4R

R1 **Role**

R2 **Responsibilities**

R3 **Results**

R4 **Requirements**

Treatment Coordinator

Help patients move from consultation to confident treatment decisions.

Team
Front office

Reports to
Office Manager

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

R1 The role

As Treatment Coordinator at [Practice Name], you help patients and families understand the orthodontist's recommended treatment and their options for getting started. You are part of the front office, report to the Office Manager, and work closely with the orthodontist, clinical team, scheduling team, and financial team. You guide patients through consultations, financial arrangements, and the handoff to treatment while keeping records and follow-up organized. This seat exists to make treatment decisions clear and comfortable, without pressure or unanswered questions.

R2 Responsibilities

Consultation Experience

- Prepare for orthodontic consults by reviewing patient concerns, referral information, health history completeness, and available records with the clinical team.
- Welcome patients and families, ask about their goals, and explain what to expect during the consultation.
- Review the orthodontist's recommended braces or aligner plan in plain language, referring clinical questions and treatment changes to the doctor.
- Confirm patient understanding of the proposed treatment, estimated timeline, visit expectations, and retainer phase before discussing next steps.

Financial Arrangements

- Present approved treatment fees and payment options clearly, including what is included in the orthodontic agreement.
- Coordinate benefit verification with the financial team and distinguish estimated orthodontic insurance benefits from guaranteed coverage.
- Review treatment agreements with patients or responsible parties, obtain required signatures under practice procedures, and save completed documents in the chart.
- Arrange approved payment plans and initial payments with the financial team before handing patients off for treatment.

Scheduling and Handoffs

- Coordinate missing diagnostic records with the clinical and scheduling teams before the next treatment step.
- Schedule bonds or initial aligner delivery according to the doctor's direction and the practice's appointment templates.
- Coordinate same-day starts only when the doctor approves and clinical capacity, required documentation, and financial arrangements are ready.
- Document and communicate the start plan to the clinical team, including patient concerns and expectations for adjustments, aligner checks, debonds, and retainers.

Follow-Up and Tracking

- Maintain an accurate pending list with each patient's treatment recommendation, decision status, concerns, and next contact date.
- Follow up with undecided patients through approved communication channels, answer nonclinical questions, and respect requests to pause or stop outreach.
- Coordinate observation or recall follow-up for patients the orthodontist determines are not ready to begin treatment.
- Review consult, acceptance, and start reports with the Office Manager to identify missed handoffs, overdue follow-up, and barriers to starting care.

R3 Results at 90 days

Clear Consultation Next Steps	Patients leave consultations with the doctor's recommendation, financial options, and an agreed next step documented. Measure: The Office Manager audits [number] consult charts per week for all three elements, targeting [goal] % complete.
Informed Treatment Acceptance	Patients recommended for treatment make informed decisions, with acceptance and reasons for deferring recorded without pressure. Measure: The Office Manager reviews accepted cases divided by completed consults recommended for treatment within [tracking window], against [goal] %, and audits documented reasons for deferral.
Timely Pending Patient Follow-Up	Patients on the pending list receive the agreed follow-up without repeated or unwanted outreach. Measure: The Office Manager checks due follow-up tasks weekly for [goal] % completed on time and audits [number] records for contact preferences.
Complete Treatment Start Handoffs	Scheduled starts have the required records, agreements, financial arrangements, and clinical handoff ready before the appointment. Measure: The Office Manager and clinical lead review the upcoming start list weekly, targeting [goal] % readiness and tracking missing items.
Reliable Accepted Case Starts	Patients who accept treatment reach their planned start appointment or have a documented reason and revised next step. Measure: The Office Manager reviews accepted cases with starts due in [tracking window], targeting [goal] % started as planned and checking exceptions weekly.

R4 Requirements

Essential skills

- **Patient communication.** Listen carefully and explain doctor-approved braces and aligner plans without jargon or pressure.
- **Financial communication.** Explain approved fees, estimated insurance benefits, and payment options accurately and comfortably.
- **Organization and follow-through.** Keep consult preparation, pending lists, patient tasks, and treatment start handoffs current.
- **Software and documentation.** Use practice management software, scheduling tools, and approved messaging systems while protecting patient information.

Qualifications

- Experience in patient-facing service, treatment coordination, or a comparable role involving sensitive decisions and detailed follow-up.
- Orthodontic or dental front-office experience preferred, with willingness to learn the practice's consultation and treatment start workflows.
- Experience discussing costs, agreements, or payment arrangements accurately and respectfully.
- Ability to work [schedule] at [practice location].

Attributes

- Empathy that helps anxious patients and families feel heard without rushing their decision.
- Ownership of details, follow-up commitments, and mistakes that need correction.
- A calm, collaborative approach and willingness to learn from the Office Manager and clinical team.

Interview guide

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

01 Patient Trust

Tell me about a time a patient or customer felt anxious about a significant decision, and describe what you did and how the conversation ended.

Listen for: A strong answer shows active listening, clear explanations, and respect for the person's pace and choice.

02 Financial Conversations

Describe a time someone wanted a service but was concerned about the cost, and explain how you discussed available options and confirmed their understanding.

Listen for: A strong answer shows comfort with money conversations, accurate explanations, and no promises or discounts beyond the person's authority.

03 Professional Boundaries

Tell me about a time a patient or customer asked a question you were not qualified to answer, and explain how you got them an accurate response.

Listen for: A strong answer shows that the candidate recognized their limits, involved the right expert, and followed through without guessing.

04 Pending Follow-Up

Describe a time you managed several undecided patients or customers, including how you tracked next steps, prioritized outreach, and respected their preferences.

Listen for: A strong answer shows a dependable tracking system, personalized follow-up, and respect for requests to pause contact.

05 Team Handoffs

Tell me about a time a handoff or scheduling problem put a patient's or customer's next appointment at risk, and describe your role in resolving it.

Listen for: A strong answer shows timely communication, attention to readiness requirements, and coordination rather than promises the team could not keep.

06 Process Improvement

Describe a time you used a report or task list to find missed follow-up or incomplete paperwork, and explain what you changed and how you checked the outcome.

Listen for: A strong answer shows ownership, a practical process change, and evidence that the change reduced missed 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 Consultation Workflow

- Train with the Office Manager on patient privacy, practice software, consult preparation, pending lists, and approved communication procedures.
- Shadow the lead Treatment Coordinator or Office Manager through consults, financial discussions, agreements, and treatment start handoffs.
- Review doctor-approved braces and aligner explanations with the clinical lead, then practice a consultation and financial discussion with the Office Manager.

Days 31 to 60

Guide Consults With Support

- Lead consultation preparation and nonclinical treatment discussions with the Office Manager or lead Treatment Coordinator observing and giving feedback.
- Complete supervised financial presentations, agreement documentation, and bond or aligner delivery handoffs using the practice's readiness checklist.
- Manage an assigned pending list and review contact timing, patient preferences, and weekly reports with the Office Manager.

Days 61 to 90

Own the Consultation Process

- Manage assigned consults from preparation through follow-up with the Office Manager available for exceptions and escalation.
- Coordinate approved same-day starts and scheduled treatment starts with the clinical lead while checking documentation and financial readiness.
- Review chart audits, acceptance, follow-up, and start results with the Office Manager, then agree on ongoing goals and one workflow improvement.

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 Treatment Coordinator

A first orthodontic consult can come with big hopes, a few nerves, and a whole list of questions. At [Practice Name], you'll help patients and families make sense of the doctor's recommendations, understand the financial details, and decide on their next step.

You're a fit if

- You listen before you explain and can help a nervous patient feel comfortable.
- You can talk about treatment costs clearly without turning the conversation into a sales pitch.
- You enjoy a good laugh and know when someone needs a quieter, more thoughtful conversation.
- You keep your promises, your notes, and your follow-up list in good shape.
- You welcome coaching and pitch in with the front-office and clinical teams.

What you'll do

- Guide patients through consults and explain the orthodontist's recommended braces or aligner plan.
- Review approved fees, estimated insurance benefits, payment options, and treatment agreements.
- Coordinate records, bonds, initial aligner visits, and approved same-day starts with the clinical and scheduling teams.
- Keep the pending list current and follow up with patients respectfully, with clear notes and next steps.

What we offer

- Pay: [pay range].
- Benefits: [benefits].
- Schedule and location: [schedule] at [practice location].
- Training and support: a 90-day training plan with the Office Manager and [ongoing development opportunities].

Send your resume and a short introduction telling us how you help people feel comfortable making decisions through [how to apply].