

Job Description

Job Title	Dental Financial Counselor	Reports To	Patient Services Supervisor
Department	Patient Services	FLSA Status	Non-Exempt
Approved Date	7/11/2024		

Position Summary

The Dental Financial Counselor duties include but are not limited to: explaining the treatment plan, addressing patient concerns, and answering any questions. This role will assist the patient in prioritizing the treatment and establish a plan for scheduling and payment.

Duties/Responsibilities

- Prepare a financial action plan by reviewing the patients for the next day and determining their financial needs and status, be prepared to collect
- Research insurance benefits and prepare estimates on treatment diagnosed before discussing financial arrangements with patients
- Collect all patient portions at the time of scheduling
- Document financial arrangements in the patient file
- Schedule financial arrangements after the exam and before treatment
- Obtain a signed financial agreement if you decide to offer the patient financing; specify the number of payments and due dates. Monitor payments.
- Record all verbal discussions regarding with the patient in their file
- Present a treatment plan, using models and diagrams, and provide related literature
- Prepare a treatment planning schedule, book the first appointment and arrange for subsequent hygiene appointments
- Estimate costs of today's treatments
- Make available to recalculate financial arrangements as needed
- Contact patients when pre-authorization is received and proceed with scheduling
- Call on outstanding treatment plans
- Be able to coordinate with current Enrollment staff – eventually being able to enroll patients on their own
- Support the organization as needed
- Performs other duties as requested
- Participates in departmental or organizational meetings and trainings
- Demonstrates ability to use equipment relevant to the position

Required Skills/Abilities

- Knowledge of English composition, grammar, spelling, and punctuation
- Skilled in the use of standard office equipment and computer software (MS Excel, Word, Practice Management software)
- Ability to maintain composure and professionalism when exposed to stressful situations
- Ability to engender trust from the doctors, co-workers, and patients
- Ability to work cooperatively with management, staff, and patients
- Ability to prioritize, organize, and complete tasks in a timely and independent manner
- Ability to accept constructive criticism
- Ability to understand and follow written and verbal instructions



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- Ability to collect data, establish facts, draw valid conclusions, and maintain confidentiality
- Ability to communicate and express thoughts and ideas competently
- Ability to quickly grasp relevant concepts regarding duties and responsibilities
- Has a positive attitude about the practice, the services provided
- Increases knowledge and skills through self-study and by attending courses and seminars
- Has dependable job attendance and can be relied on the follow through with assigned tasks
- Demonstrate passion for and commitment to FHC's mission and its importance to the community.
- Culturally competent and exhibit cultural sensitivity.

Education and Experience

- Previous insurance eligibility experience (preferred)
- Previous experience submitting NDMA and MNMA applications highly beneficial
- Healthcare knowledge and experience (desired)

License, Registration, and/or Certification

N/A

Typical Physical Demands/Work Environment

Occasional standing, walking, lifting, reaching, kneeling, bending and stooping. Talking, typing, hearing/listening, seeing/observing. Requires eye-hand coordination and manual dexterity sufficient to operate a computer, telephone and other office equipment.

Indoors, Environmentally Controlled. The noise level in the work environment is usually quiet.

Sedentary to light work: Exerting up to 10 pounds of force occasionally and/or negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary to light work involves sitting approximately 75% of the time. Also, involves exerting up to 25 pounds of force intermittently or up to 50 pounds of force infrequently.

The physical demands and work environment described here are representative of those that must be met by and employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Regular and predictable attendance is required of all Family Health Care Employees.

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice

I have read and understand the requirements and expectations set forth. I have received a copy of this Job Description and I am able to complete all job responsibilities with or without reasonable accommodation.

Employee Signature _____

Date _____