



PRESIDENT'S PERSPECTIVE

Last quarter, Ortho2 went through something many of you have also experienced in your careers – a software conversion. In August, we transitioned from a custom built Customer Database (CDB) to Salesforce for tracking our tickets (aka correspondence) with you, our orthodontic partners. This was no small feat, as we have used the CDB for 30 years, but the time had come for a change and I'm pleased to report a positive outcome.



The CDB was created in 1992 in Paradox for DOS, a relational database management system to track information on our OneTouch (also DOS) customers and contained four tabs: bio/address, phone numbers, sales info, and customer call info. Similar to Ortho2's product line transitioning from OneTouch to ViewPoint (Windows), six years later, in 1998, the CDB was converted from DOS to Windows using Microsoft Access and Microsoft SQL Server. The CDB continued to expand and contains 24 tabs today, as well as other areas of integration such as the Ortho2 Webstore. Some CDB additions over the years have included:

- Order tracking and triggering of internal processes
- Tracking software and hardware used, as well as services provided

- Document archive
- Users Group Meeting information including attendees, their selected classes, and more
- Focused tabs for various teams including New Customer Care (NCC), Network Engineering, and Custom Projects

Before making the switch, the CDB amassed nearly 2 million calls logged (1,786,392 to be exact) – wow! – with the most calls logged by a specific customer at 10,515. Let me know if you think that was you!

The CDB also saw us transition from supporting approximately 900 individual users at its inception to more than 24,000 users (orthodontists and their teams) today!

For 30 years, the CDB served us well but as technology marches on, we knew we needed to make a change. After a period of exploration into several options, Salesforce was selected as our next customer management system. Being a leader in the space, Salesforce was an excellent fit for today and into the future.

But our journey isn't over, as our ticket tracking was just one of the 24 tabs mentioned. We will continue to find new homes for all the information currently stored in the CDB in the coming months so we can continue to deliver the best service and solutions to you. 🍀

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USERS GROUP MEETING

FEBRUARY 23-25, 2023 | LAS VEGAS

REGISTRATION IS OPEN

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.

Register online at www.ortho2.com/ugmregistration. If you have questions, contact Kim Barker, Meeting and Event Coordinator at 800.678.4644 or 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.



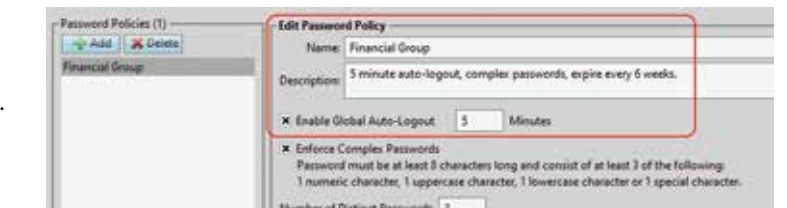
Edge Cloud's Auto-Logout Policy

Our Software Support Team fields a lot of calls asking if we can help log people out of Edge Cloud to free up a license. This can happen if you forget to log out in one location, and you are in a second (or another) for the day. Setting up an auto-logout is a shortcut to ensuring this won't happen.

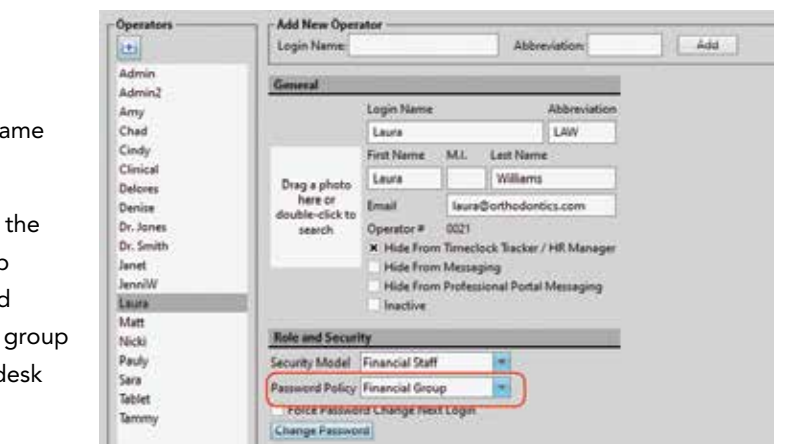
There are two ways to accomplish this task. The first way is to click User Options in the Tools tab of the Home ribbon bar. In the General tab, click Enable Auto-Logout, then type in the number of minutes the computer should be inactive before logging out of Edge Cloud. Click OK. If you use this option, you will need to set it up on each computer in your office.



The second way to set up the auto-logout feature is through the editors, and when you do the task this way, you set up the feature per operator. Select Editors in the Tools tab of the Home ribbon bar, then search for the Password Policy editor. If you have the proper security clearance, you can type in your username and password to access this editor.



Click Add to create your new policy. Type a name for the password policy, and enter a description that will help you select the appropriate policy for your Edge Cloud operators. We recommend creating a policy for each group of operators in your office, i.e. financial group, front desk group, or clinical team.



Then, check Enable Global Auto-Logout, and enter the number of minutes of machine inactivity to wait until the operator is logged out of Edge Cloud automatically. Continuing to use the computer for other applications outside of Edge Cloud, such as word processing, does not count as inactivity. Click Save.

Open the Operators editor. Again, you must have admin access to use this editor. You will need to assign each operator a Password Policy. Under Role and Security, use the Password Policy dropdown to choose the password policy group you set up in the step above. Click Save. Using the auto-logout policy this way means that no matter what computer the user is on, Edge Cloud will be logged out automatically. ☺

COME VISIT US AT THESE FALL MEETINGS

Mother of Pearls Conference

October 7-8, 2022

Pacific Coast Society of Orthodontists/
Rocky Mountain Society of Orthodontists

October 27-30, 2022

Midwestern Society of Orthodontists/Southern
Association of Orthodontists/Southwestern Society
of Orthodontists

November 3-5, 2022

MESSAGING WITH EDGE CLOUD

Sending instant messages in Edge Cloud is a quick and easy way to communicate between your team members and other professionals. There are many features within messaging that can save you time during your day.

You can access your instant messages in two ways: on the Dashboard or in the Message Center. If your messages aren't already on your Dashboard, add them by clicking Widget Library next to the Home ribbon bar, then click Messaging. This is a read-only option for your messages.

Optionally, open the Message Center from the Home Ribbon bar in the Messaging tab to view messages. Here, you can read, respond to, or start a new message. In addition, you can see the messages you have sent to other operators.

High Importance Option

Enable the High Importance option to flag a message as high priority. If you receive a message flagged with High Importance while you are logged into Edge Cloud, or if you have an unread high importance message when you first log in, the message will pop onto the top of your Edge Cloud screen so you can take care of it right away.

You can set each message you send to default as High Importance if you wish. Open User Options from the Tools tab of the Home ribbon bar. Select Messaging, and either toggle on or off the Default High Importance option.

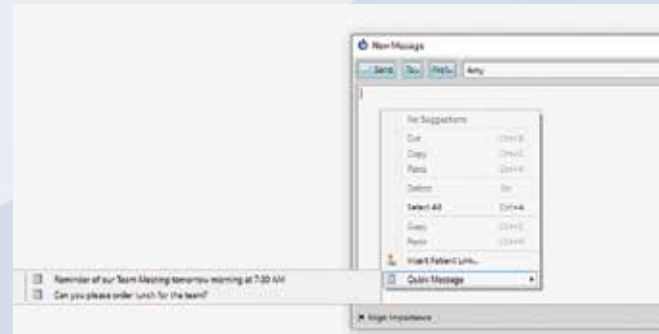


Creating Quick Messages

Also in the Messaging User Options, you can create Quick Messages to insert standard text you use frequently into your messages, helping you save time. In your User Options window, click the Messaging tab, then click the Add button. This inserts a box under the Quick Message heading. Click

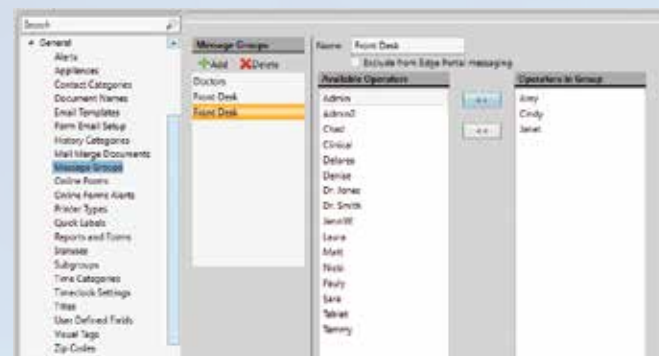
inside that box and type the text you want as your quick message. You can add more by repeating this process. When you are done, click OK.

Now in the Message Center, click New Message. Right-click in the message body section of the *New Message* window where you would like to insert text you have previously saved, and hover over Quick Message. Then select from your Quick Message list. You can edit the quick message text if needed.



Setting up Message Groups

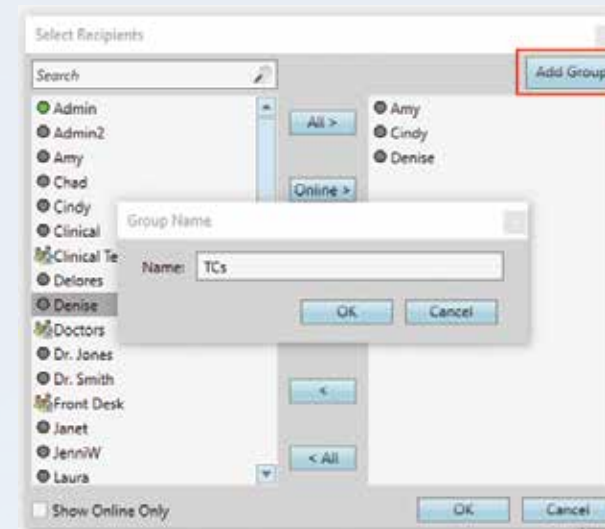
Use Message Groups to easily send an instant message to a specific group of Edge Cloud operators. When you send a message to a group, each team member that is included in the group will receive the message.



You can create groups in one of two ways. The first is through the Editors. Open the Editors from the Tools tab of the Home ribbon bar and open the Message Groups editor under the General heading. Click the Add button

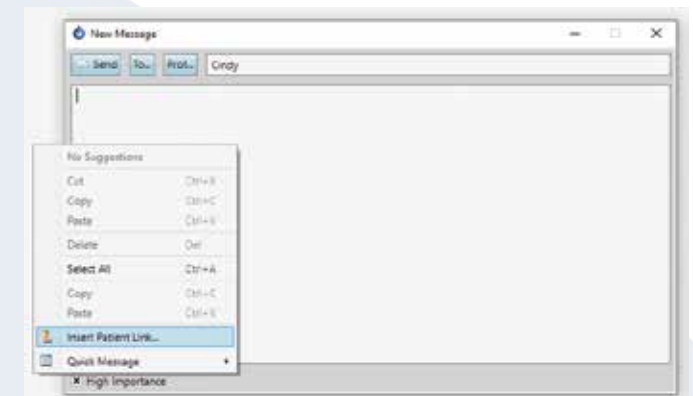
under Message Groups to add a new group; give the group a Name. Select an operator name, then use the ">" and "<" arrows to add or remove the operator from the group. Now when you go to select message recipients, notice that message group names are preceded by a group icon.

The second way to set up Message Groups is in the message itself. When you click To in a new message, select the operators, then use the ">" arrow to add operators to the group. Once you have all the operators selected, click Add Group in the top right corner of the *Select Recipients* window. Give this group a name and click OK in the *Group Name* window.



Adding Patient Links to Messages

If you are sending a message about a specific patient, you can include a link to their patient folder within the message. In the message body, right-click where you would like to include a link to a patient folder, and select Link Patient. If a patient record is already active, that patient's information will be loaded automatically. Otherwise, you use Fast Find to search for the patient to work with. After you send the message, the recipient can click the link to open the patient folder.



Sending Messages to Professionals

You can also use Edge Cloud's Message Center to send messages to the professionals you collaborate with. There are two qualifications for this to work: a professional record must have a valid email address to be available for messaging, and that email address must be registered to use your Edge Portal Premium application to retrieve the message.

When you go to send a message to a professional, instead of clicking To, click Prof... to bring up a Fast Find window. Type in all or part of the professional's name, and use the results to find your recipient.

In addition, messages received from professionals via Edge Portal are saved in the professional's correspondence history. If the message included a patient link, a copy of the message is saved in the patient's correspondence history as well. ◊

FOLLOW UP WITH YOUR UNDECIDED PATIENTS

By the time you get to the end of a new patient evaluation, your practice has invested a significant amount of time and many costly resources (think digital X-rays, camera, hardware, software, clinical supplies, staff time, and doctor time to name just a few) in seeing that patient and providing a high-quality new patient experience. Although carefully laying the groundwork for a treatment decision at the time of the exam can certainly decrease the number of undecided patients, it is also critical to have a strong tracking and follow up protocol in place for those patients who were undecided at the time of the exam.

In my years of providing remote practice analysis reports for Ortho2 offices, I continue to find a surprising number of these valuable patients falling through the cracks in many practices. I believe part of this, is a mindset that we might be bothering the patient/parent when we follow up or seem pushy because we call. I actually see not following up as a disservice to the patient/parent since many questions may go unanswered. Scheduling a follow up phone call (two to three days after the exam) can give you the opportunity to answer questions that come up after the exam. You can even create a procedure code and actually schedule the phone consult into the TC schedule. Just remember to block any reminders you send from that procedure code. If you prefer you can set up a morning or afternoon appointment and use Tasks or To Do to remind you of the need to call.

The great news is that Edge Cloud and ViewPoint have many tools and reports that can help support your follow up system and improve the percentage of patients that convert to starts. Since so many reports are status driven, the first step may be to clarify the statuses used for undecided patients. For status to be used as a tracking tool it is important to realize that status needs to be changed at the end of the exam to whatever next step the patient/parent has decided on. So a patient who scheduled their start would be SCH start scheduled. A patient going into pre-treatment observation would have their status changed to OBS or whatever you use. It can be helpful to set up an Appointment Kept Workflow that prompts you to change the status.

Any undecided patient would have their status changed to the appropriate status. Whatever you might call them in your practice (Will Call Back, or Undecided for example) I have found that having clear statuses makes follow up very easy. You might include the following statuses:

- WME for Will Call Missed Exam
- WCR for Will Call Records (if you have a separate records appointment)
- WCS for Will Call Start (for those that are ready to schedule their start appointment)
- WC2 for Will Call Phase 2 (which is a great group to look at when the practice is a little slower)
- WRF for Will Call Referred to GP/Perio
- WCP for Will Call Pending (for those patients/parents who are waiting for a set date in the future to get started. For example: patient will start when insurance begins in January or when another sibling completes their treatment).

I've also had offices have @WChild and @WCAdult for patients who you want to receive an email blast from the office twice a year. These separate statuses allow you to follow up on a targeted group of patients.

You will also want to create matching Recall Procedures for each of the statuses you decide to use. Being able to put these patients on a specific recall in the future can be

Undecided Patients *continued on page 15*

About the Author



Natalie Beaton has more than 30 years of hands-on experience as a Treatment Coordinator and Financial Administrator. She works exclusively with Ortho2 clients to maximize their use of the Edge Cloud and ViewPoint systems in all critical practice areas.

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IMPROVE YOUR MINDSET, IMPROVE YOUR PRACTICE

A smile can change someone's day, from the moment you answer the phone and with every step in an office. You never know what people are going through, or how much one kind act can leave an impact on someone and inspire them to come back. It's cliché but it's true! Your mindset reflects back and affects everything around you. Setting this as a standard for your office can make or break a new start! Here are four reasons why improving your mindset affects your practice:

1. How do you greet people over the phone? Are you aware of whether your tone and attitude is motivating your undecided patients to feel welcomed to your office?

When you're greeting a patient on the initial call, it's ideal to have an upbeat and perky attitude. They can tell if you're smiling through the phone! This is an easy way to uplift any conversation. Even if you're sad and you motivate yourself to smile, over time you learn that you have more control over your emotions and attitude than you originally thought. We don't always have good days, but choosing to readjust is a powerful skill we should all integrate into our daily lives and practice. Shake off the jitterbug, do the dance instead! Make sure you're fully engaged and present with the conversation. Active listening and enthusiasm is the perfect way to transition into your new patient call script. That is when you address the who, the what, the when, the where, the why, and the how. The how brings it all together.

2. Have you made a connection with your patient? How kind were you? Do you think your patient feels safe to express their needs from the office?

Knowing your patients' needs is very important. Find out what they are looking for to make sure you address their needs for creating the smile that they want. When you address people using the feel, felt, found technique, this creates a level of trust between you and your patients. Here's how it works: You tell them you know how they feel, that you have felt how they feel, and you have found a solution to that issue,

thus creating the emotional connection to them you are looking for. In a world where we don't trust the institutions around us, the only real metric for trust is human connection. To be educated in this field, you have to prioritize empathy for the change people want to undergo and why.

3. Did you educate your new patient on the value of all that's included for a proper smile assessment? Did you create an importance in setting an appointment and excitement to get to meet your new patient and them to meet the doctor?

Be knowledgeable and know your craft! People don't buy what you sell, they buy what you believe. Educating your patient on the details and solutions to the needs they just communicated to you can secure you a new start. Ask "Have I answered all of your questions?" or "Do you have any other questions?" Set high expectations so your patient knows you are prepared for the impact you are about to have on their life. Most importantly, understand your doctor's dance. You both have to be on the same rhythm!

4. Are you ready for the day? Do you keep your office tidy and refreshed? Is the flow of your office comfortable and soothing?

First impressions are the deciding factor to securing the image you just developed. Remember their

Improve Your Mindset *continued on page 15*

About the Author



Cathy Jugovic is a meticulous and detail-oriented individual, and enjoys analyzing complex information. Having run two successful orthodontic practices, she knew she had a passion for helping people maximize their potential and profitability. She will be presenting at the 2023 Users Group Meeting.

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THE POWER OF CONNECTION

Let's assume for a moment that we can agree that no one is successful all on their own, and there are always other people that help us along the way. If you don't subscribe to this theory, let me simply point out that you need a dental team, an attorney, an accountant, an estate planning or tax attorney, and, perhaps, consultants.

So, at least for the moment, let's agree that no one is successful on their own. This brings up a key question: who is it best to connect with and how will those connections help you to achieve your vision and the success that you have always wanted? Furthermore, how will your connections help you to maintain that success and not have it slip away or fall behind?

Connectivity

As an orthodontist it makes sense to think about connections. The most obvious connections are the orthodontic team and your advisors. But we need to go beyond that when it comes to practice success and referral marketing.

There are three groups that you need to connect with in a very powerful way for referral marketing to either be successful or reach its potential. Consider the following groups:

1. Patients and parents. In a general sense, we often advise orthodontists to think of parents as part of the practice. We even advise having a separate parent referral marketing program that includes calling to thank any parent that refers another patient or family, having contests and gifts, having regular 30-day email communication pieces to augment the brand of the practice, etc. For the kids, the most obvious form of referral marketing is the fun programs they enjoy as they receive treatment.

Connections are more important than almost any other single factor in orthodontic practice success.

2. Referring doctors. Many orthodontists haven't put in the time or effort with referring doctors and then simply subscribe to the theory that they don't refer anyway because "they do all of the orthodontics". However, by analyzing data collected in the Orthodontic Products/Levin Group Annual Orthodontic Practice Survey this year, we found that approximately \$3.6 billion of revenue is referred annually to orthodontic practices by general dentists. This is a massive amount of revenue that most practices want to access. In doing this it becomes essential to have a referral marketing program that connects to the referring doctors.
3. Community. This is the hardest, most dispersed, and most expensive form of marketing, but it can still produce an excellent result. Most of the community will not be interested in orthodontics. However, community branding is important in creating awareness, helping patients like the practice, and maintaining enough current and future patients to build and maintain success.

As you can see, these are three distinct areas that must be continually targeted and evaluated. But the goal is connectivity to the right people. For example, here are several examples from our clients.

Scenario #1: One of our clients has a strong relationship between the orthodontist and a local school principal. The orthodontist is the one that gives all the talks on all aspects of dentistry including orthodontics. They also sponsor the PTA and several other programs and sports teams from that school. This has resulted in an ongoing stream of referrals of students from the school that seems to just continue indefinitely.

Scenario #2: Another client donated a scoreboard to a local school because the orthodontist knew one of the coaches extremely well. Part of the arrangement was that at least once at every game the scoreboard would display signage thanking the orthodontist and the practice for donating the scoreboard. This definitely resulted in an increase in community referrals.

Scenario #3: This orthodontist grew up in the community where he opened a practice. He was friends and schoolmates with several of the local dentists and was able to shift all their referrals to his practice off the strength of their shared history.

These three examples are easy. They were natural connections that resulted in opportunity. But what if you don't have all those natural connections? Then you must go out and make them happen and that is where referral marketing comes in. Think about it this way:

1. Your current connections could eventually refer patients. This does not mean that 100% of people you communicate with will refer, but after 38 years of referral marketing consulting, we can tell you that if you throw a net out you will absolutely capture referrals.
2. The number of touchpoints you have are important. How many times do you interact with a certain connector that can support your practice? Whether it's a school principal, referring doctor, or influential mother in the community, touchpoints are directly proportional to how many referrals will occur. They will not all come at once and they will not all be steady. But as opportunities arise the practice will benefit.
3. Consistency is a key in connectivity. Who do you connect with? What opportunities might occur in the future? How often do you connect with them? How many touchpoints are you getting? Are you consistent?

If you have identified certain connections that may be beneficial in the future, and not everyone will be, then you

must be consistent in your communication, touchpoints, and referral marketing strategies.

Summary

Connections are more important than almost any other single factor in orthodontic practice success. Some practices have been fortunate to build large patient bases where families simply refer other families. Others have the majority of their referrals coming from general dentists who respect them and like working with them. Still, others have found a way to access and connect with the community.

Based on our belief that orthodontics will become increasingly competitive, we recommend that you continue to access all three areas. You may not need them today, but you don't want to end up wishing you had done it tomorrow. Just because a practice is successful doesn't mean it's time to take your foot off the accelerator. ◊

About the Author



Roger P. Levin, DDS is the CEO and Founder of Levin Group, a leading practice management consulting firm that has worked with over 30,000 practices to increase production. A recognized expert on orthodontic practice management and marketing, he has written many books and articles and regularly presents seminars. He 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 insurance. These videos include topics such as:

- **Creating an Insurance Detail**
- **Running Insurance Forms**
- **Submitting Insurance Claims**
- **Scheduling Insurance Forms**
- **Using Electronic Insurance**
- **Insurance Reports**

To view these videos, log in to support.ortho2.com, then click Product Help > Visual Help > Edge Cloud > Insurance. 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 third quarter of 2022.

Thirty-Five Years

Sara Harbacheck

Seventeen Years

Michelle Kinnaman

Fourteen Years

Cal Rebhuhn

Thirteen Years

Judy Denny

Eleven Years

Brent Jacobsen
Steve Mahan

Ten Years

Rachel Gildersleeve

Nine Years

Wesley DeShaw

Eight Years

Nathan Hemmings
Jorge Rios

Four Years

Darcy Dakovich

Two Years

Jeff Brockway
Marley McDonald

CAREER MILESTONES AND DEVELOPMENT

Jasmine Snell started as a Front End Developer on July 5. Jasmine comes to Ortho2 from Santa Fe College where she worked as a developer for more than ten years. Welcome aboard Jasmine!

Welcome **Samantha Armstrong** to the Software Support Team! Samantha joined Ortho2 on July 25 as a Software Support Representative. She is currently working toward completing her bachelor's degree in software engineering at Iowa State. We're glad to have you with us!

ON A PERSONAL NOTE

Congratulations to **Nicole Gibson**, Software Support Representative, on her marriage to Jack Cook on July 22! We wish you many years of wedded bliss!

Congratulations to **Joe Skluzacek**, Software Developer, and his wife Courtney, on the birth of their daughter Leah Marie! Leah was born on July 22, weighing 7 pounds, 6 ounces, and was 20 inches long.



Nicole and Jack



Leah Marie

HELP US HELP YOU

Please be prepared to provide your customer number, practice name, and office location when you call our support teams for assistance. You can find your customer number in Edge Cloud by clicking File > About. If you use ViewPoint, you will find your customer number by clicking the Help menu and choosing About. Please be sure to provide this information—and repeat your phone number—when leaving a phone message requesting support.



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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 Software Developers Tony Kooima and Joe Skluzacek.

What do you really do here at Ortho2?

constantly learn new technologies.

TK: I'm a Software Developer and I work on enhancing and improving the functionality of our software.

JS: I like working with emerging technologies as well as great people.

JS: Software Developer working on Edge Cloud and web apps.

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

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

TK: We're doing our best.

TK: I enjoy that my job is challenging and requires me to

JS: We're always thinking of what's best for the customer.



Tony Kooima

Vacation destination: Canoeing and camping in the Canadian boundary waters.

Three people I would like to have dinner with: Ernest Hemingway, Sean Connery, Mickey Mantle

My role model: My father

I can't go a day without: Breakfast.

It's the most important meal of the day.

What are you listening to right now? The Revivalists

Favorites

Team: Twins, Vikings, and Cyclones, in no particular order

Software Program: Ortho2 Edge Cloud, obviously

Movie: Die Hard



Joe Skluzacek

Vacation destination: Ireland to play some great golf courses, see some amazing views, and hit up a few pubs along the way.

Three people I would like to have dinner with: Gary Vaynerchuk, Logan Paul, Elon Musk

My role model: My Dad. He worked 40+ years at the railroad and hardly complained. Got out with a great retirement and shows what hard work can get you.

I can't go a day without: Technology

What are you listening to right now? Jack Harlow or the country music my wife forces upon me

Favorites

Team: Iowa State

Software Program: VS Code

Movie: The Color of Money

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HOLIDAYS

Our corporate office is closed on the following holidays:

New Year's Day
Memorial Day

Independence Day
Labor Day

Thanksgiving Day
Christmas Day

If a holiday falls on a Saturday, we observe the holiday on the prior Friday. If a holiday falls on a Sunday, we observe the holiday on the following Monday.

The Friday after Thanksgiving, Christmas Eve, and New Year's Eve are optional holidays. We offer limited support on those days.

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.



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SERVICE EXCELLENCE

We invite you to recognize Ortho2 employees by submitting an Extra Mile form. The form is available 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 submit an Extra Mile form 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.

CHAT SUPPORT

Do you need to call into our Support Team for a question, but it's difficult to wait on hold, even for a few minutes? Ortho2 has you covered! Use our chat support to get in contact with us. When you use the chat support feature, you will be added to the same queue as phone calls. You can choose to chat with the Software Support, New Customer Care, or Network Engineering Teams.

In Edge Cloud, you can find links to chat support through the Help menu. In ViewPoint, click the Help button in the bottom right of the Daily Activities menu.

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.

Log into UserVoice through the Ortho2 website. Visit support.ortho2.com > Forms/Requests > UserVoice. Login with your user name and password. You are ready to go!

There are five product enhancement forums: Edge Cloud, Edge Animations, Edge Imaging, Ortho2 Users Group Meeting, and ViewPoint. 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.

Undecided Patients *continued from page 6*

especially helpful with your Will Call Referred (put them on an estimated date to follow up) or Will Call Pending (put the patient on a December recall just prior to when the insurance goes into effect.)

To get an idea of the current state of your active undecided patients, set up a subgroup where Has Appointment = No. You will then want to run an undecided status report. Click Reporting > Patient > Patient List. Check off all the statuses that you are using for all your undecided patients and select the subgroup for no appointment scheduled. Click run. This will mean that any undecided patient with a recall scheduled will not show on this report. Therefore, the number of patients on your report is what I think of as your active undecided list. Divide this number by average monthly number of new patients seen in the last six months. Having this at about 1.5 times or below makes the list manageable. Anything above that, there is work to be done. If you are below .5 times you may just want to be sure that patients are not being put into a never treated status too quickly or that follow up has not been completed. This is a great percentage to look at on a monthly basis.

If this list has a large number of patients that need follow up, you may want to consider a mass mailing or email. I have found that breaking this up into separate groups of children and adults can work well especially if you are sending a special offer for patients who get started. You may want to place any adult patient in the never treated or will call email adult status once you have sent the letter. This will take them

off what I think of as your active undecided patients list. This can cut an unmanageable list down to a reasonable size fairly quickly but still allows follow up with the patients.

Having the statuses and recalls set up this way means that on the first of the month you can generate a report of each of the status groups for undecided patients or choose the undecided statuses you need to follow up with. You can also generate a report of all the undecided pending patients that are due for follow up that month. To run that report, go to Report > Appointment > Recall Report. Set the Start Date to the first date of next month and the End Date to the last date of next month. Click View. To run all the past due undecided recall patients, run the same Recall Report but change your dates to Start Date to 12 months ago and End date to today.

I wouldn't want to forget Subgroup Widget (Edge Cloud)/ Subgroup List (ViewPoint). These tools are a great way to access your undecided lists and follow up during any available time. For example, by using your subgroups, you can focus on contacting parents of children that were undecided. To do that you could set up a subgroup with your will call back statuses and an age range of less than/ equal to 18 and work on contacting the parents.

Whatever schedule of contacts you chose to set up for your undecided patients, consistent and timely contact is what is going to help convert more of your undecided patients into orthodontic treatment. Isn't it great to know that Edge Cloud and ViewPoint are there to support that process? ☺

Improve Your Mindset *continued from page 7*

expectations of you. Verbiage and personal appearance go hand in hand. This goes for the office, too. There's always an opportunity to make any space feel like an escape. A theme is essential to maintaining this kind of feeling. Dental work can be intimidating for people and one bad experience can frighten them from coming back in a timely manner, or at all. Music can aid in creating a sense of calm in your office. Circling back, your attitude!

Providing education and value is going to give your new patient what they need in order to choose your practice. Preparation, love it or hate it, is key to all successful endeavors in life! Embrace your Practice Consulting Services knows what it takes to connect with your new patient. When it comes to your practice, preparing yourself and your staff to connect with new patients starts at the welcome call.

We look forward to presenting this topic at the Ortho2 Users Group Meeting! See you there! ☺



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EMPOWERING PRACTICES