

Scheduling Coordinator Training and Manual Content

This Scheduling Coordinator Manual and Training videos are designed for your Scheduling Coordinator to have the full suite of documents, letter templates, scripting and training videos at your fingertips.

You will be able to use the materials to work on the training based on the schedule that *Shimmin Consulting* and your consultant develop together. This material will also be useful for training a new Scheduling Coordinator to receive the same proven results that the *Shimmin Consulting* team has been providing clients for years.

Documents Included:

Job Description
Segregation of Responsibilities
Daily Business Meeting Agenda
New Patient Call Reminders
New Patient Call Intake Form
New Patient Cancellation Worksheet
Insurance Intake Form
Instructions for cancelled or Rescheduled Appointments
Instructions for No-Show Appointments
Missed Appointment Protocol
SC Report Instructions
SC Reports To be Run
Common Orthodontic Treatments
Common Orthodontic Appointments and Scheduling
Developing a Schedule Template
Schedule Template Configurations
Time Study Card
Status Instructions
Obs Program Outline
Observation Patient Monitoring Worksheet
Yearly Marketing and Promotion Flyers

Family Care Program – Purpose, Process, Benefits, Scripting and Marketing
Observation Program – Statuses, Letters, Reports, Scripting, Role Play, Marketing and Office Participation
Tooth Club Program – Statuses, Scripting, Tracker, Reports, Marketing and Goals

Scripting Included:

Observation
Family Care Program
Late Patients
Voicemail Samples
Emergency Triage
Front Office – Credit Rating
Front Office – Electronic Forms
New Patient Phone Call
New Patient Phone Call – Accelerated Treatment Options
Insurance
No Show Appointments
Asking for Referrals
Cancelling and Rescheduling
Accelerated Treatment

Letter Templates Included:

New Patient Welcome Letter
Exam Diagnosis to Parent – Obs
Exam Diagnosis to DDS – Obs
Missed Appointment – Obs & Obs Ready Statuses
Missed Appointments - #1, #2 and Final
Non Compliance to DDS – Appointments
Deband Invisalign to DDS
Deband Phase 1 to DDS
Deband Letters – Parents and Patients

Videos Included:

Scheduling Coordinator Manual Training
Scheduling For Success