THE ROLE & WORK
OF THE
Clinical Coordinator

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THE CLINICAL COORDINATOR

THE CLINICAL COORDINATOR AS A PATIENT FLOW MANAGER:

1. Manages patient flow and directs the doctor to make sure the practice stays on time.

2. Regularly evaluates the Template Schedules and makes appropriate changes to maximize practice efficiency and staying on time.

3. Functions as an extension of the doctor by making decisions while following established policies and procedures.

4. Manages all emergency patients and handles patient/parent treatment concerns.

5. Responsible to ensure proper clinical area appearance, sterilization and restocking by creating daily, weekly and monthly assistant tasks lists.

6. Develops a system for training and cross training in all clinical procedures and systems.

7. Ensures the accuracy of the Patient Cooperation Statistics and provides the doctor with timely feedback on any area of deficiency.

8. Regularly updates clinical area policies, procedures, and job descriptions.

THE CLINICAL COORDINATOR AS A TEAM LEADER:

9. Provides leadership by maintaining an excellent attitude while using “leadership by example” and “participative management” as her primary leadership styles.

10. Responsible for excellent teamwork and cooperation between the clinical staff and with the front office staff.
THE CLINICAL COORDINATOR AS A TEAM LEADER: cont.

11. Maintains an objective and somewhat neutral stance while handling conflicts between staff members... and between doctor and staff.

12. Holds regular clinical staff meetings to keep the assistants informed as to the goals of the practice and any changes in policy or procedures. Regularly solicits feedback on areas that need improvement.

13. Controls the clinical assistant hiring process by narrowing down candidates to two or three who will then be interviewed by the doctor for a final decision.

14. Ensures that periodic performance appraisals and salary reviews are carried out in a timely and efficient manner.

15. Manages clinical staff members through proper praise and correction.

16. Monitors clinical staff work hours, sick days, and vacation time.

17. Monitors treatment control each quarter by evaluating the last 20 de-banded cases.

18. Establishes and maintains a system of inventory that assures adequate supplies at the best prices for the highest quality.

19. Helps the clinical staff stay focused on the practice purpose and goals and instills discipline by providing prompt necessary feedback to clinical team members who show any regular work or attitude deficiencies.

20. The Clinical Coordinator is the leader of a winning team that delivers quality on-time care in a fun and enjoyable way.
THE CLINICAL COORDINATOR

THE CLINICAL COORDINATOR’S JOB PURPOSE

A. Coordinate patient flow by directing the doctor and assistants to insure quality, on-time patient care.

B. Coordinate the efforts of the patient managers (assistants).

C. Assure that patient managers meet practice standards of quality and efficiency.

D. Appropriately handle difficult communications related to scheduling and patient care.

E. Work to insure that the Scheduling Templates are efficient, effective and meet the needs of the practice.

F. Handle appropriate positive and negative feedback to constructively motivate, encourage and develop clinical team members.

SUCCESS FACTORS

Managerial  Technical

Planning  Scheduling
Organizing  Coordination of Patient Flow
Guiding  Training Programs
Measuring  Clinical Inventory Control
Clinic Area Appearance

AUTHORITY

Decides:
Hiring and firing of clinical staff
Assignment of duties to clinical staff
Requisitioning of clinical supplies

Recommends:
Changes to clinical procedures (Orthodontist)
Salary increases (Orthodontist)
Changes to personnel policies (Orthodontist)

REPORTS TO:
The Orthodontist
MANAGERIAL SUCCESS FACTOR: PLANNING

To provide an effective planning system
a. Job Profiles for reporting positions updated prior to new hiring
b. Job Profiles for reporting positions revised annually
c. Action plans for all important projects
d. Personnel policies updated regularly and enforced fairly
e. Clinical Procedures updated when necessary and implemented effectively
f. Plan before taking action

MANAGERIAL SUCCESS FACTOR: ORGANIZING

To arrange the tasks, authority, and responsibility so that work is performed effectively
a. Work organized in a logical manner, respecting skills, time, and place
b. Responsibilities not shared
c. One person, one supervisor
d. Authority and responsibility balanced

MANAGERIAL SUCCESS FACTOR: STAFF MANAGEMENT

To select and maintain a motivated staff
a. Selection based on job profiles
b. Good interviewing skills used
c. Monthly one-to-one conferences
d. Monthly staff meetings - clinical
e. Opportunities provided for professional and self development
f. Performance appraisal based on mutually-determined milestones and norms
g. Daily or regular praise for jobs well done and good attitudes
MANAGERIAL SUCCESS FACTOR: MEASURING

To establish and maintain milestones and norms which measure individual and practice progress against plans

a. Written performance appraisal every six months

b. Mutually-determined performance standards

c. Deviation from plans recognized and performance and schedules corrected accordingly

d. Measure to ensure that treatment is under control

TECHNICAL SUCCESS FACTOR: SCHEDULING

To develop and maintain an accurate system of patient manager scheduling which provides adequate coverage of the clinic and minimizes wait time and stress to patient, parents, doctor, and other staff members.

a. Resources of clinic maximizes

b. Patient's convenience and needs recognized

c. Schedule followed closely, with minor adjustments handled smoothly

d. Assignments of staff made monthly and adjusted daily if necessary to account for unpredictable variables

e. Regularly review the master schedule for any changes that may be needed

f. To bring to the attention of the front office coordinator any regular deviations in the filling in of the master schedule.

g. Ensure that the proper Doctor and Assistant time is assigned to each procedure and code.

h. Be the bridge for communications between the front office and the clinical area.

TECHNICAL SUCCESS FACTOR: CLINIC AREA APPEARANCE

a. Clinic area straightened at end of day

b. Individual work areas readied for each patient

c. Used equipment promptly and properly cleaned up
THE CLINICAL COORDINATOR

TECHNICAL SUCCESS FACTOR: COORDINATION OF PATIENT FLOW

To assure smooth flow of patients within the clinic by directing the doctor and staff to the areas where they are scheduled or most needed.

a. Job assignments insure full time coverage of clinic floor during peak hours

b. As much as possible, potential problem areas identified early

c. Monitor a central daily schedule

d. Compare daily schedule to master schedule on a regular basis to better coordinate doctor flow in operatory.

e. Assign each chair to one assistant and make sure they have reviewed in advance their charts for the day

f. Make scheduling decisions concerning unplanned treatment

g. Move assistants and patients to different chairs to facilitate patient flow and on-time scheduling

h. Ensure the assistants keep the Clinical Coordinator informed concerning all scheduling changes in their chairs

i. Make decisions as to where the doctor should go next

j. Maintain a central doctor flow sheet to indicate which chair the doctor should go to next

TECHNICAL SUCCESS FACTOR: TRAINING PROGRAMS

To develop and implement a training program which will provide for continuous improvement of the skills of current employees and bring new employees up to required levels of performance.

a. Definitive training program including manuals and hands-on exposure developed and updated regularly

b. Those training others have necessary educational tools and skills

c. All employees qualified to perform assigned tasks within 90 days

d. Appropriate dental society meetings for professional growth attended regularly

e. Schedule regular (one a month) training sessions for the assistants

f. Ensure the training of all new assistants and evaluate progress
TECHNICAL SUCCESS FACTOR: CLINICAL INVENTORY

To establish and maintain a central clinical supply area which is adequately stocked at all times

a. Procedures established for requisitioning supplies

b. Minimum/maximum levels established

c. To ensure the best process for the best quality
PERFORMANCE APPRAISAL SYSTEM

CLINICAL COORDINATOR

Rate the following on a five point scale (1 = needs considerable change, 5 = excellent)

7. SPECIFIC CLINICAL COORDINATOR AREAS OF EVALUATION

   Master schedule modified as necessary to maximize the practice’s resources and minimize wait time

   Assignments made to other clinical staff on a monthly basis and adjusted daily

   Establishes a training program for new staff members

   Sets up monthly "lunch and learn" sessions

   Maintains a smooth patient flow

   Follows the procedures for breakage and works SOS patients into the schedule in a timely manner without keeping other patient’s waiting

   Inventory control systems is properly worked

   Ensures clean and neat clinical appearance

   Is fair and friendly with the other team members

   Directs the doctor well throughout the day

   Handles poor cooperators and their parents well

   Ensures that care calls are made in a timely manner

   Brings all appropriate information to the doctor's attention and keeps team members informed

   Keeps operator y staff appropriately

   Keeps track of vacation time for all clinical staff

   Makes sure that clinical team members have work to do on non-patient days and that they complete assigned work

   Makes sure the clinical team is wearing and maintaining their uniforms
Celebrating 30 Years of Happy Satisfied Clients!

Ken Alexander with Millenium Management Services has been helping Orthodontists for more than 30 years to become more efficient, more profitable and have more enjoyment in their practice. Millenium offers many forms of orthodontic practice management consulting and will work with a practice on specific needs or a comprehensive implementation of all major orthodontic systems. We have over 500 happy, satisfied orthodontic clients in North America and Europe.

About Ken & Ryan Alexander

Ken Alexander, M. Div., Director

Ken Alexander is Director of Millenium Management Services and has 30 years of consulting experience working with over 500 orthodontic practices and lecturing to thousands more in North America and Europe. Ken delivers a wealth of practical information on scheduling efficiency, new patient enrollment, patient cooperation, team building, staff organization, customer service and marketing systems. He also works extensively with transitions consulting, practice valuations and office design.

Ken received a B.A. from Westmont College in Santa Barbara, California. He received an M. Div. and four years of graduate training in psychology, communications, human relations and public speaking from Biola University, in La Mirada, California. He is a polished lecturer who instills great motivation with a lecture style that is dynamic, practical and to the point.

K. Ryan Alexander, B.S., Consultant

Ryan joined the Millenium team three years ago after graduating from Biola University and has been fully trained in all Millenium systems and ideas. Ryan works with practices large and small, but has a special following with newer orthodontists who are seeking a solid management and marketing foundation early in their careers. Ryan offers a very affordable alternative to any practice seeking to design solid systems, especially New Patient Enrollment, Marketing and On-Time — Doctor Time Scheduling with Template Design. Ryan brings to his consulting a wealth of knowledge, smarts and a fun and enjoyable personality.

Our Services

- Doctor Time Scheduling
- Patient Cooperation
- Staff Management
- New Patient Enrollment
- Marketing
- Customer Service
- Office Design
- Analyze Your Practice and Make Valuable Suggestions
- Transitions Consulting: Buying, Selling and Partnerships

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