TREATMENT COORDINATOR DAILY CHECKLIST:

1. Participate in the morning huddle.  
2. Enter new patient information into the computer from the medical history and billing forms.  
3. Handle all financial arrangements.  
4. Ensure all new patients reschedule.  
5. Follow up on all new patients to ensure they arrive and start treatment as scheduled.  
6. Coordinate with the Accounts Manager and Scheduling Coordinator as needed.  
7. Calculate and enter Tx Plan percentage for the treatment coordinator stat for the day.  
8. Meet with any patients who need to sign a treatment plan before their appointment.  
9. Be available for all hygiene exams and doctor appointments during case presentation.  
10. Present treatment plans and work out financial arrangements. Make notes on all presented treatment plans in patient’s charts.  
11. Coordinate determination with the insurance company.  
12. Contact the patient with the determination information once it is received from the insurance company and schedule treatment appointments as needed.