4R

R1 **Role**

R2 **Responsibilities**

R3 **Results**

R4 **Requirements**

Scheduling Coordinator

Help patients stay on track, one appointment at a time.

Team
Front office

Reports to
Office Manager

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

R1 The role

As Scheduling Coordinator at [Practice Name], you are a front office team member and a welcoming first contact for patients and families. You report to the Office Manager and work closely with the clinical team and Treatment Coordinator to coordinate visits from the first consultation through retainers. You keep appointments accurate, communicate next steps clearly, and help families navigate scheduling changes without losing sight of the doctor's treatment timing. This seat exists to make care easier to access while keeping the daily schedule workable for patients and the team.

R2 Responsibilities

Patient Experience

- Welcome patients and guardians for orthodontic visits, confirm their information discreetly, and notify the clinical team of their arrival.
- Answer calls, texts, and emails about consultations and ongoing treatment appointments using the practice's approved communication procedures.
- Explain appointment logistics and approved preparation instructions for records, bonds, debonds, and retainer visits without giving clinical advice.
- Keep waiting patients informed about delays and route questions about discomfort, broken appliances, or aligner fit to the clinical team.

Scheduling and Flow

- Schedule consultations, records, bonds, adjustments, aligner visits, debonds, and retainer checks using approved appointment lengths and templates.
- Book each patient's next visit according to the clinical team's instructions and flag any availability conflicts with the prescribed timing.
- Coordinate same-day starts with the Treatment Coordinator and clinical team only after they confirm readiness, staffing, and chair availability.
- Review the next day's schedule with the clinical lead to identify appointment errors, missing instructions, and potential flow problems.

Follow-Up and Access

- Respond to new consultation inquiries within the practice's response goal and document each contact attempt and next step.
- Send appointment confirmations and reminders through approved channels and follow up on unconfirmed orthodontic visits.
- Maintain the pending list for patients who leave without their next treatment appointment, miss a visit, or need to reschedule.
- Offer suitable openings to patients on the short-notice list while preserving appointment types and clinically directed treatment intervals.

Records and Team Support

- Record orthodontic appointment changes, patient scheduling preferences, and follow-up commitments accurately in the practice management system.
- Relay clinical scheduling instructions and referral-related appointment needs to the appropriate team member through approved channels.
- Collect authorized payments for orthodontic visits according to practice procedures and route billing disputes or treatment contract questions to the designated lead.
- Complete front office opening and closing checklists and provide the Office Manager with assigned scheduling reports and unresolved patient needs.

R3 Results at 90 days

Accurate Orthodontic Appointment Booking	Appointments match the prescribed visit type, duration, and scheduling instructions so the clinical team can prepare appropriately. Measure: The Office Manager audits [number] appointments per week for a booking accuracy rate of [goal] %.
Timely New Patient Responses	New consultation inquiries receive a documented response within the practice's agreed response window. Measure: The Office Manager reviews inquiry timestamps weekly for [goal] % responded to within [response window] during staffed hours.
Consistent Next Visit Scheduling	Patients leave with their next prescribed visit scheduled or a documented follow-up plan when an appointment cannot be booked. Measure: The Office Manager reviews checkout records weekly for [goal] % with a next appointment or an assigned, dated follow-up task.
Reliable Pending List Follow-Up	Patients awaiting consultations or treatment visits receive timely outreach so scheduling needs do not disappear from view. Measure: The Office Manager reviews the pending list weekly for [goal] % of due follow-up tasks completed by their assigned dates.
Appropriate Schedule Gap Recovery	Eligible cancellations are offered to suitable patients without overriding appointment templates or clinical timing instructions. Measure: The Office Manager reviews the cancellation log weekly for [goal] % of eligible openings offered to appropriate patients within [response window].

R4 Requirements

Essential skills

- **Patient communication.** Listen carefully and explain orthodontic appointment logistics clearly by phone, text, email, and in person.
- **Scheduling judgment.** Match visit types and lengths to approved templates, recognize conflicts, and seek clinical direction when needed.
- **Organization and follow-up.** Track consultation inquiries, pending appointments, reminders, and handoffs without losing details.
- **Computer accuracy.** Navigate scheduling software, enter patient information accurately, and use approved systems to protect patient privacy.

Qualifications

- Experience helping customers or patients in a service-focused role, with orthodontic or dental front office experience helpful but not required.
- Ability to learn orthodontic appointment types, treatment sequences, and practice-specific scheduling procedures through training.
- Experience using computers, shared calendars, and phone systems, with willingness to learn the practice management software.
- Availability to work the practice's posted [schedule] at [location].

Attributes

- Bring warmth and patience to conversations with children, teens, adults, and guardians.
- Stay calm when phones ring, patients arrive, and the schedule changes at the same time.
- Accept feedback, own mistakes, and support teammates without waiting to be asked.

Interview guide

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

01 Patient Communication

Tell me about a time you helped an upset patient or customer when their preferred appointment or service time was unavailable. What did you say, what options did you offer, and what happened?

Listen for: A strong answer shows empathy, clear options, honest expectations, and respect for scheduling limits.

02 Scheduling Accuracy

Describe a time you caught or made a scheduling error involving the wrong service, appointment length, or staff member. How did you correct it and prevent a repeat?

Listen for: A strong answer shows attention to detail, prompt ownership, appropriate communication, and a practical prevention step.

03 Competing Priorities

Tell me about a busy shift when someone was waiting in front of you, the phone was ringing, and another task needed attention. How did you decide what to do first?

Listen for: A strong answer shows calm prioritization, acknowledgment of waiting people, and willingness to ask a teammate for help.

04 Follow-Up Discipline

Give an example of a pending list, callback list, or unfinished request you managed over several days. How did you track actions and make sure nothing was missed?

Listen for: A strong answer shows a repeatable tracking system with owners, due dates, documented attempts, and clear closure.

05 Team Coordination

Describe a time you received a request you could not safely or appropriately resolve yourself. How did you involve the right teammate and keep the patient or customer informed?

Listen for: A strong answer shows recognition of role boundaries, a clear handoff, and follow-through rather than guessing or making unsupported promises.

06 Learning From Feedback

Tell me about feedback that changed how you handled a front desk, service, or administrative task. What did you change, and how did you know it helped?

Listen for: A strong answer shows openness to coaching, a specific change in behavior, and evidence that accuracy or service improved.

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 Patients and Appointment Basics

- Train with the Office Manager on patient privacy, phone and messaging procedures, check-in and checkout, and front office opening and closing checklists.
- Shadow the clinical lead to learn consultations, records, bonds, adjustments, aligner visits, debonds, retainers, and which questions require clinical review.
- Practice booking visits, sending reminders, and documenting follow-up in the practice software with the Office Manager checking entries before independent work.

Days 31 to 60

Manage Scheduling With Support

- Manage routine calls, checkout scheduling, and appointment changes with the Office Manager available for exceptions and reviewing a daily sample for accuracy.
- Work with the Office Manager to manage consultation inquiries, the pending list, missed-visit outreach, and appropriate short-notice openings.
- Practice next-day schedule reviews and same-day start coordination with the clinical lead, confirming approval before changing reserved appointment time.

Days 61 to 90

Own Daily Scheduling Follow-Through

- Run the daily scheduling workflow independently within approved guidelines, escalating clinical timing conflicts and unresolved concerns to the Office Manager or clinical lead.
- Review scheduling accuracy, inquiry response times, and pending-list completion with the Office Manager each week against the practice's agreed goals.
- Complete a 90-day review with the Office Manager using observed patient interactions, appointment audits, and one proposed improvement to scheduling or follow-up.

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 Scheduling Coordinator

A well-run orthodontic day starts with someone who makes patients feel welcome and knows that a bond appointment is not an adjustment. Join the front office at [Practice Name], where you will report to the Office Manager, help families find their next visit, and work with teammates who appreciate a little laughter between ringing phones.

You're a fit if

- You enjoy helping kids, teens, adults, and guardians feel comfortable asking questions.
- You like a tidy schedule, accurate notes, and checking the details before clicking save.
- You can keep your sense of humor when the phone rings just as a family walks in.
- You ask for help when a scheduling request needs clinical input rather than guessing.
- You welcome feedback, learn from mistakes, and pitch in for your teammates.

What you'll do

- Welcome patients and answer calls, texts, and emails about consultations and treatment visits.
- Schedule records, bonds, adjustments, aligner visits, debonds, and retainers using our appointment guidelines.
- Follow up on new inquiries, missed visits, and the pending list so patients know their next step.
- Coordinate schedule changes and approved same-day starts with the Treatment Coordinator and clinical team.

What we offer

- Pay: [pay range].
- Benefits: [benefits].
- Schedule and location: [schedule] at [location].
- Training and support: Guided onboarding with the Office Manager and clinical lead.

Apply through [how to apply] with your resume and a short introduction about how you help people feel welcome.