4R

R1 **Role**

R2 **Responsibilities**

R3 **Results**

R4 **Requirements**

Records and Imaging Technician

Clear records help the doctor plan confident care.

Team **Clinical**

Reports to **Clinical Coordinator**

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

R1 The role

As the Records and Imaging Technician at [Practice Name], you help patients feel comfortable while capturing the records the orthodontist needs to plan and monitor treatment. You are part of the Clinical team and report to the Clinical Coordinator, working closely with the orthodontist, clinical assistants, Treatment Coordinator, and scheduling team. This seat exists to keep photos, scans, and prescribed radiographs accurate, organized, and ready for consults and treatment visits. You follow the doctor's orders and practice protocols, work within your authorized scope, and leave diagnosis and treatment decisions to the orthodontist.

R2 Responsibilities

Patient Experience

- Welcome patients and guardians to the records area and explain how photos, scans, and prescribed radiographs support their orthodontic visit.
- Verify patient identity and the planned records before starting, and complete required safety screening and consent checks under practice protocols.
- Coach patients through positioning and scanning with clear instructions, breaks when needed, and reassurance for anxiety or gag sensitivity.
- Refer questions about findings, treatment choices, or readiness for braces or aligners to the orthodontist or appropriate team member.

Records and Imaging

- Capture standardized extraoral and intraoral photos for consults, progress checks, and debonds using the practice's required views.
- Acquire intraoral scans for treatment planning, aligners, and retainers as directed, checking coverage and bite capture before releasing the patient.
- Take prescribed radiographs only when trained and authorized, following required screening, positioning, and radiation safety procedures.
- Check records for completeness and technical quality, flag limitations to the doctor, and obtain approval before repeating radiographs.

Clinical Flow

- Review the day's consults, bonds, adjustments, debonds, and retainer visits with the Clinical Coordinator to identify ordered records and timing needs.
- Coordinate records timing with the Treatment Coordinator and clinical assistants so consults and approved same-day starts have the information they need.
- Update the records pending list with missing items, barriers, and next steps, and route follow-up needs to the scheduling team.
- Alert the Clinical Coordinator promptly when patient needs, equipment problems, or incomplete records could delay the next visit or clinical handoff.

Chart and Equipment

- Save and label photos, scans, and radiographs in the correct patient chart with accurate dates and record types.
- Route doctor-approved scan files and related documentation to authorized aligner or retainer workflows using approved secure systems.
- Clean and disinfect imaging equipment and process reusable accessories according to manufacturer instructions and practice infection prevention protocols.
- Complete assigned opening and closing checks, monitor records supplies, and report equipment faults before further use.

R3 Results at 90 days

Complete Records for Review	Required records are complete, correctly labeled, and available when the orthodontist needs them for the planned visit. Measure: The Clinical Coordinator audits [number] charts per week against the visit checklist, with [goal] % complete by the agreed handoff time.
Consistent Technical Image Quality	Photos, scans, and prescribed radiographs meet the doctor's technical criteria without avoidable repeat capture. Measure: The orthodontist reviews [number] record sets per week, targeting [goal] % technical acceptance on first capture and reviewing reasons for repeats.
Comfortable and Informed Patients	Patients understand the records process and receive calm, respectful support tailored to their needs. Measure: The Clinical Coordinator observes [number] patient encounters per week, targeting [goal] % completion of the explanation, comfort, and understanding checklist.
Reliable Clinical Handoffs	Records move to the next team member on time, with missing items and barriers clearly communicated. Measure: The manager reviews handoff timestamps and the records pending list weekly, targeting [goal] % on-time handoffs and no unresolved item older than [number] days without a documented next step.
Safe and Accurate Records	Record handling and imaging follow patient identification, authorization, privacy, and infection prevention protocols. Measure: The Clinical Coordinator audits [number] encounters per week against a safety checklist, targets [goal] % documented compliance, and reviews every reported deviation promptly.

R4 Requirements

Essential skills

- **Patient communication.** Explain records procedures in plain language and help children, teens, and adults follow positioning instructions.
- **Technical accuracy.** Follow standardized photo, scan, and imaging workflows and recognize incomplete or technically inadequate records.
- **Digital organization.** Enter, label, retrieve, and securely route patient records in practice management and imaging software.
- **Clinical prioritization.** Coordinate records around consults and treatment visits while maintaining patient identification and safety checks.

Qualifications

- Any license, certification or registration your state requires for this role
- Prior orthodontic or dental clinical experience preferred, with readiness to complete supervised training on the practice's records workflows.
- Ability to demonstrate competency with assigned imaging equipment before independent use and perform only duties you are authorized to perform.
- Ability to learn and follow patient privacy, infection prevention, radiation safety, and equipment care protocols.

Attributes

- Patient and observant, especially when someone is anxious, uncomfortable, or struggling with a scan.
- Dependable and detail-oriented, with a habit of checking your work and speaking up about errors.
- Teachable and team-minded, with a calm response to feedback and changes in clinical flow.

Interview guide

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

01 Patient Comfort

Tell me about a time a patient was anxious or struggled with a scan, photo, or similar procedure. What did you change, and what happened?

Listen for: A strong answer shows empathy, clear coaching, appropriate pauses, and willingness to ask for help rather than push through distress.

02 Records Quality

Describe a time you caught an incomplete or poor-quality record before the patient left. How did you assess it and resolve the issue?

Listen for: A strong answer shows a repeatable quality check, recognition of technical limits, and appropriate approval before any repeat radiograph.

03 Patient Identification

Tell me about a time you found a mismatch in a patient's identity, chart, file label, or planned procedure. What did you do before continuing?

Listen for: A strong answer shows that the candidate stopped, verified the correct information, escalated as needed, and documented the correction.

04 Busy Clinic Flow

Describe a time several patients or teammates needed your help at once. How did you set priorities and communicate delays?

Listen for: A strong answer shows coordination with a lead, realistic updates, and protection of safety checks despite time pressure.

05 Safety and Scope

Tell me about a time you were asked to do something you were not trained or authorized to do, or noticed a safety concern. How did you respond?

Listen for: A strong answer shows respectful boundaries, prompt escalation, and a safe alternative rather than guessing or proceeding.

06 Learning from Feedback

Describe a time a supervisor corrected your technique or documentation. How did you practice the change and confirm your work improved?

Listen for: A strong answer shows ownership, purposeful practice, and evidence that the correction became a consistent habit.

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 Safe Records Workflows

- Review role boundaries, required credentials, patient identification, privacy, infection prevention, and imaging safety with the Clinical Coordinator before performing assigned clinical tasks.
- Shadow the Clinical Coordinator or designated records lead through consult, progress, debond, aligner, and retainer records workflows.
- Practice equipment setup, standardized photos, scans, chart labeling, and shutdown with the records lead, completing supervised competency checks before independent tasks.

Days 31 to 60

Build Consistency with Supervision

- Complete assigned patient records with the records lead observing and checking technical quality, chart accuracy, and patient comfort.
- Train with the Clinical Coordinator on prescribed radiographs only after required authorization is verified, including screening, positioning, and escalation before repeats.
- Manage an assigned portion of daily handoffs and the records pending list with the Clinical Coordinator, reviewing delays and missing items at the end of each day.

Days 61 to 90

Own Daily Records Flow

- Run assigned records visits within signed-off competencies, with the Clinical Coordinator available for exceptions and any duties still requiring supervision.
- Review weekly chart audits, technical acceptance, patient feedback, and handoff timing with the Clinical Coordinator against agreed targets.
- Complete a final competency review with the Clinical Coordinator and doctor, document remaining training needs, and set the 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 Records and Imaging Technician

A great patient photo takes more than asking someone to say cheese. At [Practice Name], you'll help patients feel at ease while capturing the photos, scans, and prescribed images our orthodontist uses to plan and follow their care.

You're a fit if

- You enjoy helping kids, teens, and adults feel comfortable, even when the camera or scanner feels unfamiliar.
- You notice the missing photo, unclear scan, or mislabeled file before it becomes someone else's puzzle.
- You like a friendly team and can share a laugh while keeping patient care professional.
- You ask questions, welcome coaching, and speak up when something needs a second look.
- You can adapt to a busy clinical day without skipping the checks that keep patients safe.

What you'll do

- Capture orthodontic photos and scans, plus prescribed radiographs when trained and authorized.
- Prepare accurate, organized records for consults, progress visits, debonds, aligners, and retainers.
- Help patients through each step and coordinate handoffs with the clinical and treatment coordination teams.
- Keep equipment ready, follow infection prevention protocols, and report to the Clinical Coordinator.

What we offer

- Pay: [pay range].
- Benefits: [benefits].
- Schedule and location: [schedule] at [location].
- Training and development: [training and development details], with guidance from the Clinical Coordinator.

Send your resume and a brief introduction through [how to apply], and tell us how you help people feel comfortable while getting the details right.