forms for predetermination.
29. Submit pre-authorization.
30. Enclose X-rays or copies and give clear treatment explanation.
31. Keep track of amounts billed and when insurance has paid.
32. Correspond/communicate with insurance companies regarding claims status.
33. Follow up on insurance reports and check for tracers that need to be sent.
34. Send overpayments to patients.
35. Take all phone calls from insurance companies.

36. Keep former patients' records up to date and store in inactive file.
37. Organize and maintain file systems for quick retrieval of information.
38. Assist in keeping front desk covered at all times.

## Financial Secretary Job Description

Purpose: To coordinate and manage financial policies of the practice. Assure that all money due to the practice is collected in a timely manner and outstanding accounts are appropriately monitored.

1. Answer phone (back up).
2. Cover appointment book when appointment coordinator is away from the desk.
3. Maintain accounts receivable control, accounts aging.
4. Monitor accounts receivable ratio.
5. Run credit checks on patients for financial arrangements.
6. Maintain collection control; letter sequence, collection calls, financial agreement follow-up.
7. Keep collections at 97-98% minimum.
8. Generate and send monthly statements.
9. Turn over bad accounts to collection agency.
10. Create insurance tickler and follow-up.
11. Collect data to compute and complete monthly practice statistics.
12. Contribute to new patient monitor (treatment diagnosed and accepted).
13. Keep current on financial arrangement options (MC/VISA, dental charge accounts and bank or credit union loans).
14. Attend and contribute to daily morning meetings and team meetings.
15. Encourage patient referrals.
16. Carry out other front office duties as needed or by addition to job description.
17. Prepare fee estimates on each patient's treatment indicating any optional plans.
18. Make financial arrangements with each patient in accordance with the financial policy of the office. (This is done after diagnosis and consultation and **before** treatment begins.).
19. Record all verbal financial agreements on the patient's diagnosis sheet of treatment and ledger cards.
20. Keep current by month new patient dollars diagnosed and dollars accepted.
21. Help receptionist/appointment secretary with scheduling when needed.