

# PATIENT COORDINATION

5-DAY COURSE

## Course Outline TUITION: \$2,750 (includes taxes and fees)

The **Patient Coordinator** course is a beginner-level interactive course that has been designed for people with limited dental knowledge or existing dental team members to become proficient at patient coordination and other front desk responsibilities. You will learn and practice administrative roles and responsibilities, strategic scheduling techniques, financial procedures and other essential office duties. A basic office manual is included upon completion of this course.

### Course Itinerary

#### Session 1

Role overview and relationship building  
Opening and closing responsibilities

#### Session 2

New patient experience

#### Session 3

Patient flow and DiSC personality profiling

#### Session 4

Overcoming objections and LCQAC  
Financial reporting and payment processing

#### Session 5

Dental procedures and terminology

### Topics Covered

- Roles and responsibilities of a Patient Coordinator
- Team dynamics and patient flow / 2-on-1 transfers
- DiSC® personality profiling and patient experience
- Strategic scheduling and time management
- Inventory management
- Overcoming objections and basic patient education
- Day-end, month-end, and year-end reporting
- General financial procedures (taking payments, insurance claims)
- Bank reconciliation
- Taking insurance payments
- Morning huddles
- Telephone/email etiquette and patient recall



This course is instructed in-person at our Training Centre in Mississauga. Attendance during all parts of this course is mandatory to be awarded a certificate of completion.



This course is also available upon request. This means that you can request to take this course individually or as a team at a date that is convenient for you. Please e-mail [ce@excellpm.com](mailto:ce@excellpm.com) or call (905) 362-0524 to register for this course.

À la carte

course offerings:

WHMIS Certification, AODA Certification, Team Building & Leadership

Clinical Compliance Audit, Software Training (Dentrix, Cleardent, ABELDent)

### Excell Practice Management

The Practice Management Experts!

6300 Tomken Road  
Mississauga, ON  
L5T 1N2

Tel: (905) 362-0524  
TF: 1 (855) 364-1669  
Fax: (905) 673-3215

[ce@excellpm.com](mailto:ce@excellpm.com)  
[ce.excellpm.com](http://ce.excellpm.com)

