

PRESIDENT'S PERSPECTIVE

It's a new year! I don't know about you, but boy am I ready for it. 2020 was a doozie. Ortho2 has some new things going on this year, and I wanted to make sure you are aware of them.

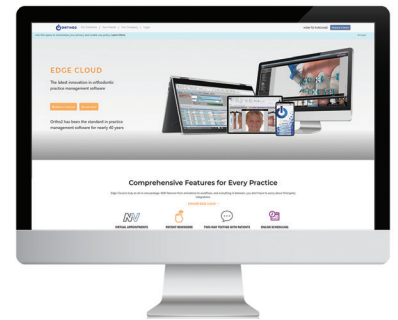
Live From Iowa - A UGM Special Event

While I was saddened to announce the postponement of our annual Users Group Meeting, I am delighted to tell you about this virtual event. Live From Iowa - A UGM Special Event is a one-day virtual meeting that will give you access to experienced Ortho2 trainers who will teach on various topics to give you and your team the tools you need to use Edge Cloud to the fullest. And the best part, this UGM Special Event is free! I hope you will join us on Friday, February 19, 2021. The meeting will run from 9:00 A.M. to 5:30 P.M. Central time and will feature such classes as Edge Cloud 101, working smarter in Edge Cloud, new features of Edge Cloud, and marketing with Edge Cloud, to name a few. Registration is now open, so sign up your office today at www.ortho2.com/ugm. And be sure to reserve January 27-29, 2022 on your calendar for our 37th annual Users Group Meeting in Las Vegas.



New Ortho2.com

Throughout much of 2020, we have been hard at work developing a new Ortho2.com. With both existing users and prospective clients in mind, the new website offers a much more streamlined and straightforward experience. This new, easy-to-navigate website features vivid images, redesigned videos, and concise text. Existing Edge Cloud users can more easily explore facets of the software they may not be utilizing, and ViewPoint users can take a deep dive into all Edge Cloud has to offer. Note: The secure and customer-only facing portion of our website might not be fully complete at the time you are reading this, but rest assured is coming soon. This new design will also feature a more streamlined and user-friendly experience for you and your team including help documentation and videos, accounting services, support tools, and more.



inVisit - Virtual Appointments by Ortho2

And last but certainly not least, inVisit. I first wrote about inVisit,

President's Perspective *continued on page 14*

INSIDE THIS ISSUE

President's Perspective	1	When Your Reception Room is a Car, Technology is Your Friend	7
Live From Iowa: A UGM Special Event	2	By Beth Leach	
The New Ortho2.com	3	Align Your Practice for the Future of Orthodontics	8
Spotlight Feature: Edge Cloud Tidbits	4	By Debbie Best	
The Ortho2 Legacy	5	Inside Ortho2	10-13
Terrific Thoughts in Tough Times	6		
By Rosemary Bray			

LIVE FROM IOWA A UGM SPECIAL EVENT

We are excited for our virtual Users Group Meeting in 2021! We are sad we won't be able to see each other in person, but we still want to bring you the best information about Edge Cloud.

Mark Friday, February 19, 2021 on your calendar for Live From Iowa: A UGM Special Event.

This free, one-day online workshop will feature classes from our experienced Ortho2 trainers about various topics to give you the tools you need to use Edge Cloud to the fullest. We'll even have trainers on hand to answer your most pressing questions.

And while there won't be a costume contest, we encourage you to dress in your best flannel and ball cap to show your Iowa state spirit.

Register now at www.ortho2.com/ugm.

THE NEW ORTHO2.COM

You have probably already seen the new Ortho2.com, but in case you haven't, we'd like to walk you through some of the changes.

If you are looking for help videos and documentation or integration specs, the easiest way to find it is to visit support.ortho2.com. This direct link will take you to the login page for the customer site of Ortho2.com. It features a more streamlined navigation system so you can easily find the information you are looking for.

In addition, you should go to support.ortho2.com to get remote support from the Software Support, Network Engineering, and New Customer Care Teams, and to log into your Ortho2 account to access your Ortho2 financial information.

You may even want to explore the Edge Cloud page to view all the features in Edge Cloud. This benefits both Edge Cloud and ViewPoint users so they can learn more about all the ins and outs of Edge Cloud. Find this by hovering over Our Solutions in the main menu > Edge Cloud.

We hope you enjoy the new features of Ortho2.com! ☺



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

You can also read the newsletter on our website www.ortho2.com > Our Company > Newsletters.

The 2021 virtual Users Group Meeting is coming up next month. To get ready for Live From Iowa: A Special UGM Event, let's talk about using Edge Cloud to its fullest potential. The Edge Cloud software is a jack-of-all-trades. It is powerful because of the many features it has throughout the software. So many in fact, that many of them often get overlooked. Here are some lesser known features that can easily get overlooked, but can help you work smarter. An ongoing theme of the UGM Special Event!

Financial and Insurance

- When posting AutoReceipts, have you ever accidentally skipped one you shouldn't have? If you catch yourself before the end of the day, you can undo this skip. Look for the Undo Skipped option in the AutoReceipt Review Screen. You can only undo the skip from the computer where the skip was originally made.
- You also have an Undo option after you click Delete in the Electronic Insurance Queue. You only have a few seconds to undo this, though.
- Sometimes ledgers can be confusing after you reverse or adjust payments or charges. You can filter the ledger so the adjustment is right next to the payment or charge even if they happen on different dates. To do this, go into the Filter bar and check Group Adjustments.
- Want to fill in the Remarks line on the insurance forms? In a patient folder, open the Insurance tab. Then, click on the ADA Form fields line, check the Custom box next to Remarks, and type away.
- Have you ever wanted to bill insurance for something that is included in the contract? Records for example. In the Insurance tab of the patient folder, use the Additional Services Provided area to bill insurance for anything you want that has an insurance code.

Patient Communication

- Tired of typing "Come on in, we are ready for you now" over and over in text messages to patients? Save text messages for the future by clicking the Save icon to the

right of the message. Then, use the drop-down menu where you type in the text message to access that text again.

Patient Widgets

- There are six different patient widgets you can add to the patient information panel to customize what you see. When you are in a patient's folder, click the Widget Library in the main menu. In the Patient Folder tab, you will see the options for the Patient Folder Widgets. Click any of these to add it to the patient folder.

If at any time you want to delete a section, simply hover over the heading of the section and click the X. These widgets are user-specific, so each user can see exactly what they want to.

Patient Folder

- Visual tags can be created and assigned to patients and responsible parties. Visual tags consist of user-defined shapes and colors that can be used to "tag" a record for classification or subgrouping purposes. Visual tags are visible in the patient record, responsible party record, Patient Tracker, and Post Payment window.

You can create your own visual tags by going to Editors > Visual Tags. Commonly used examples include: Needs Extra Time, Special Financial Arrangement Made, and Prefers Dr. X.

Edge Cloud Tidbits continued on page 14

About the Author



Derek Dohrman, Advanced Tech & 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 with his dog, and keeping up with new computer technology.

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How Dr. Edward Cronauer ended up with Edge Cloud in his orthodontic practice actually started with his father's orthodontic practice. His father, the senior Dr. Edward Cronauer, was an orthodontist in south Florida for more than 30 years. During that time, Dr. Cronauer, Sr. used OneTouch, Ortho2's MS-DOS practice management software.

Dr. Cronauer, Jr. remembers spending a lot of time shadowing his dad and even assisted in setting up a new office after a move. He recalls OneTouch being easy to transition onto new computers and servers after the move. Seeing first hand how the software worked, and the support that the senior Dr. Cronauer received from Ortho2 was important for making decisions in his own practice.

Fast forward to 2020, where Dr. Cronauer acquired a practice from a retiring doctor in February, and re-branded it as Glades Orthodontics. The operation has three offices in Florida. When Dr. Cronauer took over the practice, all the patient charts were still on paper, and the only software was for the schedule and to manage financials. Dr. Cronauer explained the challenge of having paper charts to cover three office locations, especially when patients would be seen at multiple locations. His first order of business when looking for a practice management solution was to transition to digital charting.

While looking for solutions to his charting problem, Dr. Cronauer was also looking for a cloud product for his software. "I have a degree in computer science from college, so I am pretty proficient with technology," he said. "I considered implementing a central server and connecting the offices via VPN connection like I did for my father. My prior associate job used Dolphin running on a central server. While it definitely can be done and function well, I decided the advantages of the cloud outweighed the central server – easier IT management (I could do it myself with less hassle), outsourcing backup and security management to Ortho2, and access to office data on my phone or computer from virtually anywhere without a VPN."

In addition to the benefits of the cloud, Dr. Cronauer decided on moving to Edge Cloud because of the



proficiency of the support staff if he needed help with the software, and the level of customization of forms, letters, and reports.

He remembers, "When my father did run into issues, Ortho2 was easy to reach and despite the software being decades old, they still had techs that knew their way around it so well, they could fix nearly anything within minutes. This definitely played into my decision to go with Ortho2 in my office, as the support was great and their continued support for legacy software instead of forcing users to switch was much appreciated."

Because of the coronavirus, implementing Edge Cloud was different than expected. Instead of on-site training, the team was trained remotely, and because of shut downs, the team couldn't start using Edge Cloud right away. Dr. Cronauer said the bright side of this situation was the team had more time to learn menus, features, and customize letters and reports to their needs.

Now that Glades Orthodontics is open again, Dr. Cronauer has seen many benefits from Edge Cloud. "It's really nice to be able to work from home and look up patient charts when needed outside the office," he said. "I really like all of the reports I can run and my ability to monitor the practice. I was pleasantly surprised to find out that I can upload my patient's final model scans into their charts in Ortho2, which is a great way for us to save them with no limit on file space and automatic backups." ◊

TERRIFIC THOUGHTS IN TOUGH TIMES

General Colin Powell addressed the 2000 AAO meeting in a powerful opening session. I sat near the front mesmerized, and wrote a quote down that he said to us. It certainly applies today, "If you're not riding the wave of change, you may find yourself beneath it." Look back throughout the years at the many changes in orthodontics. But also look back only to March and see the many changes in your practice, your physical office, your patient care delivery, your communication, and in YOU, yourself. I talked with a team about this recently as I observed patient care in their quality orthodontic/pediatric dentistry practice.

Rather than hear MY words to describe how they feel about work today, I want to share THEIR thoughts and words with you. I merely said to them, "Tell me how life back at work has changed since the pandemic." It was my joy to hear them share more good thoughts than unhappy or regretful ones.

Welcome to the heart of Team Styr.

Dr. Styr, Orthodontist, "I now have a real attitude of gratitude and find I focus much more on important things. I see how happy my team is to see each other and be together. They're not afraid, we're very careful, our patients are glad to be here and see our efforts to protect them. Best thing for me? I lost no team members during this trying time; they all happily came back."

Dr. Hayes, Pediatric Dentist, "Being a professional, I wonder daily how will dentistry fare through this? How will many stay afloat and keep up with all the information and changes coming at us every day? My biggest concern? Can I give the best care and advice to my patients and families? Then I go home to a seven- and a four-year-old who want to ride bikes, take walks, and need homework time. We are a closer family now – at home and at the office for sure."

Mackenzie, Clinical Specialist/RDA, "Some of our patients were scared to come back and I know we must reassure them by telling and showing them all we have learned and done to protect them and ourselves. I am so much more cautious of how careful I have to be and how easy it can

be to spread the virus. Most important thing I learned? Patients really watch us work now – everything we do is important."

Dina, Clinical Specialist/RDA, "Have to admit, I sure don't like wearing this PPE, especially the times when it is not needed. I now have a wider perspective on how I see just about everything and am more mindful and sensitive to what others might be going through. I am so sorry I can't hug my teammates and my patients when I want to. I do love hearing patients tell me how they are happy being with their family more. The greatest change for me? I've had to learn how to smile with my eyes."

Colette, Clinical Specialist/RDA, "I am so grateful to have both my job AND my health. I love that our patients are well and so happy to be here to see us – that put our practice stats up and we're really busy. I do want the kids back in school – so many of them are home alone when mom and dad are at work now. Many parents don't know the teaching technology and had to hire tutors to help their kids. The saddest thing for me? Both of my parents got the coronavirus, and my step-dad died from it. I know the seriousness of this pandemic."

Patty, Practice Administrator/Treatment Coordinator, "We're so good now at educating our patients on the phone, in emails/texts, and verbally once they are here on what to expect. I'm blessed to have my grown daughter

Terrific Thoughts continued on page 15

About the Author



Rosemary Bray spent 30 years employed as a team member herself and now more than 21 years as a consultant and speaker in orthodontics and dentistry. She has traveled the world in the name of teeth and is honored to be the 2021 recipient of the prestigious AAO Outstanding Service Award.

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WHEN YOUR RECEPTION ROOM IS A CAR, TECHNOLOGY IS YOUR FRIEND

Have COVID-19 protocols overwhelmed your front desk and affected your connection with patients and parents? If so, you're not alone. Since quarantine began, all of us have learned to deal with the changes in patient care. Whether you are seeing a first-time patient or a deband, the process of moving a patient from parking lot to chair has become extremely challenging. Our reception areas are closed and most practices are replacing them with cars, using texting or phone calls to move patients through. In most cases, this means lots of texts, calls, and frustrated patients and parents in your parking lot.

So how do we overcome these missed connections and front desk frustrations and still maintain our COVID-19-appropriate workspace? Technology can make the difference in how we practice right now. Frustrated front desk team members are finding success with communication technology. Texting your current patients through Edge Reminders from Ortho2 with COVID-19 and first appointment forms has been very effective. Other texting platforms such as Weave also offer similar functionality. My Smile Appointment uses a dashboard to automate the check-in and screening process eliminating the need for back and forth communication and freeing your front desk to focus on patients. It also has a component for parent communication and video chatting. All of these systems help you move patients through faster and more effectively.

In addition to frustration at the front desk, we are also seeing a lot less of the parents of our young patients. In some cases, doctors and team members have chosen an in-person method to communicate with parents, running out to see parents in the car after each visit. Other doctors have found that video chats, calling, and texting results of the visits through an online platform works better and is more efficient. None of these solutions gives us the same level of interaction we had pre-COVID-19 with our patient families, but they are effective ways of communicating during these times.

Connecting with parents is crucial and winter months make it harder for in-person outside chats. Getting out of your

comfort zone may be the best way to reach parents. Texting deband photos, funny smiles, doctor/patient action shots or videos to parents waiting in the car can be a surefire way to get some love on social media. Remember to post to your social media as much as possible with images of your team and practice, and the ways in which you are staying safe and creating amazing smiles. Posting on social media is key to helping parents feel safe and comfortable with your new protocols.

Using video conferencing technology has been a game changer over the pandemic. Most families have learned to use Zoom or video conference very effectively and therefore connecting with you at the practice this way is not out of the norm for them even though it might be for you. Virtual appointments have become necessary with patients who can't or don't feel comfortable coming to the practice in person. Virtual visits, initial consultations, and recall appointments have become more frequent and more effective as we have all learned to use conferencing to our benefit. Many practices have found that technology can assist in ways they never dreamed of before.

Grow outside your box and find ways to bring your parents and community closer.

The in-person communications you had pre-COVID-19 can now be done through technology. Volunteering to sponsor school events, charities, or sports can all be done over text.

Technology continued on page 15

About the Author



Beth Leach is principal in PracticeMarketer, and PracticeRetriever. She is an expert in combining the latest online marketing strategies with the most effective traditional modes of practice promotion.

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ALIGN YOUR PRACTICE FOR THE FUTURE OF ORTHODONTICS

Reflecting on my 45 years in the dental and orthodontic field, I am amazed by the changes in the industry. In 1975 I worked with a general dentist who offered “orthodontic” treatment for children. His treatment of choice was to extract four permanent bicuspid and then close the space with Hawley retainers. I had the same treatment done by a general dentist when I was 12-years-old. The result was far from ideal, and it limited my treatment options when I decided to be re-treated by an orthodontist as an adult.

When I started in the orthodontic field in 1978, treatment typically involved banding the six- and twelve-year molars, and then bonding the rest of the teeth. Starting a patient took multiple appointments over several weeks. The sequence of appointments was as follows:

- 1. Initial exam
- 2. Full records
- 3. Consultation
- 4. Separators
- 5. Band the molars
- 6. Bond the remaining teeth and place arch wires

After the patient was fully banded, they typically were seen every 4 weeks for a period of 2–2 ½ years. This meant that most patients were seen 32+ times over the course of their treatment, excluding the retention phase. Scheduling logistics limited the number of active patients due to the frequency of appointments needed to complete their treatment.

Gradually throughout the years, practices transitioned to taking records at the initial appointment. In most cases the formal consultation has been eliminated, unless it is a difficult case, or it was determined that the patient/parent required additional information prior to the start of treatment. Additionally, many doctors are eliminating the use of bands and bonding patients 7–7. Patients are often given the opportunity to start treatment at the initial appointment, reducing time missed from school or work. Many orthodontists now see patients every 6–10 weeks, reducing the number of appointments from 32+ to 20 or less. Chair time for patients has decreased from 30–45

minutes to 15–30 minutes due to self-ligating brackets and improved arch wires.

In 1997 Invisalign entered the profession, offering removable aligner treatment as an option for full treatment. Currently, more than 5,000,000 patients have been treated using Invisalign. This does not include patients who are treated with clear aligners, available through companies other than Invisalign. Patients in aligner treatment are often seen every 8–12 weeks, reducing the number of appointments over the active treatment time to 10–14. Aligner treatment has transitioned from adult only treatment to teenagers and children.

So, what does this mean to orthodontic practices that are now treating 30-70% of their patients with aligner treatment? The result is that you can start more cases, as active aligner patients are scheduled on a longer rotation. Your production can often increase 20-50%, as you have opened time in your schedule by reducing the number of times a patient is seen during their treatment time. Other than the initial placement of aligners, refinement appointments and deband, the average chair time for aligner visits is 10–20 minutes.

Over the past year, approximately 60% of my clients have increased the number of patients they treat with aligner treatment. Many doctors have made the decision to offer aligner treatment to many of their patients, including teenagers and children.

This can have a big impact on your patient schedule. The long bonding appointment has been replaced with the initial placement of attachments and aligners. This procedure requires very little doctor time, as typically the clinical assistant places the attachments. The doctor removes the excess flash and checks the fit of the initial aligners. This has reduced the time needed for the start appointment from an average of 90–120 minutes down to 45–60 minutes. With the decrease of the number and length of visits required for aligner patients, it can often open up one or more hours per day for each patient chair. The result is that you can see more patients per day,

dependent on the percentage of patients treated with aligners.

A percentage of the aligner appointments can also be done virtually, rather than in-office. This helps to reduce the number of patients seen on a daily basis (especially more important now while dealing with COVID-19 safety guidelines).

When I design scheduling templates, doctors using aligner treatment can accommodate more patients per day, due to the decreased chair and doctor time. Although this may sound great, there are additional considerations to consider. One is the lab fee, which is sometimes as high as \$1,850 per case. Although, in the long run I have found Invisalign can be more profitable, it can be very expensive for doctors to start patients. As the number of aligner starts increases, fortunately the lab fees decrease, depending on the number of starts per quarter and year. When you weigh the cost over the time saving, many doctors find that they can be very profitable, despite the increased cost.

More importantly, I see doctors struggling to find the time to treatment plan and submit the ClinCheck to fabricate the aligners. Unfortunately, many doctors are trying to get this done over their lunch time, after work, and on the weekends. The chair time per patient has decreased, however the doctor is spending more time on behind the scene aligner treatment plans.

Over the years, I have created templates for hundreds of orthodontic practices. Often, when I am contacted by a potential client, their goal is to streamline the schedule. This is often accomplished by creating a doctor-time schedule, allowing the doctor to be needed at only one chair at any given time. It reduces stress on the doctor and team, as well as helps to ensure that patients are seen on time and the appointment ends on time.

With the strong influx of Invisalign or aligner treatment, I have found that it is beneficial to adapt the schedule to allow time for the doctor to complete the behind the scene task to treatment plan and submit the ClinCheck during

the patient day. I have done this in a few different ways, depending on what method works best for the doctor and team, their treatment style, and philosophy. The options I have found to work best are:

- 1. Block out 45–60 minutes per day for the doctor to have uninterrupted time to complete the treatment plan and ClinCheck. The team continues to see patients during this time, however they are either finishing a procedure or seeing patients for non-doctor procedures (scans, records, delivering initial aligners – where the doctor is not needed until near the end of the appointment, etc.).
- 2. Build in 10–15 minutes of doctor time at the end of each aligner scan to allow the doctor to complete the treatment plan and ClinCheck for the patient at the time of the procedure.
- 3. Train a key clinical team member to be your Invisalign coordinator. They would work closely with the doctor to help manage ClinChecks during the time which is blocked out on the schedule. The Invisalign coordinator would also manage the Invisalign correspondence and track scans, aligner deliveries, and refinements. In addition, they would run the deband monitor at the end of each month to track aligner profitability.

Although there is an added expense up front, I have found the Viverra retainers to have the potential of being

Align Your Practice *continued on page 14*

About the Author



Debbie Best, senior practice management consultant and lecturer for Debbie Best, Consulting Network has over 45 years of experience in the dental and orthodontic field. Debbie evaluates staffing needs and the office computer system to develop a strategic plan for practice productivity.

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INSIDE ORTHO2

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

FREE WEBINARS

We offer you free, online webinars each month throughout the year on various topics. It's a great solution for training new users, refreshing experienced users, or learning about new features. Webinars are available online at www.ortho2.com > Our Company > Ortho2 Webinars. Find the topic for the month and click the link to view the webinar at your convenience.

Upcoming Webinar Topics

EDGE CLOUD

January – Edge Cloud: Open-ended Contracts

In some instances, you may need to create contracts without an end date. You can create open-ended contracts in Edge Cloud to accomplish this. This webinar will review the steps for creating and managing this type of contract.

ViewPoint

February – ViewPoint: Light Bar Widget

Use your Light Bar widget to monitor the doctor's involvement with patient appointments once they have been processed as "seated" in your On-Deck Operatory. The light bar notifies you about who the doctor is currently

attending, directs the doctor to the next patient that should be seen, and alerts you to patients that have been waiting an extended period of time. We will demonstrate how to access the widget, choose your settings, and use the light bar.

EDGE CLOUD

March – Edge Cloud: Edge Specialist Set Up

This webinar will walk you through the steps you need to take to get Edge Specialist ready in your practice. We will review how to set up your editors, dental procedure groups, insurance fee schedules, appointment types, and treatment chart styles.

ORTHO2 ANNIVERSARIES

Congratulations to these Ortho2 staff members who celebrated anniversaries during the fourth quarter of 2020.

Twenty-Eight Years

Todd Schuelka

Sixteen Years

Corey Schmidt

Seven Years

Steve Volcko

Twenty-Six Years

Michele Eich

Fifteen Years

Derek Dohrman

Two Years

Paige Seward

Twenty-Two Years

Lowell Davis
Denise Sargent
Jennifer Shaffer

Eight Years

Brian Good
Drew Humphrey

One Year

Dylan Groves

CAREER MILESTONES AND DEVELOPMENT

The Software Support Team has two new members. **Chloe Enos** and **Michaela Henke** joined Ortho2 on November 2.

Chloe is a recent graduate from Iowa State University with a Master's of Art in graphic design and a Bachelor's of Design. Prior to joining Ortho2, Chloe was a freelance graphic designer and an art tutor.

Michaela is also a recent graduate from Iowa State University with a Bachelor's in biological and pre-medical illustration. Michaela gained customer service experience while working at Wild Birds Unlimited before coming to Ortho2.

ON A PERSONAL NOTE

Congratulations to Jess Huennekens, Ortho2 Regional Manager, and his wife, Jessica on the birth of their son Elliott Roland on November 24. Elliott is joined at home by big brother Liam. Congratulations Huennekens family!

November 24 was a busy day for new family members. **Steve Volcko**, Ortho2 Regional Manager, and his wife, Emily, welcomed their daughter Vivian (Viv) Olivia that day as well. She was 20 inches long and weighed 7 lbs., 2 oz. Viv is joined at home by big brother Emmett and big sister Stella. Welcome to the world, Viv!



Elliott Roland



Viv Olivia

SERVICE EXCELLENCE

We invite you to recognize Ortho2 employees by completing an Extra Mile card. Simply fill one out online by going to www.ortho2.com > Our Company > Contact Us. Our goal is to uphold our tradition of excellence in customer service, and with our Extra Mile program, you can let our employees know when you appreciate their extra effort. We encourage you to send an Extra Mile card whenever an Ortho2 employee goes the extra mile for you. The recognition is valued by the recipient and is acknowledged by our management team. We continue to look for better ways to serve you. Thank you for helping us recognize excellence.



INSIDE ORTHO2

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

MEET THE TEAM – SOFTWARE SUPPORT

Any time you have a question about Edge Cloud or ViewPoint, there are many specialists available to assist you. The Software Support Team takes your calls to answer your questions, assists in enhancing your software, and trains new offices. This quarter features Dylan Groves, Software Support Representative and Jo Jacobson, Software Support Manager.

What do you do here at Ortho2?

DG: I provide software support to end users. More or less, I talk to people and answer their questions.

JJ: As the Software Support Manager, I work with the Software Support, Advanced Support, and New Customer Care teams.

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

DG: There’s a lot that I enjoy about my current role here.

If I were to pick a favorite, I would say that I most enjoy interacting with new people every day.

JJ: It’s challenging and interesting every single day.

What do you want our users to know about what you do?

DG: There are no stupid questions.

JJ: It’s a large and diverse group of good people who strive to provide the best possible service to Ortho2 customers.



Dylan Groves

Vacation destination: The Amalfi Coast

Three people I would like to have dinner with: My Father, Joe Rogan, and Ed Snowden

My role model: My father, Stanley W. Groves

I can’t go a day without: The gym

What are you listening to right now? The Miseducation of Lauryn Hill

Favorites

Team: University of Georgia Bulldogs

Software Program: Steam

Movie: *The Matrix*

Book: *The Iceman: Confessions of a Mafia Contract Killer* by Philip Carlo

Phone App: Instagram



Jo Jacobson

Vacation destination: A cabin on a lake

Three people I would like to have dinner with: Mom, Grandma, and Grandpa

My role model: Mike Jacobson. A salt of the earth guy and the kindest person I know.

I can’t go a day without: Planning out the next renovation or garden project – I have endless ideas.

What are you listening to right now? Pandora: Symphonic Radio mix

Favorites

Software Program: Ortho2 Edge Cloud

TV Show: Currently working my way through Ozark season 3

Book: Currently reading a lot of Pete the Cat adventures with my grandson

Phone App: Lately, a lot of online shopping apps

RETRAINING

Have you hired new staff since your original software training? Have you had staff members take 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.

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.

SUPPORT

By Phone: 800.346.4504

Available 7:00 A.M. – 7:00 P.M. Central Time, Monday–Friday

By Email: ortho2support@ortho2.com

Response time is usually the same day or at most within 24 hours.

And Don’t Forget Our Website: www.ortho2.com

Our website gives you 24/7 access to our knowledge base, FAQs, white papers, visual help videos, and more.

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 version 11 and beyond, it is the bottom right Help button in the Daily Activities menu.

So drop us a line when you are in a pinch! We are here to help you in whatever way is most convenient for you.

President’s Perspective *continued from page 1*

Ortho2’s new virtual appointment solution, a couple newsletters ago when it was first released. This latest innovation will streamline the way you interact with your patients, today and into the future. inVisit allows you to virtually conduct appointments with both current and prospective patients. Patients can fill out questionnaires regarding desired or current treatment, and take a series of photos of their teeth. You can review progress of current patients from the inVisit dashboard to determine the next steps for treatment. Information from prospective patients can be viewed to determine if care is needed and establish

follow up steps. inVisit lets you communicate with patients at times that work best for you and them. Once the virtual appointment is completed, set patients’ status according to what you want to do at the next virtual or in-office appointment. With inVisit, you control the number of in-office visits your patients need to make. Start using inVisit today, and get your first month for only \$30. Sign up at www.getinvisit.com.

I hope these new additions help you and your practice thrive in 2021 and beyond. ☺

Amy Schmidt
Amy Schmidt, Ortho2 President

Edge Cloud Tidbits *continued from page 4*

- You can remove the gender symbol at the top of the patient chart by going to User Options > Visuals > uncheck Display Gender Symbol in Patient Folder Header.

New Patients and Fast Find Window

- When taking that new patient phone call, search for the patient in the *Fast Find* window first to verify they are not already in the system. When they are not, simply click Add New in that same window, to pull up the *New Patient* window.

Align Your Practice *continued from page 9*

more profitable. The retainers require very little doctor maintenance, thereby freeing up your schedule to new starts and active patients. Since the patients have extra retainers in reserve, it reduces the number of patients who are seen for retreatment.

Scheduling templates have changed due to COVID-19 regulations. I recommend leaving 5–10 minutes between procedures in any given chair. It is also beneficial to stagger chairs, so you don’t have patients, seated in adjacent chairs, arriving or leaving the clinical chairs at the same time.

Embrace the future of orthodontics. Patients have

multiple treatment options, from seeking a trained specialist to having treatment done by a general dentist. When you throw consumer direct aligners into the mix (SmileDirectClub, Candid, SmileLove, etc.), it is more important than ever for orthodontic practices to step up their game to attract and retain new patients. Once we get the new patient through the door, wow them with exceptional customer service provided by a specialized orthodontist. As well as taking excellent care of the patient, respect the doctor’s personal time. Say good-bye to working nights and weekends, giving orthodontists more time and space to recharge their batteries. ☺

Terrific Thoughts *continued from page 6*

home and she has dinner ready for me when I get home from work. All my family time has become far better. A positive is that our doctor has become more brief and concise with our time-eater patients/parents. Our team came back willingly without complaint, keeping our morale up and numbers healthy. With no more spending on vacations/trips to Disneyland, parents now spend money on smiles! Biggest thing I learned? I see the impact this pandemic has had on others outside of orthodontics. We are so lucky.”

Michelle, Scheduling Coordinator, “I sure am more in tune with the flow, number of appointments, people in the reception now – it’s so important! We find people can cancel more easily and at the last minute because they don’t feel well. We know our patients value the appointments they keep more and the time the doctor spends with them. Best thing I see? I now feel more important and valued here watching the patients and our schedule closely.”

Elizabeth, Financial/Insurance Specialist, “This virus did not make me fear losing my job or being financially hurt. I stayed confident, was able to still do my work solo through it all. Sure scheduling is now harder, we had to hire another person, and the pediatric dentistry part of our practice was impacted, especially by our six-month recall schedule. But, like I bet others have told you today, I am so grateful to be here to take care of it all!”

Gina, Treatment Coordinator, “What a way to get more quality and quantity of time with my family! Now I am so much more appreciative of life and nature and the friendships I have. Sad I can’t be with people more and have

to wear this mask around my patients who want to see my smile. Biggest change I see here? When I’m chairside I’ve always asked my patients how they are doing, but now more often, they ask about me!”

Alex, Clinical Coordinator Specialist/RDA, “Hey, I have a job! I have more family time; my kids are healthy and are back into school now and happy to be there. Our team all wanted to come back as soon as we could and we are so grateful to have our jobs. Our doctor didn’t have to pick and choose who he wanted back. We were already a great team, and that stayed the same. He took all of us back; we are all really good, and we are all here 100%. What sticks out to me? Sure I hate that I can’t go out to places or watch sports events, but the positives far outweigh the negatives that this virus brought on.”

Cat, Health Concierge, is a new employee hired recently to welcome patients, take temperatures, and guide them on today’s process. She brilliantly told me she needs to, “Be kind to patients as they are anxious/worried and want to be told about the enhancements made and cleanliness guaranteed to them at each appointment. Consistency is critical and talking to them about how we are glad they are here is my job. But, I’m really in the customer service business more than anything.” Wow, you all need a Cat on your team.

And remember, flexible people never get bent out of shape. This terrific team has been flexible in just about everything and is coming out on top in just about every area of practice life because of it. ☺

Technology *continued from page 7*

Video gatherings for CE or fun with local dentists help you stay relevant in your community. Finally, get involved with local businesses owned by your patients and ask how you can help them during these times. Coming together as a community is one of the best ways to grow your practice brand and become ‘the practice’ in town.

Think outside the box, use technology to further your brand and connect with your community. We will all get through this together. ☺



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EMPOWERING PRACTICES