4R

R1 **Role**

R2 **Responsibilities**

R3 **Results**

R4 **Requirements**

Patient Care Coordinator (Front Desk)

A steady welcome and a schedule that works.

Team
Front office

Reports to
Office Manager

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

R1 The role

As Patient Care Coordinator (Front Desk) at [Practice Name], you are the first voice patients hear and the first person families meet. You work on the front office team, report to the Office Manager, and coordinate with the treatment coordinator and clinical team. You help patients move from their first consult through active treatment and retainer visits by keeping appointments, information, and follow-up organized. Your seat exists to make getting care easier for families while keeping the practice's daily schedule on track.

R2 Responsibilities

Patient Experience

- Welcome patients and guardians, check them in, and alert the clinical team to arrivals and concerns.
- Answer calls, texts, and emails with clear next steps for consults, appointments, and routine office questions.
- Keep waiting families informed about delays and coordinate updates with the clinical team.
- Route questions about broken brackets, aligner fit, or retainer problems to the clinical team without giving clinical advice.

Scheduling and Flow

- Schedule consults, records, bonds, adjustments, debonds, aligner visits, and retainer checks using the approved appointment template.
- Confirm appointments and send preparation instructions approved by the clinical team.
- Work the pending list and cancellation list to reconnect overdue patients and fill openings with appropriate appointment types.
- Coordinate same-day starts with the treatment coordinator and clinical team only after they confirm readiness and availability.

Records and Payments

- Verify contact details, guardian information, required forms, and insurance information before consults and update changes throughout treatment.
- Document scheduling conversations, follow-up attempts, and patient requests in the correct chart.
- Collect and post authorized payments according to practice procedures, provide receipts, and route billing disputes to the Office Manager.
- Save completed treatment agreements and approved referral correspondence in patient charts and flag missing documents before starts.

Team Coordination

- Review the day's consults, starts, special scheduling needs, and outstanding forms with the team during the morning huddle.
- Communicate arrivals, late patients, cancellations, and schedule changes promptly to the treatment coordinator and clinical team.
- Complete assigned opening and closing checklists, including front desk readiness, message review, and payment reconciliation.
- Review assigned scheduling and follow-up reports with the Office Manager and resolve or escalate outstanding items.

R3 Results at 90 days

Patients Feel Welcomed and Informed	Patients and guardians receive a respectful welcome, clear next steps, and timely updates when visits run behind. Measure: The Office Manager reviews [number] patient comments or check-in observations per month, with [goal] % meeting the practice's service checklist.
Accurate Appointment Scheduling	Appointments match the prescribed visit type, template, and clinical availability so avoidable booking errors do not disrupt care. Measure: The Office Manager audits [number] appointments per week for visit type, duration, and template compliance, with [goal] % booked correctly.
Consistent Pending List Follow-Up	Patients awaiting consults or overdue for treatment and retainer visits receive documented outreach and a clear next action. Measure: The Office Manager reviews the pending list weekly, with [goal] % of items due for follow-up contacted within [time frame].
Complete and Accurate Records	Patient charts contain current administrative information, required forms, and clear notes before scheduled visits. Measure: The Office Manager audits [number] charts per week, with [goal] % complete against the practice's administrative checklist.
Reliable Front Desk Payment Handling	Authorized payments are posted accurately, receipts are provided, and discrepancies are escalated before daily close. Measure: The Office Manager checks daily reconciliation records, with [goal] % of payments posted correctly and all unresolved discrepancies logged by close.

R4 Requirements

Essential skills

- **Patient communication.** Listen carefully, explain appointment steps clearly, and handle concerned patients or guardians with patience.
- **Scheduling judgment.** Match orthodontic visit types to approved time blocks and recognize when a change needs clinical or manager approval.
- **Computer and record accuracy.** Navigate scheduling software, messaging tools, and patient charts while protecting confidential information.
- **Task and payment accuracy.** Prioritize arrivals, calls, and follow-up while recording payments carefully and escalating discrepancies.

Qualifications

- Experience helping customers or patients in a busy service setting, with examples of dependable follow-through.
- Experience using digital calendars, data entry tools, and phone or messaging systems.
- Orthodontic or dental front office experience is helpful but not required, with willingness to learn appointment types and practice procedures.
- Availability to work [schedule] at [location].

Attributes

- Stay calm and respectful when phones ring, families arrive, and the schedule changes at once.
- Accept coaching, ask questions, and take responsibility for correcting mistakes.
- Notice when teammates need help and pitch in without losing track of patient commitments.

Interview guide

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

01 Welcoming Anxious Families

Tell me about a time you helped a nervous patient or customer feel comfortable during their first visit or interaction, and what happened afterward.

Listen for: A strong answer shows attentive listening, a warm welcome, clear explanations, and respect for the person's concerns.

02 Competing Front Desk Priorities

Describe a time arrivals, phone calls, and urgent requests competed for your attention, including how you chose what to handle first and what the outcome was.

Listen for: A strong answer shows thoughtful prioritization, acknowledgment of waiting people, and timely requests for team support.

03 Scheduling Problem Solving

Tell me about a time a cancellation or booking mistake disrupted a schedule, including how you checked available options and resolved it.

Listen for: A strong answer shows attention to appointment requirements, appropriate approval, clear communication, and verification of the corrected booking.

04 Persistent Patient Follow-Up

Describe a time you needed to reconnect with someone who had not responded or missed an appointment, including how you tracked outreach and determined the next step.

Listen for: A strong answer shows respectful persistence, documented contact attempts, and follow-through within established procedures.

05 Accuracy and Confidentiality

Tell me about a time you caught an error in a record or payment, including how you corrected it and protected the person's information.

Listen for: A strong answer shows careful verification, appropriate access and escalation, accurate documentation, and a practical step to prevent recurrence.

06 Teamwork and Coaching

Describe a time a manager or teammate coached you after a mistake, including what you changed and how you knew the change helped.

Listen for: A strong answer shows ownership without blame, openness to feedback, and a specific improvement in daily work.

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 the Front Desk Basics

- Shadow the Office Manager or front office lead to learn greetings, phone scripts, privacy procedures, and opening and closing checklists.
- Practice consult intake, chart updates, and booking records, bonds, adjustments, debonds, aligner visits, and retainer checks with the front office lead reviewing each entry.
- Observe payment handling and clinical handoffs with the Office Manager, then demonstrate accurate check-in and checkout using the practice checklist.

Days 31 to 60

Manage Daily Work With Support

- Handle routine calls, check-in, checkout, and appointment scheduling while the front office lead reviews exceptions and provides daily feedback.
- Work the pending and cancellation lists with the Office Manager, documenting outreach and using approved appointment blocks to fill openings.
- Practice payment posting, agreement filing, and same-day start coordination with the front office lead, obtaining required approvals before completing each workflow.

Days 61 to 90

Own the Daily Workflow

- Manage assigned front desk duties independently with the Office Manager available for escalations, including schedule changes and unresolved payment questions.
- Review weekly scheduling, chart accuracy, and follow-up results with the Office Manager and correct recurring gaps.
- Complete a 90-day skills review with the Office Manager covering patient communication, appointment types, records, payments, and clinical handoffs, then agree on next development goals.

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 Patient Care Coordinator (Front Desk)

A first orthodontic visit can come with a lot of questions, and you help families feel welcome before they ever sit in the chair. Join our front office team to keep visits organized, help patients through treatment, and make room for a little laughter along the way.

You're a fit if

- You enjoy helping kids, teens, adults, and the people who come with them.
- You can offer a warm welcome while keeping an eye on the details.
- You stay calm when the phone rings just as a family walks through the door.
- You ask questions, learn from feedback, and own your mistakes.
- You like helping teammates and can share a laugh without losing your professional touch.

What you'll do

- Welcome families, answer calls and messages, and help new patients book their consults.
- Schedule records, bonds, adjustments, debonds, aligner visits, and retainer checks using our appointment template.
- Follow up with patients on the pending list and coordinate openings and approved same-day starts with the team.
- Keep patient information accurate, collect authorized payments, and bring questions to the right teammate.

What we offer

- Pay: [pay range].
- Benefits: [benefits].
- Schedule and location: [schedule] at [location].
- Training and support: [training details], with guidance from the Office Manager or front office lead.

To apply, send your resume and a short introduction through [how to apply].