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Share the Newsletter

Each issue includes articles from Ortho II staff and from industry consultants. Some will help you get the most from our software, and some have information and ideas to help you improve your practice. All will be of use to a variety of people on your team!

- Doctor
- Office Manager
- Treatment Coordinator
- Financial Coordinator
- Clinic Coordinator
- Front Desk Staff
- Clinic Staff
- _____

President's Perspective

Dan Sargent, Ortho II President

Ortho II Excellence—From YOUR Perspective

Every day we work to execute our mission: "help our orthodontic clients succeed." Of course, there is always room for improvement. And for an organization as much as for an individual, periodic reinforcement can go a long way. So every few years we like to reemphasize some aspect of company performance. Sometimes we focus on employee satisfaction. Sometimes on internal productivity. In 2008, we are embarking on a *Quest for Excellence*, but with one significant twist. In this initiative, our yardstick of excellence is defined by you, our clients. In each area that we examine, we want to see it through your eyes.

You can help us, yourself, and other Ortho II clients, by sharing your perspective with us. As you manage your practice, what are your frustrations, and how could we make things easier for you? What services or product features are we missing or should we improve? What features or services could we offer that would enhance your profitability? We always welcome this kind of feedback, but right now we especially encourage it and are reaching out for it. Our initiative for 2008 will be to take action on what we learn! Again, our entire corporate mission is to help you succeed. But we can miss things as we get caught up in our day-to-day jobs. By sharing your ideas, your frustrations or disappointments, big or small, you will help us understand what *Excellence* from Ortho II means to you. It will then be our opportunity to act on it!

So please share with us at www.orthoii.com. From the home page select About Us > Contact Us > On-line Feedback Form. I look forward to hearing from you!

Going the Extra Mile

We celebrate Customer Service week every October. As part of the event, we post the Extra Miles Cards that you send our employees when you feel they have done something special. I know I speak for everyone here when I tell you how much we appreciate receiving these. *Thank you* for taking the time to send them. Here's a picture of some of the cards in our software support area. (Being October, we also had the whole "spooky graveyard" theme going on.)



Noted with Pride

As noted elsewhere in this newsletter, several Ortho II employees have advanced to new positions within the company, and they are all well deserved. For personal reasons, I will mention two of them. First, I am pleased and proud to announce that, effective January 1, 2008, my daughter Amy Schmidt is taking over the role of Sales and Marketing Director for Ortho II.

President's Perspective continued on page 12



Welcome

New Members

Welcome to our new members and to current members who made the move to ViewPoint during the fourth quarter of 2007!

Dr. Lisa Wendling ~ Flint, MI
Dr. Robert Bradley ~ Boerne, TX
William J. Swigler, D.D.S., P.A. ~ Stuart, FL
Shelton Hsu DDS MS ~ Sunnyvale, CA
Dr. Brian Clarke, Orthodontist ~ Sudbury, ON
Inglis Orthodontics, PLLC ~ Hutchinson, MN
Buhl Orthodontics ~ Jasper, GA
Dr. V. Matthew Heim DDS MS PC ~ Oklahoma City, OK
Olympic Orthodontics ~ Dublin, CA
Dr. Brian Nett ~ Phoenix, AZ
TC Orthodontics ~ Daly City, CA
Dr. Sharon Stewart D.D.S., M.S., P.C. ~ Lathrop Village, MI



Jacob Daub, DDS ~ Racine, WI
Advanced Family Dental Care, PC ~ Elkins Park, PA
Dr. Maria Isabel Atique ~ San Antonio, TX
Dr. Robert George ~ Garland, TX
Ronald L. Garibaldi, D.D.S. ~ Covina, CA
Dr. John A. Oshetski, DDS, MSD ~ Elk Grove, CA
Vancouver Orthodontic Specialist ~ Vancouver, WA
Dr. Adam Weiss ~ King of Prussia, PA
Dr. Steven Scott ~ Elk Grove, CA
Dr. Richard Lines ~ Safford, AZ
Dr. Ernest Goodson ~ Fayetteville, NC



Ten Year Members

Congratulations and thank you to our customers who have celebrated their ten year anniversaries with us during the fourth quarter of 2007!

Drs. William & Stephen Colby ~ Edina, MN
Thomas B. Cook, D.D.S. ~ Augusta, ME
David E. Cabeceiras, D.M.D. ~ Fall River, MA



Twenty Year Members

It is with sincere pride and appreciation that we recognize our longest-standing clients. Congratulations and thank you to our customers who have celebrated their twenty year anniversaries with us during the fourth quarter of 2007!

Dr. R. John Nelson ~ Decatur, TX
Dr. Richard T. Jones ~ Seattle, WA
Ronald J. Carr, D.D.S., M.S., P.C. ~ Odessa, TX
Mel DeSoto, D.D.S., M.S. ~ Shreveport, LA
Dr. Fredric R. Warren ~ San Francisco, CA
Terry Loeffler, D.D.S. ~ Las Vegas, NV
Dr. Richard Seabold ~ Kalamazoo, MI
Dr. David P. Stangl ~ Cedarburg, WI
David S. Briss, D.M.D. ~ Chelmsford, MA
Dr. Thomas G. DiMassa, D.D.S., M.S. ~ Lakewood, OH
Dr. Paul Keck ~ Ionia, MI
Fred Sputh, D.D.S., M.S.D. ~ Lafayette, IN

Hal Cohen, D.M.D., P.C. ~ Hanover, PA
Robert G. Wertz, D.D.S., Ltd. ~ Lebanon, PA
Richard A. Schlein, D.D.S. ~ Norwich, VT
Dr. Dennis G. Cuendet ~ Baton Rouge, LA
John H. Trotter, D.D.S., M.S. ~ Redondo Beach, CA
Randal D. Morita, D.D.S., Inc. ~ Aiea, HI
E. Stanton Key, D.D.S., M.S., P.A. ~ Graham, TX
C. Michael Stansbury, P.S.C. ~ Ashland, KY
Dr. Mark A. Vorhies ~ Greenwood, IN
Alan S. Lammey, D.M.D. ~ Manchester, CT
Dr. Timothy McReath ~ Baraboo, WI

Turn Your Resolutions Into Your Routine

LeeAnn Peniche, Peniche & Associates


Resolutions. The ultimate in New Year's folklore... we hear about them, we may even make them, but few actually keep them. They are shrouded in both mystery (why can't we follow through with these personal and seemingly simple goals?) and hope (THIS year, we will stick with it and lose that weight, pursue that career, think more positively...) But like most things, resolutions are easier said than done. Why? Because they lose priority in the day-to-day routine of life. We fall back into familiar patterns, roles, and mindsets until the next January 1st, when we begin the charade all over again.

But it does not have to be that way. **If we truly prioritize what seems so important to us every New Year, we can follow through and turn our resolutions into our routine.** But what exactly does that mean for the orthodontic practice? Unfortunately, for the mediocre office, it means nothing. But for the exceptional practice, it means striving as always to excel, despite the day, the workload, the difficult patient, or anything else that stands in the way of excellence.

In simple terms, the superior practice resolves on a daily basis to provide the highest level of service and care possible to each and every patient (not just the easy ones). The phenomenal orthodontic office sets manageable goals, embraces realistic ways of measuring progress, and offers team members support, encouragement, and practical help in order to make the daily routine one of stability and success.

So what are your practice goals? Are they tangible, attainable, and exciting? They should be. Stop putting off that planning meeting, sit down together, and take some time as a cohesive group to think about your mission and ascertain how each daily action fits into the big picture. During this time, it is imperative that you set real goals and provide yourselves with a plan of action and solutions to office challenges. For instance, if your desire is to increase case acceptance, exams, or starts, attach a firm number to your goal and strategize a realistic plan to make it happen. If your goal is to grow your practice by 35% in the coming year, you should be giving patients good financial options, offering friends and family savings to increase referrals, providing new technologies, and promoting the fact that you offer them. If your goal is to increase word-of-mouth referrals, you should provide referral cards to every patient, hold fun events to which patients can invite family and friends, and be building relationships with referring doctors and staff. Many times, we set such goals, but we don't readily seek out the solutions to reach them or put a firm plan into action. This is where we lose momentum and fall short of our good intentions. **So make the goal, make a plan, and make it work for you!**

No matter what your ultimate goal, service should be your top priority. After all, the concept of superior patient service is what sets the successful practice apart from the stagnant one. Orthodontic staff must feel compelled to provide each patient service with a smile, making it more than a cliché, but rather a commitment to excellence. Just think how you could change the course of a patient's day with a kind word, gentle care, and a sincere smile. Then think how you could change your practice by making this a daily routine, along with offering effective treatments, flexible payment options, and ease of scheduling. Can your resolutions change the course of your practice's future? Most certainly, and now's the time to turn your goals into action and watch the magic happen!

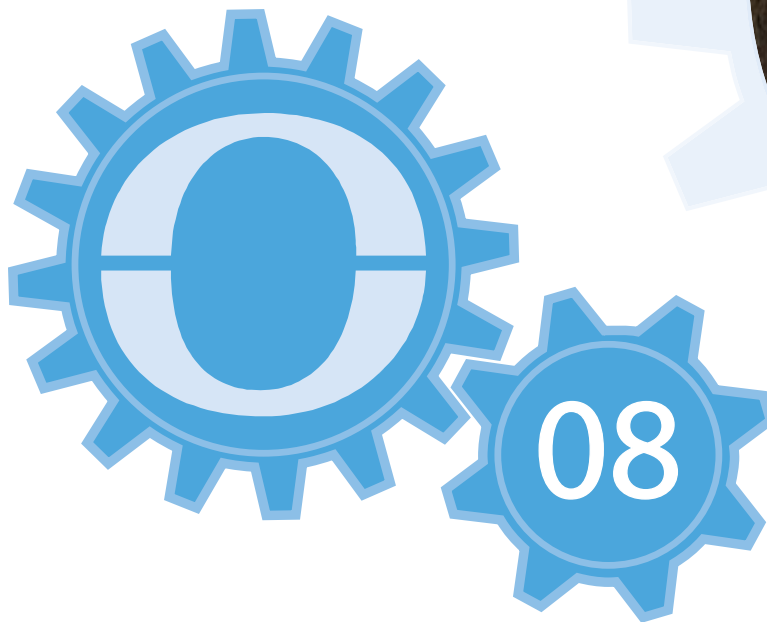
So in the spirit of the New Year, and as part of our mission to offer the kind of service that elicits real smiles, resolve to make your practice's goals a priority. Set a time to hold an annual planning meeting and organize your thoughts for the coming year as a team, making sure to write them down. This will help you to formulate a firm plan of action and give you the ability to hold each other accountable. Make your plan tangible, attainable, and manageable. Reward each other for meeting your goals and make this year's resolutions more than fleeting. Resolve to be flexible, focused, and fun and watch your practice get in shape, emanate excellence, and become the success it can be! 



As president of Peniche & Associates, Ms. Peniche has more than 25 years of orthodontic experience in both clinical and management roles. For the past 18 years, she has worked with more than 1500 practices in case acceptance, scripting, marketing, systemization, and the business of orthodontics.

At the 2008 Users Group Meeting, she will present Wow the New Patient: How to Create the Atmosphere and Communicate the Message, and Peniche & Associates will be exhibiting.

For more information on Peniche & Associates, contact them at 503 666-8538 or visit their Web site at www.leeannpenicheandassociates.com.



**ORTHO II USERS GROUP MEETING
FEBRUARY 14 – 16, 2008
SAVANNAH, GEORGIA**

By now you should have received your meeting brochure, and we hope that you are making plans to attend.

If you have not yet registered, we hope to hear from you soon! Classes fill up quickly. Reserve your place on-line now at www.orthoii.com/meetings or contact Kim Barker at 800 678-4644 or ugm@orthoii.com.

Mark your calendar for February 14–16, 2008 and plan to join us in charming Savannah, Georgia!

Look for articles in this issue written by some of this year's presenters and exhibitors.

And be sure to visit www.orthoii.com/meetings/ugm to download a brochure for full descriptions of all the classes and special events!

Rewarding Patient Compliance

Work Smarter, Not Harder

Charis Santillie, Director, Smile!

Wouldn't it be great if every patient followed instructions, got their braces off on time, without cavities, and with a great looking smile? Unfortunately, not all patients comply.

As the office manager of a busy orthodontic practice, I experienced first hand that patient compliance is a big challenge.

Patients don't brush and floss like we want them to. They don't wear their rubber bands, headgear, or neckgear as much as they should. They don't avoid hard and sticky foods. This leads to increased treatment times, cavities, and compromised finishes, not to mention the "S" word—Stress! What can we do? Fortunately, there is a lot we can do. The potential is huge and the costs are low. If you educate and motivate patients to their fullest potential, then you can...

- Improve oral hygiene
 - Reduce treatment times
 - Improve staff efficiency
 - Strengthen internal marketing
 - Increase your income

We spend so much money and time on certain areas... staff, equipment, collections, etc... we sometimes lose sight of the fact that we can train our patients to cooperate so that we achieve true teamwork.

But how do you motivate to get patient compliance? The answer is easier and simpler than you might think. You implement a Patient Reward System. There are many options available, but regardless of the system you choose, the most important thing is that you choose something and implement it well. By that, I mean your system must have a foundation of patient compliance. Patients should not be rewarded unless they follow your instructions and show evidence of good oral hygiene.

Whether you choose paper money or wooden nickels or tokens, use tangible items. If the immediate reward has inherent value, then you'll be closer to achieving your goal of motivation. It's also important to offer prizes the kids will care about. If we think we're going to get kids to do ten minutes of brushing and flossing each night in order to earn a kite, then we're fooling ourselves. Adults, too, will respond more positively to better prizes, such as gift cards to Home Depot, Macy's, etc.

With these reward systems, your patients earn their reward, and at any point in treatment, can cash it in for prizes. You'll find that most patients tend to wait until the end of treatment so they can earn a large prize, such as a Game Boy™ or music gift card. Some more complex cases and Phase I/II Treatment patients will save up to earn a grand prize such as an iPod®.

If we think we're going to get kids to do ten minutes of brushing and flossing each night in order to earn a kite, then we're fooling ourselves.

It's okay to have the prizes change as new products come out on the market, and you can simply show pictures of the nicer items so that you don't have to maintain an expensive inventory. Getting a valuable prize at the end of treatment adds to the excitement when your patient finishes treatment, and it strengthens your internal marketing. Other children will be asking Susie where she got her cool new MP3 player. However, if you'd rather not deal with multiple prizes, you can offer a MasterCard® Gift Card personalized with your logo—what a cool way to reward your patients!

As you know, poor patient compliance leads to increased treatment times. In this industry, most offices don't charge extra if a case goes long due to poor compliance. These appointments take up chair time, staff time, and doctor time. With improved patient compliance it is possible to have more time off and to grow your practice. You can achieve this freedom and this increased income if you look at your patient pool and remember that they are a valuable part of your team.

How is your patient compliance? Maybe its time to invest in training your patients so you can all be rewarded. 🌐

Charis Santillie, owner/director of Smile!, is a progressive business woman and public speaker. Her outside-the-box patient compliance and marketing strategies are being used internationally. She will present Rewarding Patient Compliance and Tips, Tools, and Strategies for Marketing Your Practice at the 2008 Users Group Meeting.

She can be reached at 415 499-5143 ext. 706, charis@cas-designs.com, or through her Web site: www.smile2succeed.com.



VP Credit Card

Part of an ongoing series spotlighting significant ViewPoint features

The ACE Up Your Sleeve

Jon DeWaard, Ortho II Systems Consultant

“VP Credit Card lets you swipe or manually enter credit card payment information directly into ViewPoint. Transactions are authorized quickly over a secure Internet or modem connection. VP Credit Card works with all major credit cards, using free X-Charge credit card processing software by CAM Commerce. With VP Credit Card, you can provide your responsible party with one receipt that includes the credit card payment information, enhancing your professional image and simplifying transactions for everybody!”

If you look up VP Credit Card in the Help section of ViewPoint, that's what you will find. It's a nice little summary of the benefits of using VP Credit Card. So what does it mean? **Why should you use it?** Why does VP Credit Card belong in your office? There are three main reasons. Just remember ACE: Affordability, Choice, and Efficiency. Let's break it down.

Affordability

The VP Credit Card **software is included** with ViewPoint at no additional cost. The only things that need be purchased are the card reader used to swipe cards, and the signature pad, used to electronically sign receipts. Both items are available from Ortho II at a cost of \$75 and \$115, respectively. Additionally, there is no fee to set up the credit card charging software provided by CAM Commerce (X-Charge). They also offer very competitive rates. Just contact X-Charge representative Steve Hester for a rate comparison at 800 637-8268, ext. 237.

Choice

Giving your patients choices is a great way to **improve the service that your office provides**. With VP Credit Card in conjunction with our AutoReceipts feature, you have the ability to set up an auto pay system which allows your patients to give you their payment information and have their card charged automatically. This can be a big convenience for some patients, and it certainly helps in preventing delinquencies.

Efficiency

VP Credit Card can certainly save you time. Without VP Credit Card, posting credit card transactions is a multi-step process that requires that you run every transaction through a separate credit card terminal before posting it to ViewPoint. Monthly auto payments are even more tedious, as they involve entering each card number into the terminal manually before posting them to ViewPoint. With VP Credit Card, this process becomes much more efficient. For single transactions, **payments are posted and charged at the same time.**

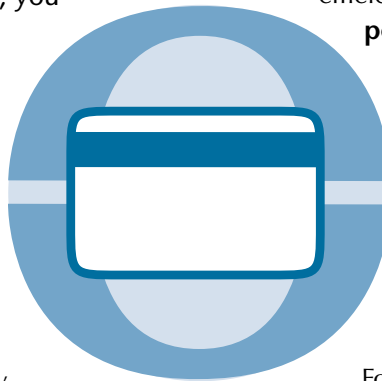
Automatic payments are even easier. With a click of a button, all scheduled payments are charged and posted.

We encourage you to request or download a copy of the VP Credit Card documentation. It is available on-line at www.orthoii.com > Support > White Papers > VP Credit Card.

For additional questions on VP Credit Card or to **get started**, be sure to contact your Ortho II Systems Consultant. Let VP Credit Card be the ACE up your sleeve, call today! ☺

Jon and other Ortho II staff will be using their technical expertise to teach many of the classes offered at the 2008 Users Group Meeting. Be sure to register for Jon's Your Paperless Office classes to learn more techniques for making your office more efficient.

Be sure to stop by the X-Charge from CAM Commerce exhibit at the UGM if you wish to speak with an X-Charge representative.

A screenshot of the ViewPoint software interface for entering a credit card payment. The interface is teal and features several input fields: 'Date' with a dropdown menu showing '01/07/2008', 'Amount' with a text box containing '\$100.00', 'Method' with a dropdown menu showing 'Credit Card', and 'Description' with a text box containing 'Credit Card'. Below these fields is a checked checkbox labeled 'Use VP Credit Card Integration'. At the bottom right, there is a button labeled 'Start Bulk Payment...'.

Date	01/07/2008
Amount	\$100.00
Method	Credit Card
Description	Credit Card
<input checked="" type="checkbox"/>	Use VP Credit Card Integration
Start Bulk Payment...	

Improve Communication With ScreenPlay

William Poss, President and CEO, Solutions by Design and ScreenPlay Technologies

Communication is the life's blood of any business. It is how efficiently and effectively we communicate that ultimately defines our success. This is pertinent at every level and every stage of communication within an orthodontic practice... from the very first contact that a patient has with your office to the time he or she has completed treatment.

From a business perspective, arguably the most critical stage of communication is the new patient examination. Without the ability to effectively communicate orthodontic problems, treatment options and recommendations, and policies and procedures you have virtually no probability of securing new patients. Maximizing this new patient experience, on the other hand, will likely secure most of the patients who are candidates for treatment.

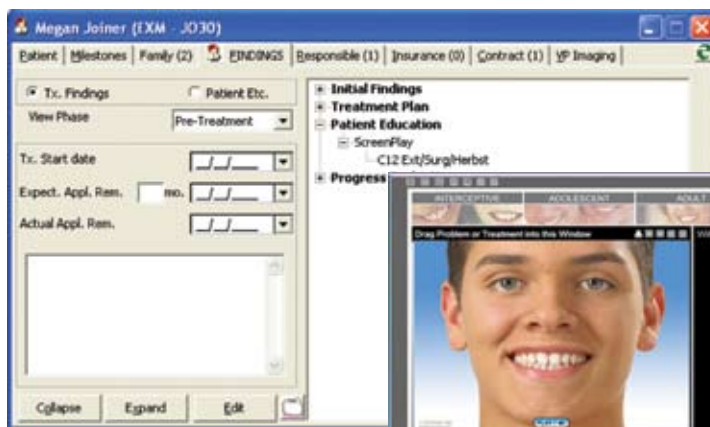


Technology plays a major role in efficient and effective communications. Ortho II and ScreenPlay Technologies now offer the means to enhance patient communication, case presentation, and patient education. **You can enter your recommendations on the Findings tab in ViewPoint and within seconds launch ScreenPlay® with this information and the patient's biographical data.** ScreenPlay takes over as the front-end presentation vehicle. This allows you to demonstrate the desired treatment options with age specific, malocclusion specific, and treatment specific lifelike animations side-by-side with actual patient records. Upon completion of the case presentation, play any of the ScreenPlay instructional and educational videos on topics such as Retainer Care, Proper Hygiene Instructions, Extractions, Orthognathic Surgery, and Expansion. There are 24 videos in all, each 1 ½ to 3 minutes in length. You can then print informational forms and burn a comprehensive CD or e-mail the entire presentation to your patient. Your walkout presentation includes patient records, findings, recommendations, and problem and treatment animations, as well as forms on proper care and policies and procedures.

ScreenPlay is designed to be the total solution, not just a piece of the communications puzzle. With the bi-directional passing of information, not only does ScreenPlay present to the patient, but it writes back to ViewPoint a comprehensive register of your presentation for future reference. This is stored in the patient's Correspondence History. The combination of case presentation with practice management increases the benefit of both programs.

Our studies have shown conclusively that ScreenPlay users have seen a reduction in the amount of time spent in the initial examination and an increase in both the patient's retention of information and the practice's exam-to-treatment conversion ratio. Patients typically retain a very small percentage of the information that is presented at the initial exam. Clinical terminology, even when explained in detail gets lost in transition from one parent at your practice to the other at home. Well prepared walkout materials, made possible by the integration of ViewPoint and ScreenPlay, are the solution to this communication problem.

Instructions for setting up and using this integration are available on the Ortho II Web site: www.orthoii.com > Products > Integrations. ○



William A. Poss is the President and CEO of Solution by Design and ScreenPlay Technologies. Bill has 23 years of experience in orthodontics and has lectured worldwide on private practice marketing.



Solutions by Design and ScreenPlay Technologies will exhibit at the 2008 Users Group Meeting.

For more information on ScreenPlay, contact them at 800 888-4084 or 559 436-8380, or visit their Web site at www.solutionsbydesign.com.

Let's ROCK & ROLL Into 2008!

Dave Daugherty, Partner, Daugherty Consulting, LP



WOW! Are you ready for the February Users Group Meeting?

It is going to ROCK! Terry and I are absolutely pumped up about doing the keynote and two breakout sessions at the February meeting! Our agenda includes how to Shape Up Your Practice, the Secret about Elite Practices, and how to use Breakdowns in your practice to create a world-class team.

Lets make 2008 **The Year!** For most of us the economic signals during 2007 were confusing for determining the impact on sustainability and growth in our practice. According to doctors we have surveyed, the industry on average has experienced “flat or negative” growth in many areas of the country. This makes **practice growth** the **No. 1 challenge** facing many practices in 2008. Clearly, this situation creates an opportunity for a **Breakdown** which every practice needs to address with their people!

Kick off 2008 with every member of your team proactively working to increase the patient pipeline and improve conversion rates. You can successfully insulate your practice against this trend of flat growth by building better processes and creating greater team ownership for relationship-marketing. Improve your practice **“Tool Box,”** so you and your team can continuously **rediscover** the solutions that work best for your market conditions.

What is the **Secret?** Is it really more difficult to have a “high-relationship” focused practice? Can your practice have built-in **“actions for growth”** by improving internal processes and relationship-building opportunities? What is more painful, to openly address the breakdowns in your practice, or to stay in the emotional tension, knowing it isn't working? How will your community of patients benefit by your practice team's streamlined, effortless execution?

Energize Your Practice DNA

The answers exist in the potentially strongest area of your practice—**Your Valued Partners™!** Your team has the greatest leverage to elevate your practice, keep it growing, and make it a fun place to work. The more intentional your actions become, the greater the probability for success. It is through those actions that new patients are attracted and referred to your practice, creating the desire for treatment and producing higher conversion rates. The **“Dynamic Need to Act”** (DNA) in your practice makes the difference! Your practice **DNA** is the beliefs, assumptions, and actions your Team is willing to take in resolving any issue.

Do you know your “Practice DNA”? Are you and/or your team constantly **rediscovering** solutions or are you

waiting for someone else to take action, solve a problem, or resolve relationship breakdowns? What makes an Elite Practice significantly different from other practices is a DNA structure of **discipline and desire** for **constant self-improvement!** It is a **belief system** that anyone has the power to change the course of any issue or challenge in the practice. It is the **willingness** to constantly look for minor breakdowns before they become major barriers to achieving the goals of the practice. These “minor adjustments” — **Dynamic Actions** — are so much easier to implement by simply making a request for something to be improved or enhanced.

A **Dynamic Action** can be a minor “tweaking” of a process, a small addition to a script, or a simple shift in an interaction. It is an internally-driven **Need to Act Now** instead of waiting, or worse, creating a story about why someone else is not doing what they are supposed to do. All of these attitudes, beliefs and assumptions, individually and collectively, make a significant difference in your **growth capability**. They also directly impact the levels of stress in the practice and increase the time demands upon the doctor to fix things.

Okay, Dave! How does this DNA impact the sustainability and growth of my practice? The DNA structure of an Elite Practice activates **Valued Partners**, professionally-oriented knowledge workers, who in turn convert their relationships into practice growth, internally and externally. Your VPs need to understand how to directly impact the productivity and growth of your practice. It takes committed discipline and laser-focused attention, not once a year at your practice retreat, but daily, weekly, and monthly. It becomes a way of working!

Growth & New Patient Process

For example, in the New Patient Process, it would be ideal if the Treatment Coordinator had all the information needed to process, examine, and convert the new patient. By having all the necessary information, including the patient's needs and likelihood to start treatment, the TC could reduce time and effort as well as increase closing rates. The ripple effect significantly reduces the TC's stress, reduces the doctor's consult/exam time, and allows more patients to be seen.

So, how can you understand your current DNA for getting information, create this ideal process, and modify your structure to make it produce the right results? For the NP Process, the Breakdown is in getting the right information at the right time for it to be useful and meaningful, which increases closing rates and reduces doctor time. We want to create a “positive cascading effect” that quickly builds the patient’s confidence in you and in the desire to start treatment.

To keep it simple (for this article), it requires identifying the information that needs to be gathered at every point in the process and what needs to be said to the patient to promote the practice before they arrive for NP Exam. Get the whole team involved so you get different perspectives to the problem, as well as better solutions. This will also give you greater insight into your team’s Dynamic Need to Act and how to create the ideal process.

Get Your DNA To Rock! Here’s How!

Step 1: Decide that you want to grow your practice!

Step 2: Set Rockin’ 2008 goals. How about these?

Achieving these goals should produce growth and sustainability! Right?

Step 3: Get your Valued Partners™ (all of them) together for 1–2 hours quarterly.

Step 4: Do the “Service Impact Process—5x5 Enhancement.”

- Break your New Patient Process into Process Steps or Patient Touch Points. (See example at right.)
- Take one Process Step at a time (at first)
- Set your “intention” and “laser-focus” your attention on two questions:
 - What five actions are done exceptionally well? (Five Positive DNAs)
 - What five things can I improve to achieve our 2008 goals? (Five DNA Enhancements)

Step 5: Now, stand back and look at all the “improvements” you have identified. What connects or creates a positive cascading effect? Look for the Dynamic Needs to Act created for each of you from this process.

Step 6: Activate your Monday Morning Actions (MMAs). Take Action Now!

New Patient Process—2008 Goals

- Increase patient case acceptance by ___%
- Streamline your New Patient Process
- Reduce Doctor-TC stress
- Amplify your relationship marketing

Service Impact Process—5x5 Enhancements™

Process Steps	Five Positive DNAs	Five DNA Enhancements
Initial Calls		
Pre-Visit Calls		
NP Exam/ Consult		
Treatment Plan		
Financial Plan		
New Starts		

This DNA and Breakdown Process always stimulates great team discussion, if facilitated effectively. It can be used to address the issues or problems in every area of the practice. The Process gives you great insight into how your practice team sees their role and accountability in your practice. Remember, the Practice DNA is what you and your team believe! What are your beliefs about relationship building and relationship marketing? What data should or can be mined throughout your NP process? How can you script each step to promote the practice? What is your “story” about why patients start or don’t start? Whatever it is, your DNA (Dynamic Need to Act) drives what is possible for growth and sustainability in your practice!

Real Life Solutions

Here are real examples of what this simple exercise can discover. Within one of our client practices, there was a Treatment Coordinator. We will call her Bobby Jean. She was new to the practice but truly embodied our DNA concept. She had an enthusiasm for “positive action” combined with a belief that there isn’t anything “we,” the Valued Partners, can’t resolve in the practice. Well, shortly after coming to work, she mobilized the whole practice team to solve a significant and recurring **breakdown** in the patient flow: the doctor’s availability to be in a NP exam and in the operatory at the same time! Can you relate?

According to team members, the **breakdown** is clearly the doctor... right? Well, the real breakdown is in the **“blending”** of the new patient process and the clinical schedule which always gets “out of sync.” It is like gravity... it just has a natural sensitivity to getting out of balance. It is an unavoidable “Doctor Trap.” The team always gets upset because the doctor messes up the schedule (You can make up the reason). The doctor is stressed by “living-in-the-tension” between meeting self-driven, high-standards of performance and satisfying the multiple demands of team and patients. Bobby Jean’s DNA just wouldn’t let it stay a major, recurring issue, so she moved the team to resolution!

Another example of a **Rediscovery** was made by a client during their Annual Retreat where we did our Service Impact (5x5) Process on their New Patient Process. The client wanted to increase patient case acceptance. We discovered two DNA breakdowns in separate steps of their process. The team’s beliefs were reducing case acceptance, disrupting the patient flow, and causing unnecessary stress in the office.

The first breakdown was in the initial call—What information will increase conversion rates? The person taking the initial call did not get the proper information to streamline the NP Process. She didn’t ask the patient the needed questions because “they will think that I am being too pushy or prying”! This

belief (DNA) had a profound “ripple effect” when the patient arrived. The missing pre-qualifying information disrupted the NP Exam process through loss of time (TC and Doctor) and decreased the chance for conversion.

Can you say “Stress” on the TC?

The second breakdown was in the “pulling” of the doctor between the clinical schedule and the NP Exam/Consult schedule. You can’t get the doctor in or out on time... Right! Everyone has experienced that Breakdown? Through the 5x5 Process we applied a system that enhanced the TC-Doctor-Clinic effectiveness and relationships with patients. The result was improved closing rates, a reduction in time away from the clinical area, happier patients, and less team stress.

Note: The DNA and Breakdown Processes create solutions from clerical to clinical, relationships to treatment results, marketing to managing referrals. The process we have discovered is critical to achieving desired practice outcomes and team harmony.

2008 The Year to Act

Your practice DNA can make your practice ROCK & ROLL in 2008! We would love to hear about your breakdowns, so come see us at the February meeting. Set your goals for 2008! This is the perfect time to discover how close you are to having significant productivity. It has been our experience that a 5–10% improvement can translate to an additional revenue stream of \$50,000 to \$100,000. All you have to do is make 2008 **the year of “tweaking”** your processes for significant results! 🌟

Dave Daugherty “Powers Up Your Practice” by teaching you how to activate the DNA in your practice. As creator of the Dynamic Need to Act, Dave works with Orthodontic teams to build sustainable growth in the practice, resolve barriers, and create greater harmony. Through the Breakdown Process he teaches teams how to integrate business results, personal leadership, and interpersonal behaviors with exceptional results. Dave Daugherty and Dr. Terry Daugherty are cofounders of Daugherty Consulting, a nationally-recognized practice development firm. They both are full time speakers, authors, practice coaches, and consultants.

They will present both the keynote session SHAPE UP in Savannah! and two classes — We have a Breakdown! Who Is Mad Now? and The Secret! Being an Elite Practice! — at the 2008 Users Group Meeting. Also, Daugherty Consulting will be exhibiting.

Visit their Web site at www.daughertyconsulting.com or contact Dave at dave@daughertyconsulting.com or 713 629-5922.



Inside Ortho II

Information about the people of Ortho II and the resources available to you as a member

Free Webinars

New! Starting in January we'll be harnessing the power of the Internet and offering monthly on-line learning sessions—what we call webinars. Each month throughout the year we will present a different topic. It's the perfect solution for training new users and refreshing experienced users without the cost of having someone come out to your office personally.

If you are interested in learning more about the webinars you can find additional information on our Web site. We will be adding more monthly topics soon, so check back often.

Pre-registration is required, and on the day of the webinar you'll be able to log onto a Web site to attend. All you need is a computer with a high speed Internet connection, a phone, and the will to learn. Webinars begin at 10:00 A.M. CST unless noted otherwise and last approximately 90 minutes. To register for a webinar of your choice, please contact Judy Brown at 800 346-4504 or jkb@orthoii.com.

First Quarter 2008 Webinar Dates

January 25: ViewPoint Overview

February 22: Grid Scheduler
From Basics to Advanced Tips & Tricks

March 7: Contracts & Posting

Remaining 2008 Webinar Dates

April 11
May 9
June 6
July 11
August 8
September 5
October 10
November 7
December 5

As usual your ideas, thoughts, and suggestions are important to us! If you have a topic you'd like to see offered or have other input to make this learning resource even better, please use our on-line feedback form at www.orthoii.com > About Us > Contact Us > On-line Feedback Form.

Career Milestones

As we work on developing Ortho II software of the future, we are expanding our Product Development Team. And in order to better assist new customers making the conversion from other software, we have created a new Data Conversions Coordinator position. Our desire to fill these positions with the most qualified individuals who can bring experience with the industry, our products, and the needs of our clients to the job may require the use of pen and paper to keep track...

Chad Kellner, who has been with Ortho II since 2004 and most recently served as Development Support Specialist, has now accepted the position of Advanced Applications System Programmer.

Tony Kooima, also with Ortho II since 2004, has moved from the Equipment Team to fill the role of Development Support Specialist.

Corey Schmidt, a member of the Software Support Team since 2004, has accepted the challenge of filling the responsibilities of the new Data Conversions Coordinator position.

Please join us in congratulating all three and wishing them success! If you will be at the 2008 Users Group Meeting, be sure to congratulate Tony and Corey in person!

We aren't finished yet: we have hired three additional people to the Equipment and Software Support Teams. They will be starting in January, so be sure to check Inside Ortho II next issue to get to know them better. And Amy Schmidt officially begins her new role as Director of Marketing and Corporate Relations on January 1st.

Professional Development

Mike DiSalvo and Erik Strabala both received CompTIA A+ certification in December. CompTIA A+ confirms a technician's ability to perform tasks such as installation, configuration, diagnosing, preventive maintenance, and basic networking. The exams also cover topics such as security, safety, communication, and professionalism.

We are proud of their accomplishment! Please join us in congratulating them.

Free Seminars

As our client, you and your staff may attend these free small-group seminars as often as you wish.

This three-day seminar emphasizes daily and month-end routines, contracts and posting, Grid Scheduler design and use, and writing and printing correspondence using the integration with Microsoft Word.

2008 Dates

January 9, 10, 11 or 16, 17, 18

March 12, 13, 14 or 19, 20, 21

June 11, 12, 13 or 18, 19, 20

September 10, 11, 12 or 17, 18, 19

November 12, 13, 14 or 19, 20, 21

Seminars are held from 9:00 A.M. until 4:00 P.M. at our corporate office in Ames, Iowa.

Class size is limited to assure individual attention, and pre-registration is required.

To register, or for more information, contact Judy Brown at 800 346-4504 or jkb@orthoii.com, or register on-line at www.orthoii.com > Members.

President's Perspective *continued from page 1*

Amy has a Marketing degree from Iowa State University, and has worked at Ortho II for many years in a variety of roles. For the past two and a half years, she has been our Corporate Relations Manager, a role she will retain in addition to her new duties. Amy takes over the sales & marketing position from me, which will allow me to stay focused on presidential functions. It was November of 2001 when I took it on as a *temporary* assignment. And I enjoyed every day of my "brief" transitional role working with the members of the sales team. But I now look forward to watching them thrive as Amy takes my place!

Also, my son-in-law Corey Schmidt recently moved from the Software Support Team into our newly created Data Conversions Coordinator position. In this role, Corey, who has a Management Information Systems degree from Iowa State University, will assure that all new Ortho II clients receive the best and smoothest data conversion possible.

So congratulations to Amy and Corey, but also to the others who have earned new internal roles, and indeed *everyone* here... we each play an important role and make a unique contribution to the success of our mission.



Ortho II Anniversaries

Congratulations to these Ortho II staff members who celebrated anniversaries during the fourth quarter of 2007.

Eighteen Years

Tricia Rose

Fifteen Years

Todd Schuelka

Thirteen Years

Michele Eich

Nine Years

Lowell Davis

Denise Sargent

Jennifer Shaffer

Five Years

Richard Kelley

Three Years

Corey Schmidt

Two Years

Derek Dohrman

One Year

Erik Strabala



Congratulations

We all know Cathie Raley as Ortho II's mild-mannered Software Support Representative, Trainer, and On-Line Coach.

But October 19–20 at the 2007 Songahm Taekwondo Fall National she was the Bronze Medalist in sparring for 1st Degree black Belt women age 30–39. The competition took place at the Disney Wide World of Sports in Orlando, Florida.

Be sure to congratulate her the next time you talk to her on the phone!

Third Party and Imaging Integrations

Ortho II has developed integrations for a variety of third party products, including popular imaging, modeling, telephony, and financial products. Any third party product following the available integration specifications may be integrated, allowing you to launch multiple third-party programs directly from within ViewPoint. With ViewPoint, the choice is truly yours. Instructions for setting up and using each integration are available on our Web site: www.orthoii.com > Products > Integrations. New integrations are being developed all the time so be sure to check the Integrations page periodically.

Imaging

- AnatoCeph

VP Imaging integrates with AnatoCeph from Anatomage. From a patient's lateral cephalometric image on the VP Imaging tab, the AnatoCeph software opens the image so it can be traced. The traced image is then saved in VP Imaging for easy reference.

- cephX

VP Ceph, included in ViewPoint, lets you use the cephX Web based software service. Traced images and analyses can then be accessed from the VP Imaging tab. Simply choose either a per-case fee or an unlimited use license.

- Dolphin Imaging

The ViewPoint/Dolphin Imaging integration allows you to use images from Dolphin Imaging in ViewPoint, On-Deck, Treatment Chart, and letters. You can also start Dolphin Imaging from Viewpoint and use ViewPoint to update and create new records in Dolphin Imaging. The integration includes over 30 sample letters, ready to use with image variables included. ☺

- FYI Technologies Dr. Ceph

The integration with Dr. Ceph, FYI Technologies's cephalometric analysis program, allows you to start the Dr. Ceph software from a ViewPoint patient record. It will also add new patients to Dr. Ceph if they do not already exist. ③

- FYI Technologies Dr. View

The integration with Dr. View, an image capture and case presentation program from FYI Technologies, allows you to start the Dr. View software from a ViewPoint patient record. It will also add new patients to Dr. View if they do not already exist. ③

- Ortho-Vision Records

The ViewPoint/Ortho-Vision Records integration allows you to use patients' Ortho-Vision Records thumbnail photos in ViewPoint, On-Deck, and Treatment Chart. You can also start Ortho-Vision from Viewpoint and use ViewPoint to update and create new records in Ortho-Vision. ☺

- Quick Ceph

The ViewPoint/Quick Ceph integration allows you to use images from Quick Ceph® in ViewPoint, On-Deck, Treatment Chart, and letters. The integration includes over 20 sample letters, ready to use with image variables included. ☺

- Standard Imaging Integration

Ortho II has developed a standard integration which can function with many imaging products, providing they either store or can export images to standard image file formats and use the required naming convention. Images can then be seen within ViewPoint. ☺

- VistaDent

The ViewPoint/VistaDent integration allows you to use images from GAC Technocenter's VistaDent™ software in ViewPoint, On-Deck, Treatment Chart, and letters. The integration includes over 20 sample letters, ready to use with image variables included. ☺

Radiography

In general, any radiography device which uses a TWAIN compliant driver should be able to be used as a scanner to add images to VP Imaging.

- Gendex VixWin

The integration with VixWin software from Gendex allows you to start the VixWin software from a ViewPoint patient record and go directly to that patient's images. ③

- Instrumentarium CliniView

CliniView™ software is used to capture panoramic, cephalometric, and intraoral images from a variety of Instrumentarium devices. When set up correctly, this will function the same as a scanner from within VP imaging.

- Planmeca Dimaxis

The integration with the Planmeca Dimaxis imaging software allows you to start the Dimaxis software from a ViewPoint patient record. You can also update and add new patients to Dimaxis from ViewPoint. ③

Integrations continued on page 14

☺ These features require the ViewPoint Image Integration.

③ These features require the ViewPoint Third Party Integration.

① These features require the ViewPoint OutBound Integration.

Integrations *continued from page 13*

- Soredex Digora

Digora® software is used with a variety of Soredex radiography machines. This integration allows you to start the Digora software from a ViewPoint patient record. You can also update and add new patients to Digora from ViewPoint. ③

- Sirona Sidexis

Sidexis software is used to capture panoramic images from the Sirona Scanner. When set up correctly, the Sirona Scanner will function the same as a regular scanner within VP Imaging.

- Visix

The integration with Visix software from Air Techniques provides direct access to the Visix program from ViewPoint. If the patient doesn't exist in Visix, one will be created with first name, last name, and patient ID from the patient's ViewPoint record. ③

Modeling

- GeoDigm emodel

The integration with emodel® software from GeoDigm allows you to start the emodel software from a ViewPoint patient record. ③

- Orthobyte

The integration with Orthobyte's 3-D Viewer software allows you to start the Orthobyte program from a ViewPoint patient record and view a selected 3-D model for the patient. ③

- OrthoCAD

The integration with OrthoCAD™ 3-D digital models will allow you to start the OrthoCAD program from a ViewPoint patient record and view that patient's OrthoCAD record. ③

Telephony

- JulySoft ReminderPro

The integration with ReminderPro from JulySoft allows you to create your calling list in ViewPoint and pass that information to ReminderPro. ①

- Tel-A-Patient PowerCalls

The integration with PowerCalls from Tel-A-Patient allows you to create your calling list in ViewPoint and pass that information to PowerCalls. ①

- TeleVox HouseCalls

The integration with HouseCalls™ from TeleVox® allows you to create your calling list in ViewPoint and pass that information to HouseCalls. ①

Financial

- OrthoBanc

Payment plans are submitted from ViewPoint to OrthoBanc. Deposits are downloaded from OrthoBanc and posted in patient Ledgers.

- Unicorn Financial

This integration opens the Unicorn Financial® Web site and transfers patient information from ViewPoint. ③

- X-Charge

VP Credit Card, included in ViewPoint, lets you swipe or manually enter credit card payment information directly into patient Ledgers individually or with AutoReceipts. Transactions are authorized quickly over a secure Internet or modem connection. VP Credit Card works with all major credit cards, using free X-Charge credit card processing software by CAM Commerce Solutions.

Case Presentation/Patient Education

- OrthoMation

The integration with GAC Technocenter's OrthoMation™ case presentation system allows you to start the OrthoMation software from a ViewPoint patient record and have the patient's findings transfer over. ③

- ScreenPlay

Ortho II and ScreenPlay Technologies have developed a system that integrates ViewPoint with ScreenPlay. ScreenPlay can be started from within a ViewPoint patient record. Information from the patient's findings is used to create a protocol within ScreenPlay. When ScreenPlay is closed, the protocol is recorded in the patient's ViewPoint Correspondence History.

For any additional assistance please call your Ortho II Systems Consultant at 800 678-4644.



Available from Ortho II

Call your Ortho II Systems Consultant at 800 678-4644 for more details on any of these products and services.

ViewPoint Software Modules

- Additional ViewPoint Client Licenses
- Grid Scheduler
- Treatment Chart and Treatment Plan
- VP Imaging (patient image capture, enhance & presentation)
- VP Ceph Tracing and Analysis (available on a per-case or unlimited basis)
- On-Deck Appointment Control (Patient sign-in and operatory display)
- VP WebAccess (Account access for patients/parents on the Internet)
- Electronic Insurance
- Data Move Utility (Transfer ViewPoint data from location to location)
- 3rd Party Product Integrations

Equipment & Networking

- Computers, Printers, and Other System Components
- On-Site Installation & Configuration

Services

- On-Site Refresher Training
- Web-Based Refresher Training
- VP Credit Card transaction processing
- VP Backup on-line storage
- Data Split (split ViewPoint database on doctor, location, or other criteria)
- Data Conversion (put non-ViewPoint data into ViewPoint file format)
- Custom Reports

OneTouch Lifespan Status:

0 to 1 Year

This status reflects our belief that it is time to move away from OneTouch.

This does not mean we will stop trying to support your OneTouch system.

However, the computer industry has left DOS behind, and it is now impossible for us to provide comprehensive support and peripheral components for OneTouch.

Contact your Systems Consultant at 800 678-4644 to discuss your options and have your questions answered.



For more resources, visit our Web site: www.orthoii.com

Free On-Line Resources

White Papers

Are you wondering how much RAM we recommend for your ViewPoint server? Do you need to print a copy of the *Training & Users Guide* or other documentation? This information and more is available on-line at www.orthoii.com > Support > White Papers.

Report Repository

Visit our Report Repository at www.orthoii.com > Support > Report Repository to download additional ViewPoint reports. Several reports, including the Patient Name, Status, and Phase List, are there now.

Users Forum

This forum allows all Ortho II customers to ask questions, share ideas, and learn new tricks with the help and support of other ViewPoint, OneTouch, and VP WebAccess users. Visit www.orthoii.com > Members > Users Forum.

BETTI

BETTI is our web-based Bug and Enhancement Tracking Tool Interface. Use BETTI to suggest enhancements, report errors, and track requests. Visit www.orthoii.com > Members > BETTI and create an account.

Searchable Knowledge Base

The Ortho II Knowledge Base, along with the White Papers and BETTI, is fully searchable using Google™ technology. Simply go to www.orthoii.com > Support > Knowledge Base and type in key words related to the information you are looking for.

H o l i d a y s

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.

S e r v i c e E x c e l l e n c e

We invite you to recognize Ortho II employees by sending Extra Mile Cards. An Extra Mile card is enclosed in this newsletter or you may send Extra Mile cards on-line from the Contact Us page of our Web site. 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 Ortho II 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.



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H e l p U s H e l p Y o u

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. If you use OneTouch, your customer number is located at the top of your main menu. 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.