The Newsletter for Members and Friends of Ortho2
October 2023 - Volume 41 Issue 4

ORTHO2
EMPOWERING PRACTICES

PRESIDENT'S PERSPECTIVE

This past August, Ortho2 executives, managers, orthodontic doctor advisors, and invited guests gathered for the annual Board of Managers meeting. This meeting both summarizes business operations over the prior year and helps refine the future focus of Ortho2. 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.

Onboarding – Onboarding new practices and OSO locations to Ortho2 remains a top priority. Throughout the past two years we have expanded both our Implementation and Internal Services Teams by 30%. Significant work has, and will, continue to go into automating different aspects of data and image conversions to improve efficiency and cut down on the time involved with these processes. And our Implementation Team also underwent a name change. Formerly called New Customer Care, our newly renamed Implementation Team better encompasses the onboarding needs of both new and existing practices. Looking ahead, we are working on streamlining systems for better cross-team communication and efficiency – both for internal Ortho2 teams and between Ortho2 and your practice's teams.

Ortho2 Development Road Map – The Ortho2 Development Team has been working on some really exciting new development that is nearing completion:

- The release of Edge Cloud 7.2. This release will include gender identity support and the long awaited Edge Proposal, which we know will be worth the wait.
- A new API platform, allowing for expanded current and easier new integrations moving forward.
- Canadian 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 to hear more on patient self-scheduling, treatment road map, improved doctor tracking, and more.

Speed and Security – Edge Cloud speed and security is always a top area of focus and this year was no exception. We continue to place great emphasis on enhancing Edge Cloud speed, leveraging newer

President's Perspective *continued on page 15*

INSIDE THIS ISSUE

LIVE FROM IOWA

VIRTUAL USERS GROUP MEETING

Join us for the 2024 Users Group Meeting!

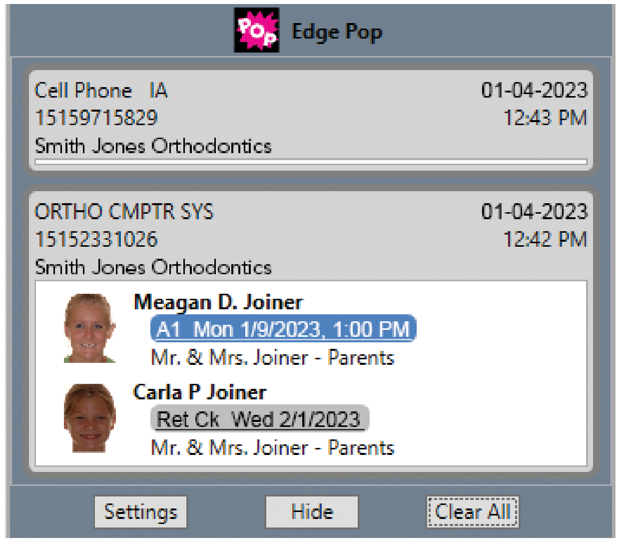
The 2024 Users Group Meeting is going virtual, and you are invited to join us on Friday, February 23, for a day of unparalleled insights and learning opportunities.

Our team of seasoned trainers will be at your service, ready to delve deep into the world of Edge Cloud. Whether you're an expert or a newcomer, our comprehensive classes will cater to all skill levels. And you won't want to miss the class about what's new and upcoming in Edge Cloud.

Stay tuned to your email and bookmark ugm.ortho2.com for more details as they become available. Save the date, share the news, and prepare for a day filled with professional growth and networking opportunities. See you on February 23!

Edge Pop

Edge Pop displays a pop-up when receiving phone calls from associated patients and responsible parties.



In order for Edge Pop to work, your phone system needs a VoIP phone system that supports SIP capability. With some phone systems, it may be necessary to create new SIP users in your phone system for use with Edge Pop. This may require additional licenses from your phone provider. In addition, the account you wish to use needs to be in the ring group for the phone number used for Edge Pop.

Once logged in to Edge Cloud, click the Services drop down menu from the Tasks tab of the Home Ribbon Bar and select Pop. The Edge Pop icon will now appear in your system tray or notification area. Right click the icon to bring up the Settings window. Call your phone company or IT provider to fill in the required settings.

You have the ability to select if you want Edge Pop to open with Edge Cloud on this screen. These settings are machine specific.

Using Edge Pop

Associated Patients

When a patient or responsible party calls in, and the number they are calling from is in the contact information section of either the patient or responsible party folder, a notification will pop up to alert you who is calling.

The pop-up notification shows the patient name, image, and the next scheduled appointment. Hover over the appointment to see the assigned orthodontist and office, if applicable. If the responsible party is calling from the phone number they are associated with, the responsible party's name appears in the pop.

Double click the notification to open the patient's folder. Optionally, you can right click the notification to open the patient's folder to either the financial or the insurance tab. You can also click the appointment link in the notification to go to the Scheduler on the day of the appointment.

Unassociated Patients

If a call comes in and the number is not associated with a particular patient or responsible party, right click the notification to either create a new patient or responsible party or associate the number with an existing patient or responsible party. ⚬

COME VISIT US AT THESE FALL MEETINGS

Midwestern Society of Orthodontists/Rocky Mountain Society of Orthodontists	October 12-14, 2023
Northeastern Society of Orthodontists	October 20-21, 2023
Southern Association of Orthodontists/ Southwestern Society of Orthodontists	October 26-28, 2023
Western Orthodontic Conference	November 3-5, 2023

TOP FOUR WORKFLOWS USES

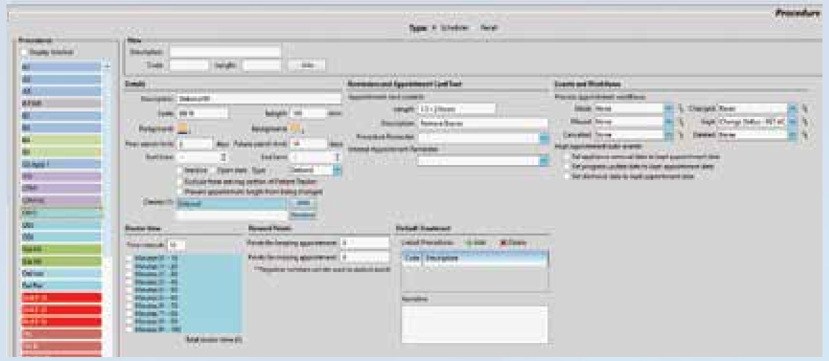
Workflows are a way to automate your system in Edge Cloud. You can change a patient's status, merge letters, add patients to stacks, and even open the patient's treatment chart when you seat a patient. Most workflows are procedure-based, meaning something is happening to the patient's appointment. You can also create workflows based on status changes and other triggers – the possibilities are almost endless.

Status Changes

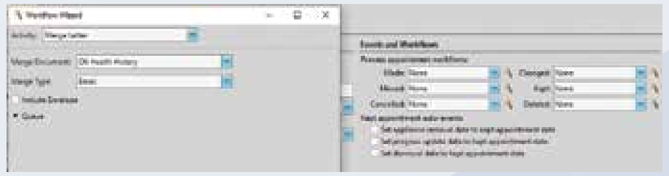
The most common workflows offices use are status changes. You can change the status to retention on a kept debond appointment, or even display a prompt to the front desk to choose a status when they process your new patient exam as kept. Status workflows are often used to clean up statuses. For example, when a records appointment is made, you know that the patient should be in the records status, and that change happens automatically in the background.

To create a status change workflow, go into the Editors, and find Procedures under Scheduling in the list on the left. Once logged in, find your debond appointment and click on the wizard icon to the right of Kept under the Events and Workflows heading. Click on the Activity drop down and choose Change Status. In the New Status drop down, choose your retention status and click OK. In the drop down list for Kept, and all other types, you will now see Change Status – Retention.

If you want Edge to prompt you to choose a status to change the patient into, follow these same steps, but in the New Status drop down, choose none. When you click OK, you will now have a workflow called Change Status – Prompt.



Merging Letters



Merging a letter is the next most common workflow, and is set up in a similar way as changing a patient's status. In the Editors, select Procedures from the list on the left under Scheduling. Once logged in, choose the procedure you want to work with. Select the wizard icon next to the appointment status you want to work with. In the Activity drop down, choose Merge Letter. This will then give you additional options to pick the letter, select your merge type, include an envelope, and if you want to send it to the queue. Once you click OK, when you click on the drop down next to status you are working with, you will see your new workflow called Merge Letter – Letter Name. Select it, and you are done.

Bonus: You can also combine workflows, for example, to change a patient's status and merge a letter. Because this workflow is going to do more than one thing at a time, we need to go to a different screen to create it. In the Editors click on Workflows under the Workflows heading. On this screen, we can manually create workflows without the wizard, or use the wizard to add to an existing workflow.

To begin, click on New. In the top of the screen, change New Workflow 1 to the name of your new workflow. When you're doing multiple activities, give the workflow a name based on how it's used. In this example, call it Exam Kept. The easiest way to create this workflow is to click on the wizard icon that has the green plus sign next to it. Choose the Change Status activity and select the appropriate status. When you're done, simply click on the same wizard icon with the green plus sign and set up the letter. Your workflow now has two activities. Once you click save in the top left corner, this workflow will be available to use in the Procedures Editor.

Stacks

If you use stacks in Edge Cloud, you can automate the process of sending a patient to a stack using workflows. Let's say that every time you process a records appointment, you want to send the patient to a stack for insurance verification. As long as the stack name already exists, this is easy to set up. Choose your procedure in the Procedures editor and click on the wizard icon next to the status you want to work with. In the Activity drop down, choose New Stack Entry. You will then see a list of all of the current stacks in your list. Choose the stack you want to add these patients to and click OK. It's that easy. You now have a workflow called New Stack Entry – Stack Name to use.

Opening a Treatment Chart when Seating a Patient

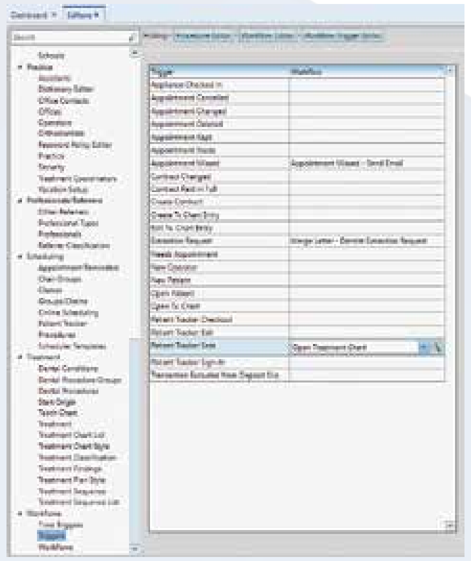
Opening a patient's treatment chart when you seat the patient is another common workflow. You will need to use the computer by the chair the patient is seated in for this workflow to function properly. To set this workflow up, you will again need to use the Workflows Editor.

In the Workflows Editor, click on New at the top and give your workflow a name. In this example, I am going to call it Open Treatment Chart. In the middle of the screen, you'll see the list of activities. Simply click and drag the Open Patient activity over to the empty Workflow Activities box to the right of it. If you drag the wrong item over, simply press delete on the keyboard to remove it.

Once Open Patient is in the middle of the screen, click on it so it displays the Activities Properties. On the right side of the screen, you will now see an option that says TabToOpen. Click on the drop down to the right of it and choose Tx. Hub. Save it and the workflow is created.

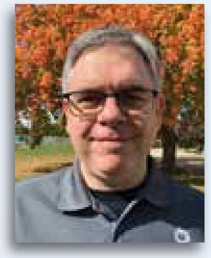
Next, we need to set up the workflow, so it fires every time we seat a patient. To do this, we need to go to the Triggers Editor. This is at the bottom of the Editors list to the left. In here, you will see a list of Triggers that you can run a Workflow with. The Triggers are used to fire a Workflow every time a certain event happens, such as every time you seat a patient, each time you process ANY appointment as Missed, or any time a contract is changed.

Click on the empty box to the right of Patient Tracker Seat. Click again on the drop down that just showed up and select Open Treatment Chart. If this option isn't available, make sure you save your workflow in the previous step. Click save. It's just that easy and it's all set up.



These are just a few examples of what you can do with the powerful workflows function. If you would like to learn more about workflows or see a video on how to set them up, watch our Visual Help video found at support.ortho2.com.

About the Author



Steve Mahan is a Software Support Advanced Tech and Trainer with Ortho2. He and his wife enjoy traveling when then can, and in his spare time, he enjoys reading, watching classic movies, and checking out various kinds of art.

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DECODING THE IMPACT OF INSURANCE BENEFITS ON ORTHODONTIC PRACTICE REVENUE

Optimizing patient benefits management and maximizing practice profitability requires careful attention to key factors. Any single issue, and frequently a combination of multiple factors, can lead to revenue loss and customer service issues. These factors include team development, streamlined processes, and a well-informed and strategic approach to insurance contracting.

Team Development

Insurance coordinators generally have a restricted understanding of patient benefit and receivable management. In addition, it is common for established practices to maintain methods and processes that have been in place for over 20 years. To optimize profitability and effectively manage patient benefits, it is crucial for the entire practice team to be well-informed and updated on the ever-changing various aspects of insurance billing and reimbursement.

Offices continue to utilize verification processes that involve obtaining three to four pieces of information about the patient's benefits. However, in today's context, it is often necessary to possess knowledge of well over 10 or more pieces of information regarding a patient's plan. I can affirm that a substantial number of insurance issues in an office can be attributed to a failure to inquire and adequately prepare by having complete benefit information before presenting treatment and pre-crediting insurance amounts on contracts.

A key foundation for success in this area is providing comprehensive education and training to all team members. This includes equipping them with the necessary skills in coding and documentation guidelines, ensuring a thorough understanding of insurance policies and procedures, and keeping them informed of the ever-evolving changes in the healthcare industry. By investing in continuous education and offering resources for professional development, a practice can empower its team to navigate the complexities of insurance systems with greater efficiency and effectiveness.

Processes

Establishing streamlined and efficient processes within a practice is crucial for managing patient benefits and optimizing profitability. This involves developing standardized workflows for patient registration, eligibility and verification, accurate calculation of benefits based on the provisions and restrictions within the plan, precise coding on claims, monitoring the timely receipt of insurance benefit payments, carefully reviewing the details of each explanation of benefits (EOB) advice received, and promptly responding to and addressing unpaid benefit situations. In addition, leveraging technology solutions such as carrier online portals and practice management software functions to automate tasks and streamline communication with insurance providers is invaluable.

Many team members depend solely on insurance aging reports to track and monitor benefit payments. Unfortunately, these reports often prove to be inaccurate. To ensure the utmost accuracy and reliability, it is crucial to consistently review and update the aging of insurance accounts. As payments are received, the date(s) for upcoming payments needs to be placed into ledgers accordingly. If your report indicates carriers have paid ahead (you will see a negative number in the aging column), it's not being aged properly as insurance never pays ahead for benefits. The frequency of benefits could also be a factor

Insurance Benefits *continued on page 13*

About the Author

With 40 years of experience working and consulting in the field of orthodontics, Tina Byrne has gained success and recognition for her well-founded proficiencies in clinical, business, and administrative functions. She has extensive knowledge and understanding of systems innovation and efficiency, data analysis, strategic business planning, and marketing implementation.

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THREE WAYS TO GUARANTEE A SUCCESSFUL ORTHODONTIC PRACTICE

Orthodontics is experiencing numerous changes that will gradually reshape how practices become and remain successful. These changes include higher competition, the growth of DSOs, and the advent of new service delivery models. Therefore, it is important for every orthodontist, regardless of what point in their career they are in, to understand three essential elements of reaching and maintaining a highly successful practice.

It is a universal truth that all businesses have competition, and competition will always expand. Orthodontics is no different. For many years, the ratio of patients to orthodontists was very positive in favor of the orthodontist. All orthodontic practices were able to succeed to a reasonable level. Today is different. Orthodontic practices are experiencing competition from other orthodontic practices, from GP practices, and from general dental DSOs that offer orthodontics at a much lower fee. The following three recommendations will help any orthodontic practice to achieve success and maintain that success indefinitely.

1. Referral Marketing

Referral marketing may be the number one success factor for orthodontic practices. If a practice has enough referrals, it will always be fine. This can be greatly enhanced if the treatment coordinator consult process is also excellent and performing well. Referral marketing focuses on five key areas. These Five Focus Areas include patients, parents, referring doctors, social media, and the community.

There are two ways to approach this. The first is to design a referral marketing program that is evenly focused on all five areas. The other is to recognize, through data, that certain areas have a greater impact for specific practices and to funnel more resources into those areas. For example, we recently saw an orthodontic practice that was successful, but no longer growing. Their patient referral marketing was excellent, and the practice was known to provide a fun, enjoyable experience. However, they had not focused at all on referring doctors, and when they designed strategies to enhance those relationships referrals increased in that area as well. It is a continuing balance and re-balance of where to focus and which strategies to implement, but understanding referral marketing will allow any orthodontic practice to reach the highest levels of success.

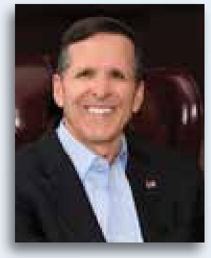
The best approach is to build a referral marketing plan for each of the five focus areas. As an example, we recommend having a minimum of eight strategies focused on patients, four strategies focused on parents, 10–12 strategies focused on referring doctors, and five strategies focused on the community. Strategies are the building blocks of referral marketing. Examples would include fantastic and relevant contests and lotteries for kids in the practice; rewarding parents who refer with manicures, pedicures, sports tickets, etc.; building powerful relationships with referring practices through personal contact; holding events; and even providing information and education to allow them to improve their practices. Social media is its own marketing niche and changes constantly, but the quantity of social media presence and appearance of fun are critical. And finally, community marketing, such as being involved in the schools, sports teams, and community entities will contribute to driving the orthodontic practice brand in the community.

2. Orthodontic Practice Systems

Systems are the foundation of successful orthodontic practices. Although it is true that enough referrals can overcome inefficiency, bad systems reduce productivity

Successful Practices *continued on page 15*

About the Author



Roger P. Levin, DDS is the CEO and Founder of Levin Group, a leading practice management consulting firm that has worked with numerous practices to increase production. A recognized expert on dental practice management and marketing, he has written many books and articles and regularly presents seminars around the world.

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ELEVEN REPORTS FOR ORTHODONTIC PRACTICE SUCCESS PART 2

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 two of this article, we will cover the final five of the eleven essential reports for daily, weekly, and monthly attention to help you run a more profitable orthodontic office. If you missed part one, check out the July 2023 Ortho2 newsletter found at www.ortho2.com.

Accounts Payable

It behooves the doctor/owner and the financial management team to always have a current report of accounts payable. The doctor must create this report themselves. Update it after opening the mail daily or have a bookkeeper prepare it. Present this report at your weekly team meeting. Once you share your expenses with the team, there will be more understanding of expenses and excessive ordering will most likely go down. We call this "Open Book Management".

Share your monthly fixed cost with the team. Mine are approximately $10,000 a month just to keep the rent, electricity, phone, storage, practice insurance, accountant, computer systems, website, stamp machine, and janitorial service running. Know your fixed costs and always be prepared for them. Schedule automatic payment for these services however possible.

Variable costs change month to month. Communicate with your team your desired size of orders and place spending caps to avoid big surprises. Reps often place pressure on inventory coordinators to place big orders. Ideal inventory management means a minimum of two weeks and a maximum of one month shelf time. A one year supply which sits on the shelf has opportunity costs.

Beware of never-ending upgrades and other practice money sinks. Get out of the habit of spending and into the habit of saving. Ask yourself "What could I eliminate which is not adding value to my practice?" Be disciplined. Take action with your team to scale starts, revenue, and profits while also using the fewest resources.

Once you have a true understanding of your office costs of goods and services, there will be a greater drive by all to charge for all services rendered with an understanding that nothing is free. With cash flow under control and an aligned team, your life will become more stress free.

Active Patients Over Treatment Time and Active Patients Without Appointments

Once you print the list of over treatment time patients, you will realize that many of these patients frequently miss their appointment. You can find a list of patients who are over treatment time by running the Exceeds Length of Treatment report. Open Reporting form the Reporting tab of the Home ribbon bar. Select Exceeds Length of Treatment under Patient. In the statues section of the Report Settings, chose your new patient status(es). Optionally, chose all statuses to give you the total number of patients and the percentage of active patients over treatment time in your practice. Attention can then be given to finishing over treatment time cases with excellence as soon a possible.

We call these missing in action (MIA) patients. To minimize the cost of missed appointments, assign weekly review of active patients without appointments. Your office time, frustration, and opportunity costs, make attention to calling these patients and finishing on time a priority.

To find active patients without appointments, you can run either the Needs Appointment report, the Patients with no Appointment report, or both. The Needs Appointment report shows patients who are in a status marked appointment required, but don't have a scheduled appointment. The Patients with no Appointment report shows everyone in a certain status who doesn't have an appointment.

Because my office is located next to a high school and a Burger King and many of my patients walk to their orthodontic appointment without their parents, I found it necessary to implement a minimal $35 missed appointment charge for missed appointments without 24 hours notice. Since initiating this action, and using a text messaging reminder system, my missed appointments are now at a minimum.

Lead Measures: The six reports listed in part one of this article, and the two above are lead measures – those for which actions can be taken to improve and maximize office success for the month. The visual display of these scores can be monitored and reported at your weekly team meeting and actions for improvement can be taken now, with each being assigned to one team member for maximum efficiency and profitability.

Lag Measures: These last three reports represent lag measures, monthly measures your team can look at and ask "How did we do?" and "In what direction are we heading?"

Production

Once the month is complete, we can look at last month's production. Use the Transaction Summary to get all of the information you are looking for. At that point it's game over. Did we hit our goal? How many starts did we begin? What is the financial impact of this score to the growth of our practice? If you reached your goal, it' s time for a celebration! If not, you've got work to do and actions to take.

Collections

Collections are the fuel of raises, bonuses, and retirement benefits, and fun things you can do together. Take time to talk about collections! This is perhaps the most important team score. Again, use the Transaction Summary to review your monthly collections. When reviewed, collections enable you to scale your office management system and schedule for maximum efficiency and profitability. This is common sense business management.

New Patients Starts by Referrer

We want our patients to receive excellent orthodontic care, outstanding customer service, and a great patient experience. Design your seamless office systems with the patient experience in mind. Our ultimate reward is for every patient to refer one or two more new patients to our office. Analyze your Referral and Referral Analysis reports to assess how each of your marketing systems in three areas are performing: patients, dentists, and community.

Patients: Fifty percent of your new patients can come from past and present patients. To make the referral process easy, give your patients something tangible, like an office "Share a Smile" card to give to family, co-workers, or friends. Distribute personalized items with the name of your office to patients whenever possible.

Dentists: Dentists will most likely be your second highest source of referrals. Know who your top referrers are and give them your highest attention. Remember the Pareto Principal: 80% of your business most likely comes from 20% of your referral sources. Know who is in that top 20% and place your focus there first.

Sending your referring dentists the initial diagnosis and treatment letter as well as copies of the initial and final records for each patient produces excellent communication with referring dentists. Take time to also reach out to new dentists to your community and get to know them. Keep a list of your referring dentists on your desk for easy reference. Regularly drop off referral pads with a small gift. Food is always an excellent love language. Pick up the phone to thank referring dentists for their referrals. Engage, connect, and build relationships in your dental community.

External Community Marketing: External marketing

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* that was released this summer.

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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 third quarter of 2023.

Thirty-Six Years
Sara Harbacheck

Eighteen Years
Michelle Kinnaman

Fifteen Years
Cal Rebhuhn

Fourteen Years
Judy Denny

Twelve Years
Brent Jacobsen
Steve Mahan

Ten Years
Wesley DeShaw

Nine Years
Nathan Hemmings
Jorge Rios

Five Years
Darcy Dakovich

Three Years
Jeff Brockway
Marley McDonald

One Year
Samantha Armstrong
Jasmine Snell

CAREER MILESTONES AND DEVELOPMENT

Welcome to **Christina Colon**! Christina started her role as an Implementation Expert on June 26. Christina has more than ten years of dental healthcare experience and most recently worked with an orthodontic office in Ohio. Welcome aboard, Christina!

Congratulations to **Wesley DeShaw** who accepted the Marketing Manager position on July 10. Wesley has been with a Regional Manager Ortho2 for 10 years working with the Southeastern United States.

Christopher Clevenger, Network Engineer, completed his CompTIA A+ certification in June. Congratulations, Christopher!

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: support.ortho2.com
Our website gives you 24/7 access to our knowledge base, FAQs, white papers, visual help videos, and more.

MEET THE TEAM – HUMAN RESOURCES AND REGULATORY AND COMPLIANCE

While most teams at Ortho2 have of more than one person, we have two departments that are comprised of just one member. Judy Denny is the Ortho2 Human Resources Coordinator, and Darcy Dakovich is the Ortho2 Quality Assurance Regulatory Affairs Manager. Because of their skill-sets, they are able to tackle the department's duties on their own.

What do you really do here at Ortho2? I coordinate and administer Ortho2's employee benefits, payroll functions, recruiting efforts, and new hires processes. In addition, I'm available for any questions employees may have on a day-to-day basis.

What's fun/what do you enjoy about your current job? The best part of my job is being lucky enough to meet and get to know every employee who joins the company.

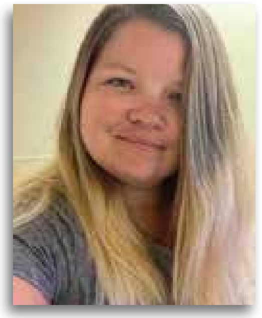
What do you want our users to know about the Human Resources Team? Well, I am a one-person team, but I feel the more I can help our employees, the more time they have to focus on helping our customers.

Judy Denny
Vacation destination: Italy
Three people I would like to have dinner with: My three kids. Anytime I can be with all of them together is great.
I can't go a day without: Coffee
What are you listening to right now? Bennie and the Jets by Elton John. That is my dog's name and he thinks I am singing to him.
Favorites
Team: I still try and be a Chicago Bears fan, but I enjoy watching and cheering for the San Francisco 49ers.
Software Program: Spotify
Movie: *James Bond* or any action movies.
Book: Too many to choose, something suspenseful with unexpected twists is always good.
Phone App: Instagram

What do you really do here at Ortho2? Regulatory and Quality in addition to training.

What's fun/what do you enjoy about your current job? I enjoy meeting people and learning about them. I get excited about office supplies such as sticky notes, pens, and folders. I think it is fun to work with regulatory agencies.

What do you want our users to know about the Regulatory and Compliance Team? Compliance works to make sure Ortho2 products meet all applicable domestic and international regulatory requirements and quality system regulations and standards. If you do not document it, it did not happen.



Darcy Dakovich
Vacation destination: Anything tropical. I love to travel and would like to visit all seven continents.
Three people I would like to have dinner with: Wright brothers. Charles E. Taylor. My whole family at family reunion would be great.
My role model: My Mom
I can't go a day without: Water and walking
What are you listening to right now? An audio book
Favorites
Team: I am not a fan of sports. My family cheers on the Packers since a lot of them live in Wisconsin.
Software Program: Calendar
Movie: I am not sure I can narrow it down. I like Disney movies, horror and hallmark.
Book: Authors James Patterson and Janet Evanovich
Phone App: Libby Audio Book App

INSIDE ORTHO2

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

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 800.678.4644 or sales@ortho2.com.

REFERRAL REWARDS

You can earn a $500 credit for each referral that results in an Ortho2 system purchase within six months. You can apply the credit toward any current or future charge or purchase—it never expires. We frequently hear from doctors that they wish we had contacted them before they purchased their current system. We wish we had too, but we didn't know they were looking. You can help us help your colleagues by letting us know when they are considering a change in systems. Enter referrals online at www.ortho2.com > Our Company > Referral Rewards, or call 800.678.4644.

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.

Insurance Benefits *continued from page 6*

for the inaccuracy. This proactive approach is essential for maintaining competence in managing insurance payments and benefits.

If your office heavily relies on the bottom-line numbers provided by insurance aging reports, I strongly recommend conducting regular audits to assess their accuracy. By doing so, you can ensure that your financial data remains trustworthy and dependable.

Contracting

An informed and calculated approach to insurance contracting plays a significant role in ensuring a practice's profitability. This involves evaluating and negotiating contracts with insurance companies to achieve favorable reimbursement rates, contract terms, and patient coverage. By thoroughly understanding the financial implications of different insurance contracts, a practice can make informed decisions about participating in specific networks or negotiating alternative reimbursement models. Additionally, staying informed about industry trends, regulatory changes, and market dynamics allows a practice to adapt its contracting strategies accordingly.

While these factors are discussed separately, it is important to note that their order of priority may vary depending on the unique circumstances of each practice. Some practices might prioritize team education as the initial step to build a knowledgeable workforce, while others might focus on implementing efficient processes first to optimize revenue cycle management. The key is to recognize the interdependencies of these factors and tailor their implementation to the specific needs and goals of the practice.

Within our organizations, we are able to maintain full autonomy over team training and the ongoing improvement of our systems. We should proactively identify any areas in need of improvement and consistently assess their effectiveness and efficiency. Conversely, external factors lie outside our sphere of influence and are often non-negotiable. Nevertheless, there are situations where we have limited power to alter these external factors. Therefore, it becomes imperative for us to embrace a strategic approach that enables us to harness the advantages presented by these external factors for our own advantage.

Based on statistical data, approximately 60-70% of the population has dental benefits, and out of those benefits, around 96% are classified as some form of managed care, with the majority consisting of PPO plans. Insurance providers are progressively enhancing the benefit amounts available for treatment received from in-network providers while reducing those for out-of-network. They are also implementing a combination of proactive and reactive strategies to educate and inform their subscribers about the numerous benefits and advantages associated with receiving care from providers within their network.

Providers frequently make hasty decisions to start or end contracts with insurance carriers, driven by factors like the practice's current state, significant discounts, and sometimes team frustrations with the processes. While some practices believe team development is the only answer, I find that positive transformation frequently indicates a need to address internal processes and contracting, whether it's the initial engagement or revisiting participation.

Ask yourself the following actionable questions to determine revenue drain in your practice:

For in-network practices:

- Have I contracted with a fee schedule that allows for the highest allowable charges? Many carriers, except for a few major ones, can be contracted through another carrier or a third-party administrator's network.
- Am I utilizing all available coding and claims submission methods for my treatments? This strategy could potentially reduce discounts under specific plans and provide greater allowances. Offices often fail to set

Insurance Benefits *continued on next page*

Insurance Benefits *continued from previous page*

up systems to assess discounts by individual carriers. Consider making changes to your system to make informed decisions.

For out-of-network practices:

- Am I losing patients to nearby offices that are in-network with specific plans? Assess your metrics to understand the situation. I have observed this happening in numerous offices I have worked with, especially now that carriers are significantly reducing benefits paid to out-of-network providers.
- Should I consider contracting with PPOs if I can maximize my allowances by itemizing the codes in my treatment plan? If being a non-contracted provider is negatively impacting your practice, it would be unwise not to take a strategic approach and explore your options.

From an operations standpoint, visit the following areas that can be improved upon:

1. **Reports:** Begin by conducting an audit to evaluate the accuracy of your insurance receivables. If this wasn't a standard protocol in the past, it's important to do so now. Often, offices discover significant credit balances on their insurance ledgers and delinquent accounts. Reviewing your insurance reports will give you a clear understanding of the situation and help identify any inaccuracies.
2. **Review the End-to-End Process:** It is crucial to revisit your entire process for handling insurance benefits. This area tends to be one where the doctor has the least knowledge. Seek feedback from your team. Assess whether you have enough benefit information from your verification process. Identify any recurring issues that could be minimized by making necessary changes to your procedures.
3. **Team's Comprehension:** Assess the level of knowledge and expertise your team possesses regarding insurance and the execution of the insurance process. Unless your staff members are seasoned and resourceful individuals, chances are they may not be well-versed in this area. Consider providing additional training and resources to ensure that your team is well-informed and capable of efficiently handling insurance matters.

To enhance the overall operations and efficiency of your practice while minimizing revenue loss from insurance, focus on addressing key areas for improvement.

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sources such as Google, Yelp, or your website will always be a great source of new patients. Google My Business Profile enables the orthodontist to update Internet presence at no charge and create blogs on a daily basis.

Innovate your marketing regularly by joining in activities within your community. Even if your orthodontic practice is 10 years or older, continue to spread fresh news about the unique value your practice has to offer. Participate in civic, school, and athletic activities in your community. Get out of the office! It all continues with marketing.

Your Next Team Win

Addressing these eleven reports enables everyone on the orthodontic team to play a vital role in practice success. These numbers represent measurable responsibilities and actions, engagement, teamwork, and ultimately, leadership for practice success. Numbers are the language of business.

It's one team, one score. As a team, focus on what's important. Maintain consistency, grit, and persistence in taking action and make practice management a team sport. Working together, you might even find that dental practice management is fun.

President's Perspective *continued from page 1*

technology and improved monitoring. We are currently in the process of building up a new data center that will offer improved performance and scalability.

Henry Schein Collaboration – Ortho2 and Henry Schein continue to explore avenues we can work together on 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

Successful Practices *continued from page 7*

and profitability and increase stress. One way to ensure excellent systems is to maximize the use of Ortho2 software to gain the highest levels of efficiency. Taking full advantage of all the benefits of practice management software will allow practices to operate faster and easier. Software can also provide excellent data that allows practices to make decisions and modifications to continually improve performance. Orthodontic practices that are focused on continual improvement will also have continual success.

Systems are also the great educator for the team. By implementing systems and training the team on them, a practice has the best opportunity for excellent team performance. In an era of a staffing shortage where new team members will periodically join practices and often not have as much experience as their predecessors, systems become the fastest and easiest way to provide training as to how the practice operates, the responsibilities of each team member, and how to measure accountability.

3. Five-Star Customer Service

Levin Group is a great proponent of having five-star customer service. Many practices believe that they are five-star but being so is actually rare. Most practices are actually three or four-star in regard to customer service, which is not bad, but it's also not five-star. To reach five-star customer service levels, a practice needs to view customer service as a system. What are those actions that are repeated every patient, every day, every time? Practices that reach five-star customer service are the practices that differentiate themselves from all others, and attract even more patients, gradually becoming the practice of choice in their area.

As an example, in addition to many other five-star customer service strategies we develop for clients, we recently added a recommendation to call all patients one week after debond just to check in and reinforce patient satisfaction. We also added a recommendation of sending an email to patients one year following debond that expresses the hope that they are enjoying their beautiful new smile. When added to a solid foundation of other five-star customer service strategies, orthodontic practices can expect to have established a great reputation in the community.

Working toward excellence in the three areas outlined above is literally all it takes to have an excellent orthodontic practice. Success is about identifying the right approach and then implementing that approach with regular modification or replacement as new changes and challenges emerge. An orthodontic practice is still a great opportunity to have a wonderful career and overall financial success and career satisfaction. Practices who implement the three recommendations above and continue to focus on those over time will continue to grow, develop a great reputation in the community, and find success easier to achieve.

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