



PRESIDENT’S PERSPECTIVE

Forty years ago the popular science fiction film *E.T. the Extra-Terrestrial* debuted, Disney Futuristic Park EPCOT (Experimental Community of Tomorrow) opened, and Ortho2 was created. After sending letters to lawyers, doctors, dentists, and orthodontists in Ames, Iowa, Dan Sargent received just one reply. Dr. William Iversen was interested in a custom programmed orthodontic practice management system for his office. Following completion and installation in Dr. Iversen’s practice, Dan and Dr. Iversen agreed to form Ortho2 to market and sell this system to other orthodontists. And with this, Ortho2 is formed.



What began on an Apple III computer in 1982 transitioned to a DOS based system called OneTouch in 1985. (Believe it or not, we still support three OneTouch practices today.) Moving forward about a decade, ViewPoint, a Windows platform, was launched in

1998 and over time added imaging, telephony, biometrics, and other advanced technologies. ViewPoint was our flagship product for many years but was eclipsed in a number of practices by Edge Cloud, our cloud-based practice management system, which was released in 2010. Since then numerous features and modules have been added to the Edge Cloud platform – educational animations, patient reminders, mobile apps, a rewards system, patient newsletters, morphing capabilities phone pop, online scheduling, and virtual visits to name a few.

Ortho2 has gone through three successful platforms and is used in more than 2,900 office locations worldwide. Through all this our mission has remained the same: To help our orthodontic partners succeed. I am proud of Ortho2’s history of providing exceptional practice management solutions to the orthodontic community and I look forward to building on that history for many years to come. ☺

Amy Schmidt
Amy Schmidt, Ortho2 President

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2022 AAO WRAP UP



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

It was so great to see everyone in person again! We would like to thank the following staff who worked hard in the Ortho2 booth at the AAO and contributed to our success!

- Dr. Barry Feldman – Feldman Orthodontics
- Gina Good – Good Orthodontics
- Diane Julius – Feldman Orthodontics
- Jodi Miller – Quintero Orthodontics

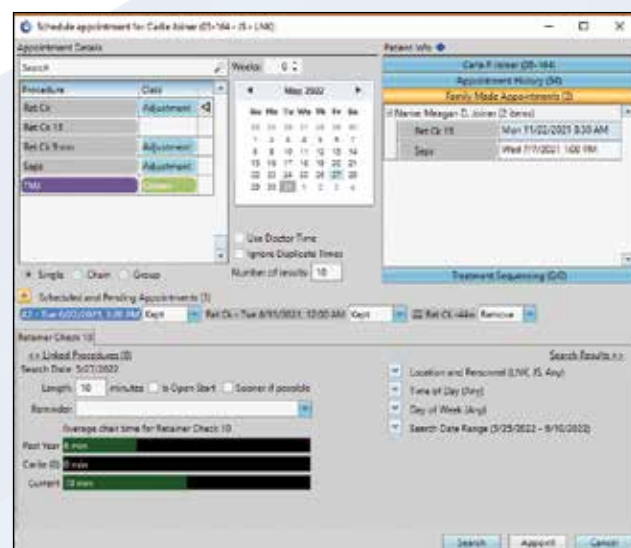
COME VISIT US AT THESE FALL MEETINGS

Canadian Association of Orthodontists
 Great Lakes Society of Orthodontists
 Northeastern Society of Orthodontists
 Pacific Coast Society of Orthodontists/
 Rocky Mountain Society of Orthodontists

September 15–17, 2022
 September 16–17, 2022
 September 22–24, 2022
 October 27–30, 2022

EDGE CLOUD SMART SCHEDULER: SCHEDULING YOUR PATIENTS THE SMART WAY

The Smart Scheduler is one of the more powerful tools in Edge Cloud. Use the Smart Scheduler to search for, identify, and schedule patient appointments. Just select your appointment type, the desired date or number of weeks out, and other details to narrow or widen the search for available appointment time slots. You can even use the Smart Scheduler to schedule near other family member appointments.



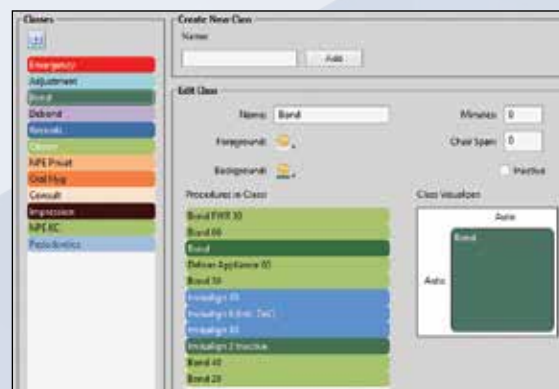
There are many benefits to using the Smart Scheduler. The first is that it is faster to search for open spots for the specific type of appointment you want to schedule. In addition, anyone can schedule an appointment even if they aren't familiar with the set up. Using the Smart Scheduler allows someone to only schedule appointments where the schedule dictates. Setting up classes and using the Smart Scheduler to schedule your appointments means you can set up your ideal day and schedule for it.

In order for the Smart Scheduler to work properly, your office needs to apply classes in two parts of the software: the appointment procedures and on the Scheduler templates. Using classes like this restricts appointment types to specific parts of the Scheduler. For example, if you want to make sure your banding and bonding appointments are only scheduled for morning appointments, one way to do that is with classes.

Setting Up Classes

How you label your classes is completely up to you. Some practices use appointment types to describe their classes, like adjustments, exams, or starts. Other practices use classes that describe the length of the procedure, like short, medium, or long. There isn't a right way to set up classes, beyond what you find works best for you.

Open the Editors from the Tools tab of the Home ribbon bar. In the Scheduling section, open the Classes editor. To create a new class, type a description in the Create New Class portion of the window, and click Add. Then enter a class name, colors, and other details.



As you are choosing colors for your classes, keep in mind that before an appointment is scheduled, your grid template displays the colors of the class assigned to that cell (if any). After an appointment is scheduled, your grid template displays the colors of the procedure scheduled to that cell. Thus, you might want to coordinate your classification colors and associated appointment colors. In the Classes editor, you can see what the class will look like in your Scheduler. Save your changes.

Assigning Procedures to Classes

After your classes are set up, you now need to assign your appointment procedures to the classes you

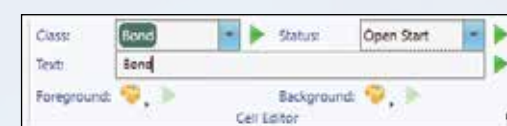


created. In the Editors, select the Procedures editor from the Scheduling section. Select a procedure to work with. In the Details section of this editor, you will find a section for Classes. Select a class of grid cells that this procedure should be scheduled to. If it can be scheduled to multiple classes, you can add additional classes as needed. Click Add. Do this for each appointment procedure your office uses. Save your changes.

Applying Classes to Grid Templates

The final step in setting up classes is applying them to your Grid templates. In the Editors, select Scheduler Templates from the Scheduling section. Choose an established template to work with, or create a new one. Then, click the Edit Grid Template button. This opens the Grid Template editor.

Click an individual cell you want to work with, or click and drag to select a range of cells. You can also click the first cell, then press your Shift key while you click the last cell of a consecutive group, or press your Ctrl key while you click additional individual non-consecutive cells.



In the Cell Editor tab of the Scheduler ribbon bar, use the drop down menu to choose the class you want to assign. Click the arrow beside the Class field. Do this for the Status, Text, Foreground, and Background colors. Repeat these two steps with the next set of cells you want to categorize.

A note about the Status option – you can classify a cell, or a number of cells as Open Start. This status is used if you want appointments to begin with this cell. When you use the Smart Scheduler to schedule patient appointments, you can require that appointment openings begin with a cell flagged as Open Start.

Setting the Smart Scheduler Options

Now that you have your classes identified and working with your appointment procedures and schedule, set up the Smart Scheduler user options to define how your Smart Scheduler

works for you. Open the Scheduler, click User Options in the Actions tab, and then choose Smart Scheduler in the menu on the right. These settings are defaults only: you can enable/disable these features while using the Smart Scheduler.

Maximum Number of Search Results – Select the number of available appointment openings to include.

Ignore Duplicate Times When Searching – Enable this option to list an available appointment time only once, regardless of the number of chairs you have open at that time.

Use Doctor Time in Searches – Choose whether you want the Smart Scheduler to calculate doctor time already scheduled for other chairs when selecting available appointment openings. If this feature is enabled, the Smart Scheduler will ignore chairs that look available, but would cause doctor time to be overbooked for that time interval.

Search Blocks of Time Equal to Appointment Length – When this option is enabled, your Smart Scheduler search results will be set apart at least by the length of the appointment being searched for. For example, if you have a block of appointment slots free from 9 A.M.-11 A.M., and you are searching for a half-hour appointment, enabling this option will produce search results for 9 A.M., 9:30 A.M., 10:00 A.M., etc.. However, if this option is disabled, your search will include results for each available time slot (i.e. for a scheduling template with a 10-minute increment, you would get results for 9:00 A.M., 9:10 A.M., 9:20 A.M., etc.)

Default Orthodontist, Office, Assistant Search Filter – Select which orthodontist, office, and assistant to use as the default filter. Choose Value Assigned to Patient to use the patient's assigned doctor, office, and/or assistant as the default search filter.

Click Ok to save any changes to your user options and exit the window.

Smart Scheduler continued on page 15

When I think about what it means to not only build but also retain a team, I believe it is essential for employers to consider this question: what do people really want from their work experience?

You've probably never heard of him, but Frederick Herzberg was an American psychologist who dedicated his life's work to find the answer to the question what do people want from their work experience? Or in other words, what makes employees happy with their jobs?

Through his research, Herzberg surveyed so many people that he could delineate a clear pattern. Then, he organized these answers into two categories. The first category included the following answers: employees want to do meaningful work, achieve goals, be recognized for those achievements, hold responsibility within their positions, and have advancement opportunities. But the employees he surveyed wanted some very practical things out of their work experience too. Therefore, the second category includes answers like thoughtfully constructed administrative policies, effective leadership, a salary that affords a certain standard of living, healthy working relationships with colleagues, and physical working conditions that meet basic human needs.

The first category of answers came to be known as motivators. These factors must be implemented into a workplace in order for your team members to go above and beyond. The second category is called hygiene factors, and these factors must be implemented in order for your team to want to come to work – let alone go above and beyond.

Herzberg quickly realized that a company could implement every motivating factor, but if they did not implement hygiene factors first, an employee would not be motivated at all, despite the company's efforts.

Why is all this information relevant to orthodontics? Let's say you just implemented a fantastic bonus plan for your treatment coordinator. You're super excited to do some profit-sharing, and you think this will motivate her to get a few extra starts a month. Win-win, right? Let's also say

that the same TC has been having issues with your office manager, they aren't getting along, and it's starting to impact day-to-day work. What do you think the outcome of this situation will be? I'm sure you know the answer.

It's situations like these that I often see as a consultant. The reality is even if we have things like bonus plans in place, it's not enough to keep a good team member. This is just one example of many. If motivators are in place but hygiene factors aren't, it often ends with a now hiring ad on Indeed.

Over the last few years, there has been a considerable shift in orthodontics, and our teams understand their worth now more than ever. It's time to take orthodontics out of the dark ages and move boldly into the future. A future where having a snack bar in the break room for your team is just as important as having one for your patients. It's imperative that we implement pay scales that meet the needs of our team members and that we are prepared to offer the same HR benefits they could receive working at the bank down the street. If we aren't meeting these needs, it can be difficult for our teams to see their positions as careers instead of jobs.

If your practice isn't hitting all of these areas, don't stress. Small changes over time can make a big difference. Remember, the number one motivator in your practice is YOU! Teams buy-in when they work for a doctor they trust

Team Retention *continued on page 15*

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 doctors in business eight years or less; or eight years to retirement.

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Do you feel powerless to improve the Google ranking on your website? Are you paying someone to blog for you and it never really has the tone or information you want? Is your SEO company writing a blog for you that they use for everyone else? If any of these things ring true for your practice, then it's time to take things into your own hands and write a blog or film your own vlog (video blog).

Many of the doctors I work with are intimidated by the process of producing new content that resonates with their patients and helps their standings on Google. But in reality, it's very easy with these three steps.

1. Think about the top 25 questions you are asked by patients and parents every single day
2. Write these questions down and think through your answers
3. Set up a tripod and film yourself answering each of these questions

That's it! You've just cracked the code to Google content success. Now you can take that video and use it directly on a vlog, or you can use software like Flixier to extract the text from your video and use the text as a blog. If you use a company to host your site just ask them to post for you and connect the SEO words and images to the rest of your site.

Google search looks at the questions and search terms of the people who use their search engine, combines that with AI to enhance the process and uses an algorithm that defines whether your website will be on the first or 30th page of Google search. There are a large number of factors that go into that algorithm, but some of the most important are the relevance of the information on a page to the question being asked by the consumer. All of these big words mean that if you write a blog or film a vlog to add to your website, Google will find it and when someone

searches that question your site will come up.

How Often Should I Post?

One question I hear a lot is how many blogs/vlogs you should I post per month. I have always recommended that if you can produce at least 2 blogs a month you're in good shape. Make sure that when you produce these pieces, you

place them on your website and optimize them for your area and the keywords you use. You can do as many as one per week if you want, but remember that when you have these posted the content will need to be search engine optimized and any images need to be tagged with words that match what they show and the content you have written.

Many of the doctors...are intimidated by the process of producing new content that resonates with their patients and helps their standings on Google. But in reality, it's very easy.

Linking to Social Media Adds to Your Visibility

After you post your blog/vlog on your site, you can take the link and add it to your social media. Facebook, YouTube (vlog) and LinkedIn are great places to share your content. If you take instructional video for Instagram, you can use that as a vlog as well. Whatever you do to add information to your website, social media, or other parts of your web presence will help more people find you online. ☺

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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WHAT THE RECESSION RISK MEANS FOR ORTHODONTICS

It is hard to believe that it has been 14 years since the 2008 economic meltdown. The Great Recession was a defining moment for my generation, but, fortunately, companies compiled research and data on consumer behavior during that challenging time that will help us prepare for another economic downturn in the near future.

Healthcare research conducted in 2013 indicated that many healthcare consumers delayed elective procedures until the economy recovered and stabilized. If consumers return to this mindset, it will most likely lead to an economic downturn in overall dental services but especially to orthodontic practices. A survey released last week

from CNBC showed that higher income consumers are now starting to cut back on spending habits and are specifically cutting back on dining out, travel, vacation, and cars.

Sadly, this is a complete reversal from last year as the economy benefited from an uber strong job market, significant wage gains, and stimulus spending among consumers that had orthodontic practices growing across the country.

As we see the tide turn, it will be important for practices to understand that consumer mindsets are shifting and should not be ignored. We must try to understand and predict these consumer behaviors. The patient attitude last year might have been "I want orthodontic treatment", but very soon those same patients may wonder "do I really need orthodontic treatment right now"? Below are the healthcare consumer trends identified in previous recessions:

- Higher patient stress levels as they worry about finances and how to pay for healthcare expenses
- Increased number of appointment cancellations and no shows
- Possible decrease in the number of patients who are

insured by an employer if companies cut back on benefits

- Patient resistance to preventative healthcare recommendations

How can we use this information to help us weather the potential economic storm? Let's start with understanding that consumers will most likely be led by emotions caused by stress and pressure. It will be important to train your team to not react to this behavior but to pause and to try to understand before responding to patients and parents. We should also know that not all geographies will feel the pressures at the same time, so do not compare your

practice to others that are not in your geographical market. It is easy to look on social media and feel like you are doing something wrong because other providers are doing great. All providers

will eventually be affected but it will happen in waves. It will be important to watch your target market trends and local economy so that you can make adjustments in your marketing for new patients. So, how can you position your practice during an economic downturn?

Understand Your Market

If you listen to Scott McDonald's "Doctor Demographics" podcast you get the importance of understanding your market demographic. Practice overhead is likely to increase due to rising inflation so understanding your market demographic will be crucial before spending your marketing dollars. A demographic analysis report is best, but you can start with free tools to understand the target audience in your market with Google analytics. Simply open a Google analytics account and click on your audience tab, this will provide an overview and market segment of your area. This will allow you to see the different demographic

groups in your area and who your potential patients are in the community. You can also check out Google trends another free tool that analyzes key search words in your community; simply search "orthodontic providers" in my area. The analytics will show you potential patient demographics as well as the other options they have to seek orthodontic treatment in your area.

Observation Patients

As we know from the data shared about consumer behaviors during the last recession, we can anticipate that patients might want to wait for treatment, therefore our observation bucket will start to grow. I recently spoke with a consultant at the AAO who shared that virtual visits will be a great option for a growth monitoring platform so that practices can stay engaged with patients and consult parents when it is time for the patient to come back into the office. If patients want to delay treatment until their finances stabilize, you can explain the importance of continued, virtual monitoring. In this way the patient knows that you understand but you can still keep them engaged for a future start.

Virtual Consultations

Most practices are using some sort of virtual consults to attract new patients. This will continue to be important as gas prices rise and patients are concerned about spending money. If you do not have a virtual platform, now is a good time to consider adding this as an option.

Focus on Community Values

During a recession families and communities tend to come together and focus on what is important to them so find ways to incorporate those values into your marketing efforts. Consumers will also care more about quality than quantity on social media platforms. This means that messages need to be meaningful and engaging rather than silly and entertaining. It will be important to show compassion during financial hardships and promote your understanding of how consumers may feel in your area. Offer community services

such as a food drive or donation to your community food bank. This can generate goodwill for your practice and also offer vital help to your community. Be sure to include these efforts on your social media platforms.

Know your Value-Proposition

You will most likely see other orthodontic and dental practices lower their fees. Direct-to-consumer companies will likely tout the lower costs of doing your own treatment at home. If you do not want to lower your fees, what can you do to ensure a patient picks your practice over other options that are cheaper? It will be more important than ever to explain the benefits of your treatment to patients. What does your patient need and why do they need it? Why should the patient start now and not wait for treatment? Practices will need to promote the benefits of treatment and the features their practice offers to patients. Also, don't overlook the importance of one-on-one patient care; while other services might be cheaper, the service in your practice should be second-to-none.

Just remember we will all weather this storm and the economy will rebound, but don't stick your head in the sand. The best way for your practice to survive a recession is to be prepared ahead of time. If you wait until the recession hits, your choices will be limited and may have a negative impact for years to come. Protect and prepare your practice now. ☐

About the Author



Shannon Patterson, Partner, CPR, CMSR is the Director of Practice Opportunities and a Placement Consultant at Bentson Copple & Associates. Shannon is a recruitment leader in the orthodontic industry specializing in placement and retention of doctors.

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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 Mail Merge.

- **Mail Merge Letter Set Up:** A quick overview of how to set up your letters to use the Mail Merge feature.
- **Using Mail Merge:** Review how to use Mail Merge to save letters for others to review before sending them.

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

Thirty-Two Years

Ken Hoffmeier
Craig Scholz

Eighteen Years

Micky Augustin

Six Years

Brooke Hawke

Thirty Years

Kim Barker

Sixteen Years

Lindsey Spieker

Five Years

Joe Skluzacek

Twenty-Seven Years

Clarence Bryan

Eleven Years

Sean Gildersleeve
Michelle Haupt
Jess Huennekens

Four Years

Izzy Austin
Sam Rubenstein

Twenty-One Years

Ron Benifiel
Cathie Raley

Ten Years

Elizabeth Nordeen

Two Years

Larry St. John

Twenty Years

Barb Williams

Eight Years

Gabrielle Schaaf
Michael Lasley

One Year

Nicole Gibson

DANETTA HIATT

For 20 years, Danetta Hiatt has called the Ortho2 Accounting Team home. Beginning as an Inventory Specialist, and then becoming an Accounting Specialist, Danetta has spent her days at Ortho2 working behind the scenes to ensure smooth operations. Danetta said when she first started in January 2002, she pulled equipment orders daily to ship to customers, and had a whole wall in the inventory room just for such occasions. She enjoys the wide variety of work these days.



Danetta has lived in Ames, Iowa, (home of Ortho2 headquarters) for almost her whole life. She has raised her three sons here, and has enjoyed being a grandmother. "I had my two grandsons for the weekend once or twice a month for more than 11 years until they got old enough that staying at grandma's was not exciting anymore. But boy did we have fun as they were growing up," Danetta said. In her spare time, you can find Danetta reading Christian fiction or catching a good movie.

AMY SCHMIDT

While the official calendar says that it's been 20 years this past March since Amy Schmidt began working at Ortho2, she worked part-time on and off prior to this date. Her role began in grade school copying floppy disks for \$2 per hour. Amy started working full-time as the Corporate Relations Manager. "I was tasked with working with orthodontic consultants, which wasn't an area Ortho2 had focused on previously. Whether in-person or via phone/email, I worked to establish and improve Ortho2's relationship with this group, including incorporating product enhancements to aide in their consulting work with Ortho2 clients. I remember being extremely nervous to talk to many of these high profile individuals, many of whom I call friends today," she said.



Today as President, Amy said she enjoys the variety of work she does and the people she works with. "Every day brings different successes and challenges, but we have a great team of people to help steer Ortho2," she explained. "Both the people within Ortho2 and the doctors, team members, consultants, and industry partners I encounter make me love working here!"

Ortho2 has always played a big part of Amy's life: she grew up coming into the building (and copying floppy disks), she met her husband at Ortho2 in 2004 (when they were married in 2007, many from Ortho2 were in attendance), and today they have four children, aged 13, 10, 8, and 4.

Amy reflected on her time at Ortho2, saying, "Originally, Ortho2 was a part-time college gig. I was drawn to a full-time position because of the challenge of creating something new for the company, and it turned into a lifelong career because of the people, both internal and external to Ortho2. And I'd be remiss by not mentioning working alongside my dad, Dan Sargent, co-founder of Ortho2 also being a great joy."



INSIDE ORTHO2

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

BARB WILLIAMS

When she first interviewed with Ortho2, Barb Williams mistakenly entered the building through the back door and was greeted by then President Dan Sargent who escorted Barb to her interview. Only after she was hired did she realize that Dan was the President. Barb was hired as an Accounting Specialist, and 20 years later has continued to fill the role. While her title is the same, Barb said she does a variety of tasks each month and she has taken on more duties throughout the years.



Barb was drawn to Ortho2 because it seemed like a really good fit for her education and experience. "My original sense that this job was a good fit turned out to be very accurate," she said. "My job still fits my education, experience and abilities and I enjoy working with everyone on my team as well as the rest of the people in the entire company." Some of Barb's favorite Ortho2 memories include group activities such as the chili cook-off, the Thanksgiving meal, and summer picnics.

Barb has lived in several states throughout her life, but said she likes living in Iowa the most since it is closest to much of her extended family. "One of my favorite activities while not working is staying in contact with family. We have always put an emphasis on family time with our extended family even if that means going on a trip to see them. It has been a little more challenging the past few years with COVID concerns, but we have been more creative with video calls and outdoor activities," she said.

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 Clarence Bryan, Michele Eich, and Doug Olsan.

What do you really do here at Ortho2?

CB: Software Development on just about anything a customer uses from us and some internal systems. I also help out with some server and network issues internally.

ME: I write code to do many of the things done in Edge Cloud.

DO: I'm a code monkey.

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

CB: Making something that people use to make their duties easier especially creating new things.

ME: Being able to take customer suggestions for improving

Edge Cloud, and implementing them.

DO: What isn't fun?! I enjoy it all!

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

CB: We like to know how customers really use our products, as sometimes how we think it should be used and how the customer thinks it should work is different. Learning more about practices and their workflows helps us better understand the needs of the customers, which ends up in a better product or feature.

DO: We are all just a little bit nerdy – no one makes fun of me for the Star Wars figurines on my desk.



Clarence Bryan

Vacation destination: Ireland, especially a tour of several castles

Three people I would like to have dinner with: Isaac Asimov, Nikola Tesla, and Raymond E. Feist

My role model: My uncle

I can't go a day without: Reading

What are you listening to right now?

Country Heat – playlist on Amazon Music

Favorites

Team: Kansas City Chiefs

Software Program: Kindle

Movie: *The Lion King*

Book: The Riftwar Cycle Series by Raymond E. Feist and The Wheel of Time Series by Robert Jordan

Phone App: Pokemon Go



Michele Eich

Vacation destination: On a sunny beach surrounded by water with my family and plenty of food and drinks!

Three people I would like to have dinner with: My grandparents – I would love the chance to chat with them again

My role model: My grandma Maxine

I can't go a day without: Chocolate

Favorites

Team: Iowa State University

Movie: Any action-packed movie

Phone App: Spotify



Doug Olsan

Vacation destination: The land of misfit toys

Three people I would like to have dinner with: Batman, Joker, and Ghandi (Surely there can finally be peace between those two!)

My role model: All models

I can't go a day without: Using the letter E!

What are you listening to right now? The clicking of my keyboard

Favorites

Team: Dillon High Panthers (if you know, you know)

Software Program: Edge Cloud (trick question)

Movie: Sharknado!

Book: *Billy's Bucket* (I have it memorized)

Phone App: Edge Mobile (another trick question)



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CAREER MILESTONES AND DEVELOPMENT

The Software Support Team added three new Software Support Representatives this past quarter:

Jake Lund started on March 28. For the past several years Jake has worked at Best Buy in several positions. Most recently he served as the Mobile Manager where he oversaw the mobile team while also working to increase sales, build relationships with customers, and provide assistance with questions and technical issues.

John Diercks began working with the Software Support Team on April 11. John recently earned his A.A.S. Degree in web development from DMACC. While he was a student at DMACC he would tutor other DMACC students in JavaScript, PHP, and other languages.

Amanda Moore started with the team on April 18. Amanda worked with CDS Global for the past seven years as a Customer Service Representative. She assisted customers in a call center environment with technical support as well as training new employees.

Please help us welcome our new team members!

ON A PERSONAL NOTE

Congratulations to New Customer Care Specialist **Jesse Howard** on the birth of his grandson Beckett Wylder Blankman! Beckett was born on April 29.

Derek Dohrman, Software Support Advanced Tech and Trainer, married Maureen Onyeziri on May 3 in Oceanside, Oregon. Congratulations to the newlyweds!

Congratulations to **Cathie Raley**, New Customer Care Specialist, on her wedding to Carl Morton on May 15! We wish you many years of wedded bliss!



Beckett Wylder



Derek and Maureen



Cathie and Carl

Team Retention *continued from page 6*

and who fosters a work environment they enjoy coming to every day, and that's the most important factor of all. ☺

Smart Scheduler *continued from page 5*

Using the Smart Scheduler

You can open the Smart Scheduler in a variety of ways; the most common is from the Scheduler > Actions tab of the Scheduler ribbon bar > Smart Scheduler.

You can review the patient's appointment history with their average arrival time, kept appointment percentage, and whether he or she prefers a certain day or time for the appointment in the Patient Info section. If the patient has a sibling, you can view scheduled appointments for each sibling as well.

In the Appointment Details section, select the appointment procedure, target search date, and other details you want the Smart Scheduler to look for. The default options you chose when you set up your user options will be included.

At the bottom of the Smart Scheduler, you can narrow or expand your search for available appointment openings by specifying a location, doctor, or assistant, and limiting the search to specific days, times, and dates. Click the down

arrow beside each setting that you want to change to open the details for that parameter.

Click Search. The Smart Scheduler window toggles to show you the search results, including the available dates and times, and associated doctor, office, assistance, number of days from your target date, currently scheduled percentage for that day, and any Scheduler notes.

You can use the Search Results >> and << Search Details links to toggle between viewing the appointment and search details you selected, and the list of available openings. You might do this, for example, if you need to adjust the appointment and search details to expand or narrow your list of openings. If you do change any search details, be sure to click Search at the bottom of the window again to refresh the list of results.

When you are satisfied with the appointment details, click Appoint. ☺



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The Newsletter for Members and Friends of Ortho2

July 2022 - Volume 40 Issue 3



ORTHO2

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