4R

R1 **Role**

R2 **Responsibilities**

R3 **Results**

R4 **Requirements**

Clinical Coordinator

Keep clinical care organized and patients moving comfortably.

Team **Clinical**

Reports to **Office Manager**

Inside **4R, interview guide, 90-day plan, job post**

R1 The role

The Clinical Coordinator keeps the Clinical team at [Practice Name] prepared, organized, and aligned with the orthodontist's treatment plans. Reporting to the Office Manager, you coordinate daily chair assignments, support clinical assistants, and work with the scheduling and treatment coordinators to connect consults, treatment visits, and follow-up care. You help patients and families understand doctor-approved instructions while keeping records, supplies, and clinical handoffs complete. This seat exists to support safe, consistent care and a manageable patient flow without rushing patients or making treatment decisions reserved for the doctor.

R2 Responsibilities

Clinical Flow

- Lead the clinical huddle to review consults, records, bonds, adjustments, debonds, and retainer visits for staffing, chair time, and doctor availability.
- Assign chairs and clinical assistants according to appointment needs, team qualifications, and the doctor's priorities.
- Coordinate with the scheduling and treatment coordinators on same-day starts only after doctor approval, required paperwork, and clinical capacity are confirmed.
- Communicate delays and appointment changes to the front desk promptly so patients receive realistic updates and appropriate next steps.

Patient Care

- Prepare patients for orthodontic visits by confirming the planned procedure, reviewing relevant chart information, and bringing questions or concerns to the doctor.
- Perform delegated clinical tasks only within your training, required credentials, and the supervision applicable to your role.
- Reinforce doctor-approved instructions for braces, elastics, aligners, oral hygiene, and retainer wear, using teach-back to check understanding.
- Route reports of broken appliances, discomfort, or poor aligner fit to the doctor for assessment and coordinate the approved follow-up.

Records and Handoffs

- Verify that required photos, scans, radiographs, and consent documents are available before the doctor needs them for consults or treatment visits.
- Check clinical notes for completed procedures, doctor instructions, appliance details, and the next appointment type before checkout.
- Track aligner, appliance, and retainer orders through receipt, checking patient identification and readiness before delivery appointments.
- Review the pending list with the scheduling coordinator to flag overdue clinical visits, missing records, and doctor-directed follow-up needs.

Team and Readiness

- Coach clinical assistants on approved workflows for bonds, adjustments, debonds, aligner deliveries, and retainer visits.
- Verify completion of sterilization, infection prevention, chair turnover, and opening and closing checklists under practice protocols.
- Monitor clinical inventory, appliance supplies, and equipment readiness, reporting shortages or maintenance needs to the Office Manager.
- Review clinical bottlenecks and recurring errors with the Office Manager and doctor, then implement and check agreed workflow changes.

R3 Results at 90 days

Predictable Clinical Visit Flow	Clinical visits begin within the practice's agreed timing window, with delays communicated rather than hidden or resolved by rushing care. Measure: The Office Manager reviews appointment timestamps weekly against a target of [goal] % beginning within [number] minutes of the scheduled time.
Complete Clinical Visit Documentation	Clinical records contain the required procedure details, doctor instructions, and next-visit information before patient checkout. Measure: The doctor or Office Manager audits [number] charts per week against a documentation checklist, targeting [goal] % complete records.
Patients Understand Home Care	Patients and caregivers can explain the doctor-approved home-care instructions relevant to their braces, aligners, elastics, or retainers. Measure: The doctor or Office Manager observes [number] instruction handoffs per week and checks documented teach-back against a [goal] % completion target.
Appointments Ready Before Arrival	Required records, appliances, aligners, retainers, and supplies are ready before the corresponding visit. Measure: The Office Manager reviews the next-day readiness checklist and readiness-related disruptions weekly, targeting [goal] % of visits ready by [time] the prior workday.
Verified Clinical Safety Checks	Required sterilization, infection prevention, and equipment checks are completed, with exceptions escalated before affected instruments or equipment are used. Measure: The Office Manager reviews logs daily and audits [number] cycles or checklists per week against practice protocols, with all exceptions documented and escalated.

R4 Requirements

Essential skills

- **Clinical coordination.** Organize chairs, assistants, doctor checks, and appointment preparation across orthodontic visit types.
- **Patient communication.** Explain doctor-approved instructions clearly, use teach-back, and respond calmly to patient or caregiver concerns.
- **Records and software.** Use practice management software to maintain accurate clinical notes, track appliance orders, and support reliable checkout handoffs.
- **Team coaching and safety.** Teach approved clinical workflows, verify infection prevention steps, and escalate concerns promptly.

Qualifications

- Experience in an orthodontic clinical setting supporting braces, aligners, records, and retention visits.
- Experience coordinating daily clinical work or training clinical teammates.
- Any license, certification or registration your state requires for this role
- Demonstrated training in infection prevention, instrument processing, and patient privacy procedures relevant to assigned duties.

Attributes

- Stay calm and considerate when a full schedule changes unexpectedly.
- Notice missing details and follow through until the right person resolves them.
- Welcome feedback and help teammates improve without blame.

Interview guide

Six questions tied to the 4R. Ask for a real example every time, then check the answer against R3.

01 Clinical Flow

Tell me about a day when a bond appointment ran long while adjustments and a debond were waiting. How did you coordinate assistants, doctor time, and front-desk updates, and what happened?

Listen for: A strong answer shows clear prioritization, realistic communication, and protection of patient care rather than shortcuts.

02 Patient Understanding

Describe a time a patient or caregiver struggled to understand aligner, elastic, or retainer instructions. What did you change in your explanation, and how did you check understanding?

Listen for: A strong answer shows empathy, plain language, teach-back, and adherence to the doctor's instructions.

03 Clinical Safety

Tell me about a time you noticed a sterilization, instrument processing, or equipment concern during a busy clinic. What did you do before care continued?

Listen for: A strong answer shows immediate protection of patients, appropriate escalation, and documented resolution under the practice's protocols.

04 Records and Readiness

Describe a time you discovered missing records, an incomplete chart, or an appliance that had not arrived before a scheduled visit. How did you resolve it and reduce the chance of a repeat?

Listen for: A strong answer shows early verification, coordination with the doctor and scheduling team, and a practical follow-up check.

05 Team Coaching

Tell me about a time you coached an assistant who repeatedly missed a step during bonds, adjustments, or debonds. How did you teach the step and verify improvement?

Listen for: A strong answer shows respectful feedback, demonstration of the approved workflow, and observation of sustained improvement.

06 Same-Day Start Decisions

Describe a time you were asked to fit an unplanned treatment start or lengthy procedure into a full day. How did you assess readiness, involve the doctor, and communicate the decision?

Listen for: A strong answer shows that doctor approval, required documentation, qualified staffing, and chair capacity take priority over adding a visit.

90-day training plan

Hand this to your new hire on day one. Training starts on the hire date and runs through a 90-day review against R3.

Days 1 to 30

Learn Protocols and Patient Flow

- Train with the Office Manager on role expectations, the scheduling template, clinical escalation paths, and the practice's result measures.
- Shadow the designated clinical lead through consults, records, bonds, adjustments, debonds, aligner deliveries, and retainer visits.
- Demonstrate chart navigation, patient identification, instrument processing checks, and doctor-approved patient instructions to the clinical lead before performing assigned tasks independently.

Days 31 to 60

Coordinate With Guided Support

- Lead the clinical huddle and chair assignments with the Office Manager observing and reviewing delays and staffing decisions.
- Manage next-day records and appliance readiness, pending-list handoffs, and checkout documentation with daily review by the clinical lead.
- Practice patient teach-back and coach an assistant on an approved workflow under the clinical lead's observation, then review feedback together.

Days 61 to 90

Own Daily Clinical Coordination

- Run daily clinical coordination with the Office Manager available for escalation and review weekly performance against the agreed goals.
- Identify one recurring flow or readiness problem, agree on a change with the Office Manager and doctor, and track its effect.
- Complete a 90-day review with the Office Manager and clinical lead covering observed skills, safety checks, patient handoffs, and any remaining training needs.

90-day review date: [date] **Trainer:** [name]

Team member signature _____ Date _____

Manager signature _____ Date _____

Job post, ready to publish

Fill in the brackets and post it on Indeed, your website and your social pages.

Now hiring

[Practice Name] is hiring a Clinical Coordinator

A smooth clinic day takes more than a well-stocked tray, it takes someone who sees what patients and teammates need next. At [Practice Name], you'll help our Clinical team stay prepared, keep patients informed, and make room for a little laughter without losing track of the details.

You're a fit if

- You have orthodontic clinical experience and know that bonds, adjustments, and debonds need different preparation.
- You can reassure a nervous patient without brushing off their concerns.
- You enjoy helping teammates learn and can give feedback kindly and clearly.
- You stay organized when the schedule changes and ask for help before a small issue grows.
- You bring a sense of humor, welcome feedback, and know when careful attention matters more than a quick finish.

What you'll do

- Coordinate clinical huddles, chair assignments, and doctor checks with the Office Manager and clinical team.
- Keep records, appliances, aligners, and retainers ready for the right patient and visit.
- Reinforce doctor-approved home-care instructions and connect patients with the right next appointment.
- Support assistant training, safe clinical routines, and clear handoffs to the front desk.

What we offer

- Pay: [pay range].
- Benefits: [benefits].
- Schedule: [schedule] at [location].
- Training and team support: [training and development details].

Send your resume and a brief introduction through [how to apply], and tell us about a time you helped a busy clinical day go more smoothly.