The Newsletter for Members and Friends of Ortho2
April 2011 - Volume 29 Issue 1

Practice Complete Management

ORTHO2

Inside This Issue

President's Perspective

Edge and ViewPoint™

With our promotional emphasis on our new product, Edge, I frequently wonder about the impression this gives to our ViewPoint clients. This turns to worry when I hear that our competitors are spreading rumors that we have, or will soon, abandon ViewPoint. Of course, this isn't true. What is true is that we are now a two product company. Yes, Edge is our new product, and it gets the lion's share of promotion in the marketplace for new customers. But in the family of ViewPoint clients, there are many reasons why ViewPoint is, and may remain, the better product for you. Let me explain.

If it ain't broke, don't fix it. I love this statement and find it applies to many aspects of life. Edge is new and attractive, but remember that ViewPoint is a comprehensive and polished practice management system. True, it wasn't designed to run from a datacenter (the "cloud"), and thus we created Edge. But unless the benefits of a datacenter appeal to you, I would argue that ViewPoint "ain't broke"!

Change isn't easy. The vast majority of ViewPoint data is converted to Edge, but the two programs are very different from a user's perspective. You will definitely need retraining, and some functions will require some thought and attention before they add value in Edge. This isn't to say that a transition to Edge may not be worth the effort. But there is effort.

Change isn't free. We offer attractive pricing for ViewPoint customers who elect to switch to Edge, but it isn't free. Your ongoing support and maintenance fees won't change for the same system configuration, but you will have an initial expense for the Edge software and training services.

ViewPoint supports many Edge features. Whenever possible during the development of Edge, we made sure that our ViewPoint customers would also

President's Perspective *continued on page 20*

Comprehensive Orthodontic Practice Management, Imaging, and Communication Solutions

In Recognition

Our mission... benefiting and fostering our Ortho2 family

Dr. Dorothy Whalen has been appointed president of the College of Diplomates of the American Board of Orthodontics for the 2010-2011 term. She is the first woman to serve in this position, and we would like to congratulate her on this accomplishment. Dr. Whalen has been in practice for over 30 years, and in her hometown of Glenn Cove for more than 25 years. Her website is www.orthodontistglencoveny.com.

At the 2011 Ortho2 Users Group Meeting, Dr. Andrew Trosien delivered a stellar 3D presentation. Dr. Craig Scholz, Ortho2 Director of Emerging Technologies, and all of us at Ortho2 thank you for your time and for the excellent results.

We would like to recognize Dr. James A. McNamara for chairing the amazing 38th Annual Moyers Symposium February 26–27th at the University of Michigan. The symposium addressed the topic of emerging technologies in clinical practice.

Thank you to Dr. Jason Bourne and his staff for recently giving an in-office demo of Ortho2 software to a prospective client. We appreciate it!

Dr. Andrew Trosien's article "Scheduling Software" appeared in the November 2010 issue of Orthodontic Products. In it he outlines how he schedules in his practice, what features he needs from his practice management software to achieve that, and how Ortho2 software and support have helped. Thank you for your support!

If you are planning a presentation or lecture at a society meeting, university, or local meeting or writing an article for publication, we can provide you with any screenshots you need and can discuss how to best use Edge or ViewPoint in any situations you may be illustrating. We appreciate the good word you spread and would like to assist in any way we can!

Contributor Contact Information:

Dr. Roger P. Levin – Roger and Ortho2 are partnering to let you attend one of the next two Ortho Levin Seminars at no charge through Ortho2 Educational Grants. E-mail lgregonline@levingroup.com for details. Information on his seminars and Levin Group consulting programs can be found at www.levingrouportho.com.

Rosemary Bray – Rosemary lectures nationally and internationally on a variety of topics, specializing in new patient exams, marketing, customer service, communication skills, and team building. To contact her, visit www.rosemarybray.com, e-mail rosemarybray@msn.com, or call (760) 268-0760.

Debbie Best – Debbie develops strategic plans for practice productivity, including customized schedules, personalized job descriptions, and a personnel manual to fit each practice's needs. To contact Debbie, call (925) 447-6993, visit www.consultingnetwork.org, or e-mail debbiebest@aol.com

Contributors Continued:

Natalie Beaton – With over 18 years experience, Ms. Beaton helps offices to develop consistency in critical systems using Ortho2 software. She ensures changes are maintained with detailed after-visit notes and regular follow-up. She can be reached at (804) 639-3052 or through her website: www.joyfulchange.net.

Nancy Hyman – Nancy has written articles for Orthodontic Products magazine, Bentson Clark reSource, and the Ortho2 newsletter. She is also the author of Winning Marketing Strategies workbook and Winning Treatment Coordinator Strategies. She may be reached at nancy@hymanortho.com or (323) 308-9817.

Ortho2 is on Facebook!

We've gone social, and as a valued part of the Ortho2 family, we hope you'll join us!

www.facebook.com/ortho2

"Like" our page to see all that Ortho2 has to offer you.

Users Group Meeting Wrap-Up

ORTHO2
Users Group Meeting
New Orleans, LA February 17-19, 2011

Unmasked in the Big Easy Costume Winners

Most Creative Masks
Dr. Dave Cramer's office

Craziest Hat
Alesha Barolet from the office of Dr. David McIntosh

Best Outfit
Darla & Mark Seymour from the office of Dr. Robert Jones

First Place Overall
Dr. Paul Perry's Office

Second Place Overall
Kohrs Orthodontics

Third Place Overall
Align Orthodontics

We would like to thank everyone who attended—doctors, staff, consultants, and exhibitors.

If *you* have not thought about attending a Users Group Meeting, consider the enthusiasm of doctors and staff when they learn new techniques for making their practice better.

"Great relationship building for our staff. It went above and beyond."
Connie Hukill, North Texas Orthodontic Associates, Allen, TX

"One of the best benefits of the User Group Meeting is hearing five to six well known consultants in three days and networking with other office staff."
Dr. William Osborn, Amarillo, TX

"Interactive, exciting, and enlightening. This was a great conference—Thank you!"
Caterina Scarlatella, Office of Don L. Wilson, DDS, Novato, CA

Get Ready for 2012

Next year we are going to sunny San Diego, California! Mark your calendar now for the 28th Annual Ortho2 Users Group Meeting, February 16–18, 2012.

Make plans to enjoy the idyllic climate, miles of beaches, and array of arts, culture, and attractions. The meeting will be held at the stylish San Diego Hard Rock Hotel in downtown San Diego, right in the heart of it all.

Preregister now to be one of the first to receive an information packed registration brochure this fall. Remember, some classes can fill very quickly. This is your chance to have the advantage.

To preregister, call Kim Barker at (800) 678-4644 or visit www.ortho2.com > Service Features > Meetings and Seminars.

Animations

Part of an ongoing series spotlighting significant features

Both ViewPoint and Edge give you the ability to use exceptional quality Patient Compliance Animations to inform your patients. (Edge Animations is an optional module for either ViewPoint or Edge and offers additional features and additional treatment and surgical animations.)

Get Started

Before you can use the animations with your patients, you will need to download them.

To get started with Patient Compliance Animations in ViewPoint, click the Edge Animations icon on the ViewPoint toolbar. From the menu, select Compliance Animations.

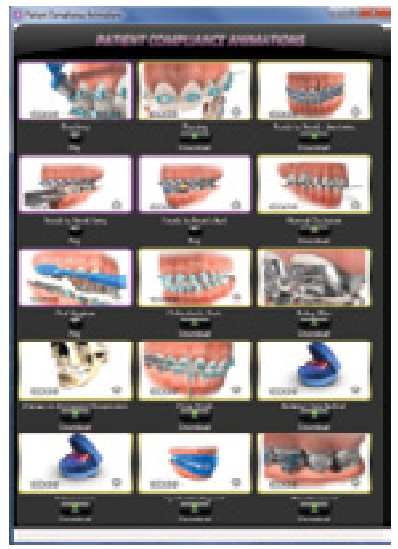
To get started with Patient Compliance Animations in Edge, click the down arrow next to "Animations" in the Module section of the Home ribbon, and select Compliance Animations.

In both ViewPoint and Edge, this opens the Patient Compliance Animations window. Animations which are available to be downloaded have a yellow border. Simply click the Download button to add them to your system. Ortho2 may add new animations from time to time.

Get to Work

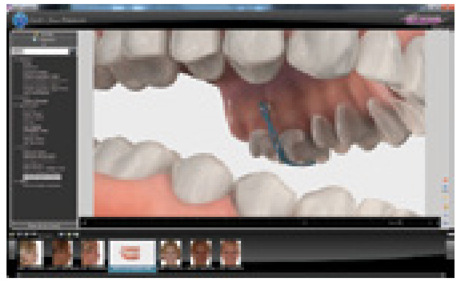
To use these animations to demonstrate these important concepts to your patients and parents, select Compliance Animations as described under "Get Started." This window can then be minimized and accessed from your task bar throughout the day.

When it's time to show an animation, simply click the Play button below the title you wish to view. The selected animation will open in Windows Media Player, where you can use the pause, play, seek, and replay features to control playback.



Edge Animations is an optional collection of powerful videos used to enhance patient education and compliance.

- Easy-to-use graphical interface
- Extensive library of videos
- Customizable playlists
- Audio and custom narration
- Fully integrated with Edge Imaging
- Ability to annotate and draw on animations
- Continuously updated and enhanced
- Ability to e-mail video links to patients and referrers
- Vivid graphics, colors, and animations
- Integrated with patient treatment findings



To learn more about Edge Animations, contact your Ortho2 Systems Consultant at (800) 678-4644 or sales@ortho2.com.

Value of Cross Training

Blend strength, skills, and capabilities

When a goose flaps its wings it creates uplift for the birds that follow. By flying in a "V" formation the flock has 71% greater flying range than if each bird flew alone. When the lead goose tires it moves back and another goose flies to the point position. The geese flying in formation honk to encourage the birds in front of them to keep up their speed. Geese instinctively know how to fly together to blend strength, skills, and capabilities. When a goose becomes sick or leaves the formation the remaining geese immediately take over without interruption.

What can we learn from the lessons of the geese? What happens when a key employee is out of the office, expectedly or unexpectedly? Does your team fall apart? Does it cause an interruption in your patients' care? Do your team members "honk" politely to give positive encouragement to employees who might be falling behind or need additional assistance?

With the change in the economy we are seeing more practices transition to a trimmer and leaner philosophy. The value of cross training has increased as we find ways to become more efficient, yet continue to deliver ongoing exceptional patient care.

Where to Start

Introduce the concept of cross training in your orientation for new employees. Create a detailed job description for each position including procedure documentation, timelines for daily, weekly, and monthly duties, and written materials and training tools that are available as references (Ortho2 and other software documentation, front office or clinical training manuals, appliance diagrams, etc.).

Utilize morning huddles and team meetings to strategize what responsibilities will be cross trained, evaluating what will have the greatest immediate and long term positive impact to the practice and the team member. Set up a 12 month schedule outlining the topics that will be cross trained on a monthly basis. Set aside a two-hour lunch or a block of non-doctor time monthly to conduct your Ortho Cross Training University (OCTU.)

Assign a team member as the OCTU Instructor for each training session, depending on their area of expertise (e.g., camera technique: records coordinator, sterilization: sterilization assistant, scheduling: scheduling coordinator).

Areas to Cross Train

Train every employee to **sterilize instruments.** Not only can they step in to help as needed, it also gives all team members the confidence to educate patients and parents regarding your sterilization process. Encourage team members to be current with a Hepatitis vaccination, even if their primary position in the practice is administrative. Develop a manual outlining the sterilization process, complete with pictures of all of the instruments used and safety guidelines. If the sterilization process includes putting together tray setups, take a photograph of each completed tray along with a list of instruments needed for each setup.

Train all team members how to **clean up the chair** after a patient is dismissed. Create a checklist of the necessary steps to clean a chair and prepare for the next patient:

- ☑ How can you tell if a chair is clean?
- ☑ How do you spray, wipe, and cover the unit?
- ☑ What disposables are replaced?
- ☑ Where are the disposables stored?
- ☑ What do you do with sensitive items (burs, hand pieces, etc?)

Cross Training *continued on page 21*

About the Author

Debbie Best, practice management consultant and lecturer for Consulting Network, has over 35 years of experience in the dental and orthodontic field. Debbie focuses on practice productivity, financial controls, and practice building.

Time to Write a New Mission Statement

The beginning of a new year often brings with it the need to take a look at your life, your successes, your goals, and your practice overall. It's a great time to revamp some systems, get those needed updates, redecorate a reception room, try that different bracket, hire a new team member, look into a better camera, etc.

So why not refresh an aged, outdated mission statement? Especially if it is one you bought years ago, copied from a classmate, found in some book, or "borrowed" off someone else's website!

The power to achieve the life of your dreams or the practice of your dreams is in your hands, and the first step toward activating it is identifying the specific goals that will make your dreams real. Success or failure as a human being is not a matter of luck, circumstances, fate, or any of the other tiresome old clichés. It's much easier to get what you want out of life when you know where you're going.

To quote a remarkably brilliant character in *Alice in Wonderland*, the Cheshire Cat is willing to help Alice find her way out of the dark, frightening forest. To better direct her, he asks her where she is headed. Of course, she has no clue and tells him she doesn't know! To that, he remarks, ***"If you don't know where you're going, then any road will take you there!"*** Hmmmm, is he talking to Alice, or to us?

A mission statement need only be a sentence to a paragraph long, but if it has specific, measurable purposes and a deadline for accomplishing the outcome, it truly can be the best way to start your journey to success. And it's easy for you to put one together in a simple, one team meeting process. Jim Rohn said, "You cannot change your destination overnight, but you can change your direction overnight." Creating an alive, *real* mission statement can help you change your direction. If you have no mission statement, then at the end of one team meeting, you could have made the shift from an ordinary existence to an extraordinary existence.

When I left my wonderful job in an ortho office, now 14 years ago, to begin a new full time career in speaking and consulting, I had *no* Mission Statement. I only knew I wanted one.

I attended a Zig Ziglar conference in San Diego to learn more about being successful and confident, and there I read one of Zig's most famous quotes. I knew instantly—that is what I wanted to say!

So I bought one of his books and stood in the long, long line of other people who wanted their books autographed. When it finally became my turn to meet him, I extended my hand and told him who I was, that I was considering leaving my full time occupation as someone else's employee to start out on my own, and that I needed to have a mission statement. I recited his meaningful quote to him and asked *very* politely if I could use it as my own mission statement because it was already proving to be very true in my life. I also promised to always give him credit for having created the saying.

Mr. Ziglar got up from his chair, came around the table to me, engulfed me with his arms, and in his Alabama twang pretty much said, "You take it young lady and good luck to you!" That moment I shall never forget though I am sure he has ☺.

The quote is framed in my office and appears in every e-mail I send. It has become my mantra, if you will, and every joy and success in my professional life is because of what it says and how much I believe in it. It has enabled me to see the world in the name of "work," visiting such superb places as Japan, New Zealand, Australia, Ireland, Africa, and 49 states. And it brings me to the Ortho2 Users Meeting once again in February to speak about the importance of communication in the practice.

"You will get everything in life that you want, if you help enough other people get what they want."

Those are powerful words, and in my life, very true words.

"People with goals succeed because they know where they are going. It's as simple as that." - Earl Nightingale

What does your mission statement say and is it true about you? Do you read it daily and do you, as I like to say… Eat it, breathe it, live it, and *be* it?

A mission statement is having goals and perhaps a purpose of achieving them. I like when a statement indicates a *why* or purpose to your career, profession, or practice. This is opposed to the notion that a mission statement is just a bunch of flowery, general phrases like "I will be the best orthodontist I can be." It's no wonder that a lot of people have this type of mission statement sitting in their desk drawer! If it never makes it past the plaque on the wall, then it is a waste of walnut, printing, and time.

An excellent example of a public mission statement was made back in 1960, when John F. Kennedy said that we would put a man on the moon by the end of the decade—a clear goal with a specific timeline for its achievement. And despite enormous challenges, by mid-1969, Neil Armstrong had taken that "one giant step for mankind." He made himself accountable for it.

Anyone can easily create a mission statement—whether it's for your practice or personal life. Living it is entirely another thing. It also must be framed and posted in view for the world to hold you accountable for it. Do not allow it to be on page 14 of an office manual that is stored on a shelf. I ask ortho team members and doctors everywhere to recite their mission for me. Sadly, many cannot do it and far too many say they don't even have one.

1. **Why is it so important to have a personal mission statement?** The highest achievers in any field view themselves as self-employed. They have the attitude that they run their own business, even if they are affiliated with a major corporation, or an ortho practice! And so they develop a sense of "mission" about their career, taking a proactive approach to create the results they want. And their mission statement guides them. This is in contrast with "average" people, who view themselves as employees and react to the ups and downs of the economy. Top producers will take charge. They realize that they can't wait until external factors, like the marketplace, get better… but that *they* must get better if they intend to achieve their goals.

Which group do you want to be in—the top 3% of achievers or the 97% of "average" people? Your personal mission statement, practice mission statement, and your clearly defined goals with timelines are going to help make the difference.

Practices that have a written philosophy of practice:

1981	1987	1993	1999	2007	2009
22.1%	34.2%	44.5%	48.5%	57.3%	59.8%

Mission Statement *continued on page 23*

About the Author

Rosemary Bray is an orthodontic consultant, trainer, and professional speaker with more than 30 years experience in the dental profession. She presented the keynote session at the 2011 Ortho2 Users Group Meeting in New Orleans.

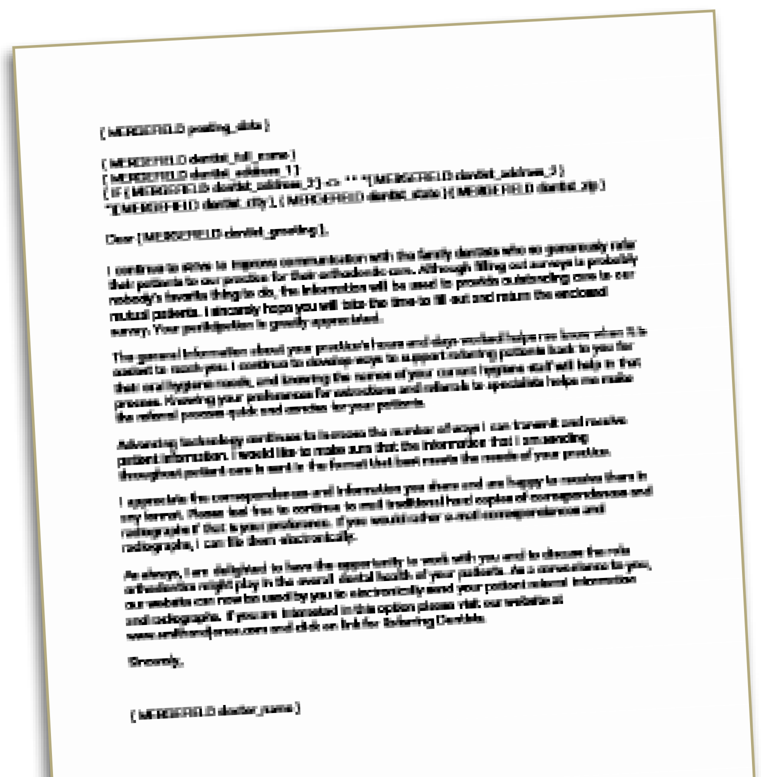
Professionals

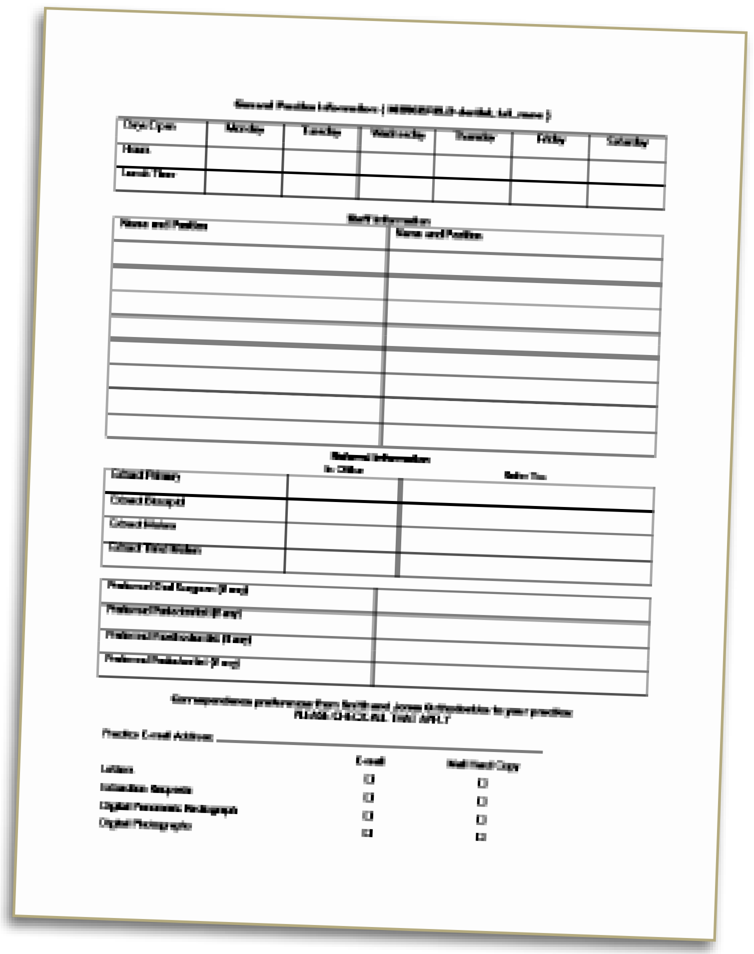
It's the little things you do that show how much you care

So you have the patient in the chair and you need to refer them for an extraction. Don't you just wish you knew whom their family dentist prefers to use as an oral surgeon or if they like to extract bicuspids themselves?

An underused feature of ViewPoint allows you to do just that! When set up correctly, this feature allows you to quickly determine who the specialist is you should be referring that particular patient to, based on their dentist's preferences. Having this information at the touch of a button really shows off your office as efficient and informed.

The very first step in this process might be best accomplished by sending a survey to your referring family dentists to establish which specialist they would like you to use for their patients. At the same time you can verify the information you have on their practice as well. The following is an example of a possible survey and cover letter you could use.





Days Open	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Hours						
Lunch Time						

Staff Information

Name and Position	Name and Position

PLEASE CHECK ALL THAT APPLY

Practice E-mail Address: ______

When the responses come in, be sure to enter all the information into ViewPoint using the instructions following the break.

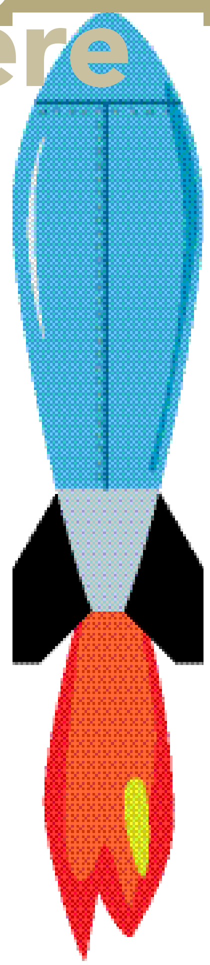
Professionals *continued on page 23*

About the Author

Natalie Beaton has over eighteen years hands-on experience as a Treatment Coordinator and Financial Administrator. At the 2011 Users Group Meeting she presented two courses on using ViewPoint to track patients and critical data.

Boost Your Marketing into the Stratosphere

Part 2



Today's savvy orthodontic practices create well-planned marketing systems to ensure that the phone is ringing with new patient calls. With a few additional strategies in place, your treatment coordinator can transform callers into patients and boost your practice into the stratosphere!

Promotion #1

Establish Keys to Increased Case Acceptance

I have surveyed the charts of hundreds of patients and found the following steps greatly increase new patient starts.

1. **Predetermine insurance benefits:** Always collect the patient's insurance information at the initial phone call and prepare the benefits information prior to the initial/recall exam. Patients/parents will not sign fee agreements without this vital piece of the puzzle.
2. **Offer a substantial sibling/family discount:** Reward your loyal families with a discount that reflects their faithfulness to your services. I prefer a set dollar amount quotes in place of a percentage. Families may shop for the best fee in spite of their satisfaction with your practice. Loyalty to one doctor is no longer the norm and your "thank you" courtesy indicates your appreciation for continued patronage.
3. **Establish an initial down payment of $500:** Without fail, all practices transitioning to a reasonable down payment report increased case acceptance.
4. **Pre-sell the practice:** Communicate the doctor's technology/expertise/amenities/differentiation from the competition during the initial new patient phone call, the appointment reminder letter, the brochures mailed to the patient, the new patient reminder call, and the new patient flow-sheet process.
5. **Follow up, follow up, follow up!:** Our team called all pending patients previously not responding to our efforts, all failed and "no-show" recall patients, and all failed records patients. (This is in addition to a very thorough follow up strategy for these categories during the year.) The "phone-athon" resulted in 8 patient starts!

Promotion #2

Follow Up

If the patient does not accept treatment the Treatment Coordinator will call the patient/parent within 7 days, send a follow-up letter and call in 15 days, and alternate phone calls and letters/e-mails for a 6 week period following the exam. Discontinue contact if the contact information is no longer applicable, the person requests to not be called, or the patient starts treatment elsewhere.

Patients who do not respond may be offered a holiday or summer special once per year. The special offer may be a $250 discount off full treatment. The offer cards/letters are mailed or e-mailed. The team calls each pending patient/parent to alert them that a "special offer" is on its way via mail. Consider a special incentive for accepting treatment at the initial exam.

In review, a sample protocol may consist of 6 points of contact, alternating phone calls/e-mail/letters. After 6

Boost Your Marketing *continued on page 22*

About the Author

Nancy Hyman, founder of Ortho Referral Systems, is dedicated to maximizing patient referrals and case acceptance with innovative, cost-effective solutions. She presented a two part marketing strategies course at the 2011 Users Group Meeting.

Saving Time and Reducing Stress with Edge

We have worked with more than 3,000 orthodontists at Levin Group during the last 26 years, and one thing they all had in common was an intense interest in maximizing their time. I've said jokingly that many orthodontists could introduce themselves to one another by saying, "Hello, my name is Mark and I practice three days per week." This is a shorthand way of saying that measuring time efficiency is a deeply ingrained part of orthodontic culture.

There is a very good reason why orthodontists pay so much attention to how time is spent in their practice, and that is "volume." Orthodontic practices see more patients per day than any other dentist or specialist. In some cases, a single orthodontist may see 100 or more patients. While the norm is below that number, the fact remains that orthodontists must use their time efficiently or they will quickly fall behind. And, of course, that would be a grave mistake since more than 66% of orthodontic patients are seen in the early morning and late afternoon. Once an orthodontic practice falls behind 10 minutes at 4:15 P.M., it is extremely difficult to catch up.

Orthodontists must use their time efficiently or they will quickly fall behind.

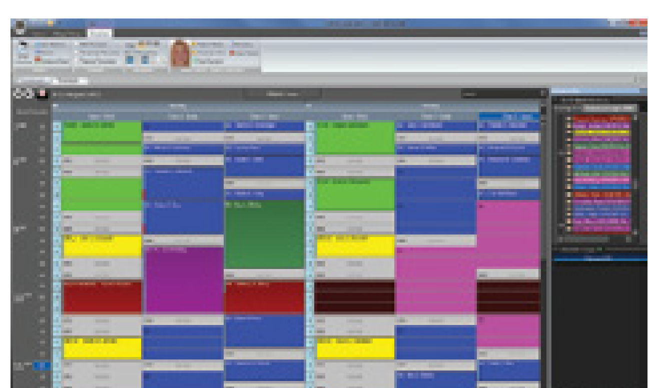
Our data shows that "unanticipated wait time" is one of the key areas of dissatisfaction among orthodontic patients and their parents. Americans are "time-starved" and have little tolerance for service businesses that make them wait unnecessarily. The frustration with wait times in orthodontic offices has a ripple effect, and the most serious one is that patients and parents will vent their dissatisfaction in subtle or even overt ways with staff and the orthodontist.

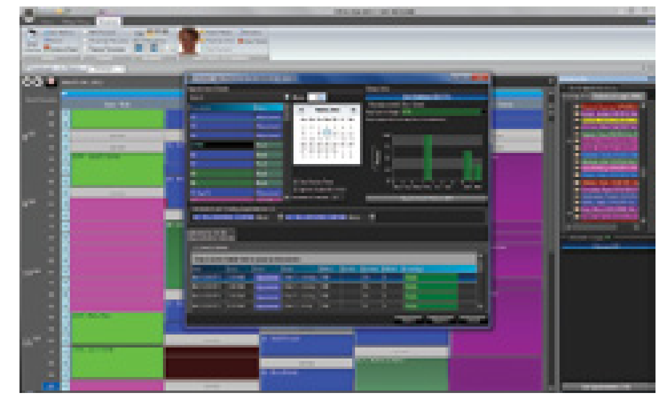
The good news is that there is a tool available that can make a major difference in maximizing time efficiencies in the orthodontic practice. I recently "toured" Ortho2's new practice management software, Edge™, and was incredibly impressed with how much it can contribute to time savings for orthodontists and their staff. While time savings is only one advantage among many that Edge offers, this is the aspect that I believe will appeal to most orthodontists.

There are 3–4 key interactions between staff and orthodontic patients that can make or break a practice as it tries to run on time. Chief among these is the discussion between a new or existing patient and the front desk staff regarding setting an appointment. Very often, the staff plays a sort of guessing game with patients and parents to see which openings in the office schedule match up with their preferences. This back-and-forth between a front desk scheduler and a patient (or parent) can easily go on for 2–3 minutes, and many times will run longer.

Some of the blame for this awkward routine lies with the practice management software an orthodontic practice uses to schedule patients. Looking at a clumsy interface that only allows users to see one day at a time or consecutive days, the scheduler finds herself hunting about and unable to view all of the needed information at once. It's a bit like trying to read a page while looking through a straw—you just can't see enough to make sense of things.

The scheduling experience is completely different with Edge. In a word, Edge is elegant. When a patient tells a





front desk scheduler that "Mondays are the best day for me," the scheduler can drag any three Mondays from a month view of the calendar, drop them into a box, and see all of the available appointments for those three days right beside each other. It's really fun and easy.

Edge even allows the scheduler to anticipate the patient's needs. The Smart Scheduler will show the patient's preferences in past appointments (e.g., morning/afternoon, day of the week), average arrival time, and kept appointment percentage. The scheduler is then able to say, "I see you prefer Tuesday or Thursday morning appointments…" or to not offer busy times to a patient who is chronically late.

What's more, when the scheduler drags an appointment time across the screen to an opening in the schedule, the schedule becomes gray if the type of appointment does not fit the "ideal template" set for the day. This makes it nearly impossible for a front desk scheduler to mistakenly put a lengthy procedure into a slot that will not accommodate it due to competing time demands in other columns.

The Edge dashboard offers additional time savings. Rather than the minutes you would otherwise spend running a report or looking things up, your most commonly needed information is visible at a glance. The dashboard with real-time statistics can be customized by individual or by role in the office. The orthodontist may monitor the health of the practice by including widgets to show this week's new starts or current cash flow data. The financial coordinator may want to include a list of past due patients with appointments this week and her task list.

Our team of consultants shares the view that efficiencies in orthodontic practices do not come from "great leaps forward" but instead from an accumulation of many small gains here and there that add up to large gains over the course of a year. There are few tools that I can confidently say will create large gains in time savings for orthodontic practices as well as Edge. It is a remarkable productivity enhancer and, for the orthodontist, it just may change how you introduce yourself to colleagues. ⚬

About the Author

Dr. Roger P. Levin is Chairman and CEO of Levin Group, Inc. Levin Group provides premier, comprehensive consulting services that deliver Total Ortho Success™ to orthodontists in the U.S. and around the world.

Inside Ortho2

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

Free Webinars

We offer you free, online, real-time webinars. Each month throughout the year we present a different topic. It's a great solution for training new users, refreshing experienced users, or learning about new features. Webinars are offered twice each month so that you can choose the time that fits best with your schedule. Preregistration, a computer with a high-speed Internet connection, and a phone are required. Register online at www.ortho2.com > Services Features > Meetings and Seminars, or contact Judy Brown at (800) 346-4504 or jkb@ortho2.com.

Upcoming 2011 ViewPoint and Edge Webinar Dates

April: Wednesday, April 13th, 2:00–3:00 P.M. or Friday, April 29th, 10:00–11:00 A.M. Central Time
Edge Patient Contracts & Proposals: Edge contracts are intuitive to set up, and making modifications is a snap. Learn about proposal template setup and using the contract proposal wizard. This session covers how to review, update, and apply proposed contracts. Learn to use the new contract wizard and how to edit contract details and reallocate contract fees. We'll also look at how to compare and change payment schedules.

May: Monday, May 9th, 10:00–11:00 A.M. or Wednesday, May 25th, 2:00–3:00 P.M. Central Time
ViewPoint HR Manager: You can securely store and maintain employee information with HR Manager. This webinar will present an overview and cover how HR Manager integrates with VP Timeclock, VP To Do, and VP Document.

June: Friday, June 3rd, 10:00–11:00 A.M. or Wednesday, June 22nd, 2:00–3:00 P.M. Central Time
Edge Smart Scheduler: Edge's Smart Scheduler puts a variety of helpful information at your fingertips. Patient information such as scheduled and pending appointments, kept appointment averages/percentages, and appointment history plus options to schedule near a sibling's appointment help you place each appointment at the best time. Also powerful search criteria make finding the perfect appointment day and time a breeze. This webinar will include an overview of all the smart scheduling tools available.

July: Monday, July 11th, 2:00–3:00 P.M. or Wednesday, July 27th, 10:00–11:00 A.M. Central Time
ViewPoint Subgroup Tools: Useful ways to use ViewPoint's subgrouping feature go beyond reports and letters. We'll look how to utilize subgroup lists, notepad subgroups, miscellaneous charge subgroups, and adding a subgroup of patients to a stack.

August: Friday, August 12th, 10:00–11:00 A.M. or Monday, August 22nd, 2:00–3:00 P.M. Central Time
Edge Reminders: This session is an overview of Edge Reminders, the easy-to-use and efficient system for automating patient reminders. We will cover setup, implementation and how it integrates with your schedule in Edge.

September: Monday, September 12th, 2:00–3:00 P.M. or Wednesday, September 28th, 10:00–11:00 A.M. Central Time
Edge Animations: Compatible with Ortho2 Edge or Viewpoint and available as a standalone program, Edge Animations is a collection of powerful videos used to enhance patient education and compliance. This webinar covers the key features: annotate and draw on animations, audio and custom narration, e-mailing video links to patients and referrers, publishing videos to YouTube, customizable playlists, and integration with patient treatment findings.

Free Seminars

As our client, you and your staff may attend these free, small-group seminars as often as you wish. Learn about your new system, train new employees, and/or implement new features. Seminars are held 9:00 A.M.–4:00 P.M. each day for three days at our office in Ames, Iowa. Class size is limited to assure individual attention and hands-on opportunities, and preregistration is required. To register, or for more information about the seminars, contact Judy Brown at (800) 346-4504 or jkb@ortho2.com. If you prefer, register online at www.ortho2.com > Service Features > Meetings and Seminars.

Remaining 2011 ViewPoint Seminar Dates

June 8, 9, 10 — September 7, 8, 9 — November 9, 10, 11

Remaining 2011 Edge Seminar Dates

June 15, 16, 17 — September 14, 15, 16 — November 16, 17, 18

Each three-day session is held Wednesday–Friday and covers the design and daily use of either ViewPoint or Edge.

Contact Us

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Please make note of our new support e-mail address: ortho2support@ortho2.com. But don't worry, the old one will still work.

Referral Rewards

You can earn a $500 credit for each referral that results in an Ortho2 system 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 > Current Users > Referral Program, or call (800) 678-4644.

Log into the Current Users Section of Ortho2.com

There are many resources available to you on our website. You will find visual help files, printed documentation, FAQs, information on upcoming meetings, the ability to register for webinars, and more.

If you haven't already created an account to access the Current Users section of our website, you will need to do that. Each doctor and staff member can create their own account. Visit www.ortho2.com, and click "Current Users" in the upper left corner to begin the process.

Next, click the "Register a new user account" link on the login screen. You will be prompted for your full name, main office phone number, and Ortho2 customer number. Finally, enter your individual e-mail address, a password of your choice (at least five characters), and a display name that will be publicly visible.

No Nickname on Record Report for ViewPoint

The "Patients with No Nickname on Record" report allows you to locate patients whose nickname (the name they prefer to be called) field is blank. Although this field defaults to the patient's first name, it could have gotten deleted. Some of your merge documents may print with a blank where the name should be, so this is good information to have in their charts.

This report is available online in the Report Repository. Visit www.ortho2.com and log into the "Current Users" section. Click the "Downloads" button, and then select ViewPoint Report Repository. The "Patients with No Nickname on Record" report is located in the Miscellaneous section.

Our Feedback Forum

Ortho2 brings you UserVoice, a powerful feedback forum that allows you to easily tell us what you think! Now you have the power to connect with us, make suggestions for enhancements, vote on your favorite ideas, and watch them become a reality.

You log into UserVoice through the Ortho2 website. Visit www.ortho2.com, and click "Current Users" in the upper left corner to begin the process. Next, log in with your e-mail and password. Finally, click the "User Forums" button and then click the UserVoice logo. You are ready to go!

uservoice

There are three product enhancement forums: ViewPoint, Edge, and Edge Imaging. You can search existing suggestions and enter your own. Vote for your top enhancements and check back to see which are getting the most votes. You can even add comments to suggestions and read comments from other users and from Ortho2.

Available from Ortho2

Call your Ortho2 Systems Consultant at (800) 678-4644 for more details on any of these products and services.

EDGE The revolutionary, all-new Ortho2 practice management system.

Your Edge System Can Include:

(Scheduler, Electronic Insurance, and Edge Imaging always included)

- Additional Edge Client Licenses
- Treatment Hub (electronic charting)
- Premier Imaging
- Patient Tracker (patient sign-in and operatory display)
- Edge Reminders (automated appointment reminders)
- Edge Animations (patient education and case presentation)
- Edge Portal—Personal (access to Edge data for you and your staff via the Internet or web-enabled mobile device)
- Edge Portal—Premium (account access for patients/parents/professionals via the Internet or web-enabled mobile device)
- HR Manager
- Third Party Product Integrations

Edge Services

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

ViewPoint™ Our core management system used by more than 1,600 orthodontists.

ViewPoint Software Modules

- Additional ViewPoint Client Licenses
- Grid Scheduler
- Treatment Chart
- Edge Imaging (available for use with ViewPoint)
- Premier Imaging
- On-Deck Appointment Control (patient sign-in and operatory display)
- Edge Reminders (automated appointment reminders)
- Edge Animations (patient education and case presentation)
- VP WebAccess (account access for patients/parents on the Internet)
- VP Glance (access to ViewPoint data from your web-enabled mobile device)
- HR Manager
- Electronic Insurance
- Third Party Product Integrations
- DataMove Utility (transfer ViewPoint data from location to location)

ViewPoint 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 or Edge Imaging)
- Custom Reports
- Custom Online Forms
- Custom Premier Imaging Analyses

Equipment & Networking (For both Edge and ViewPoint Systems)

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

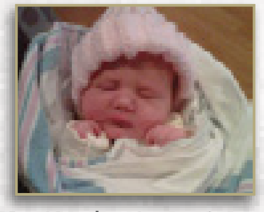
On a Personal Note

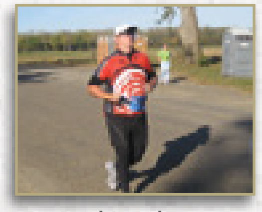
Judy Brown, Ortho2 Customer Service and Telecommunications Coordinator, now has a fifth grandson: Braylen Lee Chambers. (Judy is five for five if you are keeping score.) He was born in Des Moines on October 10th, 2010. Both he and Judy's daughter Monica are doing well.

Micky Augustin, Ortho2 Equipment Technician, and his wife Robin had a baby girl on October 27th. Katelyn was 9 pounds 5 ounces, almost 2 pounds larger than even the doctor expected. After recovering from the surprise, both mother and baby are doing well.

The Des Moines Marathon was held October 17th, 2010. **Paul Lundgren**, Ortho2 Software Support Representative, ran the half to celebrate his 40th birthday and has more races planned for this year. **Brooke Dunn**, Ortho2 Multimedia Marketing Coordinator, runs regularly and also did the half marathon this year.


Braylen Lee Chambers


Katelyn Augustin


Paul Lundgren


Brooke Dunn

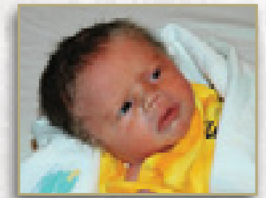
Kim Barker, Ortho2 Administrative Specialist II/Project Coordinator, volunteers for the non-profit Iowa National Wild Turkey Federation with her husband. Together they received a 2010 NWTF Volunteer Award for the State of Iowa. The NWTF works on habitat improvement projects, purchases land for conservation, and supports hunter safety classes.

Ron Benifiel, Ortho2 Repair Technician, is now a grandpa! His stepdaughter had a boy named Zack on January 7, 2011. He was born a little early, but both mom and baby and doing fine. Congratulations, Ron!

Mike Vest, Ortho2 Equipment Technician/Network Administrator, is now a grandpa! Trinitee Mae Vest was born Tuesday, February 8, weighing 7.1 lbs. Congratulations, Mike!

Kim Barker, Ortho2 Administrative Specialist II/Project Coordinator, is now a grandma! Kim's daughter, Jade, had her baby at 2:32 A.M. on February 28, 2011. Alena Marie Barker was 8 lb 12 oz and 21.5 inches long. Congratulations, Kim!

Jim Condon, Ortho2 Systems Consultant, and his wife Martha had a baby boy named Joseph Jeffrey Condon on the afternoon of March 7th at 4:44 P.M. weighing 5 lbs 11 oz and measuring 18 1/2 inches long. "He is perfect in every way!" And mom is doing well.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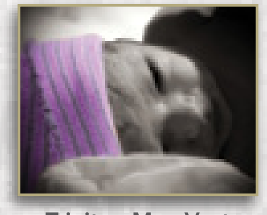
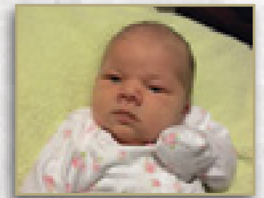

Trinitee Mae Vest


Alena Marie Barker


Joseph Condon

Ortho2 Anniversaries

Congratulations to these Ortho2 staff members who celebrated anniversaries during the fourth quarter of 2010.

Twenty One Years
Tricia Rose

Eighteen Years
Todd Schuelka

Sixteen Years
Michele Eich

Twelve Years
Lowell Davis
Denise Sargent
Jennifer Shaffer

Eight Years
Richard Kelley

Six Years
Corey Schmidt

Five Years
Derek Dohrman

Four Years
Erik Strabala

One Year
Kurt Bacon

Congratulations to these Ortho2 staff members who celebrated anniversaries during the first quarter of 2011.

Twenty-Nine Years
Dan Sargent

Twenty-One Years
Jo Jacobson

Twenty Years
Diane Lyon

Seventeen Years
Matt Hilleman

Thirteen Years
Coreen Magnuson
Steve Roberts
Mike Vest

Twelve Years
Doug Olsan

Ten Years
Joe Levenhagen

Nine Years
Danetta Hiatt
Jesse Howard
Amy Schmidt

Seven Years
Michael DiSalvo
Chad Kellner
Anthony Kooima

Six Years
Noah White

Five Years
Chris Bennett

Three Years
Scott Petersen

Two Years
Jim Powell

One Year
Brooke Dunn

Career Milestones & Development

We are pleased to announce that Mike Gude has joined the product development team on February 21st as a 3D Animator. Mike has been employed most recently by iMed Studios, Inc. in Ames, where he designed and created biomedical animations. Please help us welcome Mike to the Ortho2 team.

Background Photo: Hoar Frost on the Trees behind Ortho2, December 27, 2010

Diane Lyon

This February, Diane marked her 20th anniversary with Ortho2. She has spent almost all these years on the Software Support Team. "I liken it to being a detective. You are presented with a problem, and you keep asking questions until you have enough information to solve the problem."

Diane was the 12th employee hired at Ortho2 and things might have been more relaxed then. She tells a story about one year during the AAO, when call volumes are traditionally lower, they stretched the phone cords to the patio area and sat out there sunning themselves while answering the phones.

Her favorite part of her job is her role as Trainer. "I love to travel and see new and different places. I like going out to an office to help them through the conversion process. They are usually excited about the new software and that excitement can be contagious, spreading to me and other staff members."

Diane was featured in the August 2005 issue of our newsletter when she reached the 50 state milestone. To this day, her hobby within a hobby is visiting national parks and monuments while traveling. "I've visited many of the 'big name' parks like Yellowstone, Grand Teton, Grand Canyon, Yosemite, Sequoia, Everglades, Acadia, Devils Tower, Badlands, Mount Rushmore, Hot Springs, White Sands, Denali, and Mammoth Cave, to name a few. I'd say the number is greater than 200—There are 394 areas managed by the National Park Service. I've been known to drag fellow travelers miles 'out of the way' to go to a national park."

Her personal hobbies also include travel (India, Italy, and more) and scrapbooking her travels. She enjoys spending time with her three grandchildren, remodeling her house, and making greeting cards.

President's Perspective *continued from page 1*

benefit. This began with our HR Manager module, which was released for ViewPoint before we even announced Edge, although it was initially conceived as part of Edge. Then, ViewPoint 8 included a new, slick sign-in screen option for On-Deck which came out of Edge development.

Edge Imaging and Premier Imaging are available for both ViewPoint and Edge, and offer innovative features like card flow presentation, shadow image alignment, easy morphing, and ceph analysis.

Recently we introduced Edge Animations. It consists of two distinct elements. The Patient Compliance animations library is built into both ViewPoint and Edge. You either have it, or will soon receive it as part of your regular AutoUpdates. The comprehensive Edge Animations product is available for both ViewPoint and Edge.

Edge Reminders is another new and exciting Ortho2 service that will soon be available for both ViewPoint and Edge. It provides appointment and other reminders to patients according to their preference: phone, e-mail, and/or text.

ViewPoint isn't going anywhere. You may choose to switch to Edge, but we aren't suggesting you need to, and firmly believe ViewPoint is the better fit for many, if not most current ViewPoint users. We are, and will remain, a two product company. Don't feel like ViewPoint is a lesser product. We certainly don't!

Dan Sargent, Ortho2 President

Cross Training *continued from page 7*

This will add an immediate positive impact to your patient flow, especially during before and after school congestion.

Establish your protocol for **seating a patient.** Develop a checklist covering information that is discussed before the clinical assistant and/or doctor comes to the chair:

- ☑ Do they need to brush their teeth before their appointment?
- ☑ How are they doing with their appliances?
- ☑ Do they need any supplies (toothbrush, floss, wax, etc.)?
- ☑ Do they have any questions regarding today's appointment?

The team member who seats the patient will stay with the patient until the clinical assistant is available to start the scheduled procedure.

Train all employees on how to give **hygiene and appliance instructions.** The administrative team is often asked questions by a patient or parent regarding appliances, elastic wear, or oral hygiene, and when they are comfortable answering questions it reduces or eliminates the need to interrupt the clinic. Having all team members well versed on the parts of appliances, how they work, common concerns, patient cooperation required, and the answers to frequently asked questions will help ensure that patients are receiving correct information at all times. Checklists are particularly helpful so all important information is covered. Also be sure each team member has access to Edge Animations, particularly any animations you have customized for your patients.

With the wave of technology and computers at every chair we are seeing more scheduling done by the clinical team. Even if you are scheduling appointments at the front desk, all team members should be trained to **schedule patient appointments.** Not only can the clinical team help out by answering the telephone and scheduling appointments, it also allows for the flexibility of having a clinical team member work on non-patient days to schedule appointments. Having the clinical team schedule appointments also gives them a little more control over their daily schedule. They can make adjustments to the schedule dependent on special circumstances or 'prize patients" (patients you want to give away).

Train all employees how to **post a payment** and generate a computerized receipt. Set up a solid protocol outlining the specific steps to post payments along with the checks and balances to ensure that it is done correctly. Should employees run into problems, having a list of common questions and answers is helpful. To maintain the integrity of the daily financial audit, employees must be signed into the ViewPoint or Edge under their own name and password before they post any transaction.

Training all employees to use the software to **generate reports** allows team members to actively track patients through treatment. Educate all employees on the purpose and value of each report and document the steps needed to generate the information. Having all employees monitor patient reports reduces the possibility of patients falling through the cracks.

Make it Happen

Cross training does not happen through osmosis. Create your vision of cross training as a team exercise. Where do you want to start that would generate an immediate and valuable outcome? Set aside non-patient time and develop lesson plans for structured training and role playing, including a test or quiz at the completion of each session. Review the effectiveness of the cross training, remembering that team members require ongoing practice to stay current with their new skills.

Take the lesson that the geese have taught us and implement cross training to ensure high quality, uninterrupted care to your patients. As with geese, employees have greater potential working as a team than by flying on their own. Next time you look up in the sky and see geese flying in formation, ask yourself, "Do our employees work together as an uninterrupted team, confident that our team has been trained to assist or take over if there is a break or change in formation?" If your team is flying out of formation, take the first step to cross training today, confident that in 6 months your team can be flying in a V formation, as strong as the geese used as their role model.

Boost Your Marketing *continued from page 11*

weeks, transition to a schedule of monthly or bimonthly contact, possibly implementing a gift with patient start. I suggest a technology oriented gift valued at $75-$150. A gift can be more motivating than a discount of the same value. Once or twice annually, contact all pending patients/parents for a holiday/summer special as described above.

Promotion #3

Establish a Reward System for Patient Starts

Consider a reward system for diagnostic records completed at the initial exam or within 30 days of initial exam (with a signed fee agreement) or for scheduling and attending the recall appointment. I recommend Patient Rewards Hub, a point system in which our patients may redeem points on our website for gift cards.

Promotion #4

Develop Pending Patient Scripting

1. The patient/parent wants to talk with spouse:

   A) Offer to book the records and initial banding appointment to secure a preferable appointment.

   B) The treatment coordinator or doctor will offer to speak with the absent spouse. This suggestion may be offered at the exam to the present parent and e-mailed to both parents.

   C) The doctor will e-mail both parents with treatment recommendations.

2. The fee is considered "too high."

   A) Review your benefits list and give a copy to the patient/parent to take home. In quizzing patients who opted to accept treatment elsewhere, the reason offered was that the fee was higher than the competition without a compelling reason. Address this concern with detailed points.

   B) Suggest alternative financial arrangements. Ask what down payment is suitable for patient/parent. If the amount suggested is too low state: "Our minimum down payment is…"

   C) Offer third party financing.

Please note: In a pending call never ask, "Do you have any questions?" Always ask, "What can I do to help you/your child get started?"

Promotion #5

Refine Your Fee Presentation

Be confident in your language skills during the fee presentation and in discussions with pending patients:

Fee concerns: "Is your concern the total fee or the payment plan." If payment plan, suggest alternative options. If down payment, ask the patient what amount he/she has in mind.

A) Remind the patient of the quality of treatment and specific patient-friendly services.

B) Utilize the "benefits" list and suggest that he/she take home the list to share with spouse.

C) Confirm that the referral source is very confident in doctor.

Define your practice philosophy regarding the 5 keys to case acceptance and allow the proper time in the treatment coordinator's schedule for follow up, follow up, follow up! In the office of Dr. William Hyman we have consistently increased our case acceptance and discovered "bonus patient starts" through targeted protocols, scripting of challenging scenarios, and weekly review of goals to allow for adjustment of practice growth strategies.

Part 1 (in the October 2010 issue) covered how to promote your oral hygiene program to patients and to referring dentists in order to market your practice.

Mission Statement *continued from page 9*

Case starts for practices that have a written practice philosophy:

Don't Have One	Do Have One
221.9	263.3

Source: JCO Practice Study, November 2009

Practices that do have a written practice philosophy perform at higher levels! Especially if they read it daily, know it and truly live its words.

2. **Are goals and mission statements connected?** Base your goals directly upon your mission statement. If you've created your mission statement with "big" goals to achieve by one year from today, you'll need to perhaps break them down into quarterly or monthly goals.

   Stephen Covey has a great quote in his book, *7 Habits of Highly Effective People*. He says, "If you don't set your goals based upon your Mission Statement, you may be climbing the ladder of success only to realize, when you get to the top, you're on the *wrong building*." Amen!

3. **What to include in a great mission statement?** When writing a mission statement or renewing your existing one (which you should do periodically during your annual team retreat) draft a hand-written or typed paragraph, describe your best characteristics and how you express them, have specific, measurable outcomes, state a purpose, and since this is a team effort, incorporate words from each person on the team. Have everyone contribute a word, or a phrase that they feel is critical to your practice success. You can have everyone write their contribution on an index card, place them all on a table and then begin to shuffle them around trying to create a paragraph incorporating everyone's dream, purpose, and reason for coming to work every day.

That is the easy part. The real work begins when you ***Learn It… Eat It… Sleep It… Know It… Believe It… and… BECOME IT!***

Professionals *continued from page 10*

Set Up Professional Types

Go to System Tables > System > Professional Type. Types to consider adding: Oral Surgeon, Periodontist, Pedodontist, Endodontist, Prosthodontist. For customized fields consider adding any of the following: Fax, Children, Hobbies, Days Open, Office Hours, Office Manager, Notes.

Once you have established the professional types, you are ready to add the individual professional providers of each type. Using the names listed on the surveys you have received you may want to send surveys to the specialist to get their office hours and days worked.

Add Individual Professionals

Go to System Tables > Patient > Professional. Choose the appropriate professional type (e.g., Oral Surgeon). Scroll down the list and look to see if that provider has already been added. If not, Click New. Enter all the information you have available for that provider.

Link Specialists to Dentists

Finally, it's time to link the preferred professionals to each individual family dentist! This information will prove invaluable and is well worth the initial setup time. Go to System Table > Patient > Dentist. Click View Professional List. Click Add, and choose from list (or click New to add a new specialist). Once you have added all the various professionals that each particular family dentist prefers tor refer to, you are all set! Now you can quickly look this information up by going into a patient's folder. Click the "G" next to Dentist, and click Professional List to have all the information that you need.

Set Up Dentist User Defined Fields

In case you want to use any of the other great information that you got back on the surveys, you can simply set up your dentist user defined fields to reflect the information. Some ideas would include: Fax, Children, Days Worked, Office Hours, Preferred Communication (e.g., e-mail, snail mail, phone), Office Manager. You can set up user defined fields by going to System Tables > System > User Defined Fields. Type your choices in the right hand column.

This system is a wonderful thing to have in place and really makes the whole referral process much easier for both you and your patients. Instead of hesitantly having to contact the family dentist, you have all the information you need at a glance. Make setting this up a New Year's resolution!

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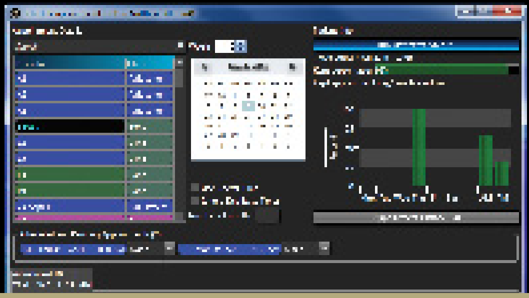
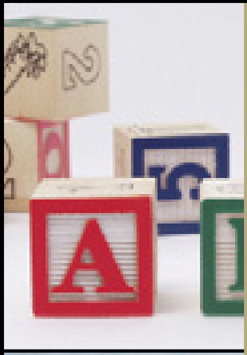
ORTHO2

"Delivering practical solutions for success to the orthodontic profession…"





The power to achieve the life of your dreams or the practice of your dreams is in your hands, and the first step toward activating it is identifying the specific goals that will make your dreams real.

page 8

Efficiencies in orthodontic practices do not come from "great leaps forward" but instead from an accumulation of many small gains here and there that add up to large gains over the course of a year.

page 12

As with geese, employees have greater potential working as a team than by flying on their own.

page 7

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