The Newsletter for Members and Friends of Ortho2
October 2021 - Volume 39 Issue 4

ORTHO2
EMPOWERING PRACTICES

PRESIDENT'S PERSPECTIVE

During August Ortho2 executives, managers, orthodontic doctor advisors, and invited guests gathered for our annual Board of Managers meeting. This meeting both summarizes business operations from the prior year and helps set the course for Ortho2 for the coming year. As is usual, many topics are discussed and a variety of opinions are shared, but by the end of the meeting, a clearer path for Ortho2 is always established. Below is a brief summary of some items discussed.

Edge Cloud Performance – Unanimously, our number one priority coming out of the board meeting continues to be improving Edge Cloud performance. Since Edge Cloud was released in 2010 it has undergone repeated optimization and technological improvements. And that work continues today with a team of developers and technicians devoted to it. Throughout the past 18 months we have invested heavily in personnel, resources, and new technologies to help us optimize Edge Cloud's speed, reliability, and consistency. In a recent update, we improved the bandwidth needed to support optimal Edge Cloud communication. We are continuing work on resource allocation and pre-caching initiatives, both of which should be released very soon. Bottom line: We believe this will provide a significant speed improvement for all Edge Cloud customers.

Ortho2 Development Road Map – In addition to performance, Ortho2 has been working on some really exciting new development that is nearing completion.

- Edge Proposal lets patients and responsible parties set contract terms that work for them through an easy-to-use interactive slider.
- Edge Specialist is a seamless solution for combination orthodontic – pediatric dentistry practices, bringing everything under one roof.
- A new API platform, allowing for expanded current and easier new integrations moving forward.
- Dedicated Canadian data center and electronic insurance to better assist our Canadian practices.

But it doesn't stop there. Ortho2 has many more innovative features and integrations planned to help you and your practice, AND improve your patients' experience. Stay tuned for more, or attend our Users Group Meeting for a sneak peek.

Users Group Meeting – Due to necessity, the Ortho2 Users Group

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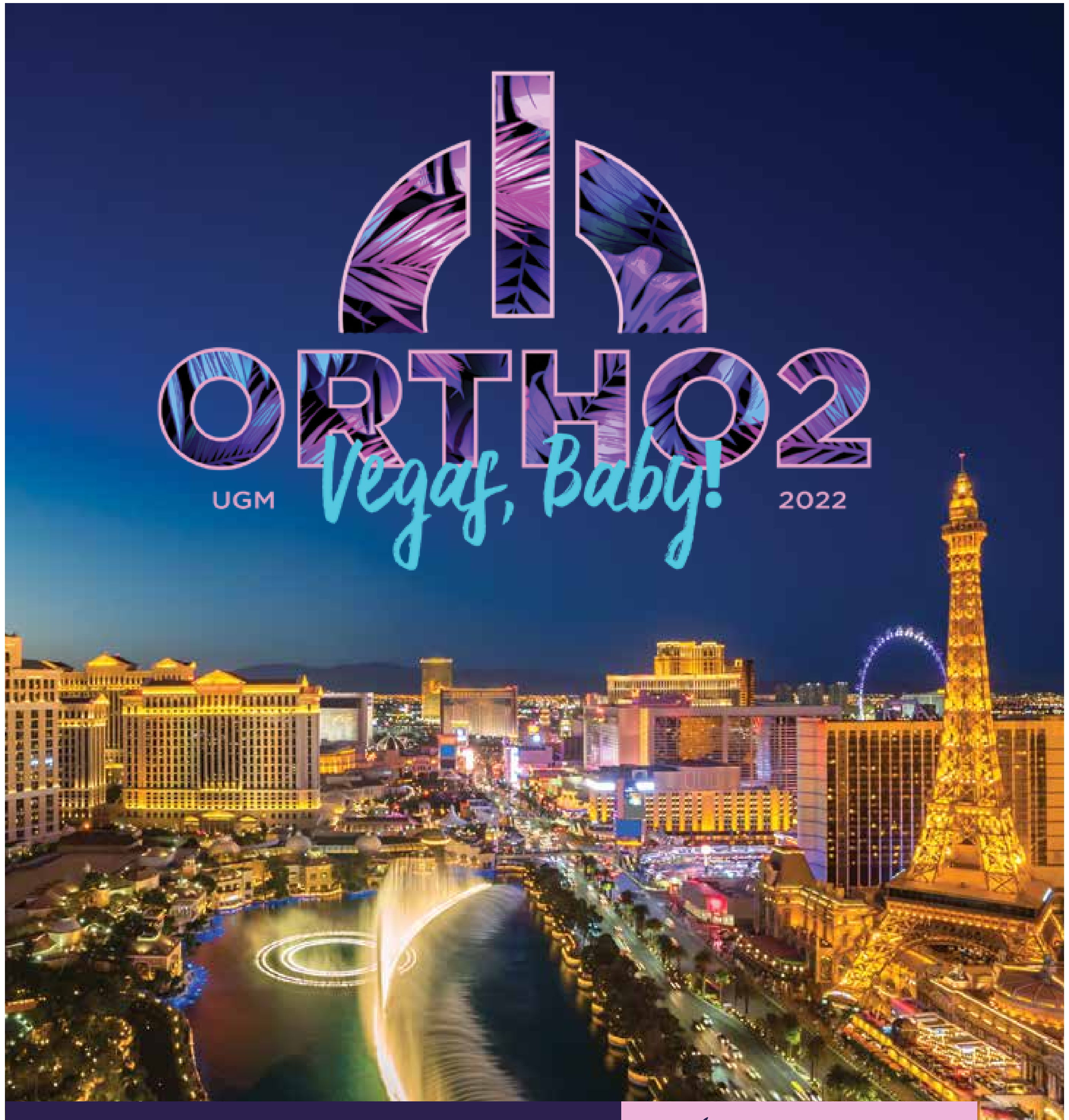
USERS GROUP MEETING



JANUARY 27-29, 2022 LAS VEGAS

We are excited to be hosting the 2022 Users Group Meeting in person! We hope to see you in Las Vegas for a time to connect, learn, and have fun. 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 TODAY!

REGISTRATION OPEN

Join us for the 38th annual Users Group Meeting in Las Vegas! The meeting will take place January 27-29, 2022 at Planet Hollywood.

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.

GAME NIGHT PARTY

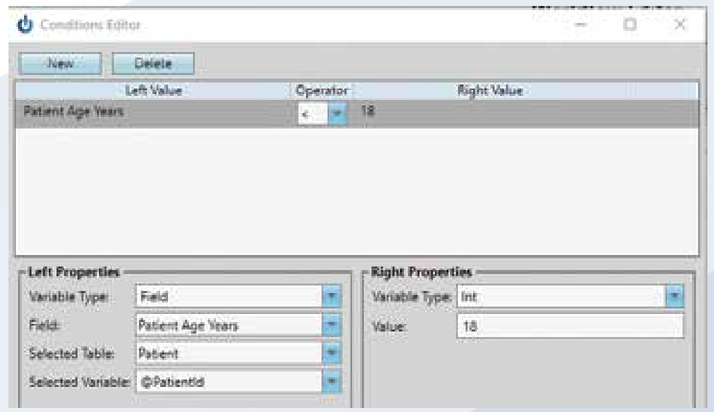
Advancing your practice is the main reason to come, but you won't want to miss the epic opening party. Join us for the Game Night Party, where you'll be **Sorry** if you don't show up!

SOCIAL MEDIA

While you are at the UGM, don't forget to share your pictures and videos with us through our social media channels. Find us on Instagram, Facebook, and Snapchat.

IF WORKFLOWS THINK, DO THEY MAKE YOU MORE EFFICIENT?

You can use workflows to automate data changes and initiate Edge Cloud actions whenever something happens in your Edge Cloud system. Depending on the type of workflow, you may be prompted to complete an action before you continue with another task. That's great, but what IF workflows did a little bit of thinking for you, too? What IF they figured out who the doctor was and moved the patient to the appropriate stack? What IF you could figure out what office the patient was in and move that patient to the correct TC's stack. What IF the workflow ran one letter if the patient is an adult and a different letter if they are a child? What IF? In case you are not getting the hint here, you can run an IF statement with workflows to even further automate them. Cool, right?

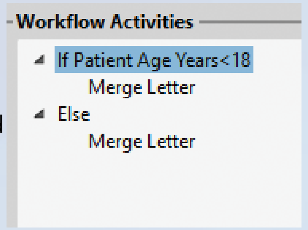


If statement workflows are a step up from standard workflows. If you are interested in learning more about workflows in general, watch Edge Cloud Workflows: Five Ways to Automate Your Practice video on support.ortho2.com > Visual Help > 2021 Users Group Meeting to become more familiar with them. Now, on to creating if workflows.

In this example, we will use patient age and run a different activity for an adult vs. a child. First, you need to start by going to the Workflow editor. Click New to create a new workflow and give it a Name that makes sense for how you will use it. Once it's named, under the Common Activities section, drag the If to the Workflow Activities section. This will add an If and Else. Click on the If you just added and on the right of the screen you will see Conditions. Click on the … to the right of Conditions to go into the *Conditions Editor* window.

In the new window, change the Field to what you are looking for. Common uses are office abbreviation, orthodontist abbreviation, patient age years, patient status, and treatment abbreviation. For this example, choose Patient Age Years. The selected Table should now fill in automatically for you. Click OK at the bottom to close this window, then click the … by Conditions to go right back in. Now fill out the Selected Variable and for most IF workflows, you need to choose @PatientId. At the top of the screen, there is an Operator, change it from equal to (=) to less than (<). Last step, fill in the Value in the Right Properties; type 18. Click OK.

Now that the if statement is created, drag the Merge Letter Activity into the if statement. When dragging it in, place the merge letter on top of the if. If done properly, it will be indented below the word if. Do the same step, but this time put the letter on top of Else. This should also be indented if done properly. Click on each merge letter to choose the letter settings in Activity Properties on the right. This workflow says if the Patient Age in Years is less than 18,



Workflows *continued on page 14*

About the Author

Derek Dohrman, Software Support Advanced Tech and Trainer, has worked at Ortho2 for 15 years and has done countless on-site and remote trainings. He enjoys playing games, video and board, trail walks, and keeping up with new computer technology. He will be presenting at the 2022 Users Group Meeting.

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MIS-STEPS TO SUCCESS

All of us have made mistakes; some big ones, some small ones. Regardless of the nature or size of the mistake, it is what you do after the mistake is made that will determine if the mistake is a setback or a set up for a breakthrough!

More often than not, when we make a mistake, our first reaction is embarrassment, followed by a cover-up/correction with the hope that no one saw the mistake. If someone has noticed the mistake and asks about it, the first position he/she takes is either denial or justification. Neither will produce the set up for a breakthrough. Rather, these responses close the window of opportunity for positive change.

> *"On no account brood over your wrongdoing. Rolling in the muck is not the best way of getting clean."*
> *Aldous Huxley*

It is very understandable that many people feel uncomfortable and defensive when facing their mistakes. I don't know anyone who had a teacher who circled all the right answers in red. We struggle to do things right and when we don't, we imagine consequences that we don't want to become a reality. Most of the fears of the consequences come from the past when our choices were more limited and we had less power to effect positive outcomes. For example, we've been conditioned (through school, our parents, church, mentors) to think we are good when we score high on tests, and bad when we don't.

But if we stay in the present, we can make conscious choices of how we will interpret and deal with consequences. We can choose to interpret mistakes as great moments for learning!

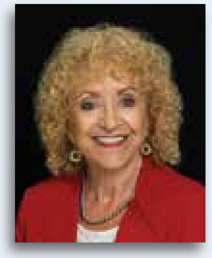
Another great interpretation of mistakes comes from Randy Pausch, author of *The Last Lecture*, who said when someone rides you it means they care about you. When you do a poor job and they don't say anything, it's because they've given up on you. Those of us who have ever been on a sports team understand this dynamic; the coach spends the most time with the "A" players, the players who show the most promise, and the ones who are open to correction knowing that the input will make them better players.

We really have little if any control on how others act in response to our mistakes. However, we do have control on how we interpret and react to them. In an ideal world, everyone would take time to pleasantly interact with us, be aware of our feelings, and speak to us in a kind and positive manner. Since we don't live in an ideal world, the best option is to choose the highest and most empowering interpretation of the correction: accept the correction and reject the tone and manner of the input that doesn't work for you. (Or as my mother used to say, "Don't throw the baby out with the bath water!")

One way to take the sting out of corrective conversations is to change your view of them. Instead of calling them 'criticisms' (which Oxford dictionary defines as the expression of disapproval of someone or something based on perceived faults or mistakes) call them 'feedback.' We all need feedback and we are all getting feedback daily without any upsets attached! For example: modern cars send an alarm if the driver comes too close to another object; our inner ear mechanism keeps us in balance and lets us know if

Success *continued on page 14*

About the Author



Joan Garbo is a premier change agent who is dedicated to her work and her clients. Throughout the past 32 years, Joan has led more than 2,500 seminars on effective communication, public speaking skills, team building, and customer service. She will be presenting at the 2022 Users Group Meeting.

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MAKING ORAL HYGIENE A PRIORITY

Excellent communication and effective coaching with our patients is more vital than ever before. For over a year, people have had limited face-to-face contact due to COVID-19, causing a change in behavior for many youth.

As practice teams continue to adapt to changing safety guidelines, it is also an opportunity to rethink patient education strategies. Many practices have embraced the concept of virtual appointments for aligner and retention checks, elastic wear, etc., to monitor treatment and provide encouragement. No masks are needed, so patients can see smiling faces!

Orthodontists continue to strive for treatment that require fewer appointments and shorter treatment time. As we minimize the number and frequency of appointments needed to create stunning orthodontic results, we rely more and more on patient compliance and parental support.

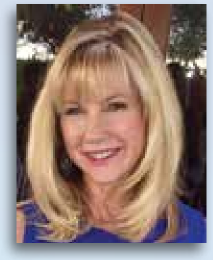
Client teams have shared with me that patient oral hygiene has slipped for many patients during COVID-19 and they are observing increased decalcification. In offices where family was not allowed in the clinic, parents may not have been aware of the change in their child's oral health.

Procedure times typically do not have time allocated for detailed oral hygiene instructions. Now is the time to review clinical protocols and formulate a strategy to advance patient education and motivation. Here are some possibilities to consider:

1. Implement an attitude of oral hygiene excellence throughout the office. Making oral hygiene a priority sends a message to the team to focus on this important topic with each patient.
2. Start patients only when they have a true grasp of how to keep their teeth clean without appliances. As we know, it is harder to keep the gingival areas clean with brackets, so being a good brusher prior to treatment makes education easier.
3. Use Edge Animations to make a customized office video for patients and parents to view on your website to refresh their memory. Make it engaging!
4. Analyze your procedure times. Is there enough time to provide feedback at each appointment and provide coaching as needed?
5. Include parents in oral hygiene instructions and updates.
6. Encourage patients to evaluate their own oral hygiene at each visit as they look into a mirror at the chair. Institute a reward system for excellence.
7. Have a team member available who can step in to see the next patient if detailed oral hygiene instructions are needed.
8. Add a virtual appointment 2-4 weeks after bonding (instead of the standard 8-12 weeks) to check and discuss oral hygiene, food choices, and confirm all is well with their appliances. Some practices do this on a non-doctor day.
9. Implement the position of Oral Hygiene Specialist who would coordinate effective education protocols and coach on effective verbal skills for all team members.
10. Between appointments, send supportive reminder blasts and/or text patients with a caring, encouraging message.

Oral Hygiene *continued on page 15*

About the Author



Lori Garland Parker is an in-office clinical orthodontic consultant, coach, and trainer, focusing on maximizing the talents of the clinical team. She helps implement systems to enhance clinical efficiency and productivity, teaches communication skills and patient motivation tips. She will be presenting at the 2022 Users Group Meeting.

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ONBOARDING YOUR STAFF EFFECTIVELY TO SET THEM UP FOR SUCCESS

In all our years in the dental industry, we've seen and learned what works and what doesn't when onboarding new employees. Taking the time to do this properly not only sets up your new staff for success but also ensures the melding of protocols and expectations in the office. Embrace your Practice has the steps to have the proper systems in place for your new employee to succeed and not fail!

To be able to effectively onboard your new hire, you should be certain that they are the right fit for your practice before they're hired. It is important that this person doesn't just perform a job, but enhances your practice's overall efficiency for you and your existing team. By simply putting together the right job description that outlines exactly what is lacking or needs improvement, you can narrow down your applicant pool significantly in order to make a timelier decision from a more niche group of people.

When hiring, be aware not to just fill a position but to bring someone in that will bring a new set of skills, knowledge, and a fresh perspective and energy. Look for a person who won't just work at your practice, but has the ability to change it for the better. From there you will already have set yourself and your team up to work with someone who is willing and able to learn, and who has the skills to raise the practice up as a whole.

In our experience, companies that have a structured onboarding process see a higher employee retention rate. In fact, 94% of employees expressed they would stay at a practice longer if the practice invested in their career more. This sense of care should start from the very beginning; the time and energy spent educating and integrating your new employee will not only set them up for success, but also instill confidence in their journey with your team.

This onboarding process should be systematic to ensure repeatability across the board. First, you take care of what you're required to do by law. After that, your onboarding activities should focus on getting your new employee settled and grounded, making sure they have the best possible chance to learn, and assessing their capabilities and fit for your team.

No matter the urgency, you will still want to put considerable effort and time into every hire you make. No matter how pressed you feel to fill a position, the fact remains that we as employers still need to attract, identify, and hire great people for our teams!

After all, how will the perfect hire find you if you don't take some time to let them know that you need them? How will you know if you're asking the right questions in the interview if you don't already know what you're looking for?

To locate that perfect hire, identify and articulate:

1. The tasks the new hire will need to perform.
2. The qualities the new hire will need to have.

Sometimes, knowing what you don't want is just as valuable as knowing what you want. That's because knowing what you don't want can help you figure out what you need.

Once you find the person to fit your unique office puzzle, you will want to make sure their first week is spent utilizing each day. Here is what we recommend:

Day one should be spent getting all employee paperwork finalized along with having them get familiarized with the office manual. Make sure to give them enough time to read through it and allow for questions to be asked before

Onboarding *continued on page 15*

About the Author

Cathy Jugovic is a meticulous and detail-oriented individual, and enjoys analyzing complex information. Having ran two successful orthodontic practices, she knew she had a passion for helping people maximize their potential and profitability. She will be presenting at the 2022 Users Group Meeting.

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CHAT, TEXT, TWEET, CALL, EMAIL, MESSENGER! OMG I GIVE UP!

In today's fast paced orthodontic practice, managing the way patients and potential patients communicate with our practices has become harder than ever before. Managing multiple communication methods and communicating with patients in a way in which they wish to connect is really making practices rethink how they do business. Before you give up and decide that all patients should conform to your rules, let's talk about the ways people communicate and find technology and tools to help your practice become the uber-friendly, patient-centric place that keeps patients coming back and referring friends for years to come.

First let's discuss the ways patients connect now. In order to really understand how patients want to communicate, we have to know how they are connecting with our practice now and look forward to how they may connect in the future. Right now, in most practices, patients are directly trying to make or reschedule appointments or discuss treatment via online chat (on your website), text, phone, email, website forms, and Google/Facebook/Instagram messages. So right now in your office, your team has to try to manage up to six communication platforms at once. This is challenging for almost every practice, no matter the size. The other important factor is the way in which your brand vision is communicated in all of these channels. What you say on the phone should be the same messaging as what you text, chat, message, or email. Your brand must shine through no matter where you connect with patients. The fact is, good training and great technology can help you be the best you can be.

The Most Important Communication Tool is Still the Phone

Although many teens and 20-somethings believe that texting is the best way to communicate, believe it or not, the phone is still the top dog. If you do nothing else, make sure you have an amazing communicator and people person at the front who can connect with new and existing patients and share your brand benefits like he/she was born in the practice. In your office you probably have phone scripts or branded messages that are used when answering the phone. Many practices use some variation of "Name Orthodontics… How can I make you smile today?" which translates into, "We are happy to work here, we love our practice, and we are excited that you are calling us". The deterioration of the call starts after the scripted greeting. The messaging for calls changes depending upon who answers the call and their training. The goal of multi-channel communication is to put the absolute best face on every communication method and that starts with the number one method of communication, the phone. Scripting is an important part of initial training of the team. Once trained, additional fine tuning on the challenging aspects of calls is crucial. Remember, many 20-somethings literally never answered their home phone let alone any phone that wasn't in their pocket. They have zero personal knowledge of how to answer a business phone, so training is key. It all starts with branded messaging on every call.

Creating scripts for all occasions is necessary to keep everyone on the same path. When working with your script, remember to have a script for all types of questions. I recommend taking a few weeks to have your team write down the questions they receive on a daily basis. This may seem like a painful exercise, but its crucial to understanding what you need to answer. Once the questions are written, you can decide which are the most common and write scripts for each. After the scripts are done, coach the team on the way in which the questions should be answered. Use the scripts you have created to play games and allow the team to make the talking points their own.

Broadening Your Brand to Messages and Mail

Once you have the script and the amazing team, next you need to take that and connect it to all of your other channels. This is where it becomes a little more challenging but not insurmountable. Make sure that all of the messaging that you want to give to patients is scripted and written out for your team to follow. They should have cheat sheets for everything you have developed. In your chat and text platforms use your scripts to develop templated replies that require your team to simply add a few personalized details to quickly answer messages. Make sure that every one of your text and chat messages matches the phone scripts or other internal messaging you have created. Each email that is sent should have some of the scripted messaging to allow for fewer errors and a branded experience for every patient who reads the email. Once you set each of these messages up the way you want them you won't have to worry about them again for a few years.

Many practices do not spend their lives on social media during the day, but patients do. The majority of patients are glued to their phones and in a lot of cases check their social media two to three times an hour. In many cases this leads to patients chatting with your team via the method that the patient finds most convenient – the messenger or Google My Business (GMB) app. Unfortunately, in a busy orthodontic office, it's hard to see when a messenger message pops up, a chat appears, a text arrives, or a GMB message comes in. The problem is people who use these platforms expect an immediate response. When you don't respond within a few seconds of their message they will, in many cases, move on. This is especially true of new patients who are scrolling through looking for a new orthodontist. They want and expect a response and it's important that we respond to them as soon as possible. Utilizing saved responses, automated messages, or chat bots on messenger really do help save your team time and energy and allow patients to feel like you are responsive. Although no one likes to talk to a chat bot, programming the bot with the questions you most frequently are asked really does help.

Utilize your social channels to spread your brand message without needing further patient interaction. Add highlights to your Instagram page that include stories created by your team that answer the most frequently asked questions. Add TikTok videos in the same fashion that utilize your awesome team members explaining how braces are placed, what to do after getting braces, how retainers are made, and why it's important to wear them as directed. Use as many channels as you can to create a brand presence which not only connects with patients in their preferred venue, but answers questions in a branded, fun way.

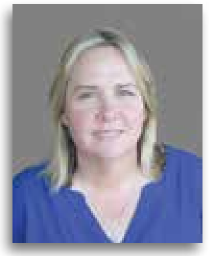
Closing the Deal

The most important part of patient communication is closing the deal with a new patient and that's where technology can really play a key role. Whether you use a chat or text system, messenger or an email, reminding new patients that they can make an appointment online is key. There is a lot of pushback from doctors who do not want patients to set their own appointments and I understand that train of thought, but having the ability to choose an appointment time and date sets your office above the others who aren't willing to do this. We book hotels and cars and flights online, we bank online, surely we should allow our patients to schedule online without the need for our team to control the schedule.

Online scheduling for live appointments is just the first step. Virtual appointments have changed the landscape of today's new patient experience. Utilizing the easy tools for virtual appointments, your team can handle far more new patients than in the past, and a TC can see patients in off hours which are more patient friendly. This type of outside the box thinking creates an environment in which the patients are seen initially either by both the doctor and TC or in many cases by the TC alone. Either way, the patient gets a feel for the office and the type of treatments available and can commit to an in-person records visit to get started with treatment.

Communication Systems *continued on page 15*

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. She will be presenting at the 2022 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

For many years, Ortho2 has offered free webinars for you to attend on various Edge Cloud and ViewPoint topics. With the launch of the new Support.Ortho2.com, and the new cycle of Edge Cloud releases, it was a good time to transition away from scheduled and pre-recorded webinars. Instead, we are focusing our efforts on updating existing and creating new Visual Help videos as new features arrive in Edge Cloud.

This quarter highlights the Scheduler videos. The 14 videos in this section cover everything you need to know about setting up and using your Scheduler. Some of the videos include:

- **Navigating the Scheduler:** Watch this video to see the basics of using your Edge Cloud Scheduler.
- **Smart Scheduler:** Learn how to use the powerful tool that is the Smart Scheduler.
- **Manually Scheduling an Appointment:** Review how to make an appointment without using the Smart Scheduler.
- **Editing an Appointment:** Learn how to change or edit appointments that are already scheduled.
- **Managing the Needs Appointment List:** Explore the ins and outs of the Needs Appointment List and how to keep this list in a manageable number.

If you have a topic you'd like to see covered in a Visual Help video, email ortho2support@ortho2.com.

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.

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.

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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. Having clear information helps us serve you more quickly.

HOLIDAYS

Our corporate office is closed on the following holidays:

New Year's Day	Independence Day	Thanksgiving Day
Memorial Day	Labor 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.

INSIDE ORTHO2

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

MEET THE TEAM – INTERNAL SERVICES

The Ortho2 Internal Services Team does more than just facilitate our internal projects and our customer database. They also coordinate and complete conversions and custom projects for our customers. This quarter, we are featuring Ken Hoffmeier, Internal Services Programmer and Elizabeth Nordeen, Internal Services Projects Coordinator.

What do you really do here at Ortho2?

KH: I do the ViewPoint to Edge Cloud conversions and administer Ortho2's customer database.

EN: I coordinate the custom projects, whether it is a custom report, online forms, or custom programming.

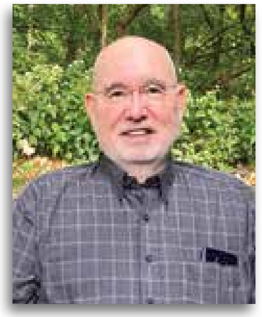
What's fun/what do you enjoy about your current job?

KH: I like the autonomous environment that Ortho2 provides me.

EN: There is a little something different every day.

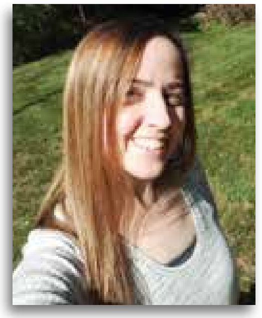
What do you want our users to know about the Internal Services Team?

EN: We are a small team working to get a lot done.



Ken Hoffmeier
Vacation destination: Australia Zoo
Three people I would like to have dinner with: My oldest brother who passed when I was nine and I never really had a chance to know him, Steve Irwin, and Stephen Hawking
My role model: Stephen Hawking. I find it unbelievable what he managed to accomplish in his life while battling ALS.
I can't go a day without: A book
What are you listening to right now? Dire Straits

<u>Favorites</u>
Team: The Lakers
Software Program: OneNote
Movie: *Quigley Down Under*
Book: *To Kill a Mockingbird*
Phone App: Libby Overdrive



Elizabeth Nordeen
Vacation destination: I have two: One would be to spend time at a really nice cabin that had a deck over water that I could fish off of. The other would be to spend time at one of those beautiful huts that are built over gorgeous crystal blue waters.
Three people I would like to have dinner with: My grandpa and my grandma. I wouldn't need a third if I had them at the table.
My role model: My brother, Steve
I can't go a day without: Laughing and spending time with my kids
What are you listening to right now? Going between the Smartless Podcast and the Avett Brothers

<u>Favorites</u>
Team: Iowa State Cyclones
Snack: Lays potato chips and AE Mexican dip
Movie: Anything when movie theater popcorn is involved
Podcast: Smartless
Phone App: Instagram

ON A PERSONAL NOTE

Congratulations to **Sara Harbacheck** on the birth of her grandson, Graham Jack Goodman! Sara, Ortho2 Help System Developer, reports that Graham was born on July 31, 2021 while family and friends were enjoying his baby shower. Surprise! Although he was four and a half weeks early, he's home and healthy and growing every day.

ORTHO2 ANNIVERSARIES

Congratulations to these Ortho2 staff members who celebrated anniversaries during the third quarter of 2021.

Thirty-Four Years
Sara Harbacheck

Sixteen Years
Michelle Kinnaman

Thirteen Years
Cal Rebhuhn

Twelve Years
Judy Denny

Ten Years
Brent Jacobsen
Steve Mahan

Nine Years
Rachel Gildersleeve

Eight Years
Wesley DeShaw

Seven Years
Nathan Hemmings
Jorge Rios

Three Years
Darcy Dakovich

One Year
Jeff Brockway
Marley McDonald

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.

President's Perspective *continued from page 1*

Meeting pivoted to an online meeting earlier this year with great success. Ortho2 is exploring the possibility of continuing a virtual meeting, either in role-focused boot camps offered throughout the year, or alternating every other year between in person and virtual users meeting. We hop you join us for the 38th Ortho2 Users Group Meeting, January 27-29, 2022 in Las Vegas.

Henry Schein Collaboration – Ortho2 and Henry Schein continue to explore avenues we can work together to bring more valuable offerings to both the Ortho2 and Henry Schein family of customers. Some offerings are already in place, for example a deeper integration and website offerings through Sesame. Other avenues of particular interest are enhanced insurance billing and analytics.

This is just a quick overview, but please know everyone at Ortho2 is working hard for you. After all, our mission is to help you succeed.

Amy Schmidt

Amy Schmidt, Ortho2 President

Workflows *continued from page 4*

run this merge letter, otherwise (Else), run this letter.

In the end, workflows are a powerful way to automate the system to streamline some of your office's tasks or procedures. If Statement Workflows take that a step further by providing a little logic into the automation.

Success *continued from page 5*

we lean too far over; our sensory system lets us know when we touch something hot, or when things are cold; our taste buds let us know what foods we like; our pets roll-over to get their tummies rubbed; etc. There are thousands of ways we get feedback on a daily basis without getting upset. But if every one of these situations I've described were called criticisms your reaction would be different! Wayne Dyer said it best, "When you change the way you look at things, the things you look at change."

Ultimately, if we're growing and learning, we WILL make mistakes; and if we can't handle correction, then we won't grow. Whether or not you have a great coach or teacher, you need to learn to be your own best coach. If you've had children, or ever watched a child learn to walk, you know that after a few steps, the toddler falls down. The adults start clapping their hands, encouraging the child and being a cheerleader for the child. If the adults started to berate the toddler for going past the center of balance, and punishing him or her for falling, the child would develop a fear of walking! As adults, start encouraging and being a cheerleader for yourself and others as we all are taking baby steps in learning to walk on the path of life's journey!

Oral Hygiene *continued from page 6*

11. Confirm all clinicians are grading oral hygiene the same way. Make a sample grading with photographs to help new team members accurately document decalcification as soon as it is seen. Be specific on location.
12. Clarify when letters are sent to parents. Do you send a letter at the first less than ideal? The second time? With longer intervals between appointments, the second poor OH grade could be too long before parents are notified. Be consistent so all patients receive the same quality treatment.
13. Review letters to confirm that the message you wish to convey is clear.
14. Utilize Pro Seal, L.E.D Pro Seal or other protective sealant to mitigate decalcification.
15. Utilize Ortho2 to the fullest at the chair with workflows, animations, and more!

These are few ideas to stimulate your thinking. Find what works for you! As with any goal, clarify objectives, make a realistic plan, execute the steps, and evaluate progress. Then celebrate the difference you make in your patients' lives!

Onboarding *continued from page 7*

signing off that it has been read. Day one should also be spent going over the defined outline of their role and what their position entails.

Days two and three are meant to give your new hire a chance to get to know each department by shadowing each department lead. On day four, your new hire will watch videos on the practice management system and all programs that are used in the practice. Finally, on day five a team member from the department your new employee was hired for will get a checklist following the explain, see, do system for the following week's training. Each week should end with an evaluation that they have mastered each job duty; it should be noted that the new employee cannot move onto the next job duty until they have mastered the one before it.

Lastly, give your employee the confidence to learn in a setting that will not put them in a position to reflect poorly on the office. You want to see them succeed! Do not let them feel discouraged by throwing them into situations they may not be ready for.

Hopefully, with your thorough and direct method of employee search, hire, and onboarding you will have set yourself, your team, and your practice up for success. After all, when one succeeds, we all succeed!

Communiations Systems *continued from page 9*

OmniChannel Practice Integration is Coming

In the near future, we will see a few companies providing omnichannel products that allow you to respond to all of your messages, email, texts, forms, and more in one place. There are a few software companies who have some of the pieces already, so in the not so distant future you will be able to manage all of your tasks under one roof.
In the meantime, make sure that you have the scripts you need to be able to handle 90% of the calls, texts, emails, messages, and other communications that you receive. Set up chat bots to handle the common questions you have discovered with your team so that the answers to most of the mundane things are available to all of your patients and potential patients whether they are on your GMB, Facebook, Instagram, TikTok, or website. Branding your practice with the most up-to-date, informative messaging which helps patients commit to treatment and solve treatment questions will set your practice apart from every practice in town.

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EMPOWERING PRACTICES