As you may know, Doctor Bob passed away this past February. It’s hard to overstate his influence on Ortho2, especially during its formative years. We knew him as Dr. Bob, Uncle Bob, just plain Bob, Dr. Bizarro, and occasionally, but rarely, as Dr. Robert P. Scholz.

Bob completed his orthodontic certification at the University of California San Francisco in 1963, then spent two and a half years in Athens, Greece practicing orthodontics for the Air Force. He ran a part time private practice, while maintaining an appointment at UCSF for 20 years, departing as Clinical Professor in 1987. He was Adjunct Professor at the University of North Carolina, Chapel Hill and Temple University. He was also Editor of Techno Bytes, the technology section of the AJO/DO. Dr. Bob lectured worldwide on various subjects including functional appliances, practice management, PC-based digital imaging systems, and most recently, on technology subjects of interest to orthodontists. And, of course, he was a stockholder, board member, and advocate for Ortho2.

I don’t have to tell those of you who knew Bob that he was an unconventional, at times confounding, but always interesting and exceptionally unique individual. No event was unchanged by his involvement and, while things wouldn’t always go according to plan, they did always benefit from his participation.

I owe Bob a tremendous debt. In 1986, when my original partner relocated to Colorado, Ortho2 could easily have gone into decline. Instead, Bob invested in it and helped provide the orthodontic expertise and big-picture thinking that launched us to the next level. He remained deeply committed to the company, most recently running the popular Cutting Edge Webinar Series, which connects industry experts to orthodontists and residents interested in a particular topic. We will continue the Cutting Edge series, but it won’t feel the same without Bob as the moderator.

Everyone who knew Bob knows what they’ve lost. For me, I’ve lost my partner, my friend, my mentor. It’s hard to imagine Ortho2 without Bob, but fortunately his legacy will live on at
2015 Users Group Meeting Wrap Up

Hollywood Nights: A Red Carpet Gala Costume Winners

First Place – Tyler, Dumas, and Reyes Specialists in Orthodontics

Second Place – Kohrs Orthodontics

Third Place – Dr. John Fishell Jr. Orthodontics

Honorable Mention – Kim Martens, Duthie Orthodontics

Congratulations to the Exhibitor Bingo winners:
• Janell Eaton with Guenther, Larson, Kim Orthodontics
• Tina Brickey with Duthie Orthodontics
• Veronica Martinez with Dr. Ann Marie Gorczyca
• Samantha Redman with Dunn Orthodontics

Contributor Contact Information:
Dr. Roger P. Levin – Dr. Roger P. Levin and Levin Group provide expert orthodontic practice management and marketing solutions. For more information, contact Levin Group at (888) 973-0000, or visit them at levingroup.com/ortho.

Debbie Best – Debbie Best, practice management consultant and lecturer, has more than 35 years of experience in the orthodontic field. Contact her at (925) 447-6993, debbiebest@aol.com, or visit her on the web at www.consultingnetwork.org.

If you are planning a presentation or lecture at a society meeting, university, or local meeting, we can provide you with any screenshots you need and can discuss how to best use Edge and/or ViewPoint in any situations you may be illustrating. We appreciate the good word you spread and would like to assist in any way we can!
Congratulations to Dr. Daniel Grob on becoming the new editorial director of Orthotown magazine!

“From the moment I sat down I felt happy, and left happier.”
Karla Flores, Drs. Demarco and Tilkin, Silver Spring, MD

“The organization of this meeting was excellent! Loved everything.”
Bobbi Sipler, Dr. Wm. Graham Gardner, Richmond, VA

“Best use of time for learning and expanding knowledge.”
Robin Boren, Dr. K.B. Wong, Seattle, WA

“Ortho2 and their staff are amazing assets to our office and help us stay knowledgeable, fast, and efficient with our practice flow.”
Ashley Erhart, Varble Orthodontics, St. Louis, MO

Join us February 25-27, 2016 in Las Vegas for the 32nd Annual Users Group Meeting! If you haven’t yet experienced a UGM, now is the perfect time to do so. Don’t just take it from us, see all of the pictures on our website www.ortho2.com > Meetings & Webinars > UGM.

Also, take the time to preregister for next year’s meeting and be one of the first offices to get information about available classes. To preregister, call Kim Barker at (800) 678-4644 or visit www.ortho2.com > Meetings and Webinars > UGM.

Congratulations to Dr. Daniel Grob on becoming the new editorial director of Orthotown magazine!

Are you the only person in your office who sees the newsletter? Pass it along! Use the routing slip on the cover to ensure everyone gets the chance to read the newsletter.

You can also read the newsletter on our website www.ortho2.com > Resources > Newsletters.
Workflows are a way to automate your system in Edge. You can change a patient status, merge letters, add patients to stacks, and even open the patient’s treatment chart when you seat a patient. Most workflows are procedure based, meaning something is happening to the patient’s appointment. You can also create workflows based off status changes and other triggers – the possibilities are almost endless.

**Status Changes**
The most common workflows offices use are status changes. You can change the status to retention on a kept debond appointment, or even display a prompt to the front desk to choose a status when they process your new patient exam as kept. Status workflows are often used to clean up statuses. For example, when a records appointment is made, you know that the patient should be in the records status, and that change happens automatically in the background.

To create a status change workflow, go into the Editors, and find Procedures in the list on the left. Once logged in, find your debond appointment and click on the wizard icon to the right of Kept. Click on the Activity dropdown and choose Change Status. In the New Status dropdown, choose your retention status and click OK. In the dropdown list for Kept, and all other types, you will now see Change Status – Retention.

If you want Edge to prompt you to choose a status to change the patient into, follow these same steps, but in the New Status dropdown, choose none. When you click OK, you will now have a workflow called Change Status – Prompt.

**Merging Letters**
Merging a letter is the next most common workflow. In the Editors select Procedures from the list on the left. Once logged in, choose the procedure you want to work with. Select the wizard icon next to the appointment status you want to work with. In the Activity dropdown, choose Merge Letter. This will then give you additional options to pick the letter, select your merge type, include an envelope, and if you want to send it to the queue. Once you click OK, when you click on the dropdown next to status you are working with, you will see your new workflow called Merge Letter – Letter Name. Select it, and you are done.

**Stacks**
If you use Stacks in Edge, you can automate the process of sending a patient to a stack using workflows. Let’s say that every time you process a records appointment, you want to send the patient to a stack for insurance verification. As long as the stack name already exists, this is easy to set up. Choose your procedure in the Procedures Editor, and click on the wizard icon next to the status you want to work with. In the Activity dropdown, choose New Stack Entry. You will then see a list of all of the current stacks in your list. Choose the stack you want to add these patients to and click OK. It’s that easy. You now have a workflow called New Stack Entry – Stack Name to use.

You can also combine workflows to, for example, change a patient’s status and merge a letter. Because this workflow is going to do more than one thing at a time, we need to go to a different screen to create it. In the Editors list on the left, scroll down to the bottom of the list and find Workflows. On this screen we can manually create workflows without the wizard, or use wizard to add to an existing workflow.

To begin, click on New. In the top
of the screen, change New Workflow 1 to the name of your new workflow. When you’re doing multiple activities, give the workflow a name based on how it’s used. In this example I will call it Exam Kept. The easiest way to then create this workflow is to click on the wizard icon that has the green plus sign next to it. Choose your Change Status activity and select the appropriate status. When you’re done, simply click on the same wizard icon with the green plus sign and set up your letter. Your workflow now has two activities. Once you click save in the top left corner, this workflow will be available to use in the Procedures Editor.

**Opening a Treatment Chart when Seating a Patient**

Opening a patient’s treatment chart when you seat the patient is another common workflow. Please note, you will need to use the computer by the chair the patient is seated in for this workflow to function properly. To set this workflow up, you will again need to use the Workflows Editor.

In the Workflows Editor, click on New at the top and give your workflow a name. In this example, I am going to call it Open Treatment Chart. In the middle of the screen, you’ll see the list of activities. Simply click and drag the Open Patient activity over to the empty Workflow Activities box to the right of it. If you drag the wrong item over, simply press delete on the keyboard to remove it.

Once Open Patient is in the middle of the screen, click on it so it displays the Activities Properties. On the right side of the screen, you will now see an option that says TabToOpen. Click on the dropdown to the right of it and choose Tx. Hub. Save it and the workflow is created.

Next we need to set it up so this workflow fires every time we seat a patient. To do this, we need to go to the Triggers Editor. This is at the bottom of the Editors list to the left. In here, you will see a list of Triggers that you can run a Workflow with. The Triggers are used to fire a Workflow every time a certain event happens, such as every time you seat a patient, each time you process ANY appointment as Missed, or any time a contract is changed.

Click on the empty box to the right of Patient Tracker Seat. Click again on the dropdown that just showed up, and select Open Treatment Chart. If this option isn’t available, make sure you saved your workflow in the previous step. Click save. It’s just that easy and it’s all set up.

These are just a few examples of what you can do with the powerful workflows function. If you would like to learn more about workflows or see a video on how to set them up, watch our Visual Help video on Workflows. You can find it in Edge by going to the File menu, hovering over help, and choosing Visual Help. Once logged in, scroll down to the Webinars section and Click on Edge Workflows.

### About the Author

Derek Dohrman is an Advanced Tech and Trainer with Ortho2. In his free time, Derek enjoys spending time with his wife and two dogs, kayaking, and sampling craft beers that he has not tried before.
Running a successful ortho practice is a complex enterprise that requires careful coordination and proficiencies beyond the science of orthodontics. Practice owners must manage their offices adeptly, especially in the new dental economy where competition for patients has intensified and ortho shopping is commonplace. When a practice doesn’t run as smoothly as it should, what improvements should be made first? Levin Group has identified 9 Areas of Expertise that, when effectively handled, will result in more referrals, more new patients, higher production, and less stress.

1. Production
Establishing – and meeting – a target of 15% growth in production every 12 months will keep ortho practices on the path to success. Anything less than 15% serves as a warning that the practice might be headed for a plateau or, worse, a decline. Fortunately, ortho production can be consistently increased without working more hours. Here’s how:

- Develop systems to bring in more new patient referrals from both doctors and current patients.
- Lay the foundation for additional future production by executing a solid observation program.
- Build higher levels of production into the day with more efficient scheduling.

2. Collections
Controlling practice finances and collecting 99% of fees owed will protect the bottom line as production increases. To reach the collections target and keep profits up, orthodontists can implement the following measures:

- Help make treatment more affordable, and encourage on-time payments, by offering financing options to every family. These should include smaller deposits to begin treatment and financing through a reputable outside company.
- Limit office overhead to 49% by regularly analyzing expenses and looking for ways to cut costs.
- Make sure the practice’s fee structure is competitive but that it also maintains profitability.

3. Team Building
For most orthodontists, managing a team can seem more daunting than even the most difficult clinical procedures. Workforce administration isn’t part of the curriculum in most dental schools, yet practice owners find themselves hiring, supervising, and coaching a multi-person staff. By making team building a focus and following a few guidelines, doctors can eliminate many personnel issues and solve the conflicts that inevitably arise:

- Create a cooperative atmosphere with a practice vision statement of where the practice will be in 3–5 years. This provides a common goal for the entire team and serves as a uniting influence.
- Promote collaboration through efficient team meetings. Each morning, the Daily Business Meeting™ informs everyone what to expect that day. The Monthly Business Review™ gives the orthodontist and staff the opportunity to train together and address more complex questions.
- Provide team members with written job descriptions, annual performance reviews, and a regular training schedule so they can meet and exceed expectations.

4. Scripting
Scripts help all team members, including the doctor, become adept at influencing patients and parents, whether in a case presentation, on the phone, or in the chair. Scripts are not meant to be recited, but instead translated into each person’s own words. The guidelines below will help ensure that scripting is successful in the ortho practice:

- Scripts should be practiced through role-playing so that they become second nature.
- Every patient and parent interaction should be
scripted so that team members:

- Ask for more word-of-mouth referrals.
- Close more case presentations.
- Reduce no-shows and cancellations by emphasizing the value of each appointment.
- Build strong relationships with every family.

5. Case Acceptance

In today’s dental economy, ortho practices need to maximize both time and effort. That includes closing 90% of all cases by emphasizing what parents are buying: a beautiful smile for their child. Treatment coordinators and doctors can turn more “maybes” into “yeses” by:

- Scripting the entire case presentation from start to finish, keeping the doctor’s time in the room to a minimum.
- Emphasizing lifestyle benefits (the smile) rather than clinical details.
- Expecting and skillfully handling questions and objections.

6. Scheduling

An ortho practice’s scheduling system can make or break the entire day. It manages patients, staff members, and the doctor to expand production and minimize chaos. To keep each day running as smoothly as possible:

- Conduct time studies on the most common procedures performed at the practice to ensure that the schedule allows enough time, but not too much, for each appointment.
- Use 10-minute increments to build the schedule, rather than 15.
- Set aside time for new patients so that they can be scheduled within 7–10 days, and know where emergencies might be fit into each day.

7. New Patient Experience

The New Patient Experience begins with the very first phone call to the ortho practice. It encompasses the consultation, the tour, and the first appointment as well. Throughout the process, parents and patients continually consider whether they want to join the practice – or not. Here’s how ortho teams can provide WOW customer service to prospective families:

- The front desk staff must be prepared with proper scripting so they can appoint 98% of prospective patients who call. To do this well, team members need to have the scheduling system at their fingertips, get to know the caller a bit, and impart information about the orthodontist and practice.
- During the consultation, the treatment coordinator needs to welcome new families like VIPs and get to know them while presenting the case for treatment.

8. Treatment Coordinator

Hiring a treatment coordinator and training her to sell ortho treatment successfully will help make a 90% case acceptance rate possible and improve the ortho practice’s ability to establish relationships with families. Her job description should include the following:

- Practicing the “golden 10” with patients and parents by learning 10 personal facts about them. This technique gets them talking and feeling comfortable.

About the Author

To learn more about how to grow your ortho practice, attend Dr. Roger P. Levin’s “Building The Superior Ortho Practice” seminar on June 19 in Newport Beach, CA. Ask your Ortho2 Systems Consultant how you can receive an educational grant to attend the seminar free.
Piloting a successful orthodontic practice – between building and maintaining a quality crew, monitoring systems and protocols, and consistently delivering excellent service to your first class passengers – is a full time job. With the right training, practice, and dedication one pilot can fly a small plane. Just as when you transition to a larger aircraft it takes more than one person to keep the plane in the air, it can be difficult for orthodontists to treat patients and manage all of the details needed to keep the growing practice above ground.

Whether you use a co-pilot to assist you or a crew armed with a comprehensive checklist and well versed in your practice philosophy, it is critical to create a support system to help you with management responsibilities allowing you to concentrate more fully on the overall well-being and treatment of your patients. Just like the co-pilot and crew of the airlines, each person must go through a detailed check list before the plane is ever moved.

During my consulting career I have been asked several times to develop and “name that position”, putting into place either an office manager or team committees to assist the doctor in leading the practice. The decision to either have one person in the leadership position or utilize multiple team members depends on how much and in what areas you are willing to relinquish personal, hands-on supervision to someone else. It all starts with hiring right and setting the foundation before you go to the next level.

Start by determining what responsibilities you are willing to turn over to someone else. What can you take off your plate to lighten your load? How much information are you willing to share with an employee or employees? Make sure you understand your emotional commitment to your vision and clarify your expectations to this right-hand person you will rely on.

Let’s look at some of the leadership options that can be used to develop your practice. Commonly, in the average to large size practices, a combination of scheduling coordinator, financial coordinator, treatment coordinator, clinical coordinator, lab, clinical assistants, records assistant, and a sterilization coordinator is used to cover practice responsibilities. Each position has its own systems, protocols, checks and balances, as well as a detailed job description to set the team up for success. Additional responsibilities can be assigned to team members depending on their expertise and your level of comfort. The added responsibilities might be combined with their current job description (Financial/Human Resource, Treatment Coordinator/Marketing, Clinical Assistant/Ordering, Clinical Coordinator/CE Opportunities, etc.) or delegated to a committee who is made up of 2 – 3 team members.

When using the team committee concept determine in what areas of the practice you require assistance. Do you want to turn over some of the responsibilities in one area of the practice or implement changes in several areas over a period of time? Utilizing team committees can give you the opportunity to empower multiple team members instilling the attitude that the practice is everyone’s “baby”.

The following are examples of team committees:

**Human Resource Committee** – Monitor vacation, sick days, holidays, personal time off (paid and unpaid), and making arrangements if you will be down a team member. The Human Resource Committee will be involved with performance reviews and making recommendations regarding future hiring, or expanding the employment opportunities for those employees who are not making the cut.

**Marketing Committee** – The fun squad. This is your fun group of team members – people who can find laughter in difficult situations. The jar is half full, not half empty. Their marketing responsibilities encompass external marketing (DDS deliveries, school programs, community events, school sports, school lunch and learn presentations, etc.)
as well as internal contests and programs for new and existing patients. (Please feel free to call me if you would like to get some ideas for fun and creative external and internal marketing.) They network with your referral sources to create your “Doctor Bible”, a compilation of information regarding their practice (personal information, office hours, services, insurance plans accepted, etc.) enhancing your partnership with referral doctors. Additionally this committee is responsible for decorating the office for holidays and special occasion.

STOP. Before you give your team a green light, establish your monthly budget. Typically 3-4% of your overhead is the average marketing expenditure in orthodontic practices – 1% for internal and 2-3% for external. Have your marketing committee put together your marketing plan (along with projected costs) for the next few months.

Facility Committee – Responsible for monitoring the building from the parking lot to every area in the office. Evaluate the appearance from the perspective of new and current patients (including the little guys who see everything from a different level.) They are responsible for bringing facility concerns to the doctor, including the cost and time required to get work done. It is their responsibility to coordinate work with the repairing company, fielding telephone calls, and scheduling work around patient hours so it can be done with minimal interruption to patients.

The IT/Computer/Software Committee – Responsible for computer software updates, computer trouble-shooting, and maintaining all equipment. They are also in charge of scheduling training sessions to keep the team abreast of changes.

Uniform Committee – No matter what way you look at it, it is next to impossible to get several women to agree on uniforms they all like. From the color is wrong, the style makes them look fat to I would not be caught dead wearing that; uniforms are a headache that can best be dealt with by someone other than the doctor. Save your energy for decisions regarding your patient’s clinical treatment.

The CE Committee – Compiles all continuing education opportunities for the team. From a two hour lunch and learn to a 3 day interactive workshop “Fun in the Sun” January 28 – 30, 2016 in Puerto Vallarta with myself, Rosemary Bray, and Carol Eaton, they make recommendations for courses that would benefit the patients and practice. They are responsible for putting together a budget of estimated costs along with the desired outcome of the course.

Another option is to hire or promote someone from within the practice to act as your voice and right arm in the practice. The title of Office Manager often brings with it a negative connotation, especially when it is a new position in the practice. Consider using the title of Office Administrator or Office Coordinator. Be aware of the high probability that it will upset some of your team members, especially those who are threatened by change. Treat them with respect and avoid keeping them in the dark. Let them know what is happening and why, and make sure you are empowering this person in their new position. Emphasize to the entire team that you are still calling the shots and ultimately are the determining factor in all decisions. This individual must have the ability to balance friendship/team relationships while leading and managing the practice.

Working with your new leaders and the team requires patience and tolerance as you start to delegate. Change does not happen in 24 hours. Create achievable short-term

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About the Author

With more than 35 years of experience, Debbie Best evaluates staffing needs and systems to develop a strategic plan for practice productivity. She designs customized schedules, personalized job descriptions, and a team member handbook to fit each practice’s needs.
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

**ViewPoint: Edge Animations**

- Wednesday, April 8th, 2:00-3:00 P.M. Central Time
- Friday, April 24th, 10:00-11:00 A.M. Central Time

Edge Animations is a collection of powerful videos used to enhance case presentation, patient education, and treatment compliance. We’ll step through setup options and features available for educating your patients and promoting your practice.

**Edge: Workflows**

- Thursday, April 16th, 10:00-11:00 A.M. Central Time
- Wednesday, April 29th, 2:00-3:00 P.M. Central Time

Workflows are a great way to automate specific activities or actions according to your office protocols. We’ll present types of workflows available, setup options, and management.

**Edge: Personalizing the Dashboard**

- Thursday, May 7th, 10:00-11:00 A.M. Central Time
- Friday, May 22nd, 2:00-3:00 P.M. Central Time

Keep the information and tools you use the most at your fingertips. Use Dashboard widgets to display the productivity issues and applications most relevant to your tasks and professional goals. The widgets and settings you choose are specific to your Edge login and will follow you around the office. We will review the dashboard widgets available and setup on the stacks, tasks, and subgroup widgets – a few of the most popular.

**ViewPoint: Advanced Merge Letters**

- Friday, May 8th, 10:00-11:00 A.M. Central Time
- Wednesday, May 27th, 2:00-3:00 P.M. Central Time

Take your merge letters to the next level by using conditional variables and statements, and formatting that can make your letters stand out.

**ViewPoint: Best Practices for the Scheduling Coordinator**

- Wednesday, June 10th, 2:00-3:00 P.M. Central Time
- Friday, June 26th, 10:00-11:00 A.M. Central Time

An overview of the tools, tips, and reports for managing patient appointments.

**Edge: Managing the Needs Appointment List**

- Thursday, June 18th, 10:00-11:00 A.M. Central Time
- Tuesday, June 30th, 2:00-3:00 P.M. Central Time

The Needs Appointment List keeps patients from falling through the cracks. You can place patients on the list manually, or automatically track patients that need appointments by enabling the Appointment Required option for certain status descriptions. We step through how to access and use this feature.
Available from Ortho2

Email or call your Ortho2 Systems Consultant at sales@ortho2.com or (800) 678-4644 for more details on any of these products and services.

Our revolutionary, cloud-based management system.

**EDGE**

Your Edge System Can Include:
(Scheduler, Electronic Insurance, and Edge Imaging always included)

- Additional Edge User Licenses
- Practice Connect (Your practice in the palm of their hands.)
- Edge Animations (patient education and case presentation)
- Edge Portal Premium (account access for patients/parents/professionals via the Internet or smartphone)
- Edge Reminders (automated appointment reminders)
- Treatment Hub (electronic charting)
- Patient Tracker (patient sign-in and operatory display)
- Premier Imaging (ceph, morphing, and Bolton Standards)
- HR Manager (securely store employee information)
- Third Party Product Integrations

**Edge Services**

- On-Site Training and Refresher Sessions
- Web-Based Training and Refresher Sessions
- Credit Card Transaction Processing
- Edge Cloud (off-site, secure data hosting)
- Data Merge
- Data Conversion (put non-Edge data into Edge file format)
- Image Conversion (convert your images to Edge Imaging)
- Custom Reports
- Custom Online Forms
- Custom Premier Imaging Analyses

**ViewPoint**

Our core management system.

**ViewPoint Software Modules**

- Additional ViewPoint User Licenses
- Edge Imaging for ViewPoint (enhanced imaging functions)
- Edge Animations for ViewPoint (patient education and case presentation)
- Edge Reminders for ViewPoint (automated appointment reminders)
- Premier Imaging (ceph, morphing, and Bolton Standards)
- Treatment Chart (electronic charting)
- On-Deck Appointment Control (patient sign-in and operatory display)
- HR Manager (securely store employee information)
- Grid Scheduler
- Third Party Product Integrations
- DataMove Utility (transfer ViewPoint data from location to location)

**ViewPoint Services**

- On-Site Training and Refresher Sessions
- Web-Based Training and Refresher Sessions
- VP Credit Card Transaction Processing
- VP Backup Online Storage
- Data Split (split ViewPoint databases)
- Data Merge (combine ViewPoint databases)
- Data Conversion (put non-ViewPoint data into ViewPoint file format)
- Image Conversion (convert your images to VP Imaging or Edge Imaging)
- Custom Reports
- Custom Online Forms
- Custom Premier Imaging Analyses

**Equipment & Networking** (For both Edge and ViewPoint systems)

- Computers, Printers, and Other System Components
- On-Site Installation and Configuration
- Backup Monitoring Service
Ortho2 Anniversaries

Congratulations to these Ortho2 staff members who celebrated anniversaries during the first quarter of 2015.

Thirty-Three Years
Dan Sargent

Twenty-Five Years
Jo Jacobson

Twenty-Four Years
Diane Lyon

Twenty-One Years
Matt Hilleman

Seventeen Years
Coreen Magnuson
Mike Vest

Sixteen Years
Doug Olsan

Fourteen Years
Joe Levenhagen

Thirteen Years
Danetta Hiatt
Jesse Howard
Amy Schmidt

Eleven Years
Michael DiSalvo
Chad Kellner
Tony Kooima

Nine Years
Chris Bennett

Six Years
Jim Powell

Four Years
Mike Gude

Three Years
Mark Hoffmann
Joe Lynch

Two Years
Ben Shin

One Year
Lori Backous
Linda Cooley
Dylan Funk
David Hohbach
Michael Houlihan
Amia Sult

On a Personal Note

Jo Jacobson, Software Support Supervisor, celebrated her 25th anniversary with Ortho2 on February 12 – which was celebrated with cake and pictures from years ago. Congratulations, Jo!

Jim Powell, Ortho2 3D Animation Director, spoke to the students at Sacred Heart School in Boone, Iowa, as part of their Catholic Schools Week celebration. He explained to the students how he creates the animations used in the Edge Animations module. Way to go, Jim!
Contact Us

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www.twitter.com/ortho2systems
www.linkedin.com/company/ortho2
https://instagram.com/Ortho2Systems/
https://plus.google.com/+ortho2
http://blog.ortho2.com
www.ortho2.uservoice.com

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.
Delegate continued from page 9

goals in bite size pieces and celebrate as you accomplish each of these goals. Finish one project before you go on to another.

Establish communicating methods to enable evaluation of your current status, progress to-date and as well your ultimate goal. Promote honest input and suggestions, encourage team members to come to the table with a solution rather than a problem. Partner yourself with an individual or individuals with the appropriate mix of experience and skills in place to help you guide the practice to the next level of excellence. Develop capable team members and empower them to make decisions. Delegate responsibility thereby allowing you to focus your time and attention to your “passengers” on their flight to a beautiful smile.

Delegate continued on next page

President’s Perspective continued from page 1

Ortho2 in two ways. Bob’s son, Dr. Craig Scholz has been with Ortho2 since 1987, initially in sales and currently as our Director of Emerging Technologies. He is also a stockholder, board member, and active member of upper management. And finally, we benefit moving forward from the foundation and vision that Bob helped us create.

For those who wish to honor Bob’s memory through a charitable gift, the family asks that it be made to UNC – Graduate Orthodontic Clinic, School of Dentistry Dept. 7450, 2110 Brauer Hall; CB, Chapel Hill, NC 27599-7450.

Dan Sargent, Ortho2 President

Topics continued from page 7

• Answering any objections or questions that may be raised in the case presentation.

• Mastering a script that covers the entire case for treatment, including financial options and insurance information.

9. Marketing

Marketing is the one area that requires ortho team members to turn their attention outside the practice. Without a steady stream of new patients, future production and revenue are at risk. Referrals should be coming in from at least two sources – general and pediatric dentists in the area and current families. Here’s how to keep the patient base growing:

• Hire a part-time marketing coordinator to brainstorm, organize, and track outreach methods.

• Implement approximately 15 ongoing, consistent marketing strategies, including sponsoring community events, targeting new pediatric and family dentists in the area, displaying signage letting current patients know that referrals are appreciated, and more.

• Set a target of receiving referrals from 40–60% of current parents and patients each year.

• Establish your practice as the top choice for orthodontic care in the area.

Together, these 9 Areas of Expertise reach into every aspect of ortho practice operations. As they are mastered one by one, orthodontists will see profits increase, their patient base grow, and stress levels fall. Not only will the office become a more pleasant place for both patients and team members, but it will also be prepared to prosper in any economy.
Job Title: Office Manager

Reports To:

Summary of Position: Directs administration of orthodontics office, and administers fiscal and computer operations, and aids orthodontist in coordinating office services.

Supervision Received: Receives indirect supervision from the doctor regarding unusual problems and patient care procedures; performs recurring and routine work independently. Must have the ability to work cohesively with fellow team members to provide an atmosphere of trust, mutual respect, and cooperation.

Responsibilities

1. Directs administration of orthodontics practice and administers fiscal operations, such as budget planning, accounting, accounts receivable/payable, and establishing rates for orthodontic services.
2. Aids orthodontist in employee capacity by coordinating office services, such as personnel, budget preparation and control, housekeeping, records control, and special management studies.
3. Directs support services, such as maintenance, repair, supplies, mail, and files.
4. Compiles, stores, and retrieves management data, using computer.
5. Analyzes operating practices, such as record keeping systems, forms control, office layout, personnel and budgetary requirements, and performance standards to create new systems or revise established procedures.
6. Coordinates collection and preparation of operating reports, such as time-and-attendance records, terminations, new hires, transfers, budget expenditures, and statistical records of performance data.
7. Prepares reports including conclusions and recommendations for solution of administrative problems.
8. Issues and interprets operating policies.
9. Reviews and answers correspondence.
10. Places ads for new team members, screen resumes, interviews job applicants, conduct orientation of new employees, and plan training program.
11. Plans, coordinates, and implements security measures to safeguard information in computer files against accidental or unauthorized modification, destruction, or disclosure.
12. Negotiates for improvement of and additions to facilities and equipment.
13. Directs and coordinates activities of team and services.
14. Develops policies and procedures for the practice.
15. Performs other related duties as assigned.

Skills

- Budgeting
- Diplomacy
- Professionalism
- Oral Communication Skills
- Filing
- Project Management
- Written Communication Skills
- Math Aptitude
- Presentation
- Technical Communication
- Negotiations
- Implementation
- Customer Relations
- Organization
- Time Management
- Customer Service
- Planning
- Delegate

Education/Training: An associate’s degree or higher is required.

Experience: At least three years of full-time, or equivalent part-time, experience in managing a health care practice is required.
Edge’s workflows feature allows you to make processes easy in your office. Read about some of the most common workflows to set up.

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Running an orthodontic practice is more than just straightening patients’ teeth. Use these nine areas to ensure your practice will thrive.

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Delegating tasks to individual people or groups can help free up the doctor’s schedule. Learn what tasks can be covered by these groups.

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