Every year we hold a meeting for orthodontists and staff that use Ortho2 systems. Between 300-500 people attend, and those that do consistently tell us that it boosts staff motivation and generates the discovery and implementation of new and valued features. Yet many practices, perhaps yours, have never attended. Do you wonder why you should invest the time and expense to attend an Ortho2 Users Group Meeting? Here are ten good reasons:

1. **The Classes.** Choose your own adventure from more than 40 available classes. Each staff member can customize their own schedule so their experience relates to their responsibilities. Classes are provided for both Edge and ViewPoint users, as well as a variety of universal subjects.

2. **Exhibit Hall.** Each year we hand-pick companies to demonstrate unique and complimentary products and services in our exhibit hall. These products, from imaging technology to payment management solutions, and even consulting services, can enhance the benefits of Ortho2 in your practice.

3. **Computer Room.** Ortho2 staff will be on hand to help. Software and hardware support staff can assist you with specific questions and troubleshooting issues. The Sales Team can share information about features and modules that might make your practice more efficient. Management is available for any suggestions you may have.

4. **Direct Access to Ortho2 Developers.** Members of the Ortho2 Development Team are available to listen to your ideas for improving your Ortho2 experience. This is a great opportunity to directly share your vision for a killer enhancement, and maybe see it in a future release!

5. **Networking with Fellow Ortho2 Doctors and Staff.** The UGM isn’t just about classes. You can learn a lot by networking with fellow Ortho2 doctors and staff. As Dr. Barry Feldman told us, “The interaction with other doctors at the meeting is invaluable. Hearing what other doctors are learning and doing with their offices and software and staff keeps us all on the cutting edge.”
Watch for the meeting brochure to reach your mailbox in Mid-October. We hope you are making plans to attend the 2015 Ortho2 Users Group Meeting, February 19–21 at the DoubleTree Resort, located in sunny Scottsdale, Arizona. Explore several classes while meeting other doctors and staff from across the country!

**Classes**
- Our 2015 keynote session Team Smarts – Does Your Staff Have It? will be offered by Tina Byrne.
- Choose from more than 40 classes presented by other industry-leading consultants and our knowledgeable Ortho2 staff.
- Learn new and proven techniques for maximizing your benefit with Edge and ViewPoint.

**Fun**
- Join us at our Hollywood Nights: A Red Carpet Gala on Thursday evening. Come see your favorite actors and actresses, TV and movie characters, and musicians, and get your picture taken by the paparazzi! While dressing up isn’t required to enjoy the gala, it is encouraged. Prizes will be given for the best costumes.
- Can’t get enough of Scottsdale? Join other UGM attendees for optional excursions, including horseback riding, a 4x4 desert excursion, or Taliesin West Tour on Saturday, February 21.

**Registration**
If you have not registered yet, we hope to hear from you soon! Some classes fill up quickly and now is the time to reserve your spot. To view the brochure online or to register for the meeting, visit us at www.ortho2.com > Meetings and Webinars > UGM, or contact Kim Barker at (800) 678-4644 or ugm@ortho2.com. Then be sure to mail or fax your registration form with your course selections!

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**Contributor Contact Information:**

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Nancy Hyman – Nancy developed the Practice Representative program for Practice Builders orthodontic division and now shares practice growth programs through Ortho Referral Systems. Contact her at nancyors@gmail.com or (323) 308-9817.

Tina Byrne – For more information on systems, team building, marketing, and custom consulting programs from Byrne Consulting, visit www.byrne-consulting.com or call (800) 580-6580 or (410) 836-7848.
Check out the articles in this newsletter from some of the presenters at the 2015 Users Group Meeting!

How do we get young children and teens to cooperate? It’s the first principle of the playground: make it more fun than whatever anyone else is doing, and everyone will come join you!

K. Ryan Alexander, page 6

In this ever-evolving referral picture don’t forget the basis of most successful orthodontic practices; robust referrals and admiration from your dental community.

Nancy Hyman, page 7

Insurance coordinators are finding it difficult to identify anything they like about handling patient benefits. ...Review the Five P’s of your current insurance system to identify the need for change and implement!

Tina Byrne, page 8

Come visit us at these meetings.

Pacific Coast Society of Orthodontists          October 3–4, 2014
Southern Association of Orthodontists           October 9–11, 2014
Middle Atlantic Society of Orthodontists        October 18–20, 2014
Southwestern Society of Orthodontists           October 24–25, 2014
Northeastern Society of Orthodontists           November 7–8, 2014
Edge and ViewPoint have a new feature - Patient Rewards. This system allows you to calculate points and track rewards you offer as incentive to motivate patient attendance, treatment cooperation, oral hygiene, and more.

Patients can trade the points they earn by completing common treatment activities for prizes from your office. This use of positive reinforcement helps motivate patients to be prompt to their appointments, scheduling their next appointment while in the office, filling out online forms, and even keeping their six-month dental checkup.

It’s easy to start using this system with every patient, including recall patients. Patients use customized cards to keep track of their points each time they sign in.

**Patient Rewards Setup**

Setting up your reward system in Edge and ViewPoint is the same once you navigate to the setup screen.

In Edge, click Editors in the Tools tab of the Home ribbon bar. Click Setup under Patient Rewards.

In ViewPoint, click Patient Rewards in the Home ribbon bar, and choose Setup. Then click the Setup tab.

Use the Patient Rewards Points Label field to name your patient rewards. This is the label that will print on appointment cards, and is what patients will see when they receive point notifications and use the Prize Selector to review their point balance and redeem points for prizes.

Use the table on this page to set up who receives an e-mail or message when a prize is requested.

Next, fill in information about the prizes your office will give out. In Edge, click Prizes in the Editors. In ViewPoint, click the Prizes tab of the Patient Reward Setup window.

- **Name** – Enter a description of the prize. The name appears in the Prize Selector that patients see when they are browsing for prizes.
- **Description** – Enter a detailed description of the prize.
- **Point Value** – Enter the default number of points a patient must redeem to obtain this prize.
- **Enable Inventory Tracking** – Enable this option if you want the Patient Rewards system to automatically decrease the number of prizes in your inventory whenever this prize is processed for a patient.
- **Quantity** – Enter the number of this type of prize that you currently have in your inventory.
- **Pending Requests** – This field indicates the number of pending patient requests for this prize, to help you decide whether re-stocking the item is necessary.
- **Info. Fields** – Use the two Info. Fields to track additional information about the prize, such as where you purchase the items, or how much they cost.
- **Image** – Optional. Drag a picture of the prize onto the photo box, or click the box to browse for a picture file you have stored on your computer. This image appears in the Prize Selector that patients see when they are browsing for prizes.

Each program allows you to designate events when patients earn or lose points for common patient actions such as early sign-in, scheduling an appointment before leaving the office, keeping dental checkups, logging into mobile apps, and referring a patient.
To do this in Edge, click Point Triggers in your Editors under Practice Connect. In ViewPoint, click the Reward Triggers tab of the Patient Reward Setup window.

Finally, create a list of additional ways individual patients and subgroups of patients can earn points, such as attending your office open house, earning good grades at school, or volunteering in your community.

In Edge, use the Custom Point List Editor. In ViewPoint, click the Custom Point List tab of the Patient Reward Setup window. Click the green plus sign to add a new action. Then enter a description and point value. Save your changes.

**Managing Patient Points and Prizes**

Use the Patient Rewards Management window to add and deduct patient reward points, redeem prizes, and review the patient's reward ledger.

In Edge, open a patient folder, and select Patient Rewards in the Patient tab. In ViewPoint, click Patient Rewards in the Home ribbon bar, then click Manage Patient Rewards. If you don’t have a patient active, use Fast Find to search for a patient.

The Patient Points tab shows the patient’s name and current point balance, as well as the patient’s ledger of how points have been accrued. Additionally, you can assign points for items that are not included in either the Point Triggers or the Patient Reward Custom Point lists. You can also redeem prizes the patient has requested.

The Reward Cards tab allows you to associate and inactivate patient reward cards. To associate a card, click the green plus sign next to Associate Card, and then swipe the card. That card is now registered to the patient. You can enter a description of the card, such as the patient’s nickname, if desired. Contact Quality Resource Group to order personalized patient rewards cards. In addition, you will also need an unencrypted keyboard emulation swiper, such as the one you use to process credit and debit card payments.

The Prize Tracking tab allows you to view all prizes that have been redeemed in the time frame selected.

### Assigning Reward Points to Subgroups

In Edge, click Other Tools > Assign Reward Points via Subgroup in the Tools tab of the Home ribbon bar. Select the description to use from your Custom Points table, or type a new description for the award. You can then change the default point value to assign, if needed. Next choose the subgroup that should receive the reward points. The list of patients who will receive the points shows up in the Patient portion of the window. Individual patients can be removed from the list by selecting the desired patient and pressing the delete key.

In ViewPoint, click Patient Rewards > Assign Points to Subgroup in the Home ribbon bar. Choose a subgroup to assign the points to and click OK. Select the description to use from your Custom Points table, or type a new description for the award.

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**About the Author**

Wesley DeShaw is the Systems Consultant for the Southern Association of Orthodontists, as well as Alberta, British Columbia, Manitoba, Saskatchewan, and British West Indies. He will be teaching the Edge 101 class at the 2015 UGM.
At nearly every initial consulting visit, I am accused of being an alien: “Well, Ryan, the scheduling system is terrific, but how are we supposed to stay on time if our patients do not cooperate? I don’t know what planet you’re from, but here on Earth, patients are regularly late for their appointments, have multiple broken brackets, and terrible oral hygiene to boot!”

As fun as interplanetary consulting sounds, I can assure you that my feet are firmly planted on Earth.

So, the question for the ages (mostly 6-17): How do we get young children and teens to cooperate? It’s the first principle of the playground: make it more fun than whatever anyone else is doing, and everyone will come join you! To accomplish this, we must shift from an expectation of cooperation to an invitation to participation. I am convinced that by reframing the issue of patient cooperation, a practice can turn what was once a dreaded and boring system into a vital part of the practice marketing system.

• **Expectation:** Don’t chew gum! Don’t eat popcorn! Don’t touch those gummies, or so help me I will tear my hair out while I repair that bracket for the seventeenth time!

To children, and especially teens, do’s and don’ts are a sort of white noise. They do, however, like games, and learn best through play—so, let’s make this a game. We need to make the time spent in our orthodontic practices feel less like a parental responsibility and more like it is the patient’s game to win. If you can use all of the marketing and new patient enrollment expertise and reframe things so that you not only get the sale, but turn your patients into raving fans—well, now, that’s a good place to be.

• **Invitation:** Let’s talk practical application. There are many ways to issue a participation invitation, but here are a few ideas:

- Make them part of your team. Right up front, let the patients know that they are not only cared for, but in joining your practice they have gained a cheering section. From day one everything in the practice should focus on elevating the patient’s mind-set from being a patient in your practice to a valued team member, who without their help, the game of braces cannot be won. Each time a patient arrives five minutes before their appointment time and is ready to go on time, be sure to give them a high five to celebrate the win. Enthusiasm is the best marketing investment your practice can make. When you invest a consistent stream of kindness and genuine interest in cheering on your patients’ progress to the finish line, then a visit to your practice will become the highlight of their month.

- Start a patient rewards system. The more points they accumulate, the better prizes they win!

- Publish a set of rules to the game of braces so they know what it takes to win, with an accompanying report card. The report card can take the form of a board game or a scorecard, and when they play by the rules, they score or move up the board! If a patient’s oral hygiene is holding them back, then they don’t score or make as much progress that month. If they go too long without scoring, someone

**About the Author**

K. Ryan Alexander is a senior consultant with Millenium Management Services and for the past five years has quickly developed a large base of happy, satisfied clients using proven Millenium Systems. He is teaching one class at the 2015 UGM.
In this ever-evolving referral picture don’t forget the basis of most successful orthodontic practices; robust referrals and admiration from your dental community. It is time to add big tent productions to your professional relations marketing calendar. In addition to traditional dental visits look at larger events that gather your referrals at one location for educational and/or social purposes. Open your invitation list to all dental offices within a specified proximity to your practice and watch current referrers energize their efforts and unfamiliar offices jump into the referral mix!

Don’t forget a dated event protocol. Plan the event with a six-month lead time (when feasible) for maximum exposure.

Six months prior to the event, hand deliver and mail save the date cards. Indicate that an invitation will follow.

Four months prior to the event, hand deliver and mail invitations. Allow space for the attendees to indicate the name of doctor(s) and staff attending, office name, contact person, phone number, and optionally an e-mail address.

One month prior to the event, resend the invitation or call non-respondents. For those who have responded they are attending, send a confirmation letter and directions to the location of the event. Two days prior to the event, call to remind attendees.

After the event, send a thank you note to all attendees. For an extra impact consider having the orthodontist and practice representative hand deliver a thank you note to all attending practices.

Event Ideas
• Consider an OSHA presentation for dentists and their full team. Provide the lecture (6 CE units) every other year at a professional meeting space. Leslie Canham (leslie@lesliecanham.com) is certified in this area of expertise across the country. Alternate the OSHA meeting with creative subjects: customer service, collections, dental procedures, marketing tips, etc. Rosemary Bray (rosemarybray@msn.com) conducted a wonderful customer service presentation for our dental community in 2013 and the standing room-only audience response was nothing short of amazing!

• Offer CPR training to referring offices. You may select several days throughout the year and offer the course in your office or you may offer the course in the referrer’s office. Select a professional CPR company and send four notices throughout the year if offering in the GP’s office or select two CPR days at your practice. The marketing manager will coordinate the training date for the referring office, and call to remind the office and CPR person two days before the event. It is not necessary to provide food or be present if the event is at a referring office. If the training is at your office provide a light snack and have select staff present.

• I recommend conducting a flu shot clinic for your referring offices in September. Provide a light lunch and allow two hours for an even flow of attendees. I recommend holding the clinic from noon to 2:00 P.M. although several Ortho Referral Systems clients hold the event at the end of the day and report a well-attended group. I prefer lunch events as many staff members are concerned with childcare after hours.
In the July 2014 issue, the first part of this article explained the first three P’s for an effective insurance system. A brief recap of the earlier commentary would advise:

1. We maintain a comprehensive understanding of Plans and Participation – particularly if you are accepting assignment of benefits and/or contracted as in-network providers. Far too frequently, the primary deficiencies I encounter in offices participating with benefit plans is a lack of the most general insurance knowledge and a failure to retain current fee schedules for in-network plans.

2. To establish Practice Policy for pre-crediting, accepting, and following up with benefit receivables. Consider pre-crediting only primary carrier’s benefits at the start of treatment when benefits exist with more than one insurance carrier. It may serve your practice well to collect your fee at the time of service and allow benefit payments to go to the subscriber/patient for miscellaneous charge procedures, as these types of charges are likely to be dictated by limitations and exclusions.

3. Your Preparation is complete if you are making use of the many functions for insurance within your practice management software, aligning CDT codes to your specific treatment plans or procedures, and utilizing well-formatted forms for verification, treatment fee presentations, and financial contracts. Furthermore, insurance circumstances which may result in negative exchanges with patients/responsible parties are totally predictable – educational materials for third party benefits are as important as treatment educational materials.

Process
The process of insurance, the fourth P of our system, involves three specific tasks or areas: verification of benefits, claim submission, and benefit payments. With proper execution of each task, the job of the insurance coordinator is made much more efficient and manageable.

A) Verification of benefits or eligibility is a necessity if you are pre-crediting and accepting assignment of the insurance benefit. For new patients, benefit verification should take place prior to the initial evaluation appointment so that the treatment coordinator has accurate information for the fee presentation. For recall or growth and observation patients, it is helpful to establish a protocol where a reminder is sent the month prior to the appointment to request your office be updated on any new or changed benefit information. This eliminates the need to establish eligibility and benefits while the patient is in the chair when treatment is indicated.

Be certain to identify the following details, exclusions, and limitations at the time of verification:

- Benefit amount and percentage of fee paid
- Effective date of plans
- Waiting period
- Adult treatment
- Code exclusions – no benefit for limited or interceptive care
- Code limitations – the allowance of only one comprehensive treatment code
- Treatment or work in progress
- Coordination of benefit method
- No out-of-network assignment or no out-of-network benefit

B) Claim submission is one of the most straightforward tasks within your process, however standard guidelines for the set up of claims should be established.

- Complete all necessary information for your claims to be accepted on the first submission.
• Submit your full fee to the insurance carrier, unless the carrier mandates submission of an allowed fee schedule amount.

• Use a formulary to break down the fee into the initial amount due and the period fees. It should be the manner in which you determine your fee is earned – 25% of the fee amount as the initial, and the remainder of the 75% divided into the number of months of treatment.

• Enter the information to accurately and automatically generate ongoing or continuation claim forms. Approximately 85-90% of insurance carriers will not require ongoing claim submission for payment once the initial claim is opened or activated. Missing the setup for the other 10-15% will in due course result in delinquent insurance benefits.

• Submit start of treatment forms and miscellaneous charge forms the day appliances are placed.

• Submit ongoing or continuation of treatment forms no later than the 5th of each month.

• For claims with secondary benefits, submit the day the primary insurance payment or information is received along with a copy of the Explanation of Benefits form from the primary carrier.

Both Ortho2 Edge and ViewPoint programs allow for the preparation of insurance claims and financial contracts as proposed treatment. With this function, claim submission should never be delayed past the time frames mentioned above.

C) The posting of benefit payments must not be considered a mindless task. I mention this as I see many offices delegating this duty to team members other than the insurance coordinator. I firmly recommend your insurance coordinator be the one posting benefit payments to ledgers. Tried-and-true advice for posting benefit payments includes:

• Post insurance payments along with details for the date of service – e.g. DOS Apr-Jun 2014. Reviewing previous payment notations made in the same manner will allow for the identification of consistencies or inconsistencies of payment as expected.

(Useful Tip: Label your insurance carrier names with a code at the end which denotes the frequency of your benefit payments. Example: “Metlife_Q” for quarterly payment)

• Carefully review all Explanation of Benefit (EOB) statements for the following information and make adjustments to your pre-credited insurance or claim setup accordingly:

  • With receipt of the initial payment:

    – Look for the frequency of ongoing payment, and the necessity for submission.

    – Confirm for contracted/managed care, the allowed fee is in agreement with our final fee to the patient. There should be no discrepancy.

  • With receipt of scheduled or ongoing payment

    – Look for chronological consistency with your dates of service.

    – Make certain the amount of the payment and the

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Free Webinars

We offer you free, online, real-time webinars. Each month throughout the year we present various topics. It’s a great solution for training new users, refreshing experienced users, or learning about new features. Webinars are offered several times each month so you can choose the time that fits best with your schedule. Preregistration, a computer with a high-speed Internet connection, and a phone are required. For a full schedule, and to register, visit www.ortho2.com > Meetings and Webinars > Ortho2 Webinars, or contact Judy Brown at (800) 346-4504 or jkb@ortho2.com.

Upcoming Webinar Dates

**Edge: Office Contact Manager**

**Thursday, October 9th, 10:00-11:00 A.M. Central Time**

**Tuesday, October 21st, 2:00-3:00 P.M. Central Time**

Use the Office Contacts feature to set up and maintain the list of people, agencies, and other office resources that are not necessarily involved with your patients’ treatment and care.

**ViewPoint: Treatment Chart/Plan Setup and Design**

**Wednesday, October 15th, 10:00-11:00 A.M. Central Time**

**Monday, October 27th, 2:00-3:00 P.M. Central Time**

Creating Treatment Chart and Plans are completely customizable to your practice. You may create as many styles as you need to describe the information required at all stages of a patient’s treatment. We’ll walk through the setup options available for designing chart and plan styles that meet your practice needs.

**Edge: Scheduling Basics**

**Thursday, November 6th, 10:00-11:00 A.M. Central Time**

**Monday, November 17th, 2:00-3:00 P.M. Central Time**

An overview of the flexible, full-featured capabilities in your Edge patient scheduler. We’ll demonstrate navigation tools, and various ways you can view your schedule. Learn the different methods for making patient appointments, using drag and drop to move scheduled appointments, and processing appointments. We’ll also discuss how to use the grid bar to manage pending appointments, patients without an appointment, old appointments, and other user-definable groups. Lastly, we’ll discuss available appointment reports.

**ViewPoint: Office Calendar**

**Wednesday, November 12th, 2:00-3:00 P.M. Central Time**

**Tuesday, November 25th, 10:00-11:00 A.M. Central Time**

Use the ViewPoint Office Calendar to review and schedule non-patient appointments, such as meetings and appointments with dentists and other professionals that care for your patients.

Help Us Help You

Please be prepared to provide your customer number, practice name, and office location when you call our support teams for assistance. If you use ViewPoint, you will find your customer number by clicking the Help menu and choosing About. You can find your customer number in Edge by clicking the Edge button > Help > About. Please be sure to provide this information—and repeat your phone number—when leaving a phone message requesting support. Having clear information helps us serve you more quickly.
Judy Brown

Judy Brown, Ortho2 Internal Services Coordinator, celebrated her 20th anniversary with the company on September 6. Judy has held several positions in her tenure, all of them relating to customer service. She says taking customer calls and resolving customer issues has been her favorite aspect of her current position. While helping customers hasn’t changed much over the years, Judy remembers when the building was about a third of its current size, and the entire staff sat together in one area.

Judy has been a long time Ames resident and enjoys the college town atmosphere. She is married to David, has two daughters, Monica and Eva, and five grandsons. Her oldest daughter Monica recently moved to Florida with her family, and Judy looks forward to a new vacation spot!

When not with family, Judy enjoys being a member of the Ames Community Theater. “I love the exposure to meeting people of all talents and professions who bring theater to life for our community,” she says. In addition, Judy sings with her local church. She thought about becoming an opera singer when younger, but took up singing as a hobby instead. She has even sung at four Ortho2 colleagues’ weddings in the past.

Holidays

Our corporate office is closed on the following holidays:

- New Year’s Day
- Memorial Day
- Independence Day
- Labor Day
- Thanksgiving Day
- Christmas Day

If a holiday falls on a Saturday, we observe the holiday on the prior Friday. If a holiday falls on a Sunday, we observe the holiday on the following Monday.

The Friday after Thanksgiving, Christmas Eve, and New Year’s Eve are optional holidays. We offer limited support on those days.

Service Excellence

We invite you to recognize Ortho2 employees by sending Extra Mile cards. A card is included in this newsletter, or you may send cards online from the Contact Us page of our website. Our goal is to uphold our tradition of excellence in customer service, and with our Extra Mile program, you can let our employees know when you appreciate their extra effort. We encourage you to send an Extra Mile card whenever an Ortho2 employee goes the extra mile for you. The recognition is valued by the recipient and is acknowledged by our management team. We continue to look for better ways to serve you. Thank you for helping us recognize excellence.
Ortho2 Anniversaries

Congratulations to these Ortho2 staff members who celebrated anniversaries during the third quarter of 2014.

Twenty-Eight Years
- Craig Scholz

Twenty-Seventy Years
- Sara Harbacheck

Twenty Years
- Judy Brown

Nineteen Years
- Marla Miller

Nine Years
- Michelle Kinnaman

Six Years
- Cal Rebhuhn

Five Years
- Judy Denny
- Paul Ezerski

Three Years
- Brent Jacobsen
- Steve Mahan

Two Years
- Rachel Johnson
- Andrew Smith

One Year
- Wesley DeShaw

On a Personal Note

Ben Shin, Ortho2 Multi-Media Marketing Coordinator, and his wife, Amy, welcomed Sullivan on August 15. Congratulations, Ben!

Jo Jacobson, Ortho2 Software Support Supervisor, becoming a grandma to Eli Michael on June 20. Eli was 7 pounds, 6 ounces, and nearly 20 inches long. Congratulations, Jo!

The Sales Team was challenged by Diane Stephenson of Dr. Grob’s office to do the ALS Ice Bucket Challenge. They accepted and made a donation to the ALS Foundation.

Sullivan Shin

Eli Michael

The Sales Team after the Ice Bucket Challenge
Career Milestones and Development

Gabrielle Bradford joined the Software Support Team on June 30 as a Software Support Representative. Previously Gabrielle worked with Edward Jones Investments as the Branch Office Administrator. Welcome to the team, Gabrielle!


Micky Augustin moved to the Product Development Team when he accepted the Quality Assurance role. Micky has been with Ortho2 for more than 10 years as an Equipment Technician.

Steve Mahan and Brandon Niewoehner were promoted to Software Support Advanced Techs. Steve started with Ortho2 in August 2011, and Brandon in June 2012 as Software Support Representatives and Trainers. Congratulations Steve and Brandon!

Amy Schmidt was promoted to Vice President of Sales and Marketing. Amy started with Ortho2 in 2001, working part-time during her college career. After she graduated in 2005, she started full-time with the company. Amy was previously the Director of Sales and Marketing, a position she accepted in 2008. Congratulations, Amy!

Chris Russell joined the Software Support Team as a Software Support Representative on August 29. Chris is currently pursuing a degree in Computer Engineering with a minor in Psychology at Iowa State University. Welcome aboard, Chris!

Jorge Rios accepted the Equipment Technician position, and started with Ortho2 on September 2. Jorge recently graduated from Iowa State University with a degree in Management Information Systems. Welcome, Jorge!

Rachel Johnson moved to the Hardware Support Team on September 15 as an Equipment Technician. Rachel started with Ortho2 in July 2012 as a Software Support Representative and Trainer.

Contact Us

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http://blog.ortho2.com
www.ortho2.uservoice.com
6. **Mingle with Industry-Leading Consultants and Doctors.** This year’s meeting features EIGHTEEN top consultants and five orthodontists presenting classes. That’s 23 opportunities to benefit from leaders in the orthodontic profession about topics that directly impact you or your staff.

7. **Exclusive Discounts.** Just for attending our Users Group Meeting, you become eligible for discounts on our products and services. These discounts are available only to those who attend the meeting.

8. **Location.** The real estate maxim is “Location, location, location!” Well, we picked sunny Scottsdale, Arizona for 2015! Each year we try to select a location that can be a fun getaway during the colder weather most of us are otherwise experiencing in February. It’s always warm at the UGM!

9. **The Famous Ortho2 Welcome Party.** Over the years, our themed party has become one of the highlights of the meeting! This year’s theme, Hollywood Nights: A Red Carpet Gala, is guaranteed fun. Ortho2 staff, speakers, and many attendees (not required) will dress in their best red carpet attire, as their favorite actors, actresses, and other fun costumes. You will leave with friends you never knew you had!

10. **The Knowledge and Benefits You and Your Practice Receive.** The single best reason to come to the Users Group Meeting is the information learned that will benefit your practice right away. The Ortho2 Users Group Meeting is the best location on earth to pick up everything from simple tips and tricks, to paradigm shifting strategies that can make your practice more fun, efficient, and profitable!

Join us in Scottsdale, Arizona, February 19-21. You won’t regret it!

Dan Sargent, Ortho2 President

If you have any questions about the meeting, please contact Kim Barker, Meeting and Event Coordinator, at ugm@ortho2.com.

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**Patient Rewards continued from page 5**

description for the award. You can then change the default point value to assign, if needed. Review the list of patients that will receive the points and click Assign Reward Points.

**Selecting Prizes**

Patients can view the Prize Selector, review their point balance, and redeem their points for prizes as they use your Patient Sign-In station. In addition, Edge customers can allow patients do the above through the Practice Connect app.

For both Edge and ViewPoint, add the Browse Prizes button to your Sign-In screen. Patients should either swipe their patient rewards card or enter their birth month and day to initiate the prize selector. If you have patients use their birthday month and day to select prizes, they must have an appointment for today. However, patients can view prizes at any time if they use their patient rewards card.

Patients can see how many points they have at the top of the screen, all available prizes, and points required for each prize. In addition, they can request prizes through the screen.

**Patient Cooperation continued from page 6**

will have to talk to the coach about it. But, if the patient is winning they must receive regular rewards, and if they consistently do well you might offer an opportunity to win even bigger prizes, with contests celebrating one key area of patient participation each month.

Rethink. Retool. Re-energize. Reframe cooperation so that it becomes fun for patients. When your orthodontic team finds it fun to explain how to play and win the game of braces, then your patients are sure to follow and turn the patient participation system into the crown jewel of your marketing program. Make patient participation a fun and enjoyable system where the patient is the superstar surrounded by a team of caring, enthusiastic team members, and the patient will find their victory when they cross the finish line with a beautiful smile that they helped create!
**Insurance Benefits continued from page 9**

- With receipt of any payment or EOB with no payment:
  - Review the remark codes and corresponding comments.

**Punctuality**

The sense of urgency with which you address delinquent patient receivables must also be applied to your delinquent insurance benefits. This requires both reviewing the Explanation of Benefit statements as they are received and auditing the insurance reports each month. ViewPoint’s Insurance Detail by Company report or Edge’s Open Insurance report are excellent sources for your monthly audit.

There are some overdue benefit situations which indicate it is best to contact an insurance carrier – e.g. overdue initial payment. The oversight made by most offices with regard to delinquent benefits is the failure to communicate with the patient/responsible party!

Our system should include:

1. A delinquent insurance mailing to the patient/responsible party when an insurance benefit is 45 days delinquent. The mailing should ask for their assistance by contacting their carrier and remind them that the benefit is ultimately their responsibility.

2. A second past due insurance mailing/transferring the balance if the insurance benefit is more than 75 days delinquent and the patient/responsible party has not been in contact with you.

3. A transfer of benefit mailing indicating you have received notification from the insurance company (remark from EOB) that the benefit has either been paid in full or terminated and the insurance balance that exists has now been transferred to the patient/responsible party for payment. If there is a disagreement by the responsible party, allow them to do follow up with their carrier.

As I stated in part one of this article, insurance coordinators are finding it difficult to identify anything they like about handling patient benefits. I believe the problems exist within the insurance system whereas team members feel responsible to solve the many circumstances taking place while managing benefits and the overwhelming time required in deal with the situations.

Review the Five P’s of your current insurance system to identify the need for change and implement! For additional questions or assistance feel free to contact me at tinabyrne@byrne-consulting.com.
Are your patients not cooperating with your treatment plan? Re-think patient cooperation and transform it to patient participation to see the results you want.

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Referrals from the dental community are an important part of a successful orthodontic practice. Go the extra mile with your referrals by hosting several events throughout the year to thank them.

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Managing insurance benefits can be a tedious task. In the second part of this article, review the final two P’s you need to tackle all insurance benefits.

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