



## PRESIDENT'S PERSPECTIVE

The 2023 AAO Annual Session is in the books, and we hope you had as productive and meaningful of a conference as we did. This event requires many months of planning, organizing team members, and logistical problem solving. Even with decades of experience, new challenges arise and Ortho2 is always eager to meet them. But the highlight of the meeting is always interacting with new and familiar faces.



What does a successful AAO meeting mean to us at Ortho2 and how does that affect you? Looking at the metrics from this year's meeting, the Ortho2 AAO team performed hundreds of demos, welcomed dozens of new customers to the Ortho2 family, engaged with many companies and vendors, and had countless, amazing exchanges with orthodontists and orthodontic team members. All of this is accomplished while still maintaining the level of industry-leading support that our customers expect for those who don't attend the meeting.

Although the AAO is primarily a sales-focused meeting for us, some of the most meaningful exchanges come from the conversations with our current customers. With so many users who attend the AAO, it's

the perfect place to gather insights to what you really need from us. Ortho2's on-site team was made up of people who work in Product Support, Product Development, Network Engineering, Sales, and Marketing, as well as members of our Executive team. Each team member is able to receive valuable feedback and apply it to make our customer experience better than ever.

Ultimately, being a sales event, we look at how our team performed and how we can more effectively showcase our company. However, the undeniable truth is even with all the planning, organizing, and marketing, if our customers aren't happy and sharing their experiences, we won't sell systems. In this tight-knit orthodontic industry, word of mouth is the most powerful marketing tool, and for that we are extremely grateful to you. So many people came to our AAO booth because they were referred by a colleague. We can't thank you enough for sharing your experiences with others.

And if you didn't know, we have a Referral Rewards program that can earn you Ortho2 credit for referring a colleague. Check out all of the details at [ortho2.com](http://ortho2.com) > Our Company > Referral Rewards.

With the 2023 AAO Annual Session complete, we look forward to seeing and talking with you in New Orleans next year if not before! ☺

*Amy Schmidt*  
Amy Schmidt, Ortho2 President

## INSIDE THIS ISSUE

President's Perspective	1	The Vital Role of the Clinical Coordinator	7
2023 AAO Wrap Up	2	By K. Ryan Alexander	
Setting Up Edge Reminders Messages and Scheduled Reminders	4	Eleven Reports for Orthodontic Success Part 1	8
		By Dr. Ann Marie Gorczyca	
New! Google Local Services Ads for Orthodontics	6	Inside Ortho2	10-13
By Jeff Slater			

# 2023 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!

Gina Good – Good Orthodontics  
Diane Julius – Feldman Orthodontics  
Jodi Miller – Quintero Orthodontics

## COME VISIT US AT THESE FALL MEETINGS

Orthopreneurs Summit

September 7-9, 2023

Great Lakes Association of Orthodontists/Middle Atlantic Society of Orthodontists

September 22-23, 2023

Canadian Association of Orthodontists

September 28-30, 2023

Mother of Pearls Conference

October 12-14, 2023

# SETTING UP EDGE REMINDERS MESSAGES AND SCHEDULED REMINDERS

One of the best features of Edge Reminders is being able to set up and automate your messages. While these are typically set up during your training, we wanted to remind you of the steps so you can change your reminders at any time. After you set up your Edge Reminders messages, you'll then be able to schedule them to go out in the future.

## Set Up Edge Reminders Messages

Use the Reminders editor to create and edit the Edge Reminders messages you send via email and text message.

To create or update telephone voice messages, fill out the Custom Project form at [support.ortho2.com](http://support.ortho2.com) > Forms/Requests > Requests > Custom Project.

To open the Reminders editor, select Editors from the Tools section of the Home ribbon bar. Then, from the Integrations section, open the Reminders editor.

Choose the Edge Reminders plug in, and confirm the Active setting is enabled. All Edge Reminders set up options are then available to you.

Use the Messages tab to create or edit emails and text messages. To create a new message, click New. Or, use the dropdown list to select an existing message to work with.

After clicking New to create a new message, type a description that makes it easy to determine who it is intended for. Select Appointment Message if you want everyone with an appointment on a specific date to receive the message, or select Responsible Party Message if you want to be able to send the message to a subgroup of patient folders, such as messages regarding birthday

greetings or missed appointments. Click Ok.

**Message Type:** Choose whether this message will be sent via email or text message.

**Message Template:** (Email messages only.) Select from a list of message templates. Unless otherwise specified in the template name, your email reminders will include buttons for confirming or canceling the appointment, as well as links for opening your web site or a map to your office. If you do not want the email to include these interactive options, be sure

to select a template name that says the items are excluded.

**Preview:** (Email messages only.) To preview message templates, click View. You can then review the text and graphics, and click the interactive buttons to view the linked commands. To toggle through template

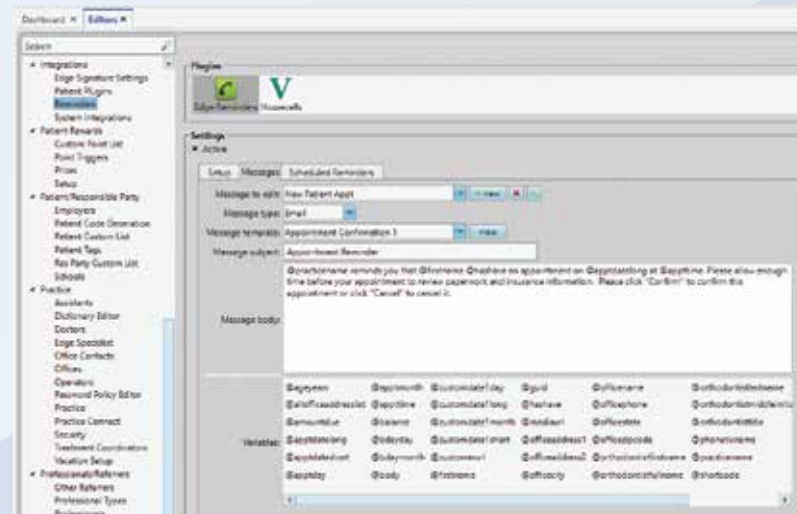
options, you can click Previous/Next, or use the dropdown at the bottom of the window to preview a specific template. When you are happy with the template you have selected, click Update.

**Message Subject and Body:** Type or edit the message in the Message Body box. Email messages also have a Message Subject text box.

To add or remove a variable from the message body, simply drag and drop the variable from the list at the bottom of the window into your message.

Keep text messages as short as possible: Some patients may have cell phones that allow a maximum of 150 characters per message. Save all changes when you are done.

Create as many reminder messages as needed. Once you



are finished, you can now schedule these messages to be sent.

## Scheduling Edge Reminders

Use the Scheduled Reminders tab of your Reminders editor to schedule recurring messages, such as daily appointment reminders, and weekly birthday messages.

In the New Scheduled Reminder field, enter a description for the new reminder. Click Add to then edit your record to complete the details.

In the Edit section, fill in the following fields:

**Name:** Use a descriptive name for your scheduled reminder.

**Inactive/Active Option:** Once you create a record, you cannot delete it. You can, however, flag it Inactive when you no longer need it. Records you flag as Inactive are not available for general use, but they remain in your system for reporting and other data collection needs. In addition, you can toggle records back to Active whenever needed.

**Recurrence:** Select how often you want the reminders to be sent: Daily, Weekly, Monthly, etc.

**Day of Week:** If you select the Daily recurrence, enable each day of the week that you want the reminders to be run (generally weekdays).

**Message:** Choose the message to send when this reminder is run.

**Choose Subgroup:** Select the subgroup to use when selecting who should receive the message. Only records that

fit your selected subgroup will be included.

**Start Date/End Date:** Enter the first date, and optionally the last date that you want the scheduled reminder to be activated. If you want the reminder to recur for an undetermined length of time, leave the end date blank.

**Start Time/End Time:** Enter the starting and ending times for sending the reminder messages. Message delivery will be attempted only during the time of day you set.

**Time Zone:** Select your time zone from the drop down list to be sure the messages are delivered at the appropriate local time.

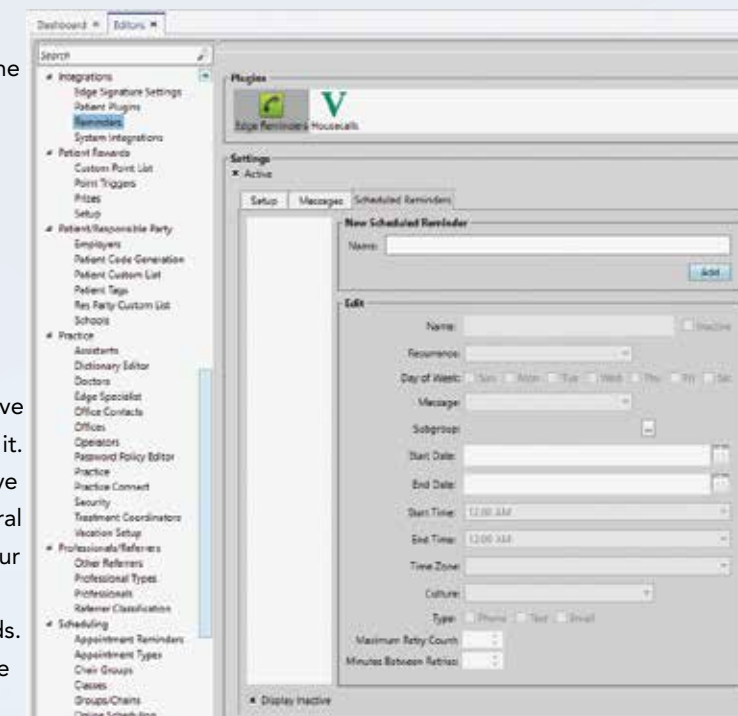
**Culture:** Select the format to use for the date and time, according to the standardized culture settings for your area.

**Type:** Enable each type of delivery method, telephone, email, and/or text, that you want to use for this set of reminders.

**Retries:** Select the maximum number

of retries, and minutes between retries, for telephone messages. These fields, which are operator-specific, are ignored for email and text messages. These fields override the values on the Setup tab of the Reminders editor.

After you are finished making your selections, save your changes. ◊



# NEW! GOOGLE LOCAL SERVICES ADS FOR ORTHODONTICS

A new kind of online Google advertising was just made available to orthodontists. They are called Google Local Services Ads. This type of Google Advertising has been around for many years but was never available to the orthodontic industry. Lately, Google has been adding many new healthcare verticals to the Local Services Ads club, and orthodontists are finally on the list!

## What Are Google Local Services Ads for Orthodontists?

Local Services Ads will show at the very top of Google's search results page. They are even shown above traditional Google Ads (and also above the Maps and organic search results).

Until recently, Local Services Ads were mostly restricted to blue collar businesses such as locksmiths and HVAC companies. Over the years, Google has gradually made Local Services Ads available to more businesses and industries, including attorneys.

Around the start of 2023, Google made Local Service Ads available to Dentists. This turned out to be precursor to Google opening the floodgates to more healthcare verticals, eventually including orthodontists. Welcome to the new frontier of digital advertising for orthodontics!

## A New Way for Orthodontists to Advertise on Google

Maybe you tried Google Ads – previously called Google AdWords – in the past. There are a lot of variables that go into the success or failure of a Google Ads program, including but not limited to:

- Budget
- Setup and Optimization
- Targeting
- Competition
- Landing Page
- Offer/Call to Action

Google Local Services Ads are created and managed in a separate dashboard from traditional Google Ads. They are

not an extension of regular Google Ads. There are some key differences between traditional Google Ads and these newer Local Services Ads.

## Differences Between Google Ads and Google Local Services Ads

The biggest difference is when your campaign gets charged for an interaction. In other words, it is pay-per-click versus pay-per-lead.

Google Local Services Ads are only billed when someone calls you or sends your business a message through the ad. It is a true pay-per-lead advertising program!

Traditional Google Ads, on the other hand, is a pay-per-click program. Whether or not someone converts and actually becomes a lead through Google Ads, you still pay for the click. With Local Services Ads, you are not charged for every click – just the leads who contact your business.

Leads can contact your business one of two ways: phone call or Google Messaging feature.

Local Services Ads have less optimization and scalability than Google Ads. With Local Services Ads, your business will show up for a limited set of keywords and search terms that Google chooses for you. Local Services Ads do not allow the level of customization you get with traditional

**Google Local Services Ads** *continued on page 14*

## About the Author



Jeff Slater is a Digital Marketing Director at Kaleidoscope. He is a local business expert with more than 10 years of experience in online marketing, SEO, website development, reputation management, Google Maps, and digital advertising for orthodontics.

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# THE VITAL ROLE OF A CLINICAL COORDINATOR

Many practices that I visit have a clinical coordinator or a clinical lead as they might call them, but few practices fully understand the vital role they play in a structure necessary to execute the position at the highest level. The clinical coordinator can be far more than a patient flow coordinator or a senior assistant when the job is spelled out clearly and the right amount of authority given to keep the practice on time and the team happy.

The clinical coordinator and your doctor time scheduling system go hand in hand to regulate the daily flow of patients to deliver a high quality of customer service. Your templates must be designed to free up the clinical coordinator to execute her decision-making responsibilities in optimizing office efficiencies. As a practice grows beyond three assistants and 50 patients per day it needs to define the one assistant responsible to making sure the doctor gets into and out of the new patient room with the least amount of wait time for any of the patients, particularly the new patient you are trying to impress.

For practices treating 50+ patients per day and on up to more than 100 with a single doctor, the clinical coordinator is given more and more free time without patients booked in her column, particularly early morning and late afternoon so she has time for decision-making, coaching, and picking up patients who walk in late, or for assistants who fall behind. If a clinical coordinator is also responsible for a full patient column in a higher volume office, she is not able to fulfill the required responsibilities which include the following duties:

1. **Clinical Operations Management:** A clinical coordinator assumes responsibility for managing the day-to-day clinical operations. They serve as a liaison between the orthodontist and other clinical staff, coordinating schedules, optimizing patient flow, and ensuring optimal utilization of resources. If an assistant is sick for the day, they take over that assistant's column and their lightly booked chair is worked by all. They manage the patient flow, help keep the other assistants on time with their appointments, and see patients as time allows to free up time for the other assistants. By

maintaining a smooth workflow the clinical coordinator helps to enhance patient and assistant satisfaction by minimizing wait times.

2. **Team Coordination and Training:** The clinical coordinator acts as a valuable link between the orthodontic team members, fostering effective communication, collaboration, and synergy. During the slower times of day (mid-morning and early afternoon), the clinical coordinator can help train the newer assistant, ensuring that they understand office policies, clinical procedures, and safety protocols. But beyond the clinical area the clinical coordinator is part of a liaison team of coordinators, especially in a larger office, who communicate effectively between each other to keep the entire practice and relationships on track. When things go wrong, and they always do, the trio of harmonious coordinators work together to resolve them. There are few things more important to the well being of a large orthodontic practice than a group of coordinators who function together to give their doctor and team the input necessary for prompt, excellent, decision making.
3. **Patient Care and Support:** The clinical coordinator plays a vital role in ensuring a positive and comfortable experience for patients, addresses patient concerns, and can watch over patient compliance and estimated

**Clinical Coordinator** *continued on page 15*

## About the Author



K. Ryan Alexander is the President of Alexander and Sons Transitions Inc., a company founded by Ken Alexander that has been exclusively teaching management to orthodontists for more than 40 years. He works in all areas of practice management with an unparalleled expertise in scheduling systems and efficiencies.

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# ELEVEN REPORTS FOR ORTHODONTIC PRACTICE SUCCESS

## PART 1

Seamless management systems eliminate stress and build practice success. We all want our orthodontic offices to run efficiently and profitably, all systems go, like a well-oiled machine. In part one of this article, we will cover six of the eleven essential reports for daily, weekly, and monthly attention to help you run a more profitable orthodontic office.

### Missed Exam List

Before you spend another dollar on a new marketing initiative, print out and address your missed exam list. Open Reporting from the Reporting tab of the Home ribbon bar. Select Patients with No Appointment under Patient. In the statuses section of the Report Settings, choose your new patient status(es). No matter how old, call every person on this list, and continue to do this every month until the number of persons on this list is reduced to zero.

If you have not addressed this report in a while, you may be surprised to find that 50% of the people listed here will immediately reschedule. Things come up. People live busy lives, and some are just plain unorganized and forgetful. This does not mean they do not want orthodontic treatment or won't be a good patient. It just means that something came up that day and they could not alter their schedule for that appointment.

If your patient is running seven minutes late into the exam appointment, call them then during the scheduled exam. They may still be able to act quickly with this immediate reminder. They may be driving near your office, lost. They may not be far away at the grocery store. Or, they may be picking up their child at school close by. They may still be able to make the remainder of their exam appointment.

Don't give up on individuals who fail their first, or even second exam. Use this opportunity to improve your own office confirmation and communication systems. Was the date and time confirmed? Did the patient receive your pre-appointment phone call, text message, and welcome materials? Were adequate directions given? Discover what may be failing in your own office management system.

The success rate of rescheduling missed exam appointments within the same month is over 50%. Another 33% of missed exams will reschedule no matter how long ago the exam. Fill your office exam schedule by going after this low hanging fruit of opportunity already in your database.

### Pending List

To get a list of pending patients, use the Patients with No Appointment report, and choose your pending status(es). Maximize your new patient starts by calling your pending list at two days, two weeks, and then every month thereafter until the new patient gives you a yes or no answer to starting treatment. It's very simple. The more patient calls you make, the more patient starts you will have. If you can't get the unscheduled new patient on the phone, send a postcard, or a text message.

Don't be shy about asking your new patient what is preventing them from starting. It is the down payment or monthly payment? Both can be adjusted to suit the new patient. CareCredit is an excellent option eliminating the down payment completely and keeping monthly payments low beyond treatment time when necessary.

Everyone on the team, including the doctor, contributes to treatment coordination and achieving the new patient goal. Share your score with your team on a weekly basis. Create a score bonus system. Nothing builds engagement and team spirit more than a team win in new patient starts.

### Will Call List

"Will call." Right. There is no Santa Claus, there is no Easter Bunny, and the new patient exam, in most cases, will not call back. This is perhaps the most common excuse given by patients who do not make a same day start commitment. Unscheduled new patient exams, after two years, may be placed into a will call status. You must continue to call them to get your yes or no answer.

Run the Patients with No Appointment and choose your WCB status(es) to get a list of patients on your will call list.

Don't assume a patient won't start treatment after two years. I assure you, many do. I recently started a Phase II patient. She was 25 years old! Her parents didn't think Phase II treatment was necessary and now as an adult, she is completing Phase II treatment, paying for treatment herself.

I started an Invisalign case after nine years! The patient was a physician, a busy man, whose son I had treated years ago. I asked him "What took you so long?" He stated, "No one ever called me!" This response is one of the reasons my new treatment coordinator does two days, two week calls, and I do the monthly pending calls now myself. Once the doctor cleans up the pending list, calling pending patients monthly should not take more than one or two hours and can easily be done during the lunch hour.

When do you give up on an unscheduled new patient start? Never. Continue following up until you receive a definitive yes or no answer to start orthodontic treatment. Parents are often the last to start orthodontic treatment waiting to complete the orthodontic treatment of all of their children first. Whatever the reason for the patient not starting immediately, be patient! Never give up on a new patient start.

### Recall No Appointment List

Growth/Observation/Early Phase I or Phase II patients without exam appointments, whatever you call it, young patients waiting to start treatment must always have their next appointment scheduled. You want the results on the Patients with No Appointments and observation status(es) to be zero. You've already worked to make these patients part of your practice, don't lose them by neglect. Pick up the phone and reschedule.

Don't let a year go by without observation of dental eruption, exfoliations, jaw growth and development, or just plain staying in touch and building a relationship with your new patient family. You may even want to create a Growth and Observation Day and make a party out of these follow-up visits. These patients are a no cost guarantee of new patients needing and starting orthodontic treatment in the future.

### Accounts Receivable

"Will that be cash, check, or credit card today?" This is one script your front desk financial coordinator needs to be able to say with confidence and ease. Although your office most likely has an EFT (electronic fund transfer) system for automatic contract payments, some patients may still fall behind due to insufficient funds or a new credit card. From your Accounts Receivable Report (be sure to exclude insurance), make weekly calls and send statements to collect past due payments. What's important is for your patient to know you're waiting for their payment and that you expect them to bring their account up to date before their next appointment.

When sending statements, add the magic pink sticker "Your Payment is Past Due." If the doctor actually signs the statement, your payments will be sent in like magic! Try to get your past due A/R report to \$0. It is possible. Stickers available from SmartPractice.

### Insurance Aging

We gladly research insurance benefits, and present the EOB prior to service, file the insurance claim, accept assignment of benefits, and pursue delinquent accounts. We do everything possible to help the patient maximize their dental insurance. But, let's get realistic. We can't guarantee that insurance will pay for your patients' orthodontic services.

Orthodontic Practice Reports *continued on page 14*

## About the Author



Dr. Ann Marie Gorczyca is a Board-Certified Orthodontist at Gorczyca Orthodontics in Antioch, California, practicing for 33 years. She is the author of several practice management books including *Take Action - Treatment Coordination for a Successful Dental Practice*. Her new book *One Team, One Score - Leadership and Teamwork for a Successful Dental Practice* will be released this year.

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# INSIDE ORTHO2

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

## ORTHO2 ANNIVERSARIES

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

### Thirty-Three Years

Ken Hoffmeier  
Craig Scholz

### Thirty-One Years

Kim Barker

### Twenty-Eight Years

Clarence Bryan

### Twenty-Two Years

Ron Benifiel  
Cathie Morton

### Twenty-One Years

Barb Williams

### Nineteen Years

Micky Augustin

### Seventeen Years

Lindsey Spieker

### Twelve Years

Sean Gildersleeve  
Michelle Haupt  
Jess Huennekens

### Eleven Years

Elizabeth Nordeen

### Nine Years

Michael Lasley  
Gabrielle Schaaf

### Seven Years

Brooke Hawke

### Six Years

Joe Skluzacek

### Five Years

Izzy Austin  
Sam Rubenstein

### Three Years

Larry St. John

### Two Years

Nicole Cook

### One Year

John Diercks  
Amanda Moore

## CAREER MILESTONES AND DEVELOPMENT

The Software Support Team added two new members. Please help us welcome Montana Horras and Monica Duarte!

**Montana Horras** started her role as a Software Support Representative on March 13. Montana graduated from Iowa State University with a Bachelor of Science in Animal Ecology, most recently working for ISU as a Large Animal Caretaker.

**Monica Duarte** started on March 27 as a Software Support Representative. Monica has more than six years of customer service experience, most recently with Centene Corporation where she was a Customer Service Representative II.

In addition to his Advanced Support role, **Derek Dohrman** has added Lead Trainer to his title. As the Lead Trainer, he will track our training success rate and follow up with customers and trainers as necessary. Internally, he will provide ongoing training for training staff and assist with the onboarding process for new trainers.

The Network Engineering Team also added two new members to their team:

**Jordan Neumayer** joined the Ortho2 Team as a Network Engineer on March 27. He previously worked for TEKsystems as an IT Contract Technician where he held positions as a Help Desk Support Technician and IS Project Technician.

**Aaron Sader** recently received his Bachelor of Science in Economics from Oregon State University before becoming a Network Engineer on May 15. While attending school he worked as an IT Support Specialist for the U.S. Census Bureau and most recently he worked for Whole Foods Market as a Customer Support Supervisor. Welcome Jordan and Aaron to Ortho2!

**Lindsey Spieker**, New Customer Care Supervisor, accepted the role of Implementation Supervisor on April 17. With the growth of our OSO interaction, she will continue to increase her involvement and will now be the primary point of contact for all post-sale operational OSO activities

Also on April 17, **Drew Humphrey**, Sales and Marketing Manager, accepted the role of Sales and Enterprise Manager. Drew will continue to manage the Sales Team, as well as being the point person for all enterprise business activities.

## ON A PERSONAL NOTE

Congratulations to **Brooke Hawke**, Multimedia Marketing Coordinator, and her husband Tyler on the birth of Rowen Kate! Rowan was born February 24 weighing 8 pounds, 11 ounces, and measuring 20.08 inches long. She is joined at home by big brother Theo. Welcome to the world, Rowen!

**Drew Humphrey**, Sales and Enterprise Manager, and his wife Kaylee welcomed Ramona Jo on March 31. She weighed 8 pounds, 10 ounces, and was 21.5 inches long. Ramona is joined at home by big sisters Juniper and Florence. Congratulations Humphrey family!



Rowen Kate



Ramona Jo

## 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.



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## MEET THE TEAM - ACCOUNTING

The Ortho2 Accounting Team completes many tasks including shipping, activating, and invoicing customer orders, as well as inventory, payroll, and assisting our customers. The Accounting Team is comprised of Danetta Hiatt, Accounting Specialist; Coreen Magnuson, Accounting Manager; Denise Sargent, Accounting Administrative Specialist; and Barbara Williams, Accounting Specialist.

### What do you really do here at Ortho2?

**DH:** Multiple accounting functions in A/P, A/R, and inventory.

**CM:** I manage the accounting department which is tasked with things like financial reporting, monthly billing (support, subscription, Edge Reminders), and order processing,

**DS:** I am in the office every day so I do the daily deposit, as well as return accounting phone calls and emails. I send out, process, and follow up on customer forms. I activate/deactivate software (licenses and modules) which includes creating new CD Keys for ViewPoint. I also help with trainers/installers travel. I manage our UPS account and help follow up with delivery problems.

**BW:** My job includes a wide variety of accounts receivable functions including billing, processing payments, reviewing accounts receivable balances and talking to customers on the phone. Another big part of my job is to process payroll for Ortho2.

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

**DH:** I love the wide variety of my responsibilities. I've been here 21 plus years and I can honestly say that Ortho2 is a great place to work for many reasons.

**CM:** The thing I enjoy most about my job are the people I've met and the flexible, family-friendly environment Ortho2 has provided over the years (now with the ability to work from home).

**DS:** I really do enjoy talking with our customers. Some are old friends now.

**BW:** We have a very good team atmosphere. Ortho2 is a

great company and I feel very lucky to work here.

### What do you want our users to know about the Accounting Team?

**CM:** We are a team of four who have been with Ortho2 ranging from 21 years to just over 25 years. You can feel confident that you are working with a team with a lot of experience and knowledge when it comes to Ortho2.

**DS:** I really do care about our customers and it just ruins my day when I talk to someone that isn't happy with us.

**BW:** Everyone on our team has over 20 years with Ortho2. Our combined experience and education provide a good foundation for our variety of accounting tasks that we tackle each day.



**Danetta Hiatt**

**Vacation destination:** Caribbean – specifically spending time by the beautiful blue waters.

**Three people I would like to have dinner with:** My mom. I Miss her.

**I can't go a day without:** Coffee

**What are you listening to right now?** People talking to customers as I am at

the office.

### Favorites

**Hobby:** Reading

**Restaurant:** El Azteca

**Flower:** Carnation

**Book:** Too many to name

**Game:** Anything I play with my grandsons



**Coreen Magnuson**

**Vacation destination:** A beach house with a deck that overlooks the ocean and a pool, spending time with loved ones relaxing, enjoying good food and drink all while not having to work.

**Three people I would like to have dinner with:** I would have to say my family. My husband, Scott, and our

children McKenna and Zach are the three most important people in my life. Any day we could all be together for dinner is a great day!

**My role model:** I don't have a specific role model, but I do my best to be the kind of person that I would want others around me to be.

**I can't go a day without:** Iced tea (no sugar, no lemon)

**What are you listening to right now?** Right now I am listening to the birds and wind chimes outside my home office window.

### Favorites

**Team:** Iowa State Cyclones and Miami Dolphins

**Software Program:** Adobe Lightroom Classic

**Movie:** *Gone with the Wind*, *Shawshank Redemption*, *The Notebook*

**Book:** I read way too many books to choose a favorite.

**Phone App:** Will you judge me if I say TikTok? LOL



**Barbara Williams**

**Vacation destination:** I would like to go on an Alaskan cruise. I have always heard that is a fantastic experience so it is on my list of places to see.

**Three people I would like to have dinner with:** My parents and one of my sisters have passed away. I would love to see them again and have dinner with them.

**My role model:** My parents were very good role models.

**I can't go a day without:** Caffeine – I am powered by caffeine!

**What are you listening to right now?** There is very lively music being played by someone in the neighborhood.

### Favorites

**Software Program:** Workforce Go Payroll

**Movie:** *The Sound of Music*

**Phone App:** Fitbit & Google Calendar

**Flower:** Daylilies

**Pastime:** Spending time with family



**Denise Sargent**

**Vacation destination:** Back to Alaska to see more of the land and go fishing AND some day I would love to take my grandkids to Disney.

**Three people I would like to have dinner with:** My mom and dad and Matthew McConaughey – not at the same time though!

**My role model:** An aunt and a cousin – they both just laugh and are fun to be with.

**I can't go a day without:** My day is always better when I talk with my twin sister.

**Anything else you'd like to add:** I'm a grandma to four beautiful grandbabies. Ava (8), Bennett (3), Levi (1) and Charlotte (9 months). I'm also active in our local Ames Legion Riders group as the Secretary and the passenger on our Harley Tri-Glide.

### Favorites

**Team:** Iowa State Cyclones, but I'm really not a fan of sports

**TV Shows:** *Blue Bloods*, *The Last Frontier* on Discovery (*The Kilchers*), *The Amazing Race*

**Movie:** *Footloose & Peanut Butter Falcon*

**Phone App:** SnapChat and Facebook – I love seeing everyone's pictures!

### Orthodontic Practice Reports *continued from page 9*

Even when pre-authorized, your patients' insurance may be discontinued mid-treatment, or the yearly allowance used up on other dental services or changed by the insurance company.

You can find any outstanding insurance balances by using the Insurance AR Aging By Company and Open Insurance reports.

Be clear to explain insurance concepts verbally and as part of the written contract. Have your patient sign the contract to codify that they realize that any unpaid insurance portion is their financial responsibility.

At Gorczyca Orthodontics, we have a patient debond letter that indicates the remaining insurance balance still outstanding for orthodontic treatment, and states that, if left unpaid, the balance is the patient's personal responsibility. The patient (when over 18) or responsible party signs this final agreement before debond, acknowledging that they commit to the remaining balance whether personal or insurance, prior to removal of braces and finishing

orthodontic treatment. The patient may choose to pay the final balance at debond or continue on with their date to date contract.

When insurance has paid in full, and monies are still due, a personal phone call to the responsible party to explain that insurance payment will be less than anticipated is always the best customer service. If a final statement needs to be mailed, another magic pink sticker is available reading "Your insurance company has paid its share of your bill. This statement is for the amount payable directly by you."

Be disciplined to bill the insurance the same day that orthodontic treatment starts. If you stick consistently with this system, bill insurance daily, and review outstanding insurance balances weekly at your team meeting, your insurance billing and payments will always be maximized and up to date.

Next quarter we'll review the remaining reports to run to set your practice up for success. ☺

### Google Local Services Ads *continued from page 6*

Google Ads. Google also doesn't share the keyword data for what search terms are causing your Local Services Ads to show.

#### What to Expect When Setting Up Local Services Ads

The setup requires multiple steps. Because Google is going to put a green check mark on the ads that says "Google Screened" or "License verified by Google" there is a somewhat rigorous vetting process before Google will allow a business to run Local Services Ads. Here's a list of the setup requirements:

- National Provider Identifier (NPI)
- Proof of Insurance

- Background Check (conducted by Evident)
- Customer Reviews
- Budget
- Billing Information
- Individual Orthodontist/Provider Verification
- Hours of Operation

#### How Much Does it Cost?

The budget can be adjusted using a slider bar on the back end of the account. Based on early testing with a new Local Services Ads account in Illinois, the minimum monthly budget is \$273. The maximum was \$1,186.

While those seem like curiously random numbers, they are

**Google Local Services Ads** *continued on next page*

### Clinical Coordinator *continued from page 7*

treatment times. By offering personalized support and compassionate care, the clinical coordinator helps build trust and confidence in patients, contributing to their overall satisfaction and loyalty to the practice. Such is the same support she should be giving to her own team of assistants as she earns their trust and they know that she has their back when it comes to communications with each other and the doctor.

4. **Supply and Inventory Management:** Efficient management of supplies and inventory is critical to the smooth functioning of an orthodontic office. The clinical coordinator plays a key role in overseeing the inventory of clinical materials, instruments, equipment, and sterilization testing. They may monitor stock levels, order necessary supplies, and coordinate with vendors to ensure a steady supply chain, or delegate these things to another team member. When these important areas are efficiently managed, the clinical coordinator helps prevent disruptions in clinical operations, avoids unnecessary downtime, and minimizes wastage, ultimately optimizing costs and maintaining a well-equipped practice.

5. **Quality Assurance and Compliance:** Maintaining

### Google Local Services Ads *continued from previous page*

likely based on Google's proprietary data from thousands of campaigns in orthodontics. Your minimum and maximum budgets could vary based on several factors including your location and the amount of competition in your local area.

#### What are the Keywords? Can I Control Them?

When you are setting up your account, Google will give you a preset list of orthodontic services. You simply check the box next to the services for which you want to run Local Services Ads.

Here is an alphabetical list of the available orthodontic services as of May 24, 2023: Archwires, braces, brackets,

high standards of quality assurance and regulatory compliance is paramount. The clinical coordinator assists in implementing and adhering to established protocols, infection control measures, and safety guidelines. By emphasizing quality and compliance, the clinical coordinator helps create a safe and secure environment for both patients and staff, enhancing the overall reputation and credibility of the orthodontic practice.

The role of a clinical coordinator in the orthodontic practice is as indispensable as the TC, office or financial coordinator. They bring to the job their clinical expertise, organizational skills and interpersonal skills to streamline operations, support the orthodontic team, and provide exceptional patient care. From managing clinical operations to coordinating the clinical team they ensure on-time scheduling and overall patient satisfaction. The clinical coordinator plays a pivotal role in optimizing office efficiency and fostering a positive working environment. Their dedication and commitment contribute significantly to the success of an orthodontic practice. This is a position that must be well optimized, especially in the larger more successful practice, or those aspiring to become one. ☺

clear aligners, crooked teeth treatment, crossbite treatment, grinding teeth treatment, mouthguards, orthodontic accelerators, other, overbite treatment, overcrowding treatment, retainers, smile improvement, TMJ treatment, and underbite treatment.

#### Advantages of Being an Early Adopter

You might be able to benefit from being the first in your area to set up Local Services Ads. This could help you dominate the early opportunities from this lead source. If you are the first practice to set up and test Local Services Ads, you'll have the prospective patients to yourself. In today's cutthroat marketplace, we need any edge we can get! ☺





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