



# Practice Complete Management

## President's Perspective

Every year we hold a training session for those who represent us at the AAO meeting. We do this to reacquaint them with the resources and procedures we use while exhibiting. This year, I had an interesting moment while watching our trainer review the features we consider particularly meaningful.

***I didn't know ViewPoint did this!***  
(And wow, it was impressive!)

Then it hit me... if the president of the company isn't aware of such a powerful feature in his own product, how can our clients possibly be expected to know everything ViewPoint is capable of? And sure enough, members of our team report that it is common to hear from customers who are frustrated by a perceived ViewPoint shortcoming, only to learn that the feature exists. Customers are happy when these calls end, but I'd much prefer (as I suspect you would) to avoid the frustration in the first place.

But it's a challenge. ViewPoint started out feature rich, and new releases every year make it easy to fall behind. This gets exacerbated by our excitement over, and focus on, our new enhancements—at the expense of attention given to significant, but older capabilities.

ViewPoint probably does much more than you know, and perhaps even things

you currently wish it did. Here is what I suggest:

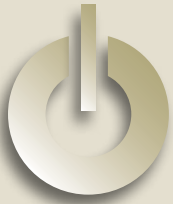
1. Please don't assume ViewPoint can't do something without checking with us. We love to help!
2. Consider the value of an on-site refresher training, especially if you can create a list of things in your practice that you would like to improve. (Sending us the list beforehand is helpful.)
3. Attend our free webinars, or our free seminars. See page 10.
4. Attend our annual Users Group Meeting (and brace yourself for the resulting ideas and excitement.) Our next meeting is in one of my favorite cities: Las Vegas. Get all the details on page 7.
5. BUT FIRST, read the ViewPoint Can Do It article on page 15 of this issue. It describes some ViewPoint features you definitely want to be aware of.

Do you have a favorite feature or implementation technique that you think other practices would benefit from? If so please send it to [editor@ortho2.com](mailto:editor@ortho2.com). We hope to collect these and present additional ideas and hidden features periodically in future issues. ☺

### Inside this Issue

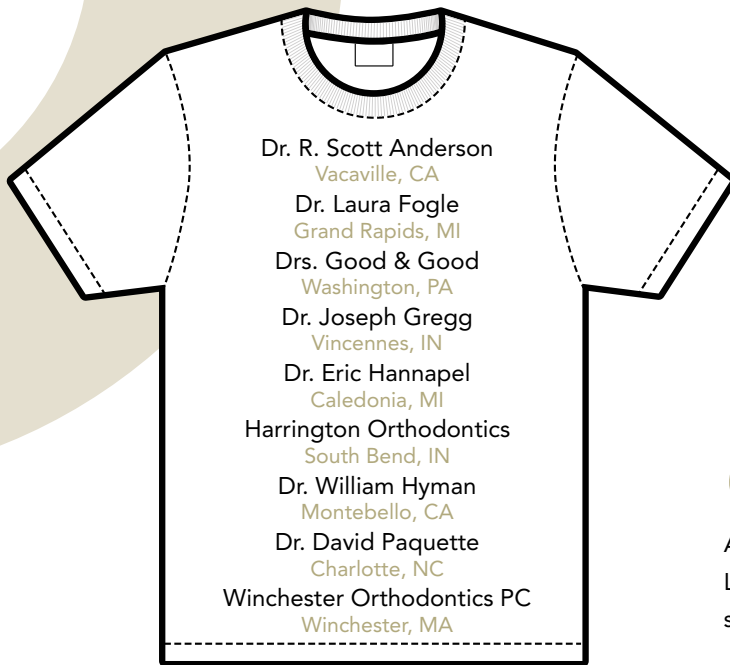
President's Perspective	1
In Recognition	2
Spotlighted Feature: Family	4
The Rock Star Months! by LeeAnn Peniche	5
Workaholic Tips for the Summer	6
Ortho2 UGM 2010	7
Total Ortho Success Practice Makeover	7
Navigating Through Tough Times by Tina Byrne	8
Inside Ortho2	10-13
ViewPoint Can Do It	15

Comprehensive Orthodontic Practice Management, Imaging, and Communication Solutions



# In Recognition

Our mission... benefitting and fostering our Ortho2 family



In the January issue of this newsletter, we asked you to let us show our appreciation for you by wearing your practice T-shirts in our booth at the 2009 AAO Annual Session—a thank you for you wearing our Users Group Meeting shirts and referring us to your colleagues.

Now, we want to say **"Thank you!"** to those offices who sent us T-shirts (and hats!) for this project. We really enjoyed wearing them.

Congratulations to Denise Schouweiler for placing in the 2009 Orthodontic Staff Presentation Competition at this year's AAO Annual Session. Denise is the financial coordinator for Drs. Guenther, Larson, and Kim Orthodontics in Rochester, Minnesota and executive secretary of the Minnesota Association of Orthodontics.

For the second year in a row Dr. Keith Kohrs has been named Top Orthodontist by 5280 Magazine!

The 2009 Top Dentist list is a comprehensive listing of more than 400 dentists and specialists throughout Colorado. Dentists and specialists were selected for the list based on experience, continuing education, manner with patients, the use of new techniques and technology, and of course, the end result.

Congratulations to Dr. Brian Hardy and his staff for winning the first Levin Group Total Ortho Success Practice Makeover. Dr. Hardy is working with the Levin Group during the year to kick-start his production.

We wish to extend our condolences to the Boston University family and the entire orthodontic community on the passing of Dr. Anthony A. Gianelly. Dr. Gianelly was an internationally respected speaker, author, teacher, and mentor to countless orthodontists.

## Contributor Contact Information:

Tina Byrne – For more information on team building, strategic marketing, and comprehensive consulting programs from Byrne Consulting, visit [www.byrne-consulting.com](http://www.byrne-consulting.com) or call (800) 580-6580 or (410) 836-7848. Orthodontic excellence is a matter of practice.

Dr. Roger P. Levin and Levin Group provide expert orthodontic practice management and marketing solutions. For more information, contact Lori Gerstley, Professional Relations Manager, at (443) 471-3164 or [lgerstley@levingroup.com](mailto:lgerstley@levingroup.com). Or visit [www.levingrouportho.com](http://www.levingrouportho.com).

LeeAnn Peniche – For more information on Peniche & Associates Consulting Service or a complementary copy of Peniche & Associates monthly planning meeting agenda e-mail [info@leeannpenicheandassociates.com](mailto:info@leeannpenicheandassociates.com) with your name, practice name, and request.

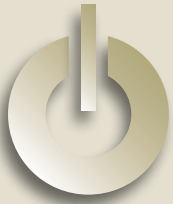


Thank you to everyone who stopped by our booth at the AAO!



## Come visit us at the fall meetings.

Canadian Association of Orthodontists	September 11–12, 2009
Southern Association of Orthodontists	September 24–26, 2009
Midwestern Society of Orthodontists	October 16–17, 2009
Pacific Coast Society of Orthodontists	October 23–24, 2009
Great Lakes Association of Orthodontists	October 30–31, 2009
Middle Atlantic Society of Orthodontists	November 3–6, 2009
Northeastern Society of Orthodontists	November 13–14, 2009



# Family

Part of an ongoing series spotlighting significant ViewPoint features

**V**iewPoint uses family identification to help you grow your practice, save you time, maintain the accuracy of your data, and save you money.

Open any patient folder and click on the Family tab to get started!

## Grow Your Practice

If you have been asking each of your new patients for the names and birthdates of their younger siblings, then you have a potential client base just waiting to be tapped.

Enter the information about a sibling, or any family member who is a potential patient, in the Siblings section of the Family tab and click Add Sibling.

To identify these future patients and invite them in, consider the following subgroup. It can be used with a custom post card, VP Reminder, the Subgroup List (covered in this column October 2008), or in many other ways.

From the Tools & Utilities Main Menu, click Subgroup Design. Click once on the folder in which you wish to keep this subgroup. Right-click the folder and select New.

Enter a Template Name and Report Reading Description. To create the subgroup, click the plus (+) in front of Sibling and then double-click Birthdate. Enter a range of dates (say, 07/01/2002 through 07/31/2002) and select "Prompt for desired dates with each use."

## Avoid Duplicate Entry

When a sibling calls to schedule their new patient exam, you can create a patient record with no data reentry.

Open the patient folder of an existing patient to their Family tab. Select the non-patient sibling who is calling in—Willa Joiner in the example here—and click

Make Patient. A list of responsible party and insurance records for the family appears. Select the information you would like copied to the new patient folder and click OK.

## Never Forget to Update Information

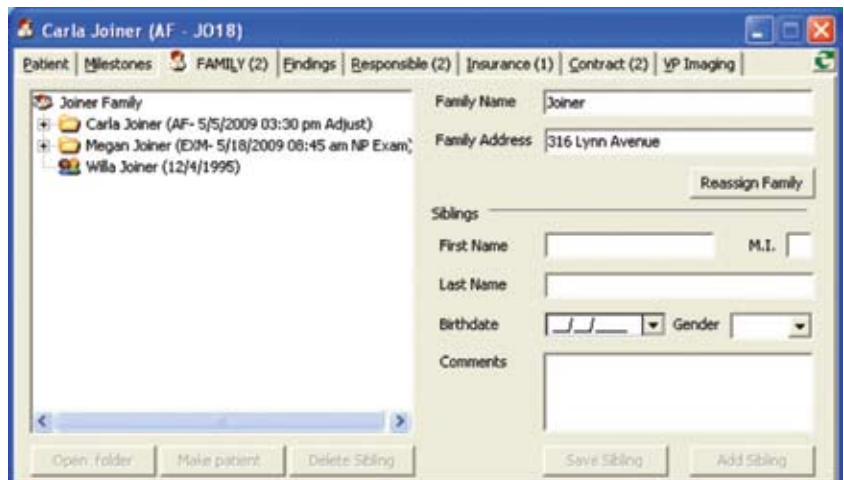
Whenever a patient or responsible party address or phone number is changed, ViewPoint displays an Update Linked Addresses window. This provides you the opportunity to update the information for responsible parties and linked family members. Changing a responsible party e-mail also triggers an update feature.

## Save Postage

Family labels use the name and address from the family tab to print one label for "The Joiner Family" no matter how many patient folders and non-patient sibling records are linked. This makes newsletters, holiday greetings, and other family-oriented correspondence easy.

From the Practice Reports Main Menu, choose Label and then Family.

For more detailed information about creating and using Family features, refer to "Family Tab" in "The Patient Folder" section of Chapter 2 of the *ViewPoint 7 Training & Users Guide*. Users guide chapters can be downloaded from our website [www.ortho2.com](http://www.ortho2.com) or requested from any Ortho2 representative. ☪



# The Rock Star Months!

Compose and rehearse to ensure your success

You've heard the saying, "Party like a rock star." Or maybe Pink's recent song that boasts, "So what? I'm still a rock star..." Yes, for those of us in the real world, the times we feel like rock stars may be few and far between. But the fact is that in the orthodontic world, three times a year we are all rock stars! Our production soars, our referral sources love us, the schedule is full of starts, and case acceptance is high! In other words, we are really rockin' it!

So when exactly are these "Rock Star Months"?	
January	New insurance flex plans kick in!
June	School's out for summer!
August	Get the braces on before school starts!

We are all rock stars 25% of the time! However, does that small percentage speak to a healthy practice in control of its own destiny? Successful, thriving practices are committed to rocking out all the time! These offices hunger to stay on stage and never believe their own press. They celebrate their past successes with an eye on the future. They are committed to staying at the top of the charts!

Recently, I was approached by a doctor who asked, "What can you do for me?" I looked at his numbers and was discouraged to see that the trends looked less like a healthy growth chart and more like the pattern of a sick patient on a heart monitor... up, down, down, up, down, down... you get the picture. His practice still had a beating heart but the question then became, "How do we repeat that success over the long term?" I inquired about planning meetings, campaigns, and Signature Marketing™, to which this doctor replied that they had the occasional staff meeting but had no time for much else. My prescription for his ailing months? Invest six percent of his total patient hours into building his future.

## Let's break it down

The Rock Star Practice commits to an Annual Planning Meeting in order to map out the upcoming 12 months.  
8 hours per year.

This same practice is dedicated to Monthly Planning Meetings to support its overall mission.

2 hours per month = 24 hours per year.

These rock stars have Morning Meetings to review daily, weekly, and MTD reports.

15 minutes per day = 42 hours per year.

Finally, the Rock Star Practice commits to daily End of Day Meetings to review the game board.

10 minutes per day = 28 hours per year.

## Now let's add it all up

For the average practice, the total number of hours per year equals 1,664 hours. And the total meeting investment as described above? Only 102 hours! In other words, the meeting time is a mere 6%... a small investment to make in planning for the future and ensuring success!

But here's the most important part: This investment gives you and your team a vital opportunity to compose and rehearse. Just like a musician cannot get on stage and perform without the proper planning, you cannot achieve success without a proper rehearsal of your orthodontic repertoire. Forget American Idol, you want to blow the amateurs away! Orthodontics is your arena—give a rock star performance and shoot for the pinnacle of success!

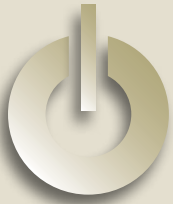
Back to my doctor friend... In order to light a fire under him, I showed him his sad trend for the third and fourth

**Rock Star Months** *continued on page 14*

## About the Author



Founder and president of Peniche & Associates, LeeAnn Peniche has earned a reputation as one of the country's premier orthodontic consultants specializing in case acceptance, scripting, marketing, and practice systemization.



# Workaholic Tips

These tips can improve your summer even if you aren't a workaholic

Summer is here and we all know what that means. You want to take vacation. Well, here are a couple things that you can do to choose the best time for a vacation, or for the workaholics out there, work right through your vacation.

Let's start by finding the best time to take your vacation. If you know you want to take a vacation but don't know the best time to take it, Grid Scheduler can help you find it.

## Grid Scheduler to plan your vacation

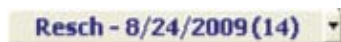
In the top left corner of the grid, there is a red grid icon. This is the month view.



The month view will show the calendar and let you see, day by day, how many patients you are seeing. It will also let you look at any notes you have on those days as well. Now, find the slowest week and schedule your vacation.

Next we need to block out that week and reschedule any patients that were there. The easiest way to do this is to go ahead and assign a Non Working Day grid to those days. Go to the Grid Tools dropdown, and open up the Template Calendar. On the large calendar on the left, click the day you want to take off, then choose your non working template on the bottom right, and click Assign Template. You can select more than one day at a time by clicking on the first day, holding down control on the keyboard, and then clicking on the other days.

So at this point, you might be asking yourself, so if I close out that day, won't I lose everyone who was already there? The answer to this is obviously, no. I wouldn't tell you to do something what would lose patient appointments. Simply close and reopen the Grid Scheduler. On the right side of the grid, below the clipboard, you will see a bar called "Resch - XX/XX/2009 (XX)." If you don't see it, you will see a triangle arrow on the bottom right corner. Click on that arrow and you will see more bars.



Once you click this bar, you can see the patients who need to be rescheduled. Drag and drop them onto a different day just like you can from the clipboard.

## VP Remote to access the office

Now it's time for the fun part, working on the beach or wherever your vacation may take you. One way to do this is to use VP Remote. It is already built into ViewPoint, free to use, and easy to set up. Here is what you need.

1. A known static IP address. If you have more than one office, you probably already have this. One way to find what it is to visit our website: [www.ortho2.com](http://www.ortho2.com). Click Support at the top, and then click Find Your IP Address.
2. A computer in the office that is always on. This is usually the server.

To set up VP Remote at the office, go to Start > Programs > Ortho II ViewPoint > VP Remote (the folder) > VP Remote Server (the folder) > VP Remote Server – Install Service.

Once the service is installed we need to go in and set a password. Open the Control Panel and double-click Administrative Tools. Once there, double-click Services. Now, scroll through the list of services and find VNC Server. Right-click it and select Start. It should bring up a new window saying that no default password has been set and will allow you to assign one. Choose a password. You

**Workaholic Tips** continued on page 14

## About the Author



Derek Dohrman is an Ortho2 Software Support Representative and Trainer. He has been a workaholic with us since 2005. In fact, he can't even remember the last time he took a vacation.

# UGM 2010

Join us in Las Vegas, February 18–20, 2010

Get out your calendar and make plans to join us at Caesars Palace in Las Vegas next February 18–20 for the fun and excitement of the 2010 Users Group Meeting.

This year's general session speaker will be LeeAnn Peniche.

Through innovative, proven, and proprietary systems, LeeAnn Peniche has consistently brought smiles to orthodontists for more than 20 years. Her life has been committed to providing orthodontists and their offices with the tools and systems for their continued success. Over 2,000 practices have experienced first-hand LeeAnn's creative outlook, years of expertise, and proven track record of success.

Be sure to read her article **The Rock Star Months!** on page 5.

Register online at [www.ortho2.com](http://www.ortho2.com) > Meetings > Users Group Meetings or contact Kim Barker at (800) 678-4644 or [ugm@ortho2.com](mailto:ugm@ortho2.com).

Look for your registration brochure with full course descriptions in the mail this fall!

## Levin Group Total Ortho Success™ Practice MAKEOVER

If you are dreaming of growing your practice, apply to win the 2nd Annual Levin Group Total Ortho Success™ Practice Makeover. Levin Group is once again embarking on a quest to find an orthodontic practice that is ready to reap the rewards of a **free** year-long orthodontic practice management and marketing consulting program.

You know the importance of having the right business systems in place. So ask yourself, when was the last time you took a close look at your practice's systems? Whether you are in the beginning stage of your career or already experienced and successful, growth is always within your reach—even in this economy.

With Levin Group's expertise and guidance, the winning orthodontic practice will experience improvements in every aspect of running their practice. This free one-year management makeover will be a customized approach based on the orthodontic practice's unique needs, goals, and potential. The winner of the 1st Annual Levin Group Total Ortho Success™ Practice Makeover, Dr. Brian Hardy, has been in the program for six months and has seen a positive shift in his practice. "The practice makeover has completely transformed my practice in all areas. The Levin Group consultants understand the workings of an ortho practice. I am already seeing an increase in referrals and production as well as a more cohesive and motivated dental team," he said.

### How Do You Apply?

To win this valuable opportunity, visit [www.levingrouportho.com](http://www.levingrouportho.com) and apply online by September 30, 2009. Finalists will be interviewed by phone, and the winning orthodontist will be selected by November 15, 2009. All travel expenses incurred during the program will be the responsibility of the winning orthodontist. For more information, contact Lori Gerstley, Professional Relations Manager, at (443) 471-3164 or [lgerstley@levingroup.com](mailto:lgerstley@levingroup.com).



WELCOME

TO THE *Fabulous*

2010

USERS GROUP MEETING  
February 18 - 20, 2010

Las Vegas, NV



# Navigating Through To

You Can't Direct the Wind—But You Can Adjust Your Sails!

I've spent more than thirty years in the orthodontic industry, and recently I've encountered the obstacle of economic paralysis among some doctors and their teams. Allow me to address this mind-set.

More millionaires were created during the Great Depression than any other era of American History. These successful business owners of the 1930s possessed two things: specific knowledge and timely action.

When growth or compliance issues get in the way of achieving a timely and successful end result to treatment, the astute clinician promptly modifies the plan. When unprecedented economic challenges threaten the bottom line, the savvy business owner takes steps to identify inefficiencies and improve productivity. So, chart your course to weather the storm—it's time to ignore THE economy and take control of YOUR economy.

## New Patients & Case Acceptance

"THE" economy has left many practices with a decline in the number of new patients. In no uncertain terms do I advise abandoning efforts to increase referrals, but I do

strongly encourage a focus on increasing case acceptance. Some offices look at conversion (the number of starts versus new patients) as opposed to case acceptance (the number of patients moving forward when treatment is presented).

Ortho2 has been most gracious in customizing a report I've implemented in my offices to effortlessly determine case acceptance. Like the Kept Procedure report, this report details selected procedures for any range of dates, offices, and doctors. In addition, there are columns for the next scheduled date and procedure, as well as the next scheduled recall date and recall procedure.

I recently spent a day with an orthodontist and treatment coordinator to enhance the new patient process and increase conversion. It wasn't long before the economic paralysis became apparent—paralysis on the part of the office, not the patient. This team was convinced that because their case acceptance was so poor, it meant patients could not afford their treatment. There was frustration as to why patients even spent the time to come for a consultation. Take my word, a patient/parent who contacts your office *wants* treatment! Let's view it as our job to make it happen whenever possible!

During this economic slump, many practices have chosen to reduce the amount of initial payments and become flexible with the terms of their contracts. A great strategy for increasing case acceptance—*only* if properly implemented. The last thing we want to experience as a result of our compromise is an increase in the rate of delinquency. If not already a tool in your practice, I urge you to implement risk assessment with a Web-based tool designed for our industry and the ease of your team. My recommendations: OrthoBanc at [www.orthobanc.com](http://www.orthobanc.com), or the new Zuelke Automated Credit Coach (ZACC) at [www.getzacc.com](http://www.getzacc.com). This is definitely not the time to throw caution to the wind.

You will find the Case Acceptance report on the Ortho2 website under Report Repository > Appointment. Please contact support for assistance in placing it into your system.

CASE ACCEPTANCE										
All Patients -- Office: ALL, Doctor: ALL										
Doctors Smith and Jones, PC, Ltd.										Date: 6/05/2009
CASE ACCEPTANCE - Friday, May 15, 2009 to Saturday, May 30, 2009										Time: 12:25:36 PM
Code	Procedure	Units	Date	Time	Patient Name	Status	Next Date	Next Procedure	Recall Date	Recall Procedure
EXAM-A	Initial exam	5	05/18/09	8:50 AM	Howell, Katelyn	PHI	7/13/2009	81-ADJ		
		5	05/18/09	11:00 AM	Smith, Kaitlyn	OBS	11/24/2009	12-OBS		
		5	05/18/09	12:10 PM	Dryer, Anna	OBS	11/24/2009	12-OBS		
		5	05/19/09	8:50 AM	Reese, Logan	FUL	6/22/2009	34-SEPS		
		5	05/19/09	11:00 AM	Hoff, James	RDY			5/19/2009	TC-WC TX PR
		5	05/20/09	2:00 PM	Wilkes, Larissa	RDY			6/15/2009	TC-ST CANC
		5	05/21/09	8:50 AM	Gang, Sophia	OBS	11/12/2009	12-OBS		
		5	05/21/09	11:00 AM	Swift, Carolina	XRF			5/21/2009	TC-TX PR IDT
		5	05/21/09	12:10 PM	Graft, Brendan	OBS	11/19/2009	12-OBS		
		5	05/21/09	2:00 PM	Burton, Austin	FUL	6/15/2009	81-ADJ		
		5	05/26/09	8:50 AM	Sanders, Erica	OBS	9/1/2009	12-OBS		
		5	05/27/09	8:50 AM	McDowell, Lauryn	OBS	11/19/2009	12-OBS		
		5	05/27/09	2:00 PM	Frish, Ryan	FUL	06/17/2009	81-ADK		
		5	05/28/09	8:00 AM	DeWitt, Kristina	PHI			5/28/2009	TC-TX PR IDT
		5	05/28/09	12:10 PM	Woods, AnyKate	LTD	7/13/2009	CK-CK RET		
		5	05/28/09	2:00 PM	Carroll, Sarah	FUL	6/18/2009	47-B-B FULL		
(16 records were printed)										
EXAM-B	Initial Exam	5	05/18/09	2:00 PM	Byrd, Keith	RDY			5/18/2009	TC-WC TX PR
		5	05/19/09	12:10 PM	Howell, Caroline	OBS	10/28/2009	12-OBS		
		5	05/19/09	2:00 PM	Groom, Bethany	FUL	6/24/2009	14-Rec		
		5	05/20/09	8:50 AM	Skyler, Michael	OBS	11/18/2009	11-RC READY		
		5	05/26/09	2:00 PM	Pope, III, Arthur	PHI	7/13/2009	34-SEPS		
		5	05/27/09	11:00 AM	Adams, James	INA				
		5	05/28/09	11:00 AM	Frye, Sarah	INA				
(7 records were printed)										
(23 records were printed)										

# ough Times

You can expect a high percentage of conversions when your team successfully handles each area of interaction in the new patient process: the connection, establishing confidence in your care, and the closing.

- 1. The Connection** with a new patient begins the minute you take the call. I have had a personal experience in which I made the decision *not* to be treated by a health care provider due to the manner in which they handled my initial call. It may sound trivial, but the simple misspelling of a name or inaccurate documentation tarnishes the patient's perception. Don't underestimate the importance of making a connection between your practice, the patient, and the primary care dentist. Failure to make a positive connection (and impression) is the first obstacle you will have to overcome in establishing confidence.
- 2. Confidence** in your care is achieved by identifying objections, addressing concerns, and overcoming obstacles relating to the patient/parent's mind-set. It's about establishing very open communication. If a patient is seeking a second opinion with your office, ask "was there something you weren't comfortable with in the other office?" How do we accomplish this in the 45 or 60 minutes we allot for a new patient consultation? Ask, ask, ASK questions throughout the exam, and don't do all the talking. Prepare yourself with information from the initial call and the welcome call prior to the exam—CONNECT!
- 3. Close** by asking for the commitment. This is an area of new patient interaction where many teams fall short. A common concern conveyed to me by team members is that they "don't want to appear pushy." Finances will be the major reason the patient will not commit to scheduling the next appointment. If you choose not to assess credit risk, establish guidelines for offering some flexibility. An example may be a lower percentage of the fee as the initial, or the initial divided into the first two or three months. Give qualified patients more options and give your team "some breathing room."

If your case acceptance needs improvement, don't miss a step with new patient interactions. If you fail to connect, it's more difficult to establish confidence. With little or no trust, don't expect open communication, and it's not going to be an easy close!

## Maximize Technology

In a time when we are forced to do more with less, let's look at making the most of what we've got and managing YOUR economy. The lack of software utilization in many offices makes my head spin. Where do I begin? Since this article is for Ortho2 users, let's start with your ViewPoint system. Allow me to share a few of the many ways we customize ViewPoint in my offices to maximize efficiency and productivity:

- 1. Financial**
  - Subgroup for any patient who is within the first three months of their payment schedule and has fallen delinquent. This allows the office to make that first collection call a "financial care" call. We communicate a concern that we may have not adequately explained due dates.
  - Subgroup for the 45–59 day age group of accounts targeted for the first collection call. A subgroup list is generated and a dedicated Notepad tab labeled "FINANCE & INSURANCE" is used to document conversations.

**Navigating Tough Times** *continued on page 14*

## About the Author



Tine Byrne's leadership qualities and upbeat presentation style provide a fresh perspective on the many challenges faced daily by the entire orthodontic team. She offers practical solutions to maximize practice productivity and profitability.

# Inside Ortho2

Information about the people of Ortho2 and the resources available to you as a member



## 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@ortho2.com](mailto:jkb@ortho2.com). If you prefer, register online at [www.ortho2.com](http://www.ortho2.com) > Members > Seminar Series Registration.

### Remaining 2009 Seminar Dates

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.



## Free Webinars

In addition to our free classroom seminars, we offer you monthly online 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. Selected past webinars are available online at [www.ortho2.com](http://www.ortho2.com) > Support > Visual Help.

Webinars begin at 10:00 A.M. Central Time unless noted otherwise and last approximately 90 minutes. Pre-registration, a computer with a high speed Internet connection, and a phone are required. Register online at [www.ortho2.com](http://www.ortho2.com) > Members > Free Webinars, or contact Judy Brown at (800) 346-4504 or [jkb@ortho2.com](mailto:jkb@ortho2.com).

### Third Quarter 2009 Webinar Dates

**July 17: The Practice Statistical Analysis Report:** The Practice Statistical Analysis Report and accompanying charts and graphs provide you with valuable insights to help your practice identify trends in business and patient care. The report compiles data on a monthly basis and can be generated for any range of dates. But this information is only as good as the setup required to generate the data. This session will review the report and necessary setup.

**August 14: 7.0 Enhancements:** With every update we add significant enhancements and a variety of improvements. This session will be a general overview of the 7.0 enhancements for ViewPoint.

**September 18: The New HR Manager:** This session will explore the new human resources manager module for ViewPoint—one place to track employee biographical information, benefits, and compensation; archive documents per employee; enter notes for employees; view employee work hours; and manage vacation time.

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## Available from Ortho2

Call your Ortho2 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 operator display)
- HR Manager
- VP WebAccess (account access for patients/parents on the Internet)
- Electronic Insurance
- Data Move Utility (transfer ViewPoint data from location to location)
- Third 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 online storage
- Data Split (split ViewPoint database)
- Data Merge (combine ViewPoint databases)
- Data Conversion (put non-ViewPoint data into ViewPoint file format)
- Image Conversion (convert your images to VP Imaging)
- Custom Reports
- Custom Online Forms
- Custom SmartCeph Analyses

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## Referral Rewards

You can earn a \$500 credit for each referral that results in a ViewPoint purchase within 6 months. You can apply the credit toward any current or future charge or purchase—it never expires. We frequently hear from doctors that they wish we had contacted them before they purchased their current system. We wish we had too, but we didn't know they were looking.

You can help us help your colleagues by letting us know when they are considering a change in systems. Enter referrals online at [www.ortho2.com](http://www.ortho2.com) > Members > Customer Referral, or call (800) 678-4644.





## Integrations

Ortho2 has developed integrations for a variety of third party products. Instructions for setting up and using each integration are available on our website: [www.ortho2.com](http://www.ortho2.com) > Products > Integrations. New integrations are being developed all the time so be sure to check the Integrations page periodically.

### Imaging

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

### Radiography

In general, any radiography device that uses a TWAIN compliant driver should be able to be used as a scanner to add images to VP Imaging—without the purchase of any additional hardware or software! The following devices are some we have worked with so far.

- Gendex DenOptix
- Gendex Orthoralix 9200
- Instrumentarium CliniView
- Planmeca Dimaxis
- Sirona Sidexis
- Soredex Cranex D

The following non-TWAIN compliant devices can be used as a scanner to add images to VP Imaging.

- Kodak 8000C and 9000C

The following integrations are designed to open the images in the third party software.

- Gendex VixWin
- Soredex Digora
- Planmeca Dimaxis
- Visix

### Modeling

- GeoDigm emodel
- Orthobyte
- OrthoCAD
- OrthoProof DigiModel

### Telephony

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

### Financial

- ChaseHealthAdvance
- OrthoBanc
- Vanco
- X-Charge

### Case Presentation/Patient Education

- OrthoMation
- ScreenPlay
- SureSmile

*In order to ensure a successful integration, please call your Ortho2 Systems Consultant at (800) 678-4644 to discuss your project before making any commitments.*

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## Ortho2 Anniversaries

Congratulations to these Ortho2 staff members who celebrated anniversaries during the second quarter of 2009.



### Nineteen Years

Ken Hoffmeier

### Twelve Years

Scott Elston  
Katherine Roccasecca

### Eight Years

Ron Benifel  
Cathie Raley

### Five Years

Micky Augustin

### Seventeen Years

Kim Barker

### Nine Years

Paul Lundgren

### Seven Years

Barb Williams

### Three Years

Lindsey Spieker

### Fourteen Years

Clarence Bryan

### Two Years

Tim Rogers

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## Career Milestones

We're pleased to announce the addition of **Brian Thompson** to the roster of the software support team. Brian has most recently been employed as a legal assistant here in Ames. In addition to working with clients in a customer service role, Brian became the office tech support person. Brian began his duties here at Ortho2 on Tuesday, May 12th.



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## Personal Note

Carol Legassick's first grandchild, Brooklyn Nevaeh Legassick, was born April 23. Congratulations, Grandma! Carol is the Ortho2 Systems Consultant for clients in Canada.



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## Support

### By Phone: (800) 346-4504

Available 7:00 A.M. – 7:00 P.M. Central Time,  
Monday – Friday

### By E-mail: [vpssupport@ortho2.com](mailto:vpssupport@ortho2.com)

Response time is usually the same day or at  
most within 24 hours.

### By Fax: (515) 233-1454

You can fax us support requests. While not required, forms that help identify these requests are available at [www.ortho2.com](http://www.ortho2.com) > Support > Fax Support.

### And Don't Forget Our Website: [www.ortho2.com](http://www.ortho2.com)

Our website gives you 24/7 access to our knowledge base, FAQs, white papers, visual help videos, and more.



## Navigating Tough Times *continued from page 9*

- A patient tag of “DC-NA” is used for any patient who has had delinquent communications with our office and has a new arrangement for payment. The contract is not changed until there has been at least a three month history of on-time payments of the new arrangements. A subgroup is created on this tag to follow the commitment.
- VP To Do records dates of ongoing follow-up for a delinquent account or a promise to pay.
- Contract classes are customized with a list of any PPO or DMO plans so that the office can ascertain both the production and adjustments given to these patients.
- Proposed contracts are prepared once a banding date has been scheduled. The financial coordinator is able to arrange all of the insurance information and merge contractual documents either to the Print Later Queue or in hard copy.

### 2. Scheduling

- Subgroup active treatment patients who are overdue or require an appointment in the upcoming weeks so that an automated phone reminder, e-mail, or text message can be generated weekly until those patients are scheduled.

- Subgroup recall patients by type of procedure so automated reminders and merge documents can be easily generated for upcoming and overdue recalls.
- Stack scheduled start patients in a ViewPoint stack labeled START DOCS for efficient communications to the financial coordinator.

### 3. Treatment

- Subgroup patients by start date for easy search and tag of patients due for treatment progress reports.
- Subgroup pre-treatment recall patients by upcoming procedure and date as well as last kept procedure and date to identify needed updates of patient and financial information. Automate reminders to the group as well.

Other much under-utilized areas of technology include case presentation software. Many offices have implemented the programs, but use only the very basic features. Consider customizing it for use as lunch and learn presentations, and invite referring doctors and staff. Expand on marketing orthodontic and office events with newsletters on a regular basis.

I am a firm believer that within every challenge lies hidden opportunity. Manage YOUR economy in this time of recession and identify inefficiencies and the untapped sources you’ve invested in to enhance your bottom line. ☺

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## Rock Star Months *continued from page 5*

quarter and suggested he start his Fourth Quarter Push NOW!

Yes, it is during the heat of summer that EVERY practice needs to ready themselves for fall campaigns. Consider a campaign to be a marketing message with arms and legs—diverse touch points that reach community, patients, professional partners, and press. Now is the time to create campaigns to target the schools, alpha moms, and generation G, otherwise known as the givers, and charitable organizations.

As I explained to the doctor, once you have your core campaigns in place, it is not necessary to reinvent yourself every year like Madonna. However, having the basics down allows you the opportunity to expand, refresh, and place a new spin on proven programs. This ensures that you are able to create your own signature brand thereby becoming a rock star all year long! ☺

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## Workaholic Tips *continued from page 6*

will need this password to get connected so don’t forget what it is. Once you have assigned a password, reboot the computer and you are all set.

Now, on your home computer, visit our website, [www.ortho2.com](http://www.ortho2.com), and download the VP Remote Viewer. It can be found by selecting VP Remote Viewer from the Support menu at the top. Download and install the files. Then simply double-click the VP Remote Viewer icon and type in the IP address of the computer at work. It will ask you for a password and you are good to go.

If you need, you can get detailed setup and use instructions for VP Remote in the White Papers section of our website: It is in Chapter 15 of the ViewPoint 7 *Training & Users Guide* or Chapter 13 of the 6.0 version.

Last but not least, enjoy your vacation and try not work the whole time. ☺

Are you looking for software with any of the features described below?  
Did you know you already have it?

# ViewPoint Can Do It

**“Some of our patients want to receive appointment reminders by text message.”**

**“AutoReceipts are great. Now, I want to push a button and have all the information sent to the credit card companies.”**

**Contact us to schedule an on-site or web-based re-training today.**

**“Doctor wants to easily e-mail patient photos to dentists and consulting professionals. Don’t make him look up addresses or search the network to attach files. Make it just a few clicks and then send.”**

**“Our parents expect to be able to look up appointment and account information on the Internet any time they want—and maybe even make payments online.”**

**Make plans to expand your knowledge at our annual Users Group Meeting while networking with other offices and industry professionals.**

1. VP Reminder
2. VP Credit Card
3. E-mail via Outlook
4. VP WebAccess
5. Complete Patient History
6. Online Forms
7. Needs Appt Grid Bar

What ViewPoint features do you use that others might not be aware of? Let us know, and we’ll make sure they are! Send submissions to [editor@ortho2.com](mailto:editor@ortho2.com).

**“It sure would be convenient to see a patient’s whole timeline in one place—all the charges, payments, appointments, phase changes, etc.”**

**“Patients are asking if they can fill out the health history form on our website. I know I would like it if I didn’t have to reenter all the information from the paper forms.”**

**“I need an easy way to see all the patients who should have appointments but don’t. We can’t afford to let these patients fall through the cracks.”**

**Take advantage of free monthly webinars and quarterly seminars to stay current with new features.**



**"Delivering practical solutions for success to the orthodontic profession..."**



Forget American Idol, you want to blow the amateurs away! Orthodontics is your arena—give a rock star performance and shoot for the pinnacle of success!

*page 5*

When growth or compliance issues get in the way of achieving a timely and successful end result to treatment, the astute clinician promptly modifies the plan. When unprecedented economic challenges threaten the bottom line, the savvy business owner takes steps to identify inefficiencies and improve productivity. *page 8*



Now it's time for the fun part, working on the beach or wherever your vacation may take you. One way to do this is to use VP Remote. It is already built into ViewPoint, free to use, and easy to set up.

*page 6*

**COMPLIMENTARY ISSUE**

If you haven't discovered the Ortho2 difference yet, please accept this issue of our quarterly newsletter with our compliments.