4R

R1 **Role**

R2 **Responsibilities**

R3 **Results**

R4 **Requirements**

New Patient Coordinator

Help new patients take their first confident step.

Team
Front office

Reports to
Office Manager

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

R1 The role

As New Patient Coordinator at [Practice Name], you are the front office contact who guides prospective patients and families from their first inquiry through their consultation and handoff to treatment. You report to the Office Manager and work closely with the treatment coordinator, doctor, clinical team, and scheduling team. You help families understand what to expect, keep new patient information organized, and make the next step clear without pressuring anyone to start treatment. This seat exists to turn inquiries into well-prepared consultations and keep interested families from getting lost in follow-up.

R2 Responsibilities

First Contact

- Respond to new patient calls, texts, emails, and online inquiries within the practice's response target, using approved communication channels.
- Ask about the patient's orthodontic concerns, referral source, and scheduling needs, and document the conversation in the patient record.
- Explain what happens at an orthodontic consultation, including any planned records, who should attend, and what information to bring.
- Route questions about braces, aligner suitability, treatment timing, or clinical concerns to the treatment coordinator or clinical team rather than offering clinical advice.

Consult Scheduling

- Schedule consultations and any prescribed records appointments using the practice's appointment types, time blocks, and provider availability.
- Collect patient and guardian contact details, required intake forms, and insurance information before the consultation.
- Confirm consultations, share arrival instructions, and follow up on missing forms or records before the visit.
- Reschedule canceled or missed consultations and document the next contact date so interested families stay on the pending list.

Visit Coordination

- Welcome new patients and guardians, verify their information discreetly, and introduce them to the treatment coordinator or clinical team.
- Alert the team when a consultation patient arrives, records are missing, or a family needs extra support.
- Coordinate same-day starts only after clinical approval and completion of the practice's required financial and consent steps.
- Arrange the handoff for approved bond or initial aligner appointments and clarify who will schedule later adjustments, debonds, and retainer visits.

Follow-Up and Records

- Maintain the pending list with each patient's consultation status, reason for waiting, assigned owner, and next follow-up date.
- Follow up with families after consultations according to their preferences and the practice's process, routing treatment and payment questions to the appropriate teammate.
- Document contact attempts, family decisions, referral information, and appointment outcomes accurately in the practice software.
- Review inquiry, consultation, and pending-list reports with the Office Manager and flag missed handoffs or overdue follow-up.

R3 Results at 90 days

Timely New Patient Responses	New patient 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.
More Inquiries Become Consults	Families who inquire about orthodontic care receive clear information and a practical opportunity to schedule a consultation. Measure: The Office Manager reviews the inquiry-to-consult booking rate weekly against [goal] %, using an agreed definition of eligible inquiries.
Prepared Patients Attend Consults	Scheduled families arrive knowing what to expect, with the required intake information ready for the team. Measure: The Office Manager checks consultation attendance against [goal] % and audits [number] charts per week for required previsit information.
Consistent Pending List Follow-Up	Every patient awaiting a decision or next appointment has a documented status, owner, and next action without unwanted pressure. Measure: The Office Manager audits the pending list weekly for [goal] % of records with current next steps and no more than [number] overdue follow-ups.
Reliable Treatment Start Handoffs	Patients choosing treatment reach the appropriate teammate with their approved next appointment and required administrative steps documented. Measure: The Office Manager and treatment coordinator audit [number] start handoffs per week for [goal] % completion of the practice's handoff checklist.

R4 Requirements

Essential skills

- **Patient communication.** Listen closely, explain the consultation process in plain language, and respond calmly to worried patients and guardians.
- **Scheduling judgment.** Use orthodontic appointment templates correctly and coordinate consults, records, and approved start appointments without disrupting clinical flow.
- **Organization and follow-up.** Track inquiries, pending consultations, missing information, and next steps without relying on memory.
- **Computer and record accuracy.** Navigate scheduling software, phone and messaging tools, and patient records while protecting private information.

Qualifications

- Experience in customer service, reception, scheduling, or another role involving frequent contact with the public.
- Experience handling appointments, contact records, and follow-up tasks with attention to accuracy.
- Orthodontic or dental front office experience preferred, with willingness to learn the practice's terminology, software, and workflows.

Attributes

- Warm and patient with families who are nervous, busy, or not ready to make a decision.
- Dependable about follow-through and willing to own and correct mistakes.
- Curious, coachable, and ready to help teammates while respecting clinical and financial boundaries.

Interview guide

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

01 First Contact

Tell me about a time you helped someone who was nervous or unsure during their first contact with your workplace, including what you said and what happened next.

Listen for: A strong answer shows attentive listening, plain-language explanations, and a clear next step without pressure.

02 Scheduling Judgment

Describe a time someone needed an appointment that did not fit the available schedule, and explain how you handled the request and involved your team.

Listen for: A strong answer shows respect for scheduling rules, practical alternatives, and escalation rather than promises the team cannot keep.

03 Persistent Follow-Up

Tell me about a time you managed a list of people waiting for a decision or next step, including how you tracked contact attempts and knew when to pause.

Listen for: A strong answer shows an organized tracking method, timely follow-through, and respect for each person's communication preferences.

04 Accurate Patient Information

Describe a time you caught missing or incorrect information before an appointment or service, and explain how you corrected it while protecting privacy.

Listen for: A strong answer shows careful verification, discreet communication, and documentation that prevents the same problem from recurring.

05 Team Handoffs

Tell me about a time a customer or patient asked a question outside your authority, and walk me through how you connected them with the right person.

Listen for: A strong answer shows clear boundaries, a complete handoff, and ownership of making sure the person received help.

06 Learning From Mistakes

Describe a time you missed a callback, booked something incorrectly, or made a similar service mistake, and explain what you did afterward.

Listen for: A strong answer shows honest ownership, timely repair, and a specific change that improved reliability.

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 Patient Journey

- Train with the Office Manager on privacy practices, approved messaging, inquiry documentation, and the consultation scheduling template.
- Shadow the lead treatment coordinator through consultations and start handoffs to learn the roles of records, bonds, aligners, adjustments, debonds, and retainers.
- Practice new patient calls, intake checks, and consultation confirmations with the Office Manager reviewing your work before independent handling.

Days 31 to 60

Own Consults With Support

- Handle routine inquiries, consult bookings, and previsit preparation with daily coaching from the Office Manager.
- Work the pending list with the lead treatment coordinator, documenting decisions and next actions while routing clinical and financial questions appropriately.
- Coordinate approved start handoffs with the lead treatment coordinator and review sample charts and scheduling errors with the Office Manager each week.

Days 61 to 90

Build Consistency and Independence

- Manage the routine new patient workflow independently, with the Office Manager available for exceptions and weekly check-ins.
- Review response times, booking rates, consultation readiness, and overdue follow-up with the Office Manager against the agreed goals.
- Complete a 90-day review with the Office Manager using observed calls, chart audits, and teammate feedback to set your next training priorities.

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 New Patient Coordinator

The first orthodontic visit can come with a lot of questions, and you can be the person who makes it feel a little easier. Join our front office team to help families go from wondering about braces or aligners to knowing exactly what happens next.

You're a fit if

- You make people feel welcome on the phone and in person, even when they ask the same question twice.
- You enjoy a friendly laugh and know when someone needs a little extra patience.
- You like a clear checklist and get real satisfaction from a completed callback list.
- You own your mistakes, ask questions, and put feedback to work.
- You help your teammates and know that treatment advice belongs with the clinical team.

What you'll do

- Answer new patient inquiries, learn what families need, and schedule orthodontic consultations.
- Prepare families for their visit, collect intake information, and coordinate with the treatment coordinator and clinical team.
- Keep the pending list current and follow up thoughtfully with families who have not scheduled or decided.
- Help coordinate approved same-day starts and hand off bond or initial aligner appointments without skipping required steps.

What we offer

- Pay: [pay range].
- Benefits: [benefits].
- Schedule: [schedule] at [location].
- Training: A 90-day plan led by the Office Manager, with support from the lead treatment coordinator.

Send your resume and a short introduction through [how to apply], and tell us what you enjoy about helping someone feel comfortable in a new place.