



## PRESIDENT'S PERSPECTIVE

This quarter, I would like to highlight two things – Windows 8.1 ending support and the Edge Cloud/Global Payments Integrated improvements.

As you may know, Microsoft is ending support for Windows 8.1 January 10, 2023, and it is important to update or replace every computer running Windows 8.1 before then.

After support for Windows 8.1 ends, you can continue to use the OS, but at your own risk without updates and patches from Microsoft. New computer viruses and other malware are developed all the time and, without the security updates to fight them off, your data and your system are vulnerable.

In addition, if you accept payment by credit cards, you must also comply with PCI standards. PCI Data Security Standards (PCI DSS) 6.1 require you to “ensure all system components and software have the latest vendor-supplied security patches installed. Deploy critical patches within a month of release”. Once Microsoft stops releasing patches and updates you will be unable to do this. HIPAA regulations are similar to the PCI standards in this area. HIPAA states that you must implement “procedures for guarding against, detecting, and



reporting malicious software”.

Speaking of credit cards, you may have also heard Edge Cloud has an improved Global Payments Integrated credit card integration. Global Payments Integrated is used by the majority of Ortho2 users (more than 70%) and this brings along some exciting new capabilities:

- **EMV/Chip Support:** New processing methods, such as EMV and contactless payments, are available when utilizing a supported payment terminal.
- **Debit Card Support:** One-off payments can be processed using debit cards utilizing a supported payment terminal.
- **Decline Minimizer:** This service will attempt to automatically update card-on-file information when processing recurring payments to combat declines due to card expiration or replacement.
- **Full Functionality in Canada:** All options for payment processing, including ACH, debit, and EMV, are available to our customers both in the United States and Canada.

I hope highlighting this type of information is helpful to you, our orthodontic partners. If you have any questions, please contact our Network Engineering ([engineering@ortho2.com](mailto:engineering@ortho2.com)) or Software Support ([ortho2support@ortho2.com](mailto:ortho2support@ortho2.com)) Teams. 📧

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# USERS GROUP MEETING

FEBRUARY 23-25, 2023 | LAS VEGAS

Join us for the 39th annual Users Group Meeting in Las Vegas! The meeting will take place February 23-25, 2023 at Planet Hollywood. You can view the speakers, class list, learn more about the Game Night Party, and everything you need to know about the Users Group Meeting at [ugm.ortho2.com](http://ugm.ortho2.com).

Register online at [www.ortho2.com/ugmregistration](http://www.ortho2.com/ugmregistration). If you have questions, contact Kim Barker, Meeting and Event Coordinator at 800.678.4644 or [ugm@ortho2.com](mailto:ugm@ortho2.com).

## WHAT YOU'LL LEARN

Each of the more than 40 classes are designed for every member of your team – from the doctor, to the treatment coordinator, even the marketing coordinator and clinical team member. The diverse group of presenters includes Ortho2 team members, industry-leading doctors, and consultants.



## Using the Light Bar Widget

Use your Light Bar widget to monitor active involvement with patient appointments once they have been processed as seated in your Patient Tracker.

The widget, designed to be used with a dedicated computer station at each chair, notifies you about who the doctor is currently attending, directs the doctor to the next patient that should be seen, and alerts you to patients that have been waiting an extended period of time. Your Practice Monitor widget can use the data collected by the light bar to help you analyze and evaluate the efficiency of your treatment routines.



Your Light Bar widget uses colors, numbers, labels, and flashing to indicate the current status of a patient's appointment activity, and to direct the doctor to the next patient. When viewing the light bar in queue format, the priority of the appointment determines its place in the list. Each box includes the chair the patient is assigned to, and the number of scheduled minutes remaining for the appointment. In addition, if the patient is flagged as Doctor is Needed or Doctor is Needed - High Priority, a number appears to indicate that patient's place in the queue. The box can optionally include the patient's nickname, the appointment procedure code, the orthodontist, and the assistant assigned to the appointment.

From the Application section of the Widget Library ribbon bar, choose the Light Bar widget, and select to open it as either a Dashboard or Application widget.

Because the Light Bar widget is designed to be used chair-side, most settings are computer-specific. However, certain settings are system wide. These settings are defined in your Patient Tracker editor.

**Light Bar Status Colors:** Use the color selectors in your Patient Tracker editor to choose appointment milestone colors for your Light Bar widget: Seated, Dr. Needed, Dr. Needed High Priority, Dr. Here, Dr. Was Here and Assistant Needed.

**Queue by Doctor or Office:** (Applies only when the Queue style is selected in your Light Bar.) Enable the Single Doctor Queue Per Office option in your Patient Tracker editor to separate patients in your Light Bar widget by the office assigned to the appointment. If this option is disabled, the light bar will separate patients by the doctor assigned to the appointment instead.

Within the Light Bar Widget, click the Settings icon to select how the light bar appears on your screen. These settings are computer-specific, so you should choose the settings that work best for the chair this computer is assigned to. ⚙

Are you the only person in your office who sees the newsletter? Pass it along!

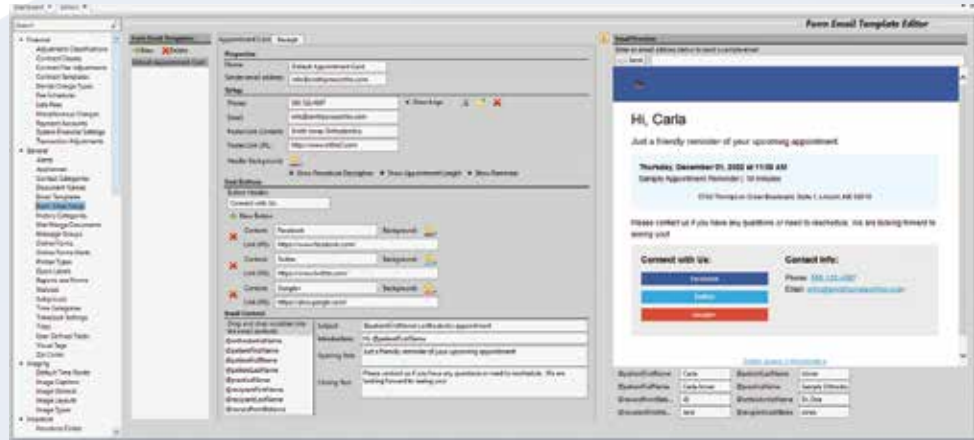
You can also read the newsletter on our website [www.ortho2.com](http://www.ortho2.com) > Our Company > Newsletters.

# EMAILING APPOINTMENT CARDS AND RECEIPTS

Edge Cloud has the ability to email appointment cards and receipts to your patients with a click of the mouse. Setup is easy, and using it is even easier.

## Setup

Open the Form Email Setup editor. When you open this editor for the first time, you must enter the sent from email addresses to include on your appointment card and payment receipt email messages. You can change these values for individual templates from within the editor at any time.



## Choose Your Settings

To set up your template, click the Appointment Card or Receipt tab to select the type of email template you want to work with. Then create a new template, or edit an existing template as needed.

**Properties** – Enter general information to identify this template including the name (for your office use only) and sender email address if different from the original set up.

**Setup** – Enter your contact information, header properties, and data options to include in this email template.

**Phone/Email** – Enter the phone number and email address that you would like to appear in the “Contact Info” section of the email message. The recipient will see the number as a link that they can click to call your

office. You may use the same email address as the “Sender Email Address”, above, or choose a different address. If you leave either field blank, they will not appear in the message.

**Footer Link Content/Footer Link URL** – Enter the text you want to display as a link in the footer of the email message, and enter the URL to go to when the recipient clicks the link. Be sure to include the entire URL (i.e. <https://ortho2.com>). If either the link content or link URL are missing, or the URL is incomplete, the

link will not appear in the email message.

**Header Background** – Use the color drop down icon to select a color for the background of the email message header.

**Detail Options** – Enable each detail that you want to include in the message. Options for the appointment card include Show Procedures Description, Show Appointment Length, and Show Reminder. The receipt options include Show Amount Due, Show Balance, and Show Insurance Info.

**Logo** – You can optionally include your logo in the header of your email messages by clicking the Show Logo option in the Setup section of the window. Click the Add New icon, then navigate to your logo file.

**Resize Logo Placeholder** – Select the maximum size for your logo by clicking the Resize icon, then using the slider bars to adjust the maximum width and/or height to use. If your logo is bigger than your maximum settings, it will be reduced proportionally to fit within

your parameters.

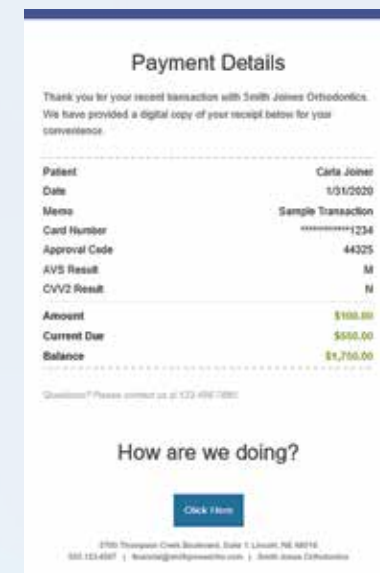
**Link Buttons** – Use this section of your email template to create buttons in your message that link to your web site, social media sites, and any other online resource you wish. The buttons will be listed in the email message in the order they appear in your template.

**Define Button Header** – Use the Button Header field to enter the text you want to appear above the web button section of the email (such as “Connect With Us”). If you leave this field blank, your buttons will still appear in the message.

**Set Up Buttons** – Click New Button to add a new web link button, then use the Content field to enter a description of the button (such as “Facebook”), and use



**Appointment card and receipt email examples.**



the Link URL field to enter the complete web address. You can then use the Color icon to select a background color for the button.

**Change Button Order** – Your web link buttons will be listed in the email message in the order they appear in your template. To change the button order, you would need to delete buttons, and re-enter them in the order you wish them to appear.

**Email Content** – Use this section of your email template to create the body of the message you want to send to your patients and parents. In all sections, you can optionally drag and drop variables, such as @patientFirstName from the variables list at the left of the window into the text box.

**Subject** – Use this field to type the subject line of your email messages, such as “Reminder From @practiceName”.

**Introduction** – Use this field to type an introductory greeting, such as “Hello there, @patientFirstName.”

**Opening Text** – Type an opening sentence, such as “This is just a friendly reminder” in this field.

**Summary (Receipt templates only)** – Use this field to insert a summary line underneath the account details section of the email message, such as “Questions? Please call!”

**Closing Header (Receipt templates only)** – Use this field to insert a line of larger text above your closing remarks.

**Closing** – Use this field to type a closing for your message, such as “Please call us at @officePhone if you need any assistance or have any questions.”.

## Use

To email an appointment card to a patient, simply right

**Appointment Cards and Receipts** continued on page 14

# CREATING A PARTNERSHIP WITH YOUR EMPLOYEES

The Google dictionary says, “A partnership is the relationship between two or more people to do trade or business. Each person contributes money, property, labor, or skill and shares in the profits and losses of the business. An effective partnership proposal needs to highlight shared values, set goals, outline benefits, and demonstrate commitment to a long-term relationship.”

Although you aren’t technically setting up a true partnership in the form of a general partnership, limited partnership, or limited liability partnership, the concepts and foundation of being partners towards a common goal provides a much healthier relationship than the standard employer-employee mentality of you work hard and I’ll make the rules and get all the benefits.

By using the principles of partnership as a foundation, together you and your team members can create synergy and work together towards building a better practice while creating a much-desired work environment to retain long-term, dedicated team members as well as entice future employees.

With today’s challenge of limited work pools to find desired team members, I recommend the following outline for yearly employee reviews that creates a new and effective work relationship with your existing and future employees.

Take the time in 2023, to sit down for a one-on-one meeting with each individual team member. These can be spaced out during the year to allow for one or two of these each month depending on the size of your team. They can be scheduled on or near work anniversary or individual team members’ birthdays. I recommend that if you have an office manager, administrative assistant, or onboard human relations person, they sit in on each of these with you to make note of conversations, shared input, and mutual expectations.

One of the top requests for employees in their ideal work environment is **open and clear communication**, and it is essential in developing a healthy work relationship. Being valued is a desire we all have. The best way to feel valued is to be heard, and have the freedom to express our opinions

and suggestions toward the environment or relationship we are in.

The goal of this yearly meeting is to address key issues impacting the practice in a non-judgmental format based on mutual trust and respect.

- Have the employee list, from their perception, what is working well to support the practice goals.
- Again, from the employee’s perception, have them list any limitations keeping you and the team from improving and exceeding patient/parent expectations.
- Are there any concerns that prevent providing a healthy work environment? (Safety concerns, non-bullying, or toxic relationships that need to be dealt with?)
- Have both the employer and the employee list the identified strengths and assets of the employee. (This is great opportunity for praise and admiration.)
- Discuss the team member’s past accomplishments and advancements to date for that employee and discuss the positive impact of these actions for the practice.
- What does the employee suggest is needed to raise the bar? (Improved systems, more people on board, more training, etc.)

**Creating Partnerships** *continued on page 14*

## About the Author



Carol A. Eaton has partnered with a multitude of practices over her 48 years specializing in training treatment coordinators, developing marketing plans, and providing team empowerment. In 2022, she changed her status to semi-retired yet still lectures and offers custom team retreats. She will be presenting at the 2023 Users Group Meeting.

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# LANGUISHING: THE HIDDEN SYNDROME DRAGGING YOUR TEAM DOWN

Since the onset of the pandemic, have you felt different ... emotionally?

Does your energy seem more drained?

Does your focus feel off? Are you distracted easily?

Have you noticed bouts of brain fog more often than you’d like to admit?

After work, do you struggle to do anything other than just chill?

Has your desire to work diminished? Have you lost motivation to do more than the minimum?

Chances are you have felt this on some level, and so have your team members. What you might be experiencing is called languishing.

In psychology, the spectrum of mental health spans from flourishing, the peak of well-being, to depression, the valley of ill-being. Languishing is the middle ground between the two. It’s the absence of well-being, or as organizational psychologist Adam Grant puts it, “the neglected middle child of mental health.”

Why is it important for you as a business owner to know this? Because languishing affects your office’s energy, culture, and productivity.

One of the most recognizable ways languishing shows up is in people’s bedtime routines. How you go to bed, or avoid doing so, is a huge indicator that you are languishing. A Chinese phrase translated as “Revenge Bed Procrastination” describes this symptom well. It means staying up later than you should at night, usually doing nothing productive, hoping to reclaim the freedom missed during the day.

If this is ringing true for you or someone you know, it’s essential to know the consequences of this sustained behavior.

According to research from sociologist Corey Keyes, most people who experience languishing are on a trajectory to experience clinical depression and anxiety in 5-10 years if

they don’t improve their state of being.

If you aren’t able to identify languishing among your workforce and discuss openly how to overcome it, languishing can become the predominant mood in your office. The consequences are higher turnover rates and dissatisfied employees.

So, how do you combat languishing? What is the antidote?

One possible answer, according to Grant, is the concept of flow.

Flow is the feeling of being in the zone, with such absorption in an activity that we lose sense of time and self. Flow often happens while cooking, gardening, playing an instrument, or exercising. Flow does not, however, include binge-watching TV or scrolling social media — those activities are passive. Flow is active engagement in the real world. Jim Quik, author of the book *Limitless*, describes the state of flow as the “ultimate place of learning.”

When researchers studied the early impact of the pandemic on mental health, they realized how important the positive effects of flow are for the psyche. Results showed that the best predictor of well-being didn’t come from optimism or mindfulness. Rather, people who focused on productive projects, engaged in enjoyable activities, and learned new skills thrived most mentally. Not only did they avoid languishing, but they were also more likely to maintain their

**Languishing** *continued on page 15*

## About the Author



Dino Watt is the Founder and CEO of Our Ripple Effect, Inc. and one of the most exciting business relationship trainers in the world. His goal is to help business leaders create more passion, be more productive, and create more profit in all areas of life. He will be presenting at the 2023 Users Group Meeting.

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# HOW TEAM MEETING STRATEGIES CAN IMPACT YOUR PRACTICE'S SUCCESS

Success can be a status, a goal, or something always in the forefront and beyond. It's not gained through luck alone. It's earned. It is worked for, clawed at, scraped by, and roughed up as we pursue it. Yet, it is the most tangible intangible thing in our lives. We define it individually and collectively. We love it and hate it. It brings out the best and worst in people, and when we lay our heads on our pillows at night, it fuels our dreams and nightmares.

The type of relationship we carve out with success is often very finite. We either are or we are not. But I want to challenge this idea because the thing about success is that you never are. You will always be working towards the

next level, the next tier, the next goal, the next whatever. So, if you live your life in business thinking that one day you will wake up changed, you may be cutting yourself out of the success equation before you even get a chance to solve it. In this new year, I want to share with you what definable things encourage our success and how you can leverage your team to achieve it.

I've been in hundreds of practices, coached hundreds of doctors, trained hundreds of teams, and the one thing that can set a practice apart from others is a single foundational element, team meetings. As a doctor, you could be a SMART goal expert or a SWOT analysis whiz, but no matter how in line you are personally with your goals, you will only see results if your team is aware of them. Therefore, I recommend four types of meetings to all practices to maintain continuity and achieve your goals: Daily Morning Huddles, Quarterly Team Meetings, a Yearly State of the Office Address, and Monthly One-on-One Rhythm Meetings with individual team members.

A Daily Huddle is a standard within our industry. However,

poor daily huddles can quickly become repetitive and pointless if we aren't effectively using our time. There is a lot of opportunity to shake up the way we have always done things, and the morning huddle is a great place to start. These meetings are a way for the team to come together and look at their day ahead of time and be proactive vs. reactive to problems lurking on the schedule. Focus on scheduling conflicts, new patients that could turn into start appointments, and if scheduled same day, who will see that appointment in the clinic. Talk about problems with the regular scheduling rotation; weeks off, slow days that need to be filled, communicating lack of particular appointments, etc. These few tweaks can make a significant difference and are the best use of everyone's time.

Now let's talk about the evolution of the Monthly Team Meeting into a Quarterly Team Meeting. The primary objective is to let your team come together with no interruptions once a quarter with a plan for success. Gone are the days of rushed meetings shoved into lunch hours. Instead, I want you and your team to take the time to work on your business. Carve out three to four hours once a quarter to review your core values and quarterly goals, evaluate your SWOT for the quarter, talk about your marketing opportunities, and discuss your wins and pinches within your practice. It's also an excellent time to do scheduled training events, check in on training needs for each team member, and gauge if any new roles need to be added to the practice to fit growth. Think of this as a little timeout to align yourselves and reaffirm that you are all heading in the right direction.

The yearly State of the Office Address could be a new concept for some of you, but it is defined as a daylong meeting that happens once a year. I know this can take some planning and foresight from you as the doctor, but

I promise it is worth it. One of the critical functions of this meeting is to set the yearly goals you have for the practice and your team and, more importantly, review the goals you had set the previous year.

## Goal Setting Pro Tips

1. Write your goals down in a place you can easily reference throughout the year. This helps to keep them at the forefront of your mind.
2. When reviewing your previous year's goals, check them intently and with a curious mindset. You'll want to consider which goals you did and didn't hit and investigate the reasons behind the answers. If you hit a goal, why? What made you and your team successful in that area? If you didn't hit a goal, what was the catalyst, and what will be done next time? Write all your answers down, then start plotting for the following year.
3. Remember to be realistic. If your goal last year was far from attainable, don't do the same thing again. Be honest with yourself and what is achievable. Don't set yourself up to fail before you've even begun.

The goals you create should then be addressed at your yearly meeting. Take the time to talk as a team about an action plan and who is responsible for achieving each goal. I also recommend reviewing SOPs and updating them as needed, discussing team member needs, reviewing your marketing efforts in the current year and ROI, setting your marketing budget for the next year, and planning your marketing calendar. Finally, plan your work schedule to the best of your ability and plot out your quarterly meetings, CE courses, and events. This is your opportunity to give your team members a pat on the back, highlight what they have done to help the practice succeed, and help them understand their important role in your practice.

Last, let's talk about a new concept that may even replace the yearly review process. Rhythm Meetings are the easiest way to gain a connection and, hopefully, employment longevity with each team member. A Rhythm Meeting is a

dedicated time for you and your employee. Set aside 15 minutes per month to check in. It should be a one-on-one meeting solely dedicated to connecting with your team member. This is a time to discuss their mindset, obstacles, and where they are at with their personal business goals. And most importantly, what do they need FROM YOU to succeed within your practice? The value of this type of meeting cannot be overstated, as it enhances workplace performance and satisfaction for everyone involved.

Remember, success is not an individual sport; it requires you to be the team captain or coach, which is most likely a position you find yourself in daily. It's up to you to guide the team and ensure the game is won. Each game has its own rules, and every player must understand them. This is where things like core values and mission statements for your business come into play. They are the rulebook for your team. They are the foundation for the game. If you, as the coach, don't define them and teach them to your team, you will find yourself missing goals. Instead, use your yearly team meeting to align your team with your values and ensure everyone understands them. Success might not be guaranteed in your business journey, but anyone ready to pour into their business this way will find success without issue. It's here waiting for you, right within your reach. You have to grab hold of it and refuse to let go. ☺

## About the Author



Jill Allen is a national orthodontic consultant with a passion for helping doctors bring their practice dreams to fruition. Jill and her team specialize in start-up practices and training doctors and team members who have been in business for eight years or less, or eight years to retirement. She will be presenting at the 2023 Users Group Meeting.

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# INSIDE ORTHO2

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

## VISUAL HELP ROUNDUP

If you haven't taken the time to review the visual help videos on our website, now is a great time to do so! There are a variety of topics that you can choose from – ranging from a quick overview to a full in-depth explanation.

Each quarter we'll highlight a set of videos so you can become familiar with the content that is provided to you. This quarter features videos about Edge Imaging. These videos include topics such as:

- Viewing Images
- Auto Import
- Editing Images
- Single Import
- Image Tools and Export Options

To view these videos, log in to support.ortho2.com, then click Product Help > Visual Help > Edge Cloud > Edge Imaging. If you have a topic you'd like to see covered in a Visual Help video, email ortho2support@ortho2.com.

## ORTHO2 ANNIVERSARIES

Congratulations to these Ortho2 staff members who celebrated anniversaries during the fourth quarter of 2022.

### Thirty Years

Todd Schuelka

### Nineteen Years

Jesse Howard

### Nine Years

Steve Volcko

### Twenty-Eight Years

Michele Eich

### Eighteen Years

Corey Schmidt

### Two Years

Chloe Enos

### Twenty-Four Years

Lowell Davis

Denise Sargent

Jennifer Shaffer

### Seventeen Years

Derek Dohrman

### Ten Years

Drew Humphrey

### One Year

Christopher Clevenger

Zach Benjamin

## CAREER MILESTONES AND DEVELOPMENT

The Software Support Team added three team members this past quarter. Help us welcome:

**Alex Richardson** who comes to Ortho2 with experience as a Conversational AI Analyst, AI Trainer, and Team Lead with Structurely.

**Jason Cantonwine** who gained experience with Heartland of Iowa Regional Transit Agency where he worked in Dispatch and Scheduling.

**Dustin Heims** who is pursuing his bachelor's in computer engineering from Iowa State while assisting our customers.

The Product Development Team added **Mikayla Morrison** as a Project Manager/Business Analyst. She spent the last four years with MetaFarms, Inc. where she was most recently a Product Owner. Welcome to Ortho2, Mikayla!

## ON A PERSONAL NOTE

Congratulations to **Amy Schmidt**, Ortho2 President, for celebrating eight years of volunteering with the Mileage Club at her children's school. The Mileage Club is an annual program that incentivizes, encourages elementary students to move more. "I have volunteered for eight years, starting when my oldest was in kindergarten. I was really impressed with the program. It turns fun recess playtime into an opportunity to teach kids fun ways to incorporate exercise. As a volunteer, I really enjoy watching the excitement on the kids' faces. Some of them come charging out of those recess doors and are determined to get out there and meet their goals," said Amy.



## REFERRAL REWARDS

You can earn a \$500 credit for each referral that results in an Ortho2 system purchase within six 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) > Our Company > Referral Rewards, or call 800.678.4644.



# INSIDE ORTHO2

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

## MEET THE TEAM - QUALITY ASSURANCE

The Ortho2 Quality Assurance (QA) Team reviews new versions of our products to determine and verify they are to the highest standards prior to our customers receiving them. This quarter, we are featuring Micky Augustin, Quality Assurance Tester, Joe Levenhagen, Quality Assurance Manager, and Cal Rebhuhn, Development Support Specialist.

### What do you really do here at Ortho2?

**MA:** Test all new code prior to being released, investigate and report deficiencies discovered by our staff or customers.

**JL:** I manage the team that tests all Ortho2 software.

**CR:** Day to day, I work with our development team and other departments at Ortho2 to answer questions, resolve problems, and assist customer requests, in addition to assisting with the release of new updates and features.

### What's fun/what do you enjoy about your current job?

**MA:** Every day is something new to learn and get better at.

**JL:** We work with a lot of cool technologies. There is always something new to learn.

**CR:** What I enjoy most about my position is creatively approaching new issues as they arise. Each day is different and poses unique problems to solve.

### What do you want our users to know about the QA Team?

**CR:** Our QA Team works hard to address existing issues, and to vet new and upcoming features.



### Micky Augustin

**Vacation destination:** Alaska

**Three people I would like to have dinner with:** Cristiano Ronaldo, Michael Iaconelli, Randy Newberg

**My role model:** My dad

**I can't go a day without:** Jolly Ranchers

**What are you listening to right now?**

SiriusXM Hits 1

### Favorites

**Team:** Manchester United

**Software Program:** paint.net

**Movie:** *Fantastic Mr. Fox*

**Book:** What's a book?

**Phone App:** OnX Maps



### Joe Levenhagen

**Vacation destination:** Alaska fly-in drop camp. Spending a week trying not to get eaten by a bear sounds like a lot of fun!

**Three people I would like to have dinner with:** My grandparents

**My role model:** My dad

**I can't go a day without:** Coffee

**What are you listening to right now?** Zach Bryan, Tyler Childers, Shane Smith and the Saints

### Favorites

**Team:** Minnesota Vikings

**Software Program:** Ortho2 Edge Cloud!

**Movie:** *The Shawshank Redemption*

**Phone App:** Spotify



### Cal Rebhuhn

**Vacation destination:** New Zealand

**I can't go a day without:** Our pets

**What are you listening to right now?** Clarkesworld Magazine podcast

### Favorites

**Team:** Springfield Isotopes

**Software Program:** Home Assistant

**Movie:** Have y'all seen this musical *Spirited* yet!?

**Book:** These days, anything by Stephen Baxter

**Phone App:** Lately PictureThis has been super valuable at identifying wild plants

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ugm@ortho2.com

### Social Media

facebook.com/ortho2

youtube.com/ortho2systems

twitter.com/ortho2systems

linkedin.com/company/ortho2

instagram.com/ortho2systems

blog.ortho2.com

ortho2.uservoice.com

## SERVICE EXCELLENCE

We invite you to recognize Ortho2 employees by submitting an Extra Mile card. You may send cards online from the Contact Us page of our website. Our goal is to uphold our tradition of excellence in customer service, and with our Extra Mile program, you can let our employees know when you appreciate their extra effort. We encourage you to send an Extra Mile card whenever an Ortho2 employee goes the extra mile for you. The recognition is valued by the recipient and is acknowledged by our Management Team. We continue to look for better ways to serve you. Thank you for helping us recognize excellence.

### Creating Partnerships *continued from page 6*

- Discuss opportunities for growth and advancements for this employee (Cross-training, new roles and/or responsibilities, continuing education, etc.)
- Have the employee make a list of both professional and personal goals, as well as areas they would like to improve in for the upcoming year; making sure expectations are discussed, clarified, and easy to measure for future feedback.
- Discuss flexible work schedules that offer a healthy work-life balance, especially to young parents raising children or team members taking care of elderly parents (such as flex hours, less days/longer hours, job sharing positions, etc.). Does the practice encourage a healthy lifestyle by offering gym membership, good medical insurance, and healthy snacks?

Although the discussion of salary, benefits, and bonuses based on growth (if applicable) are critical for a healthy work relationship, I recommend that this discussion take place at a separate meeting during the year. Separate your goal setting, shared input for improving the practice both individually and collectively from a discussion of money just as it is recommended to always separate treatment from money issues with the patient. When setting up this secondary meeting, discuss the following:

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### Appointment Cards and Receipts *continued from page 5*

click on the appointment in the schedule and choose Appointment Card > Email Appt. Card. Use the Select Email Address window to choose which email address(es) you want to send the reminder to, then click Send. Your choices for this patient are remembered the next time you go to email a reminder card.

To email a receipt to a patient, simply right click on their

- Review current salary and history of increases.
- Based on employee education, experience, attitude, ability to work well with other team members, and the contribution they make to the practice, review any proposed salary and/or benefit increases along with potential for future growth.
- Review benefits utilizing a benefit calculation sheet that details all the benefits offered (paid holidays, bereavement time, sick or well pay, vacation accrued, educational opportunities paid for, support of any licenses if applicable or required continuing education, mileage paid, etc.).

### Partnership is a Process! Start the Journey Today!

Renew your working relationships with your employees in the coming year. Enjoy sharing the challenges that come with the joy of running a practice by letting your team members contribute their insight and suggestions. And don't forget to acknowledge your team and praise them for their efforts. A happy team member will be a long-term, committed team member working side by side in supporting and helping meet your practice goals. ☺

payment in the patient's ledger, and choose Receipt > Email. As with the reminder card, you can choose which responsible party or parties receive the receipt.

When posting AutoReceipts, click the Generate Receipts After Posting option to email a receipt to any responsible party with an email on file. ☺

### Languishing *continued from page 7*

pre-pandemic levels of happiness.

According to Grant, flow is made up of three components: mastery, mindfulness, and mattering.

**Mastery.** To combat the stagnation of languishing, flow involves momentum. Psychologists find that the strongest factor in daily motivation and joy at work is a sense of progress. The feeling of mastery does not have to come from a big accomplishment. Tracking and celebrating small wins will, over time, lead to higher levels of satisfaction and mastery.

**Mindfulness.** Focusing your full attention on a single task, versus trying to multitask, is an essential part of being in flow. There's evidence that people today are switching tasks every ten minutes and become distracted by phones and other electronic noise. This creates a phenomenon known as time confetti, where we take what could be meaningful moments and shred them into increasingly tiny, useless pieces. Time confetti is an enemy of energy and of excellence. If we want to find flow, we need better boundaries and dedicated time for deep focus on one task only.

**Mattering.** While mastery and mindfulness will get you to flow, the third condition of mattering is what really creates a peak experience. Knowing that you make a difference to other people in your life, especially at work, is vital.

The antidote to languishing does not have to be something productive, it can be something joyful. Many moments of flow happen when we are having fun with the people we work with or share love with. To be in our peak flow, fun should be on our daily to-do list.

Though curing languishing and finding inner flow takes time and thought, discovering what works can significantly increase contentment and satisfaction. To help your team members find their flow, I'd recommend that you first discover your own path to flow. Then you can share from a place of experience, not common knowledge. Where do you find mastery and mindfulness with the people who matter to you?

Next, share with your team the meaning of languishing, recognition of the symptoms, and that there's a path to finding more flow. Perhaps in a team meeting you can collectively mastermind ways to get into flow at the office and at home. Support them in finding ways to be joyful, focused, and in flow during their daily tasks.

Lastly, invest in your employees by creating opportunities for them to get into flow as a team. Show them that they matter to you. In-office training or seminars, off-site team building experiences, special educational events, or any avenue that helps them feel supported and valued will help. Mattering is essential for reaching peak flow.

As business owners, it's critical to rethink our understanding of mental health and well-being. Not being depressed doesn't mean you're not struggling. Not burned out doesn't mean you (or your team) are fired up about life. It's ok to admit to yourself and to your team if you're languishing right now. Putting attention on your team's flow — mastery, mindfulness, and mattering — will yield happier employees, less turnover, and more productivity and profits. The return on your investment will be infinite. ☺





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