

Comprehensive Orthodontic  
Practice Management, Imaging, and  
Communication Solutions

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## Share the Newsletter

Are you the only one in your office who gets to read our newsletter each quarter? If so, please pass it on to everyone in the office.

Did you know that you can read the current newsletter and back issues on-line? Go to [www.orthoii.com](http://www.orthoii.com) > Members > Newsletters.

- Doctor
- Office Manager
- Treatment Coordinator
- Financial Staff
- Front Desk Staff
- Clinic Staff
- \_\_\_\_\_
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## President's Perspective:

*Dan Sargent, Ortho II President*

### Self-help On-line Movies

If a picture tells a thousand words, imagine how helpful on-line movies can be. At [www.orthoii.com/support](http://www.orthoii.com/support) under Visual Help you will find more than two dozen self-help movie topics, including six that cover new features in ViewPoint Version 6.0 in detail. Use them to learn about powerful new features like our On-line Health History form. (And read **On-line Forms** on page 6.) We also post recent continuing education webinars here so everyone can benefit from them at a time of their choosing. With all this and movies covering common support topics, you and your staff will agree that our Visual Help movies are a great self-help resource!



### Are Missing E-mails Causing Lost Opportunities?

Are you getting periodic e-mail messages from us? If not, we either don't have your e-mail address or your spam filter is blocking our messages. Either way, it's too bad because we are using e-mail more and more to communicate with our clients. You can add your e-mail address to our mailing list at [www.orthoii.com/members](http://www.orthoii.com/members) as described on page 10. And make sure \*.orthoii.com isn't blocked by your spam filter. Otherwise you will miss out on money saving promotions as well as customer feedback questionnaires that help us understand what you want as we develop future features and products.

### Make Your Files Follow You Around!

If you ever find yourself moving documents between computers, you should look into Windows Live™ Sync (An earlier version was known as FolderShare), which was released on December 11, 2008. This free application from Microsoft® allows you to designate folders on your computer to share with other computers. For example, I share "My Documents" and my browser Favorites. Whenever I edit or add a file, it is automatically copied, usually in a matter of seconds, to my other computers over the Internet. Because my notebook computer is frequently off or off-line, it updates all changed files within a minute or two the next time it has Internet access. Thus I always have a local copy of my important documents and Web site addresses, whether I am working at the office, home, or on the road. I no longer worry about which copy of a document is the most current because the most current version follows me around! ☺



## Welcome New Members

Welcome to our new members who made the move to ViewPoint during the fourth quarter of 2008!

Shauna Fung, D.D.S. ~ New York, NY  
Mark D. Knoll, DDS, MS ~ Bellmore, NY  
J. William Schlicher DMD, MS ~ Pleasanton, CA  
Dr. Steven Wood ~ Weatherford, TX  
Dr. Sheila T. Marrero ~ Gurabo, PR  
Richard P. Fisher, D.D.S., M.S., S.C. ~ Marinette, WI  
Dr. Jenny Zhu ~ New York, NY  
Hoss Abar, D.D.S., M.S.D. ~ Pinole, CA  
Fernando J. Duarte D.M.D., M.S.D. ~ Coral Gables, FL  
RM Orthodontics ~ Brentwood, TN  
Sayre Orthodontics ~ Bozeman, MT  
Fernando A. Galeano, D.D.S. ~ Tampa, FL  
Dr. Alon Ofir ~ Downey, CA  
Ellis Orthodontics ~ Beloit, WI  
Dr. Nick Hersh & Dr. Marsha Beattie ~ Commerce Town, MI  
Dr. Bryan R. Hicks, Inc. ~ West Vancouver, BC  
Greenway Orthodontics ~ Glen Burnie, MD  
Christopher D. Schulten D.M.D., M.S. ~ Louisville, KY  
Robert S. Strange, D.M.D., M.D.S. ~ Leesburg, VA  
Susan E. Berey DMD, Med ~ New York, NY  
Adam Brand, DDS, MS, APC ~ San Diego, CA

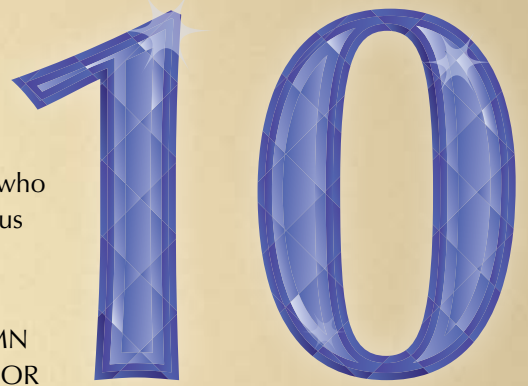


## Twenty Year Members

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 2008!

Dr. Roanne T. Tsutsui ~ Hilo, HI  
Steven L. Hechler, D.D.S., M.S., P.A. ~ Overland Park, KS  
Reznik Orthodontics, LLP ~ Odessa, TX  
Patricia F. Fong, D.D.S. ~ Sacramento, CA  
Drs. Weilburg & Hayden ~ Westerly, RI  
Michael P. Arrigo, D.M.D. ~ Revere, MA  
James P. Ziuchkovski, DDS, MS, PC ~ Colorado Springs, CO  
Brian P. Radulovich, DMD, MSC, Inc. ~ Olmsted Falls, OH  
Ballrick Orthodontics, Inc. ~ Rocky River, OH  
Dr. Joseph A. Cardarelli ~ Haverhill, MA  
Gary Devian, D.D.S. Orthodontics ~ Yorba Linda, CA  
Dr. Guy W. Favaloro ~ LaPlace, LA  
Dane Benko, D.D.S., M.S. ~ Butler, PA  
Dr. Michael J. Wagner DMD, PS ~ Woodinville, WA

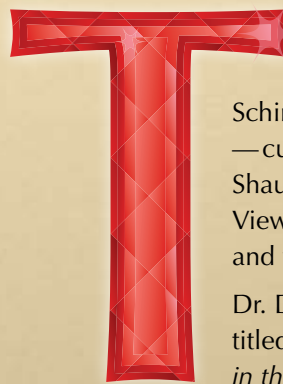




## Ten Year Members

Congratulations and thank you to our customers who have celebrated their ten year anniversaries with us during the fourth quarter of 2008!

- Dr. Michael Klein ~ Olathe, KS
- Hultgren & Hoxie Orthodontics ~ Eden Prairie, MN
- Dennis W. Trammell DMD, MSD, LLC ~ Eugene, OR
- J.A. Diddle DDS, MS, PC ~ Knoxville, TN
- Steven M. Lash D.D.S., M.S., P.C. ~ W Bloomfield, MI
- Susan M. Pincofski, D.M.D. ~ Flemington, NJ
- Dr. David Cordes ~ Westfield, MA
- Dr. Theo Mantzikos ~ Old Greenwich, CT
- Dr. Wuiteng Koh ~ Seattle, WA
- Monte S. Harrington, D.D.S., M.S. ~ Charleston, SC



## Thank You

Schimmel Orthodontic Associates (Riverdale, NY) —customer since first quarter 2008— allowed Dr. Shauna Fung (New York, NY) to visit them and see ViewPoint in action. Thank you for your hospitality and your confidence!

Dr. Dave Paquette (Charlotte, NC) gave a lecture titled *A Day in the Life: Utilization of Technology in the Orthodontic Practice* at the PCSO meeting this fall. His presentation included some ViewPoint screenshots and caused a lot of buzz around the exhibit hall, resulting in a number of people stopping by our booth. Thank you very much, Dr. Paquette!

Dr. Barry Feldman (Cheshire, CT) joined us in early December at the University of Connecticut for a Lunch and Learn presentation with the residents. Thank you for your help!

If you, like Dr. Paquette (see right), are preparing a lecture or presentation at a society meeting, university, or local meeting, we can provide you with any screenshots you need and can discuss how to best use ViewPoint in any situations you may be illustrating. We appreciate the good word you spread and would like to assist any way that we can.

## Congratulations

We would like to congratulate Dr. Trotter and Dr. Wetzel on their recent accomplishments.

Dr. John Trotter (Redondo Beach, CA) was installed as the California Association of Orthodontists President in November. The California Association of Orthodontists represents some 1600 orthodontists who practice in the State of California.

Dr. Jim Wetzel (Casper, WY) was awarded the William Gaylord Distinguished Service Award for his many years of dedicated service to the Rocky Mountain Society of Orthodontists and the profession of orthodontics.



# ORTHO II

## Users Group Meeting

February 19 - 21, 2009

Scottsdale  
Fountain Hills, AZ

Don't forget to make plans to attend the 2009 Users Group Meeting February 19-21 in Scottsdale, Arizona.

If you have not registered yet, we hope to hear from you soon. Register on-line at [www.orthoii.com](http://www.orthoii.com) > Meetings > Users Group Meetings or contact Kim Barker at 800 678-4644 or [ugm@orthoii.com](mailto:ugm@orthoii.com). Then be sure to mail or fax your registration form with your course selections!



The 2009 Keynote Session will be offered by Carol Eaton. She has been involved with the dental community for over 30 years. This session, **Finding New Growth in a Desert Setting**, will give you practical information for finding new growth, new motivation, and new team concepts for your practice.

Then choose from forty classes presented by eleven other leading industry consultants and knowledgeable Ortho II staff.

- Mary Kay Miller will be offering "Marketing Your Practice through Different Eyes—Your Patients'," and her company Orthopreneur will be in the exhibit hall. Read her article **Protect Your Turf With Internet and Digital Technology** beginning on page 5.
- Andrea Cook will be offering "Instrument Reprocessing in the Orthodontic Office." Read her article **TADs Sterilization** beginning on page 7.
- Dr. Roger Levin will present a two part course "The Secrets of Growing Your Orthodontic Practice by 30%" and The Levin Group will be exhibiting. Read his article **Do You Know the Secret to Orthodontic Growth?** beginning on page 8.
- Rosemary Bray will be presenting "Have 'Em at Hello!" and "What Makes a Great Ortho Team?" Read her article **The Team and Technology** beginning on page 9.

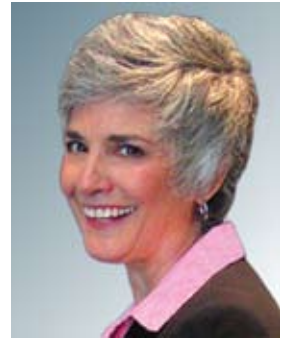


New this year... a Western Roundup dinner and dance. This special event will be at La Puesta del Sol with 360° views of the McDowell, Four Peaks, Mazatzal, Superstition, and Red Mountain ranges. Come for complimentary margaritas, dinner cooked on open flame grills, Michelle Lynn and the Legacy Band, and a gorgeous sunset.



# Protect Your Turf With Internet and Digital Technology

Mary Kay Miller, Marketing Coach, Orthopreneur Marketing Solutions



Few, if any, orthodontic practices have experienced the aftermath of a major economic meltdown like we are witnessing today. Every area of business and commerce is affected globally. Not only are we navigating through uncharted waters, we are suffering from a tsunami of real time media coverage. Consumers and Internet media have access to every minute detail of a drowning economy as it's reported, fueling fear in the minds of our global society.

Advances in digital technology are occurring at lightning speed and turning life as we know it upside down. In the past 5 years on the Internet alone, popular forms of communication have surfaced in the form of blogs and social media to dramatically change information gathering in the 21st century.

- Consumers age 10–40 are watching less TV and spending more time on the Internet watching video and chatting with friends on social network sites such as Facebook, MySpace, and YouTube.
- Election analysts report the presidential election was won and lost on the Internet, changing forever how election campaigns will be run in the future.
- The yellow pages are dead. Yellow pages advertising in the past two years is reported at record lows and sales staff are shifting to yellow book Internet marketing services to offset losses.
- Gannett newspapers, one of the largest publishing firms in the country, is laying off staff due to reduction in newspaper sales.
- .com companies quick to venture into the Internet market such as Amazon.com, on-line retail stores, and eBay have forced out many big name players—slow to compete with an Internet presence—changing forever how businesses sell products and services.

The Internet is now considered the greatest communication tool invented since Gutenberg built the printing press in 1436. The traditional printed message of old—where businesses told consumers what they wanted consumers to hear—has been replaced by a virtual environment growing faster than its inventors and promoters ever imagined in their wildest dreams. This virtual frontier is the new marketing medium where the consumer has control. Blogging, social networking, and on-line comments offer consumers an entirely new perspective when searching for an orthodontic treatment provider.

The yellow pages are dead.

The Internet has replaced Gutenberg's printing press.

Gen X, Gen Y, and Global Tweens—your current target orthodontic market—are the most tech savvy and skeptical consumers in history. Understanding their personal preferences in information gathering and finding a way to get through all the marketing clutter and noise which surrounds us all today is a major challenge.

- They no longer respond to traditional marketing strategies of old.
- Their buying decisions are based on emotion, personal preferences, and latest trends.
- They rely heavily upon friends and family for referrals.
- Their favorite forms of communication are text messaging, cell phones, social networks, and the Internet.
- They have low tolerance for businesses they perceive as being outdated or “computer challenged.” If you don't have a Web site to engage this group with content rich information, you might as well be invisible.

Ortho II users have a distinct advantage over other orthodontic practices throughout the world. In a book released by Dr. Howard Choi this year, *An Evaluation of Orthodontic Practice Management Software: Maximizing the Return on the Investment of the Orthodontist*, levels of satisfaction were studied comparing the various orthodontic practice management software programs currently available.

Ortho II software was rated superior in comparison to other programs in the study and received high marks on most features. Since your practice management system is the digital hub of any orthodontic practice, Ortho II users are already ahead in the digital game. Delivery of treatment and customer service, always has been and always will be the foundation of any successful marketing plan. Without reliable user friendly practice management software, customer service and treatment delivery is compromised. It reduces team efficiency, consumer satisfaction, and tarnishes the overall treatment experience, causing negative word of mouth comments.

Discovering how to maximize digital technology to its highest potential, not only in treatment delivery and customer service, but as an Internet marketing tool

**Protect Your Turf** continued on page 14

# On-line Forms

Part of an ongoing series spotlighting significant ViewPoint features

*Cal Rebhuhn, Ortho II Software Support Representative*

Through on-line practice management tools such as VP WebAccess and Electronic Insurance submission, ViewPoint already helps you keep your business efficient and up to date with advancing technology. And now in ViewPoint 6.0, you can have your patients fill out On-line Forms. Then, with just a few clicks of the mouse, your staff can add the completed forms to patient folders.

With ViewPoint's On-line Forms, your patients can complete their own health history, biographical, or other custom forms on-line and submit them for download right into your ViewPoint software, saving your office staff the time and hassle of gathering patient information. Plus, as many offices make the transition to paperless operation, your forms can now be stored and accessed in an electronic, easy-to-use format.

For example, our OII Health History Form is included free of charge with ViewPoint. If your office has a Web site, you or your Web site administrator can simply place the practice-specific link to your office's on-line forms in your Web site. Now your patients can follow the link, fill out their health history, and submit it for use by your office.

Alternately, you can e-mail the link to your on-line forms to your patients and/or responsible parties, allowing them to go directly to the forms without accessing your Web site. If your office does not have a Web site, this also provides an easy way to get the word out on your new feature and point your patients to the same On-line Forms.

Once a patient submits an On-line Form, your staff can use it in several ways. For instance, your staff can download the form directly into a patient's record in their Findings tab, making the information immediately accessible whenever a patient's folder is open. The OII Health History form information can also be accessed

from a patient's Treatment Chart. A simple click of the Health History button in the Treatment Chart toolbar will bring up a patient's most recent Health History Form information. In addition, this data can be merged into a document to print for the patient's records or used in a letter to a consulting professional.

## Getting Started

You can find the link to your OII Health History Form in the Plug Ins section of your ViewPoint Main Menu.

Double-clicking OII Health History Form will automatically open a Web page that shows you the links to your forms. Choose and click a link to see the form that a patient will view and fill out. (This form can be customized for you.)

Once your patient clicks the Submit button at the bottom of the form, these forms are available for you to download into your ViewPoint software. Go ahead—fill out and submit one yourself!


Then select On-line Forms from your Add-In menu in ViewPoint to automatically download and display all pending On-line Forms.

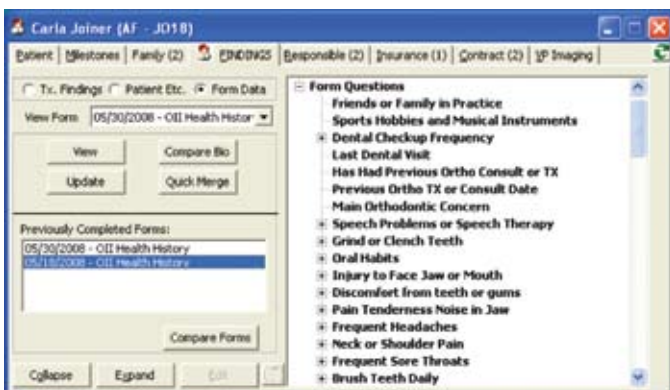
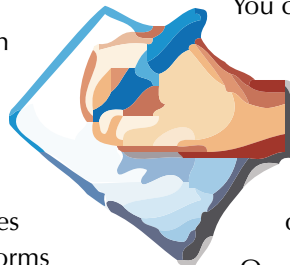
From here, you can link forms to patient records, create new patient records from the data in the forms, and more. If you filled out a test form, you may want to View the data and then Delete it.

Our OII Forms Viewer software is also available in the Plug Ins Main Menu. This allows for in-house completion and submission of on-line forms directly to your patient's records. Try letting your patients fill out On-line Forms from a computer in your reception area while they wait to be seated.

More detailed instructions on On-line Forms are in Chapter 2: Daily Activities in the 6.0 *Training & Users Guide* which can be downloaded from our Web site at [www.orthoii.com](http://www.orthoii.com) > Support > White Papers. Even better: a Visual Help movie is available at [www.orthoii.com](http://www.orthoii.com) > Support > Visual Help > VP 6.0. *And be sure to attend Practicing the Essentials on Thursday afternoon at the 2009 Users Group Meeting.*

## Share Your Ideas

Let us know at [editor@orthoii.com](mailto:editor@orthoii.com) how the On-line Forms feature has helped you, or share a powerful way in which you use it or another feature in your office. We will consider all ideas for publication in a future issue. 



# TADs Sterilization

*Andrea Cook, Orthodontic Clinical Consultant, Andrea Cook Consulting*

Many orthodontic offices have chosen to implement the use of TADs (temporary anchorage devices) into their practice to decrease treatment time and increase efficiency in their mechanics. Use of these devices can lead to improved results, reduction in treatment time, and most importantly, reduction in the number of extractions and lengthy surgical cases. Less reliance on patients for compliance is a definite advantage that often results in shorter treatment times. Lasers are also being widely used for uncovering teeth that are not fully erupted in preparation for bonding as well as gum contouring. Whether the doctor chooses to place the TAD themselves in office or refer out is strictly a personal decision based upon their comfort level and training received.

The clinical implementation of the TADs and laser procedure can be a bit overwhelming for the clinical team. Often they are not trained on the technology and this may make them uncomfortable with the procedure. Fully educating the clinician will allow them to feel comfortable and be able to communicate information to the patient and/or parent regarding the procedure.


TAD placements and laser procedures are considered surgical procedures and require specific sterilization guidelines to be followed. All instruments, cotton, and gauze that are to be used in the procedure need to be packaged prior to sterilization. As this is a surgical procedure they need to be double wrapped as well. The instrument package will be opened chairside by the clinician indicating to the patient and parent that your practice is providing sterile instruments and the highest level of infection control. The doctor and clinician need to wear sterile gloves during the procedures. Standard exam gloves are not sterile and should not be used at any time during the procedure. Mask, protective eyewear, and clinic gown (i.e., disposable isolation gown) should also be worn by the doctor and clinician. Protective eyewear should be provided to the patient, and for laser procedures these glasses should be the orange colored glasses.

In order to ensure the package of instruments is sterile, a biological monitoring test strip (spore test) should be run on the sterilizer used for the procedural setup. This can be accomplished by placing a test strip inside a cassette that has been double wrapped and dated. The surgical procedure cassette will also be double wrapped and dated. Once the sterilization cycle is complete the "dummy" cassette will be opened and the biological monitoring test strip will be sent in for assurance that the cycle was effective in sterilizing the load. Until this test strip is returned to the office with a passing result, the surgical cassette cannot be used.

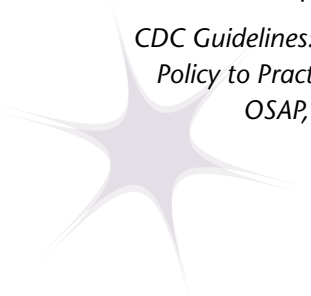
Compliance with CDC guidelines and patient assurance of providing sterile instruments during these procedures are necessary portions of the implementation of TADs or lasers into a practice. Please call me for a smooth and seamless integration of these procedures into your busy practice. ☺

*Andrea Cook's hands on training motivates and energizes orthodontic clinical teams for premier orthodontic offices across the country. She bases training systems on practical knowledge gained through 20 years chairside experience working in single, double, and multi doctor practices. This experience allows her to understand and address the concerns of the clinical team. Since effectively training clinical team members is critical to the advancement of clinical productivity and profitability Andrea works with teams to increase efficiency, improve communication, and guide the office to a new level of excellence.*

*At the 2009 Users Group Meeting she will offer the course Instrument Reprocessing in the Orthodontic Office.*



Oral surgical procedures involve the incision, excision, or reflection of tissue that exposes the areas of the oral cavity that normally are not exposed.



*CDC Guidelines: From Policy to Practice by OSAP, 2004*

# Do You Know the Secret to Orthodontic Growth?

Roger P. Levin, D.D.S, Founder & CEO, Levin Group, Inc.



To reach the highest levels of orthodontic success, doctors need excellent clinical skills and strong business know-how. Many entrepreneurs never figure out the key drivers of their business and eventually go bankrupt. While very few orthodontic practices ever file for bankruptcy, they can experience challenges, especially in an uncertain economy such as we have now.

In its 23-year experience of consulting to thousands of orthodontists, Levin Group has found that most orthodontic practices operate at 30–50% or more below their true potential. What is the difference between highly successful orthodontists and those who struggle to grow their practices? The answer is understanding the key production drivers that make an orthodontic practice successful.

## The Ultimate Key Driver

I was recently talking to one of our clients who had completed an extremely successful year with his consultant at Levin Group. This young orthodontist had grown his practice over 36% and reduced his work week from five days to three-and-a-half days. I have no doubt he will grow another 30% or more in his second year of consulting because, as he told me, he finally figured out one of the major keys to business success—referral marketing!

In the early years, he focused on being the best orthodontist possible. Unfortunately, this doctor had trouble accumulating any savings and struggled to pay all of his bills. He built a world-class facility, hired and trained an excellent staff, and expected success to occur right away. In our conversation, the young orthodontist said it was a revelation when he finally realized that a key driver in any business is referral marketing. Without marketing, as he stated, “there is no business.” Marketing creates customers. For orthodontic practices, referral-based marketing is one of the secrets of long-term growth.

Frequently, orthodontists believe that if they are the best in their area, they will automatically achieve financial success. Unfortunately, many orthodontists end up very disappointed, have high stress levels, and feel that they have been cheated in some way. Remember, excellent clinical skills alone are not a guarantee of success. You need the right business skills to achieve your true practice

potential. And one of these skills every orthodontic practice needs to develop is referral-based marketing!

The key to orthodontic practice growth is implementing a comprehensive referral marketing program and carrying it out consistently for the remainder of your career.

## Why Referral-Based Marketing?

Every business has key drivers. Conventional marketing, with logos, stationary design, business cards, etc., does not attract significant numbers of patients to orthodontic practices. These are the basic aspects of building an orthodontic practice that patients will see once they have made a choice to come to your practice.

Referral marketing is different. It is an intense and strategic focus on both patients and referring doctors using multiple strategies to encourage them to refer other people. The truth is that most patients have a limited number of people that they can or will send to your practice. However, when hundreds of patients refer low numbers of other individuals, the result is excellent.

In a new concept recently introduced to Levin Group clients, we are teaching *deliberate relationships*.

Deliberate relationships is a concept where the top 200 orthodontic parents and patients receive a special type of marketing program to encourage them to refer other people. Although this program has only been in place for approximately 12 months, the results are already dramatic. However, it does require a marketing plan that focuses on these individuals, encouraging them to refer and expressing your appreciation once those referrals take place.

The second major aspect of referral marketing focuses on general dentists. While a patient has the opportunity to refer a few other individuals, the general dentist has the potential to send 100 patients or more per year. Many Levin Group orthodontic clients have referring doctors who send \$250,000 of production or more each year, greatly contributing to practice success. Working with Levin Group, these orthodontists developed a general dentist referral marketing program with 15–30 consistent, ongoing strategies. As I have taught in orthodontic

Implement a comprehensive referral marketing program and carry it out consistently for the remainder of your career.

**Secret to Orthodontic Growth** continued on page 14

# The Team and Technology

Rosemary Bray, Speaker, Trainer, and Consultant to the Dental and Orthodontic Profession

"A computer in an ortho office? You have **got** to be kidding! That will never happen!" These are words I must admit that I actually said in the early and mid 90's as I worked in an orthodontic practice.

My particular practice truly had a file in the office entitled "**The C Word**," and into it went every flyer or article about the computerization of orthodontics. There were a lot papers in there from Ortho II. The folder was rather thick... and finally, close to the time I was leaving the practice to become self employed as a speaker and consultant, **my** practice was fully computerized. (Today, they are an Ortho II client!) This was too late for me to realize the magnificence and positive effect it would have on an ortho practice.

Certainly now I can see it everywhere I travel to. So much of what we are doing today—what we think is modern and "techy"—will someday to be to our children and grandchildren as outdated as our pegboard bookkeeping system and our appointment books seem to us today. Times change, things change... and so must we.

I have said often in my lectures that **one** thing I am most certain is true about orthodontics is that the 3 areas which combine to make an ortho practice "Successful, Profitable, Quality, Happy, Harmonious, Excellent..." must be an **equal** combination of and focus on:

**33% Clinical Excellence**

**33% Extraordinary Service**

**33% Great Teamwork**—includes **education** and integration of new technology

John Wooden, former very successful and famous UCLA basketball coach, brilliantly said, "It's what you learn after you know it all that really counts." Boy, is that a true statement, and it certainly applies to all of us in ortho as we adapt to the many new technologies which have entirely changed the way we practice our profession.

Computer management systems for orthodontics began in the early 80's, with Ortho II being established in 1982. I actually learned from Dr. Bob Scholz, with Ortho II from early on, that he obtained his first computer in December of 1984—an IBM AT with a 10 MB hard drive that ran on 8.7 MHz with a monochrome monitor—at an astronomical cost of \$8700! Today we can get so much more computer that runs so much faster, does so much more in multi-colors, weighing nothing, and costing little.

There were very few ortho offices who were trying computers in 1984... and the rest, as the saying goes, is **history**.

When bringing any new technology into an office, the **doctor** and the **team** must be totally on board, mentally and emotionally, before beginning the research and purchases.



## What Makes a Team Member Stay at a Job

- 1 ~ Overall job satisfaction
- 2 ~ Being valued and appreciated
- 3 ~ Increased work knowledge \*\*
- 4 ~ Ongoing challenge and growth \*\*
- 5 ~ A feeling of doing something worthwhile
- 6 ~ A sense of empowerment
- 7 ~ Increased skill \*\*

\*\* These three areas specifically apply to the area of new technology and learning.

## Benefits of Being on a Team vs Being Solo

- 1 ~ It enhances better overall communication
- 2 ~ People appreciate the differences and strengths in each other more
- 3 ~ It stimulates greater creativity and learning
- 4 ~ It is easier to solve challenges and concerns as a group
- 5 ~ Change is more welcomed and better handled

All of these apply to ortho.

## Benefits of Learning & Using New Ortho Technology

- 1 ~ Overall efficiency is enhanced
- 2 ~ Time is saved by all team members
- 3 ~ Enables a more organized practice
- 4 ~ Provides hands on learning for patients and all team members
- 5 ~ Reduces (or eliminates) the "lost chart" hunts
- 6 ~ Empowers you to your patients and referrals
- 7 ~ Markets your practice as advanced, state of the art, and dedicated

Is this all true in your ortho practice?

- Yes  No  
 Not yet

**Team and Technology**  
continued on page 15

# Inside Ortho II

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

## Put Your Shirt on Our Back!

We want to show our appreciation for you, our clients, and all you mean to us by wearing your practice T-shirts in our booth at the 2009 AAO Annual Session in Boston. You've worn our UGM shirts and you've referred us to your colleagues. Let us return the favor. If you won't be able to make it to the meeting, you can still be there in spirit. And if you will be there, please be sure to drop by and say hello!

We will need about thirty shirts in a variety of sizes. If you'd like to see us in your practice shirt, contact Kim Barker at 800 678-4644 or [kbarker@orthoii.com](mailto:kbarker@orthoii.com).



## Free Seminars

As our client, you and your staff may attend these free small-group seminars as often as you wish. Attend classes initially to learn about your new system. Then as time goes on, return to train new employees and/or implement new features.

Seminars are held 9:00 A.M.–4:00 P.M. Central Time each day for three days at our office in Ames, Iowa. Class size is limited to assure individual attention, and pre-registration is required.

To register, or for more information about the seminars, contact Judy Brown at 800 346-4504 or [jkb@orthoii.com](mailto:jkb@orthoii.com). If you prefer, register on-line at [www.orthoii.com](http://www.orthoii.com) > Members > Seminar Series Registration.

### 2009 Seminar Dates

January 14, 15, 16  
March 11, 12, 13  
June 10, 11, 12  
September 9, 10, 11  
November 11, 12, 13

Wednesday's session focuses on the design options, features, tools, and daily use of the Grid Scheduler.

Thursday's session addresses ViewPoint operation, including understanding the Patient Folder, entering patient data, creating contracts, posting transactions, and filing insurance.

Friday's session covers reports, subgrouping, month-end routines, and using Tools & Utilities, as well as creating and merging documents to produce customized correspondence using the ViewPoint/Word integration.

## Join Our E-mail List

Here's an exciting opportunity to enhance your success with Ortho II products and services. We have launched an e-mail communication program which includes money saving discounts and incentives, overviews of new features, productivity tips, meeting updates, periodic optional feedback surveys, and more. We think you will like getting these messages.

Furthermore, we believe associate doctors and members of your staff will benefit from the productivity and usage tips, and we would encourage them to sign up as well.

To register e-mail addresses for this program, simply visit the Members section of our Web site, [www.orthoii.com/members](http://www.orthoii.com/members), using your practice login information, and fill in the "Join Our Mailing List" box. As mentioned above, multiple individuals from your office can register. Even if we already have your e-mail address, it won't hurt to register here, and it will guarantee your inclusion in this program.

And of course, if you or any of your staff ever decide that the messages are not of interest, you can simply use the "opt-out" option provided on each message.

## 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.

## Free Webinars

In addition to our free classroom seminars, we offer you monthly on-line real time webinars. Each month throughout the year we present a different topic. It's the perfect solution for training new users, refreshing experienced users, or learning about new features.

Pre-registration, a computer with a high speed Internet connection, and a phone are required. Register on-line at [www.orthoii.com](http://www.orthoii.com) > Members > Free Webinars, or contact Judy Brown at 800 346-4504 or [jkb@orthoii.com](mailto:jkb@orthoii.com).

Selected past webinars are available on-line at [www.orthoii.com](http://www.orthoii.com) > Support > Visual Help.

### First Quarter 2009 Webinar Dates

January 9

#### Financial Reports

10:00 A.M. – 11:30 A.M. Central Time

ViewPoint has a variety of financial reports available, and understanding what each report can tell you is important. We'll look at the information in each report and how you might use that information on a daily, weekly, monthly, or yearly basis.

February 6

#### ViewPoint Professional Tracking Feature— A Closer Look

10:00 A.M. – 11:30 AM. Central Time

The new professional type tracking helps you keep better records and extend detailed treatment information to other professionals attending your patients, such as oral surgeons and periodontists and pedodontists. We'll discuss getting setup to use this feature and ways it links to other existing features such as labels, letters, and subgrouping.

March 20

#### Contracts & Posting

10:00 A.M. – 11:30 A.M. Central Time

This session will cover entering contracts and using the various options in the contract editor. We'll look at options available for making modifications to existing contracts and using the contract reallocator. You'll get the basics for how to post charges and payments, enter adjustments, reverse charges or receipts, and issue refunds.

### Remaining 2009 Webinar Dates

April 17	July 17	October 16
May 22	August 14	November 20
June 19	September 18	December 11

## Third Party Integrations

Ortho II has developed integrations for a variety of third party products. Instructions for setting up and using each integration are available on our Web site: [www.orthoii.com](http://www.orthoii.com) > Products > Integrations. New integrations are being developed all the time so be sure to check the Integrations page periodically.

### Imaging

- AnatoCeph
- cephX
- Dolphin Imaging
- FYI Technologies Dr. Ceph
- FYI Technologies Dr. View
- Ortho-Vision Records
- Quick Ceph
- Standard Imaging Integration
- VistaDent

### Radiography

- Gendex DenOptix
- Gendex Orthoralix 9200
- Gendex VixWin
- Instrumentarium CliniView
- Kodak 8000C and 9000C
- Planmeca Dimaxis
- Sirona Sidexis
- Soredex Digora
- Visix

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.

### Modeling

- GeoDigm emodel
- Orthobyte
- OrthoCAD

### Telephony

- JulySoft ReminderPro
- Tel-A-Patient PowerCalls
- TeleVox HouseCalls

### Financial

- ChaseHealthAdvance
- OrthoBanc
- Vanco
- X-Charge

### Case Presentation/ Patient Education

- OrthoMation
- ScreenPlay
- SureSmile

*For any additional information on integrations, please call your Ortho II Systems Consultant at 800 678-4644.*

## Contact Us

Phone  
800 678-4644 (Sales)  
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Internet  
[www.orthoii.com](http://www.orthoii.com)

Newsletter Submissions  
[editor@orthoii.com](mailto:editor@orthoii.com)

## 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, enhancement, & presentation)
- SmartCeph
- 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)
- Data Merge (Combine ViewPoint databases)
- Data Conversion (put non-ViewPoint data into ViewPoint file format)
- Custom Reports

## Free On-Line Resources

**Visual Help:** Help movies are available at [www.orthoii.com](http://www.orthoii.com) > Support > Visual Help. Recently added movies cover the new features of ViewPoint 6.0, providing an easy way to make sure you aren't missing something good. Other movies include answers to common questions, recent webinars, and a SmartCeph tutorial.

*For more resources, visit our Web site: [www.orthoii.com](http://www.orthoii.com)*

## Career Milestones

Angie DeWaard, who has been with Ortho II since 2001 and most recently as a Software Support Representative and Trainer, has taken the new position of Software Support—Advanced Tech. Her responsibilities will include building resources and increasing information distribution as well as assisting with complex support issues.

## On a Personal Note

Dr. Greg Pezza (Cranston, RI) and his wife, Melissa, welcomed a daughter at the start of October. It is their first child and Dr. Joseph Pezza's 6th grandchild, but first granddaughter. Congratulations!

## Carol Legassick

Carol Legassick joined the sales team last summer. Carol, who is herself Canadian, will be working with our Canadian customers and prospects.



Using her years of experience at long-time Ortho II customer Stackhouse Orthodontics (St. John, NB) she will also be doing trainings for Canadian customers.

Carol was born in Scotland and moved to Canada with her family in 1975. After high school graduation she completed a dental assisting program and is a Certified Dental Assistant. She has been working in the dental field since 1976 and for the past 15 years as a Certified Orthodontic Assistant and Office Supervisor for Stackhouse Orthodontics.

Now living in Ontario, she is looking forward to serving Canadian customers for Ortho II. Introduce yourself to her at the UGM if you have not already met!

## Ortho II Anniversaries

Congratulations to these Ortho II staff members who celebrated anniversaries during the fourth quarter of 2008.

### Nineteen Years

Tricia Rose

### Six Years

Richard Kelley

### Sixteen Years

Todd Schuelka

### Four Years

Corey Schmidt

### Fourteen Years

Michele Eich

### Three Years

Derek Dohrman

### Ten Years

Lowell Davis  
Denise Sargent  
Jennifer Shaffer

### Two Years

Erik Strabala

# The Quickest Tool

*Paul Lundgren, Ortho II Software Support Representative and Trainer*

Can you imagine a world without automobiles? ...I'd imagine you're struggling with that one just a bit. The automobile is utterly pervasive in our culture; virtually everyone takes them for granted. We also take for granted television, telephones, supermarkets—and computers.

For those of us privileged enough to live in this age of high technology, we have taken other things for granted as well—namely, the Internet. For all its Luddite detractors, there is absolutely no denying the impact this resource has had on our lives. Virtually any piece of information you can dream up is at your fingertips. And for those of us in the information technology business, it is an indispensable resource for fixing other people's computer troubles.

With Internet communication and remote control programs such as VP Remote, it becomes a matter of seconds to connect to a computer across the globe and minutes to fix a problem that could otherwise cripple an office. For instance, an office recently called because they were unable to connect to ViewPoint in their satellite office. The problem turned out to have been that the server in the main office didn't have the database engine started. I was able to connect remotely, get the database started, and get them running. This saved them needing to have an employee make a trip back to the main office to do this manually, and drive back to continue the workday.

What happens if you do NOT have access to the Internet? I recently took a call from one of our offices that needed to have me send them a file. You guessed it—no Internet access in that office. I had to mail them a floppy disk. A problem that could have been fixed in minutes took days.

## Why doesn't your office have Internet access?

- **Viruses:** Many doctors have a fear of losing time and productivity—to say nothing of a loss of data itself—to a virus acquired through the Internet. It's a legitimate fear, and we do see the occasional call to assist with viruses (and, more commonly, spyware), but commercial software and hardware greatly reduce the risk.
- **Hackers:** Having someone break into your network is a much lower probability than Hollywood movies might lead you to believe. Proper protection and diligent upgrades to your firewall and anti-intrusion software (included with most anti-virus programs) make the hacker's job much more difficult, and they will move on to easier marks.
- **Productivity:** A much more realistic concern. If you have desktop access to Web sites and e-mail, how can you be sure your employees won't take advantage?

The answer is, they will, but not as much as you might think. In a normally running orthodontic office, there simply isn't that much time to kill. And an occasional check of e-mail is a good way to decompress from the afternoon rush.

- **Expense:** In the current economic climate, some doctors are looking to cut costs any way they can. This could be compared to cutting your advertising budget—it will cut costs, all right, but it will also cut out a valuable and powerful tool that should be considered not an expense, but rather an investment.

## Why should your office have Internet access?

- **Downloading software fixes:** Computers are becoming increasingly complex. Software and hardware manufacturers are constantly finding new "bugs" in the system, and it is a simple matter to place a fix on-line for consumers to download. One example of this is the AutoUpdate feature in the ViewPoint Help menu. It is a matter of minutes to receive the latest features and fixes, rather than waiting for days for a disk to be mailed to your office.
- **Human troubleshooting:** Software representatives like us here at Ortho II can quickly connect to your computers to perform complicated diagnoses that would take much longer when talking the user through them—especially when working with staff members who are not well versed in computer terminology. In order to be able to accomplish certain tasks properly, we need the correct tools for the job, and sometimes that means connecting directly to the computer is unavoidable.
- **Marketing:** The average consumer is becoming increasingly technically savvy. New means of marketing through the Internet are rendering traditional advertising media increasingly inconvenient and ineffective. Given new capabilities, such as the ability of ViewPoint to send out text message appointment reminders, you have ever-more-powerful tools by which to sell your practice to potential customers.

Let's take an example. Traditionally, offices that chose to do appointment reminder calls had one option: Designate an employee to do the work manually. This may be a nice personal touch, but it takes someone away from other duties, resulting in a loss of productivity.

Today, not only can ViewPoint send out e-mail reminders to parents (automated reminder calls, too, but that's another discussion), we can also send text messages to cell phones and BlackBerry® devices. Now, instead of needing to go home and press "Play" on their answering machine, a parent can receive a message on their phone wherever they are, read it at their convenience, access the phone's calendar feature to make sure the appointment is there, send a text message to their child...

**Quickest Tool** continued on page 15

## Secret to Orthodontic Growth *cont. from page 8*

seminars throughout the country, it is not only the quality of the marketing strategy that is important, but also the quantity. This is where a PRC comes in.

### The Professional Relations Coordinator

A PRC or Professional Relations Coordinator is the key to making the ultimate driver—referral marketing—successful. Most orthodontists do not have the time, knowledge, or interest to carry out or maintain a full-blown referral marketing program. Even if you get started, there is a high likelihood that your motivation will drop off fairly quickly. On the other hand, if you hire a PRC, you will have a dedicated team member whose job is to focus on marketing, building the practice, and dramatically increasing referrals, all while you provide optimal orthodontic care and enjoy other aspects of your life.

In 1985, when I first launched the concept of referral marketing, I had not created the involvement of a PRC. In that time, clients did have positive results, but not nearly as high as I would have liked. I quickly realized that the number one bottleneck was that doctors were running the marketing program and that they only had so much time, energy, and commitment. In 1987, I implemented the PRC, and it has been a tremendous success ever since. Today, I tell orthodontists that if you do not have a PRC, it is unlikely you will have a strong marketing program.

The PRC runs 95% or more of the entire marketing program. The PRC's responsibilities include clearly defining the referral marketing strategies, creating timelines to carry them out, implementing the strategies, tracking results, and adding new strategies. The PRC's job is to continually find ways to increase referrals from patients and referring doctors using a systematic method. Marketing is a highly sophisticated science that will deliver a predictable result, if it is implemented and carried out consistently using the appropriate systems. The PRC should be thought of as a professional who will need to learn the science of referral marketing. Unfortunately, referral marketing is a very esoteric part of marketing not taught in most business schools. With the right training and guidance, a PRC can help you generate hundreds of new patient referrals every year.

### Conclusion

To guarantee a successful practice, a strong referral-based marketing program is a necessity, not an option. Practices that consistently and effectively engage in referral-based marketing will become the production and profitability leaders in their area.

You owe it to yourself, your staff, and your families to help your orthodontic practice perform in the most efficient

and effective manner. Every day that you do not take steps to grow and protect your practice, opportunities for increased profitability and referrals are lost. Referral marketing is the key to making your practice stronger and highly productive. Think of it as one more way you can recession-proof your practice. ☺

*As Founder & CEO of Levin Group, Inc., Dr. Roger P. Levin, author and international lecturer, has embraced one single mission since 1985—To Improve the Lives of Dentists. Since then, hundreds of orthodontic practices have benefited from Levin Group's solutions for increasing production, boosting profitability, and reducing stress. A third-generation dentist, Dr. Levin is one of the profession's most sought-after speakers. For more information on Levin Group Practice Success seminars, visit [www.levingroup.com](http://www.levingroup.com) or call 888 973-0000 and mention Ortho II for a 50% courtesy.*

*Dr. Levin will present a two part course The Secrets of Growing Your Orthodontic Practice by 30% at the 2009 Users Group Meeting.*



### Protect Your Turf *cont. from page 5*

with an SEO (Search Engine Optimized) Web site and Web 2.0 Internet marketing program, empowers you to increase demographic visibility to prospective new patients and set your practice apart in an economy where many practices are floundering. Approximately 40% still don't have a Web site, and the majority that do have not begun to tap into their Internet marketing potential. Competition is greater than ever before, especially with pedodontists and general dentists competing for your orthodontic patients. *Protect Your Turf—Stake Your Claim* in Internet marketing real-estate now to build your practice for the future. ☺

*Mary Kay Miller is founder of Orthopreneur™ Marketing Solutions. With 30 plus years experience as an orthodontic business coordinator, treatment coordinator, and marketing coordinator, Mary Kay experienced first hand what it takes to make an ordinary practice... EXTRAordinary. She co-designed custom orthodontic software for practice management in 1983 and created her first orthodontic Web site in 1998. Mary Kay created the first orthodontic marketing blog in 2007 and video blog in 2008. Go to her Web site [www.orthopreneur.com](http://www.orthopreneur.com) and download her FREE 90 page multi-media ebook on Orthodontic and Internet Marketing written for the entire team. She can be reached at 877 295-5611.*

*She will offering the course Marketing Your Practice through Different Eyes—Your Patients' at the 2009 Users Group Meeting.*

## Five Most Common Mistakes When Applying New Technology

- 1 ~ No formal training. We often say, “it’s too expensive, we don’t have time, we can manage without” or worse, “We know this guy who is a real geek and he can...”
- 2 ~ Only a few get trained. We say, “it’s easier, less down time, some are smarter than others, they can teach the rest of us, I learned that in my other office...”
- 3 ~ No follow up training. We say, “it’s less costly, we got it already, we don’t have time, we have to see patients...”
- 4 ~ The doctor does not get trained. We often say, “the team can teach him/her, s/he needs to see patients, we don’t have the time, s/he’s a geek already...”
- 5 ~ No training on the updates. We often say, “it’s less expensive, we already got it (again), we need to see patients, our good friends can show us how...”

## The Doctor’s Role in the Team and Technology

- 1 ~ Dr. must have a clear vision of what is expected from the technology being considered. Discuss it with others, research, compare, shop it around first!
- 2 ~ Dr. needs to communicate that vision and expectation to the entire team, not to a few, to everyone.
- 3 ~ Dr. must commit to the continued ongoing costs of technology and training and upgrading. It has to become part of the regular expected monthly budget.
- 4 ~ Dr. makes sure all get fully trained. Not a select few, everyone, including the Dr.
- 5 ~ Dr. needs to make it safe to make mistakes. Real confidence comes not from always being right, but from not fearing to be wrong. Too many team members fail to learn because they fear being proven wrong or making a mistake. Adapt a no blame environment. You will see people learn better and with less anxiety.
- 6 ~ Dr. has to continually praise, thank, and appreciate the team for the above and beyond effort to learn. (Team, you can do the same for Dr., you know.)
- 7 ~ Dr. must anticipate **change**. Just when you think “you got it,” get ready, the cheese will move again! Embrace the changes.

## The Team’s Role in the Team and Technology

- 1 ~ We must accept that technology is here to stay—it is not going away.
- 2 ~ We must be fully trained and cross trained.
- 3 ~ We must communicate far better than we ever have in the past.
- 4 ~ We must own our own mistakes. No fear of being wrong, no “not my fault” excuses. Err, admit it, learn from it, and move on. That is how we grow.
- 5 ~ We need to welcome the education and the training—it will be forever.

6 ~ We should agree that the costs of all new technologies and training are well worth the money spent. We cannot be resentful of the money the practice commits to spending, nor can the team feel it is their “lost bonus or raise.” No whining!

7 ~ We need to stay as positive as possible, even in times of stress.

8 ~ We must accept that change is not always comfortable, but in order to grow and learn, it is required. It is not an event, it is a process. Welcome it.

Integrating any new technology, system, or product into your practice requires a lot of great communication and positive attitudes. But first, the **acceptance of change** must be dealt with. Many are frozen by it, as we learn in the terrific Spencer Johnson book, *Who Moved My Cheese?* I recommend reading this before initiating any major change in the practice, or in your life for that matter!

“We have to either **move** or **be** moved.” ~ Colin Powell, at a past AAO meeting.

When integrating any new technology into your great practice, stay positive and enthusiastic and quote our President Elect, saying all together, “Yes We Can!” ☺

*Rosemary Bray has more than 30 years experience in the dental profession, including 16 years as an Office Manager and Treatment Coordinator in an orthodontic practice. As an orthodontic consultant and professional speaker since 1998, Rosemary has lectured nationally and internationally on a variety of topics, specializing in new patient exams, marketing, customer service, communication skills, and team building. She can be reached at 760 268-0760 or via [www.rosemarybray.com](http://www.rosemarybray.com).*

*At the 2009 Users Group Meeting, she will present Have ‘Em at Hello! and What Makes a Great Ortho Team?*



## Quickest Tool cont. from page 13

Imagine how appealing this sounds to potential clients: “We can give you an appointment reminder by postcard, phone call, e-mail, or text message. Which one works best for you?”

The Internet is as vital to 21st century consumers and businesses as the telephone, the fax machine, and the photocopier were for most of the last century. An office that does not have on-line access, or doesn’t take full advantage of it, is at a disadvantage to those who are best able to make the most of it. ☺

*Learn more about Internet benefits at the 2009 UGM in these courses: Practicing the Essentials, VP WebAccess, Contracts & Postings (Part 1), Electronic Insurance, and Marketing Your Practice through Different Eyes.*



*“Delivering practical solutions for success to the orthodontic profession...”*

The traditional printed message of old—where businesses told consumers what they wanted consumers to hear—has been replaced by a virtual environment growing faster than its inventors and promoters ever imagined.

*Page 5*

Compliance with CDC guidelines during these procedures is a necessary portion of the implementation of TADs or lasers into a practice.

*Page 7*

Conventional marketing, with logos, stationary design, business cards, etc., does not attract significant numbers of patients to orthodontic practices.

*Page 8*

When bringing any new technology into an office, the doctor and the team must be totally on board, mentally and emotionally.

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