

**Job title:** PD Personal Care Specialist

You will report to: \_\_\_\_\_

**GENERAL OBJECTIVE:**

Field incoming calls while ensuring that patients/customers receive a 5 star friendly, professional and consistently high quality service call 100% of the time, helping resolve various enquiries, close sales enquiries and get it right the first time. Implementing call center strategies and operations as directed by the Personal Care Team Supervisor; improving systems and processes. Take full responsibility for the needs and requests of the callers,; with precision, accuracy and genuine care. Provide meticulous documentation of all calls.

**SPECIFIC OBJECTIVES:**

- Collect voice mails daily from all offices and route to proper office, provider or employee
- Attend to incoming calls
- Manage all calls to completion – take responsibility for full satisfaction – be of service
- Route calls appropriately to an office, provider, employee or financial departments if applicable
- Make and reschedule appointments for active or inactive patients.
- Online booking (all providers) New patients and recall patients can both schedule from this link. Each day the Personal Care Team will need to check the Appointments Booked Online which is under the Schedule drop down in Ascend. Date Range should be "last month" The date filter option should be "Day the patient booked online". You will need to evaluate the patient records to be sure the appointment is scheduled correctly and add the appropriate procedures needed. Once the appointment has been verified a note should be put in the "other box", in place of the note routine exam/cleaning or New patient which was auto entered by online booking to hold the appointment, stating Verified by initials . If the appointment is not ok, pt should be called and the appointment rescheduled.
- Process initial new patient calls with appropriate scripting\* (Copy of New Patient checklist on first day of employment)
- Accurately enter new patient information into Ascend
- Send Videos (when ready) to patients with upcoming appointments - this could be procedure videos and or office 360 tours.
- Confirm appointments - next day Doctor, two days Hygiene for all offices
- Process credit card payments over the phone and post to ledger along with making any necessary adjustments to the account
- Research required information using available practice resources
- Provide callers with product and service information
- Update existing patient information as encountered
- Manage and resolve customer complaints
- Identify and escalate priority issues
- Provide school excuses, appointment cards and new patient registration forms via email
- Give directions to offices

- Documentation of all incoming calls in the appropriate location (Clinical note, Guarantor note or Patient note) \*(Copy of where to documents notes on first day of employment)
- Familiar with USA phones
- Familiar with Dental terminology \* (Copy of Dental Terminology and abbreviations on first day of employment)
- Familiar with Front Desk Job description and tasks \* (Copy of job description on first day of employment)
- Familiar with Clinical Job description and tasks \* (Copy of job description on first day of employment)
- Familiar with Hygiene job description and tasks \* (Copy of job description on first day of employment)
- Self-track performance on:
  - call volume
  - caller inquiry resolution
  - appointments rescheduled
  - new patient appointments reserved

## **PERSONAL REQUIREMENTS**

### **Educational**

- High school diploma
- Legible handwriting for notations, memos, and messages
- Attend continuing education courses/seminars as directed
- Solid data entry/typing skills
- Experience in customer service is required
- Knowledge of performance evaluation and customer service
- Proficient in MS Office, Google Docs and Personal Care Team equipment/software programs
- Outstanding communication and interpersonal skills
- Excellent organizational skills with a problem-solving ability
- Positive and patient
- High school diploma or equivalent; Higher degree in a relevant discipline will be appreciated

### **Office Participation**

- Be an active participant in staff meetings
- Promote team concept by interacting with others in the office
- Lead by example. Follow policy and procedures noted in the Progressive Dental's handbook and encourage other staff to do the same.
- Follow, adhere to and encourage other staff to adhere to Progressive Dental's code of conduct, posted in the office.

- Participate in creating and encouraging other staff to maintain a safe, non-hostile working environment for fellow employees and Doctors (no gossiping or negativity toward others).
- Praise others when you “catch them doing something good”.
- Follow and believe in Progressive Dental’s mission statement and encourage other staff to do the same.
- Train, coach, and educate new personnel (including interns/externs)

**Interpersonal Skills and Expected behavior for this position**

- Good interpersonal skills to maintain effective rapport with patients, dentists, other staff members, and community
- An effective verbal skill to communicate with patients, doctors, and staff.
- Ability to communicate openly while maintaining professionalism and respecting others.
- Ability to be coached and be approachable.
- Ability to maintain patient confidentiality.
- Good listening skills.
- Ability to manage multi-tasks
- Ability to handle regular interruptions.
- Ability to work with the computer system and dental software.
- Ability to handle patient complaints, concerns, or questions.
- Able to discuss all office needs with your Supervisor and be objective and pleasant
- Ability to resolve conflict while being courteous and professional

I have received a copy of and understand my job description. I also have had the opportunity to ask any questions.

Employee \_\_\_\_\_ Date \_\_\_\_\_

Supervisor \_\_\_\_\_ Date \_\_\_\_\_

\*\*\*Management retains the discretion to add to or change the duties of this position at Anytime.

\*Will be give a copy on first day of employment