Front Desk Coordinator Onboarding Guide

Contents

Instructions for this guide: You will use this Front Desk Coordinator Onboarding Checklist to guide you through the onboarding process. Both the Front Desk Coordinator and Trainer should utilize this checklist to ensure all necessary information is discussed and covered. Please note that some tasks may not apply to your specific practice. Additionally, some responsibilities might not be listed on this checklist; however, this does not exempt you from completing those tasks. As you complete each task, check it off the list to easily track your progress. The tasks do not need to be completed in any specific order; your Trainer will determine the order.

The Basics of the Role

POSITION PURPOSE:

- o Performs administrative and clerical work for the practice to include the following.

PRINCIPAL RESPONSIBILITIES AND DUTIES:

- **GENERAL DUTIES:**
  - o Opening and closing office each day.
  - o Maintaining a clean and organized work area as well as maintenance of patient waiting room.
  - o Answer multiple telephone lines and field calls.
  - o Greets and directs patients, salespersons and visitors.
  - o Filing (medical records and miscellaneous filing).
  - o Schedule miscellaneous meetings for doctors and administrator.
  - o Running miscellaneous errands for doctors and administrator.
- **PATIENT CARE:**
  - o Compiles and records medical charts, reports and correspondence including preparation of charts for the following day's appointment.
  - o Schedule in-office appointments and confirm such appointments at least one day prior to appointment.
  - o Monitoring and adjusting appointment schedule for one or more of the doctors to ensure smooth daily operations.
  - o Communicate with surgical assistant the schedule of one or more of the doctors.
  - o Instructs new patients in completion of medical history and information forms.
  - o Enters all pertinent patient demographic information into practice management software. Maintains and updates such information regularly.
  - o Confirms patients' insurance eligibility with insurance companies and obtains appropriate pre-determination /pre-authorization for procedures.
  - o Calculates patient financial responsibility and collects co-pay /co-insurance amount from patient prior to procedures being performed.
  - o Posting charges and payments into practice software.
  - o Generating referral letters and miscellaneous correspondence.
  - o Generating end of day reports for doctors (schedules and call lists).
  - o Completes insurance claim forms, submits claims to insurance companies.
- **ACCOUNTS RECEIVABLE MANAGEMENT:**
  - o Monitors insurance billing procedures and performs claims follow up with all submitted claims for the practice.
  - o Telephones or writes insurance companies with unpaid insurance claims to obtain settlement of claim.

- o Responds to any insurance company inquires regarding: claims, additional information needed to process claims and denials.
- o Posts insurance payments/denials to patient accounts and performs any necessary contractual adjustments, patient adjustments, secondary claims filing, and patient billing activities.
- o Post patient payments to account and performs any necessary patient adjustments, claims submission/re-submission and patient billing activities.
- o Answers patients' questions regarding statements, explanation of benefits and insurance coverage.
- o Creates financial agreements for patient and monitors such agreements.
- o Performs detailed account audits for the purpose of clarifying patient and/or insurance company questions regarding accounts.
- o Performs detailed account audits to provide to the administrator for the purpose of issuing patient/insurance refunds on accounts.
- o Works closely with the administrator in monitoring patient account receivable reports, outstanding claims reports and un-submitted claims reports.
- o Prepares monthly report regarding outstanding receivables and provides to administrator for review as scheduled.

BASIC KNOWLEDGE & COMPETENCIES

- o Outstanding verbal and written communication and collaboration skills with Surgeons and or Medical Doctors
- o Ability to use basic math and some algebra skills (i.e. measuring, using whole number, common fractions and decimals).
- o Ability to calculate and convert milligrams to milliliters with the aid of a conversion chart when measuring medications
- o Some computer skills are necessary for this position. The employee is expected to and will be given every opportunity to learn basic computer knowledge with on the job training. Surgical assistants are expected to reference the practice management software to retrieve information regarding doctors schedules, patient information not provided in the patient chart, night call schedules, print prescription, print labels, and schedule appointments for patients
- o Ability to apply common sense, the understanding to carry out instructions furnished in written, oral, or diagram from. Ability to deal with problems involving several concrete variables in standardizing situations as well as the ability to solve practical problems and deal with variables in situations where only limited standardization exists. Ability to interpret a variety of clinical instructions furnished in written, oral or schedule form. Ability to prioritize tasks and handle multiple tasks concurrently.
- o Establishes a track record of delivering measurable results and making sound business decisions
- o Ability to contribute to a high performing team
- o Excellent Patient / Customer Service and multi-tasking skills
- o Strong attention to details and high level of accuracy while maintaining short deadlines

Technology

Technology	What it does	Who to contact with questions
Paycom - Client	This is where you manage your employees Human Resources needs, like Payroll, time off	HR@usosm.com Learning@usosm.com

	requests, I-9 verifications, Performance Management, and training.	
Paycom - Employee	This is your self-service version of Paycom. This is where you manage things like your direct deposit information, benefits, and learning.	HR@usosm.com Learning@usosm.com
Healthicity	This is where you complete your compliance learning, like HIPAA and Standards of Conduct.	Compliance@usosm.com
Power Connect	Corporate Intranet - A central hub where our entire workforce can connect, share ideas, access resources, and stay updated on the latest happenings across the company. It provides a secure and structured digital environment exclusively for our team, promoting seamless collaboration and fostering a sense of unity within our organization.	Marketing@usosm.com
Practice Management System WinOMS DSN OMS Vision	Practice's main system of record for managing basics	PMAdmin@usosm.com
Birdeye (Customer Satisfaction Survey)	When an appointment is finished, a customer satisfaction survey is sent to the customer via text/email. Marketing, Robin, has access to this information	Marketing@usosm.com
Sowingo (Procurement of Clinical Supplies)	Clinical Supply Ordering (at Practice) - Clinical and Front staff have the ability to order supplies from one common system that has USOSM vendor negotiated pricing.	Zack McNeil
Phone System	Practice phone system Strategic Scheduling	Phones@usosm.com
Egnyte	Knowledge base where documents are maintained and uploaded as required.	
BOA Global Access	Bank of America Global Access allows you to see balance and charges on the P-card	
BAML	Bank of America Merrill Lynch: The bank that is used for daily deposits of cash via the ATM and checks via the remote scanner through CashPro	
AvidExchange	The system that AP uses to processes invoices and make payments to vendors	
Transit	Merchant center for processing credit card payments.	Rcm@usosm.com
Care Credit	Provides a credit card specifically for healthcare expenses, offering financing options for medical and dental	
Keeper	Program that allows you to safely store all your passwords	

Checklist:

1. Identify all logins used (Windows, WinOMS/DSN/Vision, Email, Leading Reach, etc.)
2. Paycom overview (clocking in/out, requesting time-out, punch change)
3. How to set up email signature
4. Navigating Google Password/Keeper
5. Overview and knowledge of Practice's Website
6. Knowledge of shared drives (Egnyte and One Drive)
7. Call Transfers (Billing/Clinical Staff/Back Office)

Contacts

How to Reach Us	General Topics	Resources and Support
Human Resources HR@usosm.com	Onboarding Offboarding Discipline Hiring Compensation, bonus, benefits Performance Review	HR Leader Binder
Learning and Training Learning@usosm.com	Learning requests Completion inquiries	e-Courses and other training
Leading Reach	Leading Reach Referral management	e-Course tutorial in Paycom
Schedule Optimization	Schedule Optimization, centralized or local	e-Course tutorial in Paycom
Revenue Cycle Management RCM@usosm.com	Patient Registration & Insurance Patient Registration & Insurance Coding & Documentation Claims Processing Payment Handling Denial Management Reporting & Analysis	PowerConnect has basic Practice Support documents, checklists and forms
Benefits Verification	Patient Information Collection Insurance Coverage Confirmation Benefit Eligibility Check Co-pay and Deductible Info Prior Authorization Coordination of Benefits Electronic Verification Documentation Compliance	PowerConnect has Medical and Dental verification forms
IT Support PMadmin@usosm.com	PM system is not acting as expected.	PowerConnect has basic resources available

Phones@usosm.com	Phone system is not acting as expected.	
Marketing Marketing@usosm.com	Market Research Brand Development Marketing Campaigns Digital Marketing Social Media Marketing Advertising and Promotions Marketing Analytics and Measurement	PowerConnect has basic Marketing resources available

USOSM Support

Checklist

Learn USOSM Support Offered (these are covered individually in sections as well)

1. Leading Reach
2. Schedule Optimization
3. Revenue Cycle
4. Benefit Verification
5. Human Resources
6. IT support
7. Accounts Payable
8. Procurement
9. Credentialing
10. Marketing
11. Compliance

Human Resources

How to Reach Us	General Topics	Resources and Support
Learning@usosm.com	Learning requests Completion inquiries	e-Courses and other training

Facility Management

How to Reach Us	General Topics	Resources and Support
Facilities@usosm.com	Any facility repair issues	
Property Manager	Understand what your lease entitles you to, such as parking lot repairs	Lease agreement

Checklist: Facility

1. **Lobby**
   - Is the furniture restricting patient flow or emergency egress?
2. **Reception Area**
   - Is the area orderly with no patient info is visible?
3. **General Facility**
   - Appears clean during walk-thru?
   - Anything blocking areas of egress (e.g., supplies, wheelchairs, or furniture)?
   - All signage throughout the practice framed and displayed consistently?
4. **Cleanliness**
   - Are break areas free from food debris, regularly cleaned, etc.
5. **Protection**
   - Security system
   - Keys
   - Keypad entry

Practice Workflows

How to Reach Us	General Topics	Resources and Support
RCM@usosm.com	Payment issues Refunds Claim follow up	
Verifications@usosm.com	Insurance verifications	
Phone@usosm.com	Phone issues	

Checklist: Front Office

1. **Equipment**
   a. Fax, printer, phones
2. **Referral Tracking**

   a. How are referrals tracked and monitored?
   b. What system is used for referrals?
   c. What procedure does the office have for following up with referrals not scheduled?

3. **Patient Workflow**
   a. Understand the general patient workflow for all situations
   b. Work with clinical lead for the clinical workflow
   c. Consultations vs same day appointments
   d. Triage for emergencies/trauma
4. **Patient Communication**
   a. General expectations
   b. HIPAA
   c. Text, email, phone expectations
5. **Schedule Optimization**
   a. Monitor schedule daily to ensure correct scheduling for productivity.
   b. Who handles scheduling from referrals?
   c. Who handles scheduling for cancellations, short lists, etc.?
   d. What is the protocol for scheduling and payment?
   e. Hospital surgeries
   f. Scheduling follow-ups
6. **Patient Intake**
   a. How is the patient greeted?
   b. Is there a system in place with regard to patient files for the day?
   c. How is the patient's paperwork handled?
   d. What is the breakdown of work in your practice? (Knowing everyone's responsibilities)
7. **Treatment Presentation**
   a. How was the treatment presented? What documentation is required?
   b. Was payment collected upfront - before scheduling the surgery?
   c. documents and forms for billing
   d. documents and forms for anesthesia
   e. Third Party Financing
      i. Care credit
      ii. Prima
8. **Staging**
   a. Does the practice have a staging process for more complex cases?
   b. How is this staging process managed (built into the PMS or separate but tightly managed)
9. **Checkout**
   a. What is the general process?
   b. How is the patient's paperwork handled?
   c. Learn the merchant processor
   d. How do refunds work (procedure, approval)?
10. **Communication**
    a. How does communication happen between the clinical and front office/back office?
11. **Payment Collection**
    a. Collecting balances (procedure for calling, cadence, communication with RCM)
    b. Merchant processor

    c. Credit card authorization (who is responsible, where are the documents found and stored)
    d. Payment over the phone authorization

12. Claims
    a. Who inputs claims, when, and how
    b. Who follows up on claims
    c. Who tracks claim denials and charges patient?

13. Inventory Management
    a. Who completes inventory

14. Practice Management System
    a. What is the system
    b. What training is available

15. Phone system
    a. What is the system
    b. What training is available
    c. Phones answering expectations
    d. Voicemail – expectations
    e. Phone transfers (clinical or billing teams)

16. Open/Mid-day/Close
    a. What happens to open, close, and mid to keep the office running

Checklist: Back Office

1. **Triage for emergencies/trauma**
2. **Post Operative Care**
    a. Documents, managing, and scheduling
3. **Medical Records**
    a. What is the workflow of a patient's medical chart, from new patient to after surgery
    b. Where are medical charts kept?
    c. How to handle medical record requests/laws
4. **Implant Management**
    a. How are implants monitored
    b. Implant status sheets and other tracking
5. **Inventory Management**
    a. Who manages inventory?
    b. What is the process in place for managing inventory?
6. **Open/Mid-day/Close**
    a. What happens to open, close, and mid to keep the office running
7. **Back Office Audit**
    a. How are the back office staff audited?
    b. How are back office procedures audited?
    c. What is the cadence for auditing?

Checklist: Team Set-Up

1. **Who is responsible for each aspect of the office/clinical workflow**
    a. Are these job descriptions clear?
2. **What training exists for your role**

    a. Determine what exists in office
    b. Reach out to Learning@usosm.com with any questions
3. **Ensure adequate staffing**
    a. Discuss business reasons for current and future staffing with your ROD
4. **Coordinate coaching/management/auditing for each employee**
    a. What is the cadence for 1x1
    b. What is the cadence for auditing employee work
    c. What is the coaching plan for each employee
5. **Emergency Preparedness Plan**
    a. What is the plan, where is it location, who is responsible for what task, and are there drills?

Revenue Cycle Management

How to Reach Us	General Topics	Resources and Support
Treasury@usosm.com	CashPro log in and password resets	
ITadmin@usosm.com	Access to Egnyte folders	
RCM@usosm.com	Revenue Cycle Management Support	
PMadmin@usosm.com	Issues with the Practice Management System	

Checklist: Accounts Receivable

1. **AR Dashboard**
    a. How to access the dashboard
    b. How often the dashboard is updated
    c. How to read the dashboard
2. **Monthly AR Report**
    a. Snapshot of dashboard
    b. Discuss remediation, collection rates, goals, additional training offered
3. **CashPro Log-in**
    a. Gain access to CashPro
    b. Access training for CashPro
    c. Access statements

Checklist: Revenue Cycle Management

1. **Treatment Plan**
    a. No Surprises Act - we have to have the correct documentation
    b. Insurance Waivers

c. Pre-Treatment Estimate
d. Billing expectations - collecting at time of scheduling
e. Collecting surgeon's fee based on state law
f. Collecting for non-covered services
g. Learn existing training

2. **Insurance Claims/Billing**
    a. Clean Claims going daily
    b. Best practices and why this is beneficial
    c. Requirements for claims (ex: x-rays, anesthesia notes), notes, etc.
    d. Sending claims electronically
    e. Sending claims via paper
    f. Aging report credit and report credit (keeping track of claims to make sure they are paid)
3. **Insurance Companies**
    a. What companies are we in-network with?
    b. How to manage out of network providers?
4. **Posting Payments**
    a. Processing insurance EOBs
    b. Daily patient payment posting
    c. Post courtesies and change billing types from RCM
5. **Accounts Receivable and Collections**
    a. Handling chargebacks
    b. Handling AR/Unpaid claims
    c. Managing unpaid patient balance
6. **Patient Refund**
    a. Determine when a refund is owed
    b. Who issues the refund/how the refund is issued
    c. What is the approval process
7. **Vendor Checks**
    a. Handling vendor checks related to patient payments
    b. Handling vendor checks NOT related to patient payments

Checklist: End of Day Reconciliation

1. **Payments Posted must match monies received today**
    a. What documentation is required
    b. What is the process
    c. Who is responsible
    d. Who approves
    e. What is there are inaccuracies
2. **Upload into Egnyte**
    a. What is required to be uploaded
    b. Where is this uploaded
    c. By when should this be uploaded
3. **Deposit cash received same day**
    a. What documentation is required (deposit slip)?
    b. Who is responsible?

c. What is the auditing process?

Marketing

How to Reach Us	General Topics	Resources and Support
Marketing@usosm.com	Awareness/Findability/Promotion New Patient Acquisition Referral Development PSC & Field Marketing Support	PowerConnect has basic Practice Support documents, checklists and forms

Checklist: Marketing at your Practice

1. **Who is in charge of Marketing in your practice?**
    a. RDP
    b. Field marketing manager
    c. PL
    d. Hybrid (someone who does multiple roles within the practice)
2. **What are we doing to market the practice?**
    a. Branding
    b. Referral Marketing
    c. Consumer Campaigns
    d. Program development and management
3. **Technology**
    a. Birdeye
    b. Lighthouse 360
    c. Invivio
4. **Reputation Management**
    a. Website review
    b. How to utilize data in Birdeye

FAQ

Patient Concerns

1. **Do you charge for evaluations?**
    a. Yes, they are $_____, however if you are eligible through your dental insurance, we will bill your insurance.
2. **How much does the surgery cost?**

   a. The purpose of our evaluations is to review the procedure and financials. There are many variables that affect the cost, and we want to provide the most accurate estimate to you at the evaluation.

3. **What days do you perform surgery?**
   a. Surgeries are performed Monday through Friday in the mornings.
4. **How long does the evaluation take?**
   a. *This answer will be site specific for time duration. Please be aware of your doctor and evaluation types.*
   b. Example answer: The evaluations are about 45 minutes to an hour based on questions and information.
5. **What is your soonest appointment?**
   a. Our first available appointment is _______, If we have any changes, we can add you to if you need an appointment sooner. Surgeries are typically one week from the evaluation.
6. **What insurances are you in-network/ participate with?**
   a. We are in-network with multiple insurance companies, what is your dental insurance, and I can let you know if we are in-network with your policy.
7. **Do you take Medicare/Medicaid?**
   a. *This answer will be site specific for your doctor's and practice. Please be aware if your practice accepts Medicare and Medicaid.*
   b. *Please be aware if your practice accepts Medicare and Medicaid.*
   c. Example answer: We are non-participating providers with Medicare and Medicaid; however, we do work with patients who do not have insurance.
8. **Do you bill medical?**
   a. *This answer will be site specific for your doctor's and practice. Please be aware of your practice's processes with surgery types and their insurance coverage.*
   b. Example answer: We do not participate with medical insurance; however, we will bill medical if the dental insurance requires, we bill medical first.
9. **What is a CBCT and is it covered by the insurance?**
   a. A CBCT is a 3D scan that is taken to evaluate the upper and lower jaw anatomy so we can provide the best treatment recommendations.
   b. CBCT's are taken when the referring doctors do not have sufficient x-rays or request additional imaging be taken.
   c. CBCT isn't covered as dental insurance, our rate is $___.
10. **How long is the estimate for surgery good for?**
    a. *This answer will be site specific for your doctor's and practice. Please be aware if your practice accepts Medicare and Medicaid.*
    b. We recommend the treatment to be received ___ days after the estimate is received. A new estimate will be provided if the procedure is more than ___ days after the evaluation.