4R

R1 **Role**

R2 **Responsibilities**

R3 **Results**

R4 **Requirements**

Orthodontic Office Manager

Keep the team aligned and patient care moving.

Team **Leadership**

Reports to **Owner Doctor**

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

R1 The role

As Orthodontic Office Manager at [Practice Name], you lead daily operations so patients receive organized, welcoming care from their first consult through retainers. You serve on the Leadership team and report to the Owner Doctor, turning practice priorities into clear routines, staffing plans, and follow-through. You work closely with the clinical lead, treatment coordinator, scheduling team, and financial team to keep patient flow, communication, and accounts on track. You own operational decisions within the doctor's direction, freeing the doctor to focus on clinical care while keeping treatment decisions with the doctor.

R2 Responsibilities

Team Leadership

- Lead daily huddles that review consults, bonds, adjustments, debonds, staffing gaps, and patients who need extra support.
- Coach front-office and clinical leads on clear handoffs from consult and records through treatment starts and retention.
- Set staff coverage and cross-training plans that protect check-in, checkout, and chairside support during busy orthodontic sessions.
- Address performance concerns promptly through documented expectations, coaching, and follow-up with the Owner Doctor.

Scheduling and Flow

- Maintain scheduling templates with the clinical lead that protect appropriate time for consults, records, bonds, adjustments, debonds, and retainer visits.
- Coordinate same-day starts with the treatment coordinator and clinical lead only when the doctor approves and staffing, records, and chair time allow.
- Review missed visits, overdue adjustments, and aligner follow-ups with the scheduling team and assign outreach owners.
- Resolve schedule bottlenecks with the clinical lead while keeping clinical urgency and treatment timing decisions with the doctor.

Patient Experience

- Set clear standards for answering new patient calls, explaining the consult process, and responding to patient messages.
- Review the pending list with the treatment coordinator to ensure each patient has a documented next step and respectful follow-up.
- Resolve patient or guardian concerns about wait times, scheduling, or financial communication and route clinical questions to the doctor.
- Check that handoffs for braces, aligners, debonds, and retainers include documented instructions from the clinical team and the next appointment.

Financial and Practice Operations

- Review treatment contracts, payment plan setup, and insurance follow-up with the financial team for accuracy and timely completion.
- Reconcile daily payment totals with system reports and investigate discrepancies before closing the day.
- Monitor collections, overdue accounts, treatment starts, and staffing costs against goals approved by the Owner Doctor.
- Maintain workflows for patient record access, referral correspondence, and administrative supply ordering that support uninterrupted orthodontic care.

R3 Results at 90 days

Reliable Appointment Flow	The team follows the approved appointment template and reduces avoidable delays across consults, treatment visits, and retention checks. Measure: Review weekly scheduling audits and visit timestamps with the clinical lead against [goal] % template adherence and [goal] % on-time visit starts.
Consistent Pending Patient Follow-Up	Patients on the pending list receive timely, helpful follow-up with a clear next step and no pressure to begin treatment. Measure: Audit the pending list weekly for [goal] % of patients with an assigned owner, documented next step, and follow-up completed by its due date.
Accurate Payment Follow-Up	Payments are reconciled and overdue accounts receive consistent follow-up under the practice's approved financial policies. Measure: Check daily reconciliation for [number] unresolved discrepancies at close and review the aging report monthly against [goal] % of overdue accounts contacted on schedule.
Accountable and Prepared Team	Team members understand their responsibilities and receive the training and coaching needed to carry them out. Measure: Review the training tracker and coaching log monthly for [goal] % of assigned training completed by its due date and [number] documented coaching check-ins per team member.
Resolved Patient Service Concerns	Patient and guardian concerns receive a clear response, an assigned owner, and follow-through to an agreed resolution. Measure: Review the concern log weekly for [goal] % acknowledged within [number] business hours and [goal] % resolved by the agreed follow-up date.

R4 Requirements

Essential skills

- **Team leadership.** Set expectations, coach staff, address performance concerns, and lead useful daily huddles.
- **Orthodontic scheduling.** Coordinate consults, records, bonds, adjustments, debonds, retainers, and aligner visits within doctor-approved templates.
- **Financial oversight.** Read collections and aging reports, review treatment payment workflows, and investigate reconciliation differences.
- **Patient communication and systems.** Handle sensitive conversations, document next steps, and use practice management software and basic spreadsheets accurately.

Qualifications

- Experience managing daily operations in an orthodontic practice, or dental office leadership experience with a demonstrated understanding of orthodontic workflows.
- Experience supervising staff, planning coverage, and training or onboarding team members.
- Hands-on experience with treatment contracts, payment plans, insurance follow-up, and patient account reporting.
- Experience handling confidential patient and employee information according to practice policies.

Attributes

- Stay calm and respectful when the schedule changes or a patient is upset.
- Follow through on commitments and take responsibility for mistakes.
- Stay curious, welcome feedback, and balance team support with clear accountability.

Interview guide

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

01 Schedule Recovery

Tell us about a day when an orthodontic schedule fell behind or staffing changed unexpectedly, including how you prioritized consults and treatment visits and what happened afterward.

Listen for: A strong answer shows coordination with the clinical lead, respect for doctor-directed care, clear patient updates, and a practical review of what caused the disruption.

02 Team Accountability

Describe a time you coached a team member whose repeated scheduling or handoff errors affected patients, including the expectations you set and how you checked progress.

Listen for: A strong answer shows specific feedback, a fair training plan, documented follow-up, and evidence of improvement or an appropriate next step.

03 Patient Concern Resolution

Tell us about a patient or guardian who was upset about a delay, treatment fee, or scheduling issue, and walk us through how you handled the concern.

Listen for: A strong answer shows active listening, accurate explanations, appropriate decision boundaries, and follow-through without promises outside the manager's authority.

04 Pending List Follow-Up

Describe a time you improved follow-up for patients who had completed a consult but had not started treatment, including how you organized the list and evaluated the change.

Listen for: A strong answer shows clear ownership, documented next steps, respectful outreach, and results checked through practice reports rather than pressure tactics.

05 Financial Oversight

Tell us about a payment discrepancy or overdue-account pattern you uncovered, how you investigated it, and what you changed.

Listen for: A strong answer shows careful reconciliation, appropriate confidentiality, collaboration with the financial team, and a repeatable process that prevents missed follow-up.

06 Doctor Partnership

Describe a time you brought an operational problem and a proposed solution to an owner doctor, including how you handled disagreement and measured the outcome.

Listen for: A strong answer shows concise use of evidence, respect for clinical authority, clear decision ownership, and accountability for implementation.

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 People and Patient Flow

- Meet with the Owner Doctor to clarify decision authority, leadership expectations, practice priorities, and the baseline reports used to set goals.
- Shadow the clinical lead through consult, records, bond, adjustment, aligner, debond, and retainer workflows, then review appointment templates with the scheduling lead.
- Train with the administrative lead on pending-list ownership, treatment contracts, payment reconciliation, patient communication, and confidential record handling.

Days 31 to 60

Lead Daily Operating Routines

- Lead daily huddles and build staff coverage plans with the clinical lead observing and giving weekly feedback.
- Run pending-list and overdue-visit reviews with the treatment coordinator and scheduling lead, assigning owners and checking completed follow-up.
- Review financial reports and a first round of team coaching with the Owner Doctor, then agree on targets and one operational improvement to test.

Days 61 to 90

Own Operations and Improve Follow-Through

- Manage daily operations and patient service escalations independently within agreed authority, with weekly coaching from the Owner Doctor.
- Evaluate the improvement tested in the previous month with the relevant lead using baseline and current reports, then document the workflow to keep or revise.
- Present a 90-day review to the Owner Doctor covering the five expected outcomes, remaining training needs, and priorities for the next quarter.

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 an Orthodontic Office Manager

A full orthodontic schedule needs someone who can spot a snag, support the team, and help a worried parent feel heard. At [Practice Name], you'll lead daily operations alongside our Owner Doctor, with room for a little laughter between the consults and retainer checks.

You're a fit if

- You enjoy helping people do their best work and can have a kind, direct conversation when something needs to change.
- You know how an orthodontic day flows, from consults and records to bonds, adjustments, and debonds.
- You can read a collections report, spot a scheduling problem, and turn either one into a clear next step.
- You stay steady when the phone rings, a parent has a question, and the schedule needs a backup plan.
- You take the work seriously, welcome feedback, and don't mind a little team humor along the way.

What you'll do

- Lead huddles, coach team members, and coordinate staffing with the Owner Doctor and clinical lead.
- Keep appointment templates and patient handoffs organized, including doctor-approved same-day starts when the team has capacity.
- Oversee pending-list follow-up, patient service concerns, treatment payment workflows, and daily reconciliation.
- Review practice reports with the Owner Doctor and turn agreed priorities into clear assignments and completed follow-up.

What we offer

- Pay: [pay range].
- Benefits: [benefits].
- Work schedule and location: [schedule] at [location].
- Training and development: [onboarding and ongoing training details].

Please send your resume and a short introduction about your orthodontic leadership experience through [how to apply].