ORTHO2

EMPOWERING PRACTICES

PRESIDENT'S PERSPECTIVE

After three years, Ortho2 recently held its first in-person Users Group Meeting again. It was a fantastic event with more than 500 attendees and a record setting 30 exhibitors! The meeting opened with Craig Scholz, Ortho2 Vice President of Emerging Technologies, and me describing the changes in orthodontics in recent years as well as changes at Ortho2. Avish Parashar gave a phenomenal keynote address on how you can use ideas from improv comedy to improvise, adapt, and innovate in an ever-changing world. The meeting continued over the next 2.5 days with more than 40 classes taught by not only Ortho2 team members, but also 27 industry-leading orthodontic consultants and doctors. Amazing team building and networking happened, both between offices and with the Ortho2 Team, and of course the opening reception Game Night party was a hit.

The meeting continued Saturday afternoon with an Ortho2 Development Conference (ODC). This was the 15th annual ODC and was attended by doctors, team members, and many from the Ortho2 Team to help shape the future of Ortho2 development. We discussed a number of features about to be released, like Edge Proposal and patient self-scheduling, as well as new integration ideas, and more.

This conference is a great way for our Product Development Team to hear directly from our users.

However, not all Ortho2 users get to experience the Users Group Meeting or Development Conference. Only one-third of Ortho2 customers have attended the Ortho2 Users Group Meeting in the past ten years, and only half have ever attended. COVID-19 forced our hand and in 2021 we hosted the first ever virtual Users Group Meeting. While very different than an in-person meeting, this virtual event was a tremendous success, with more than 1,000 attendees and 3,511 individual class sign ups. It allowed us to engage with a larger, and in many cases new, audience. So while different, we found this type of meeting also brought significant value.

Following this virtual meeting, we surveyed our customers to determine the best meeting path for Ortho2 moving forward. This survey showed nearly 40% of Ortho2 users prefer virtual meetings. One of my favorite quotes from this survey was, "Both the virtual and in-person Users Group Meetings are very valuable to our practice. I feel like a virtual option should be made available to those practices that cannot commit to travel."

I couldn't agree more. Moving forward, Ortho2 will alternate in-

INSIDE THIS ISSUE

2023 USERS GROUP MEETING

We loved seeing you in Las Vegas for our 2023 Users Group Meeting! The event was packed with learning from Ortho2 software support trainers, industry-leading consultants and doctors, and each other.

Our costume contest was a huge success! Congratulations to our winners:
1st Place: Kalamazoo Orthodontics
2nd Place: GLK Orthodontics
3rd Place: Kohrs Orthodontics
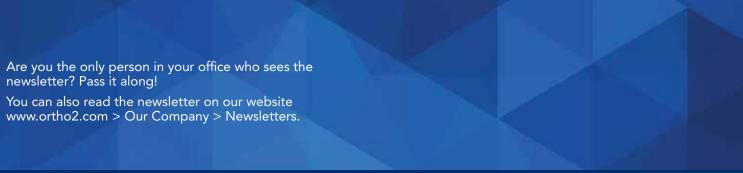Honorable Mention: Oakley Orthodontics

Join us next year for Live from Iowa, our virtual Users Group Meeting. Fill out the form at ugm.ortho2.com to let us know you're interested in attending the meeting. You won't want to miss this event and all the information about how to make your practice run better with Edge Cloud!

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 > Our Company > Newsletters.

We are excited to announce the release of Edge Cloud 7.1 and all of the features in this update that will enhance your practice.

- **Improved Global Payments Integrated Integration –** Our Edge Cloud/Global Payments Integrated integration now supports payment terminals with state-of-the-art security and EMV technology for your patients' swipe, tap, and keyed credit and debit card payments. The updated technology also includes the Decline Minimizer feature, which attempts to update a card on file automatically when it expires or the number changes.

General Feature Enhancements

- **End Edge Cloud Sessions –** If given the proper security rights, Edge Cloud users can now end a session within Edge Cloud. To do so, open the Sessions widget. Then, right-click the session you want to end and select End Session. After a buffer of 30 seconds, the session will be ended.

- **Auto-Generate Miscellaneous Charge Insurance Claims –** Edge Cloud can now auto-generate electronic insurance claims whenever you post specific miscellaneous charges. This feature is particularly useful for offices that accept Medicaid and other pay-for-service insurance.

- **Subgroup Smart Values Enhanced –** New subgroup smart values include "6 months ago", "6 months from now", "one year ago", and "one year from now".

- **Default Patient Folder Page –** You can now select which page you see when you first open a patient folder. To set up your default, open any patient folder. Then, right-click the tab you want to open first, and select the Default option. This page will be your default whenever you open a patient folder on any Edge Cloud computer you log into.

Edge Imaging Enhancements

- **Display DOB Caption on Images –** If you choose to include the patient's date of birth on your image captions, the date will now be preceded by "DOB".

- **Change Image Header Font Size –** You can now use your Imaging User Options to adjust the font size of the header that appears at the top of your Index layout and individual images that you maximize. Your setting is specific to you: Other Edge Cloud users can have a different font size selected. To adjust the font size, open User Options from the Tools section of the Home ribbon bar, and select the Imaging option. You can set the image header font size anywhere between 12 and 32. If a patient Imaging page is open when you change the font size, you will need to refresh the page to see the changes.

Scheduling Enhancements

- **Office Filter for Scheduler Month-View –** When viewing your Scheduler in Month View, you can now filter which office(s) you would like to include, so you can more easily see statistics and apply templates that are relevant only for your location. This feature is especially useful for practices with a large number of offices.

  To function correctly, every chair of your Scheduler templates must be classified by office. To do this, go to the Scheduler Templates editor and choose a template to work with. Click Edit Grid Template. With the Grid Template Editor on your screen, choose the Modify Chair option. Assign an office to each chair of the template. Be sure to save your changes. To apply your new office assignments to all instances of the template that are already in use, click Reclassify Chairs from the Scheduler Templates editor screen, and select the Office option.

- **Recall Date Auto-Set Feature More User-Friendly –** The recall appointment auto-set feature has been enhanced to better choose the next recall date for the intervals of "month" or "week". When the interval is "month", and the current date is the last day of the month (i.e. January 31), Edge Cloud will count the number of months, and choose the last day of that month (i.e. February 28 or June 30) as the next recall date. Also, if you select an auto-set interval of "week", the Day field

is not taken into account, and is hidden from the screen. When using the "week" interval, Edge Cloud simply counts the number of weeks from the current date.

Treatment Hub Enhancements

- **Treatment Hub Can Show Missed/Kept Appointments –** The Treatment Hub can now include a summary of the appointments the patient has kept and missed for the current treatment phase. To enable/disable the summary, open your User Options window and select the Treatment Hub tab. Choose to show/hide the Appointments Kept/Missed Summary option.

- **Tooth Chart/Image Tab Choice –** When you display the tooth chart and patient images as "stacked" in the header of your Treatment Hub, Edge Cloud now remembers which tab you were viewing when you exit and re-open a patient folder.

New Integrations and Reports

- **DDX Integration –** It's never been easier to track prescriptions and lab appliances with DDX. This improved integration leverages the existing visual tag and alert systems to provide real-time updates on case status within the most visible areas of Edge Cloud, such as the Scheduler and patient folder.

  In addition, a filter option is available to display historical DDX events within the Treatment Hub. Once selected, any previous DDX activity is interleaved by date next to existing chart entries with a clickable interface to open DDX to the specified patient quickly.

- **OrthoFi Integration –** You can now integrate your patients' OrthoFi payment plan with their Edge Cloud patient accounts. To activate this integration, go to the System Integrations editor and select "Enable" in the OrthoFi section of the window. Once access has been granted within Edge Cloud, contact the OrthoFi team at integrationsteam@orthofi.com to let them know you are ready to continue the integrations onboarding process.

- **Schedule Availability Report –** Run the new Schedule

Availability report to see how many weekly appointment openings you have for up to 10 weeks from the date you select, based on your Scheduler template classifications.

- **Production and Collection Report Updates –** The Dental Procedures section of the Production and Collection report has been updated to include the patient name and date on dental charge adjustments, and to fix the charge and net columns.

Edge Specialist Enhancements

- **Dental Procedure Adjustments Improved –** Use the Adjust Dental Procedure window to make changes to the base fee, discounts, allocations, and insurance write-offs for completed pediatric dentistry procedures. With this updated tool, you are in full control of the allocation of your dental procedure fees, including how the fees appear in your patient ledger and on your insurance forms.

- **Edit Planned Procedure Office from Treatment Hub –** You can now edit the office location for planned dental procedures from the patient's Treatment Hub. Previously, only the doctor and assistant could be edited. To edit the office of a planned procedure, open the patient's Treatment Hub page. Right-click or double-click to edit the procedure. You can then select the office to assign. If the procedure is in a group, you will need to edit additional procedures individually. You can click Next at the bottom of the editing window to advance to the next procedure in the group. Click Ok to save the changes and close the editing window.

  Important – Changes you make to your dental procedure details from the patient's Treatment Hub remain in the Treatment Hub only; they are not reflected in the patient's Scheduler appointment or any appointment reports.

- **Manually Close Insurance Claims –** In normal use,

We hear it every day, orthodontic practices are struggling with hiring and retaining team members. The labor shortage and rapid turnover of team members have compounded to form one of the industry's most pressing crises: burnout strain. Often times if your practice is short a team member it creates low morale, salary complaints, and ultimately resignations.

Employee turnover can have a negative impact on your practice – excessive costs, knowledge loss, and low productivity. Solving turnover in your practice will require new strategies as well as team communication and team buy-in. One way to foster this sort of environment is to better understand what your team needs. Practice owners and managers need to ask team members what they can do about burnout and how they can help increase job satisfaction. It is important to remember not to blame the employee for being stressed or overwhelmed, but instead, acknowledge "this is a tough and fast paced job." Two things can destroy your employee retention rate, overworking your team and a toxic culture. Plenty of practices increased bonuses and salaries last year, but increasing pay may not always be the best answer.

The most important asset in an orthodontic practice is your team. They are essential contributors to a profitable and thriving practice. Their skill set accounts for 85% of a practice's assets while employee efficiency, talent, and attitude determine its pace and growth.

Maintaining high morale with your orthodontic team members is critical to a positive practice culture and employee retention. It is important for practice owners to invest time and effort into improving your team's morale. Here are a few ways to help you improve your team's happiness and satisfaction.

1. Demonstrate Gratitude
Celebrating individual and team accomplishments can go a long way toward fostering a positive work atmosphere, especially when your team doesn't expect it. We are constantly thanking our patients but are you thanking your team? A verbal thank you goes a long way, but also consider slipping your team members a hand written note to let them know how much you appreciate their efforts and thank them for what they bring to the practice. This will be much more impactful when you personalize it to each team member and recognize their accomplishments.

2. Encourage Open Dialogue
We often think we understand the challenges our team faces, but there's a good chance we are in the dark about a few things. It is important to sit down and explain to your team that you want to hear from them about what would make their job better and more satisfying. If they don't feel comfortable sharing face to face, encourage them to write it down and leave it on your desk. This doesn't mean that you are going to make constant changes in the practice, but you want to encourage open dialogue. Giving your team members a voice makes them feel like their opinion matters while also providing a sense of ownership over the practice as a whole. Furthermore, involving more of the team often leads to great ideas on top of the team building.

3. Provide Continuing Education
Upskilling and reskilling your team are great ways to inspire confidence and job satisfaction, ultimately improving team performance. Practices can do this in several ways, whether it's taking the time to personally provide the education and tools, or bringing in an outside consultant to run training

About the Author

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Our post-COVID world has brought about massive changes in our work environment, including team turnover. In the Visier Insights Report, *Stop the Exit*, findings land squarely in our industry and the turnover we are experiencing. Most resignations are from women, those in the 30-45-year-old age range, and those in the healthcare industries.

No wonder so many practices are being faced with onboarding more team members than ever before. One real challenge is simply maintaining services, so conducting any training beyond on-the-job or just-in-time can seem impossible. But is there a cost to the practice and the patient with such an approach? Yes, there is. The trickle-down impact of not slowing down to intentionally train ultimately impacts your bottom line.

According to Gallup's State of the Global Workplace: 2021 Report, training and development is one of the five key drivers of employee engagement. Consider these results:

- A team where there is low engagement produces 14%-18% less in sales and has a 10% lower patient loyalty score than high-engagement teams.

- Turnover rates are up to 43% higher for low-engagement versus high-engagement teams.

- Costs to replace an existing team member are up to two times their yearly wage.

Vital to the success of the practice are three foundational training and development areas that increase employee engagement at any time but especially during the onboarding process.

1. Job-Specific Skills
Each role needs documentation of, and training to, Standard Operating Procedures (SOPs). This ensures each team member understands their role and is completing tasks consistently. This reduces errors, individual interpretations, and variable patient experiences.

Tips for SOPs include:

- Consider recording SOPs on video, uploading them to your practice documents, then have a master document with hyperlinks to the various recordings.

- Start with the most common or most error-prone processes.

- Link SOPs to checklist items.

- Set repeating calendar reminders to review SOPs for needed edits.

2. Cultural Norms
Every practice has their own unique culture. Within that culture there is intrinsic knowledge that fosters connection or isolation. We tend to be good on day 1 in providing a new hire a tour of where their personal locker is located, how to clock in, and where the bathrooms are. We may print out our mission, vision, and core values. But what about the cultural knowledge that helps them BELONG and FIT IN?

Teaching cultural norms can include:

- Creating a "Here's What You Need to Know" sheet for their day 1 experience and providing it once they accept your job offer. Include things such as: what to wear, arrival time and parking location, whether to pack a lunch for day 1 or if a team lunch is scheduled, favorite lunch locations, amenities for team use – fridge, coffee, etc.

About the Author

Amy Demas MBA, DTM, DFSS is the President of Communicate Excellence and provides communication training and coaching. She is an award-winning speech evaluator through Toastmasters. Amy is an international speaker and coach, and author of *Communicate Excellence*, a resource guide for front office team members.

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In the last few years, AI has become one of the most developed and utilized parts of how we interface with technology. From phones that open with face ID, to virtual personal assistants such as Apple's Siri, Amazon's Alexa, and Google Assistant, to chatbots and grammar checkers, we use AI every day. Over the last few months, AI has been in the news as it becomes more noticeable to the average American. The most newsworthy of the AI systems is chatGPT, but it is only the tip of the iceberg.

So how does this affect us as orthodontists? First, we need to understand a little about AI. In general, AI can be broken down into two main categories: symbolic AI and machine learning. Symbolic AI involves creating algorithms that humans can easily understand. Machine learning (ML) is the current paradigm in AI where the algorithms learn from examples rather than rules set by humans. With the help of statistical and probabilistic tools, ML algorithms can continuously improve as new data is introduced. This can be in the form of predictions, identifying new patterns, or classifying new data.

Deep learning (DL) is a subset of ML that involves the machine determining specific features of an input. This is achieved through artificial neural networks (ANNs). The result is the development of deeper neural networks, known as deep learning. By utilizing AI technologies such as ML and DL, orthodontists and the companies that develop the products used by orthodontists can provide more effective and efficient treatment plans.

Overall, AI is helping orthodontists to reach and engage with potential patients more effectively, allowing them to grow their practices and improve patient satisfaction. The future implications of AI in orthodontics are significant.

AI is being used by orthodontists to help monitor patient progression in software used by Invisalign, Dental Monitoring, InBrace, and many others. In addition to these uses, forward-thinking marketing firms have been using AI to help find new and better patients for orthodontic practices. Some of the ways we are using AI in marketing include:

Targeted Marketing
AI algorithms can analyze patient data to create targeted marketing campaigns. These campaigns include

- **Geo-Targeted Ads** – Targets specific geographic areas you want to get patients from.

- **Demographic-Based Ads** – Targets specific demographics such as age, gender, income, and education level.

- **Retargeting Ads** – Serves ads to people who have previously interacted with your website or social media accounts.

- **Look-Alike Audience Ads** – Targets ads to people who have similar characteristics and interests to your current patients.

- **Behavioral Targeting Ads** – AI analyzes a user's online behavior, such as the websites they visit and the content they engage with, to serve them targeted ads.

Reputation Management
AI can monitor online reviews and social media mentions of the practice, providing insights into patient satisfaction and helping orthodontists to address any issues that arise.

Automated Marketing
AI can automate routine marketing tasks, such as sending email campaigns or social media updates. These personalized communications can use AI to send follow-up emails after appointments, and personalized treatment progress reports. These are especially helpful in today's world where parents drop off their kids and never come inside the office. Communicating with them through AI or even a customized, non-AI, text is super helpful in keeping lines of communication open.

Creating Job Offerings
ChatGPT is a great example of this using simple commands, the AI is able to create a job listing that is specific to your practice and the position that is available.

Chatbot Marketing
We have all seen chatbots on websites. Love them or hate them, they are here and in many cases, you have to interact with one before you can speak to a real person. Chatbots are simply computer programs that simulate conversations with human users. They provide an automated response to customer inquiries or requests. Orthodontic practices can use chatbots to provide instant customer service, directing patients to specific areas of your website where answers to their questions may be found, and providing information about services and appointment scheduling. Chatbots can operate 24/7, which is especially helpful for practices outside of regular business hours.

Overall, AI is helping orthodontists to reach and engage with potential patients more effectively, allowing them to grow their practices and improve patient satisfaction. The future implications of AI in orthodontics are significant. As technology continues to advance, orthodontic practices will have access to even more powerful tools. AI-powered systems will be able to analyze vast amounts of patient data, including dental records, medical histories, and social media activity, to identify patterns and insights that can improve marketing strategies. AI-powered chatbots will become even more sophisticated, providing patients with more personalized and responsive customer service. Virtual consultations and remote monitoring will become more common, allowing patients to receive orthodontic treatment from anywhere in the world. Additionally, AI-powered tools will continue to improve the patient experience, offering customized communications, and real-time feedback on treatment progress. The future of AI in orthodontics is exciting, and it is clear that practices that embrace this technology will have a competitive advantage in the years to come. However, it's important for orthodontists to use AI ethically and responsibly, following all laws and regulations and respecting patient privacy. ⚙

About the Author

Beth Leach has worked in the orthodontic marketing field for more than 20 years with PracticeMarketer and PracticeRetriever. She is an expert in combining the latest online marketing strategies with the most effective traditional modes of practice promotion to generate high-level practice growth.

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INSIDE ORTHO2

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

CAREER MILESTONES AND DEVELOPMENT

Leslie Mehalek and **Teresa Gutierrez** both joined the Software Support Team as Software Support Representatives in January. Leslie comes to us with more than ten years of orthodontic office experience as an office/treatment coordinator with a practice that used Edge Cloud and ViewPoint. Teresa also has more than ten year of experience in orthodontic offices and as an orthodontic consultant, training offices on financial and insurance processes in Edge Cloud. We are excited for both Leslie and Teresa to join the Ortho2 Team!

Congratulations to **Tony Kooima**! Tony was promoted to Senior Software Engineer I in February. He has been with Ortho2 since 2004, holding various positions on the Software Support, Network Engineering, and Product Development Teams. Congratulations, Tony!

ORTHO2 ANNIVERSARIES

Congratulations to these Ortho2 staff members who celebrated anniversaries during the first quarter of 2023.

Forty-One Years
Dan Sargent

Thirty-Three Years
Jo Jacobson

Thirty-Two Years
Diane Lyon

Twenty-Five Years
Coreen Magnuson
Mike Vest

Twenty-Four Years
Doug Olsan

Twenty-Two Years
Joe Levenhagen

Twenty-One Years
Danetta Hiatt
Amy Schmidt

Nineteen Years
Michael DiSalvo
Chad Kellner
Tony Kooima

Seventeen Years
Chris Bennett

Fourteen Years
Jim Powell

Twelve Years
Mike Gude

Eleven Years
Mark Hoffmann

Nine Years
Lori Backous
Linda Cooley
Amia Sult

Four Years
Joe Randazzo

Two Years
Kimberly Betke

One Year
Noah Parks

AVAILABLE FROM ORTHO2

Contact an Ortho2 Regional Manager at sales@ortho2.com or 800.678.4644 for details on any of these products and services.

EDGE CLOUD
Our cloud-based management system.

Your Edge Cloud System Can Include:
(Scheduler, Electronic Insurance, HR Manager, Patient Tracker, Treatment Hub, and Edge Proposal always included)

- Additional Edge Cloud User Licenses
- Edge Specialist (pediatric dentistry module)
- Edge Animations (patient education and case presentation)
- Edge Portal Premium (online account access for patients/parents/professionals)
- Edge Reminders (automated appointment reminders)
- Premier Imaging (ceph and morphing)
- Third Party Product Integrations

INVISIT

Virtual Appointment & Consult Solution

- Generate new patients with virtual consults
- Virtually monitor ongoing treatment and retention
- Communicate with patients through two-way text messaging or email
- Customize patient questionnaires
- Configure your management dashboard to fit your needs
- Integrates with Edge Cloud's Treatment Hub to quickly review submitted material
- Import submitted photos into Edge Cloud
- No app to download for patients
- Sign up at www.getinvisit.com

Equipment & Networking (For both Edge Cloud and ViewPoint systems)

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

ViewPoint™
Our local server management system.

ViewPoint Software Modules

- Additional ViewPoint User Licenses
- Edge Imaging for ViewPoint (enhanced imaging functions)
- Edge Animations for ViewPoint
- Edge Reminders for ViewPoint
- Premier Imaging (ceph and morphing)
- Treatment Chart (electronic charting)
- On-Deck Appointment Control (patient sign-in and operatory display)
- HR Manager (securely store employee information)
- VP WebAccess (online account access for patients/parents)
- VP Glance (mobile access to your ViewPoint data)
- Electronic Insurance
- Grid Scheduler
- Third Party Product Integrations
- DataMove Utility (transfer ViewPoint data from location to location)

Ortho2 Services

More Than Just Software

- On-Site Training and Refresher Sessions
- Web-Based Training and Refresher Sessions
- Credit Card Transaction Processing
- Edge Cloud (off-site, secure data hosting)
- VP Backup Online Storage
- Data Split (split Edge Cloud/ViewPoint databases)
- Data Merge (combine Edge Cloud/Viewpoint databases)
- Data Conversion (put non-Ortho2 data into Ortho2 file format)
- Image Conversion (convert your images to Edge Imaging)
- Custom Reports
- Custom Online Forms
- Custom Premier Imaging Analyses

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MEET THE TEAM – PRODUCT DEVELOPMENT

The Ortho2 Product Development Team does everything from creating and updating our practice management softwares, to maintaining our data center, and investigating and implementing new UI/UX concepts. This quarter, we are featuring Mikayla Morrison, Project Manager/Business Analyst and Jasmine Snell, Front End Developer.

What do you really do here at Ortho2?

MM: I work with internal stakeholders, OSOs and third-party integrators to identify project scopes and objectives. I also organize the development items put in front of the Ortho2 Product Development Team.

JS: I am a Front-End Developer which means I help create beautiful and easy to use applications for our users and their customers.

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

MM: I enjoy getting to work with passionate individuals who want to improve the Ortho2 products and be a part of driving scope for new projects.

JS: I enjoy creating, learning, and growing my skill set while building incredible software with the Product Development Team. I also enjoy having coworkers who are always happy to help.

What do you want our users to know about the Product Development Team?

MM: The team works hard to deliver the features and updates customers need while striving to improve our processes. Customer needs are constantly evolving, and our team works hard to keep up with changing technology and industry needs.

JS: It's our job is to make their lives easier and that's what we get satisfaction from.

Mikayla Morrison
Vacation destination: Alaska, going off-grid to relax with my family.
Three people I would like to have dinner with: God and my grandfathers
My role model: My mentor
I can't go a day without: Reading a book
What are you listening to right now? A mix of everything; I like a lot of genres.
Favorites
Team: Not a sports person
Software Program: Microsoft Excel
Movie: I prefer action movies
Book: Too many to choose from
Phone App: Kindle or Spotify

Jasmine Snell
Vacation destination: The Azores, Portugal
Three people I would like to have dinner with: Sir David Attenborough, Dolly Parton, John Mulaney
My role model: My mom
I can't go a day without: Chocolate
What are you listening to right now? Hozier
Favorites
Team: Florida Gators
Software Program: Google Chrome, but it must come with a good Internet connection!
Movie: *Eternal Sunshine of the Spotless Mind*
Book: *The Girl with the Dragon Tattoo*
Phone App: YouTube

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 > Our Company > Referral Rewards, or call 800.678.4644.

LOG INTO SUPPORT.ORTHO2.COM

There are many resources available to you on our website. You will find visual help videos, printed documentation, request forms, information on upcoming meetings, and more.

If you haven't already created an account to access the Customer Site of our website, you will need to do that. Each doctor and team member can create their own account. Visit support.ortho2.com, and click Register New User under the Login fields.

You will be prompted for your full name, main office phone number, and Ortho2 customer number. Finally, enter your individual email address, a password of your choice (at least five characters), and a display name that will be publicly visible.

RETRAINING

Have you hired new team members since your original software training? Has someone on your team taken on new responsibilities? Do you feel you might not be taking advantage of the enhancements that have been added over the years?

Ortho2 offers many options for refreshing your knowledge of old features and informing you of new features, but do you want to be able to set your own agenda to meet the specific needs of your practice?

A retraining — either in your office or over the Internet — addresses all these issues. To learn more and to schedule one for your practice, contact your Ortho2 Regional Manager today at sales@ortho2.com or 800.678.4644.

ON A PERSONAL NOTE

Congratulations to **Mike Vest**, Ortho2 Network Administrator, on the birth of a new grandson! Kasey Jay was born on February 23, weighing 6 lbs. 6 oz. Welcome to the world, Kasey!

insurance claims are closed when you process them as paid. However, you can now manually close pediatric dentistry insurance claims and the associated dental procedures, even if the claim has not been paid. You might do this, for example, if you accidentally submit a claim to the wrong insurance company, or for the wrong patient, or when you first start using Edge Specialist and need to reconcile paid dental procedures against their submitted insurance claims.

Important – You cannot re-open closed insurance claims or dental procedures for payment. Once closed, any remaining fee will need to be added to another insurance, responsible party, or write-off. If later you receive an insurance payment for a closed procedure, you will need to create and submit a new paper claim, then post the transaction.

Edge Proposal is our upcoming case presentation and acceptance module that will fully integrate into Edge Cloud 7.2. With this update, we are beginning the roll-out of Edge Proposal to a closed group of customers in our early

adoption program. Stay tuned over the coming weeks for additional information once we start to expand access. We want all of our customers to be able to use this much-anticipated feature, and we have decided to include Edge Proposal to everyone free of charge. If you have already submitted an order for Edge Proposal, please know that you haven't and won't be charged.

You can review the entire list of enhancements, and learn how to use each new feature, by reviewing the release notes found in Edge Cloud > Help > Release Notes.

If you have any questions about the new features in the release, or how to implement them, contact the Software Support Team at 800.346.4504 or ortho2support@ortho2.com. ↻

sessions for your team. By demonstrating your commitment to continuing education they will know you are vested in their career growth.

4. Clarify Your Practice Mission and Value Statement

Does everyone know what the mission of your orthodontic practice is? This means that you need to craft a clear mission statement and share it with your team. Or if you already have a mission statement, take the opportunity to review and revise it, perhaps with the help of your team. It is important to reinforce it with signs in the practice. Repetition is key to keep the team focused and engaged on the same goal.

5. Appraise Team Members

We do not all learn the same way and we are all motivated

differently. Take time to learn and understand your team's individual personalities rather than seeing them as a single unit (which is easy for practice owners to do). Consider having each team member complete a form during your onboarding process that asks a range of questions to bring out their preferences. Integrating your practice's culture is important, but allowing a new hire to share their individual identity can help them feel less like an outsider. Some sample questions to consider: Do you learn best by reading, doing, or listening? What are your top three strengths? What achievements are you most proud of?

When it comes to keeping your team happy, there's no single fix. The only way for practices to retain the best team members is to consistently evolve to ensure you have happy individuals working together to care for your patients. ↻

person and virtual Users Group Meetings. Both have value and allow us to better serve our entire Ortho2 family. So please stay tuned for more on the virtual 2024 Users Group

Meeting AND the next in-person meeting in 2025. I sincerely hope you'll consider attending both events. ↻

Amy Schmidt
Amy Schmidt, Ortho2 President

- At the daily huddle, rotate having one (or two) current team member(s) tell of their role, what they are especially good at in the office, and one fun fact about themselves.

- Shadow different team members across multiple roles; repeat after a month when they are more knowledgeable to ask even better questions.

- Provide an onboarding checklist and mastery timeline to calibrate expectations and prevent the feeling of overwhelm.

3. Communication Skills

How we communicate directly impacts the team dynamics and the customer experience. Our post-COVID world is filled with more anxious and less patient individuals. By providing coaching on communication skills, you not only empower team members to have better experiences at work, but also better experiences in their personal lives. And as a bonus, those better personal experiences carry over into better work experiences.

Critical communication skills include:

- **Phone Training –** Record calls and provide systematic coaching feedback in an environment of trust based on performance trends. This is different from the occasional

mystery call approach, which is usually spotted by your team member, and feels like a "gotcha" call. No matter how much we begin to use other technology streams to work with patients and potential patients, the phone is still a major communication channel.

- **Conflict Management –** Teams must know how to navigate a frustrated customer experience to resolution. With social media and online review opportunities abounding, we cannot afford to have patients venting online.

- **Personality Training –** Understanding personality types and their desired communication preferences empowers team members to navigate conversations within the team as well as with patients and parents.

In conclusion, the need for effective training and development, especially during the onboarding process, is no longer a nice-to-have item. It is a necessity. In this Great Resignation space we must be strategic in getting and keeping our teams engaged; a key factor of engagement is providing training and development. When we do so, we not only empower our team members, but we also increase their job satisfaction. And happier team members provide better customer service to our patients, resulting in a positive impact on the bottom line of our practices. ↻

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EMPOWERING PRACTICES