The Newsletter for Members and Friends of Ortho2
January 2024 - Volume 42 Issue 1

ORTHO2
EMPOWERING PRACTICES

PRESIDENT'S PERSPECTIVE

We are just over a month away from the 2024 virtual Users Group Meeting and we're excited to share a day of learning with you! Join us on Friday, February 23, as we take a deep dive into the best features of Edge Cloud. Our Ortho2 Team of trainers, Regional Managers, and executives will be on hand to teach a variety of classes and answer your questions with our live Q&A. If you haven't already, be sure to register at ugm.ortho2.com. And best of all it's FREE!

Our team has been working hard to improve on our first virtual meeting in 2021. This year we are introducing a new, all-inclusive platform that is sure to enhance your experience. Once you join the event, you will be able to connect with other users and begin networking in the reception area. Then, enter the main stage where each class will take place. Each person in your office only needs to register once, and they will be automatically signed up for every class so they can attend any or all sessions! And don't worry, you can jump in and out of the platform as necessary during the day.

After you have registered, be sure to fill in your profile on the platform with information such as your title, practice name, and social media links. This is a great way to connect with others who share similar job functions and learn from each other. Once your profile is complete, be sure to preview the event and familiarize yourself with the platform.

Another feature we're excited about for this year's virtual meeting is the chat function. You will be able to chat with Ortho2 team members and other attendees in the main reception area and each class. The chat feature is a great way to connect with others, ask questions, and learn from each other. During each class, a dedicated Q&A chat will be available to ask questions that are specific to that session and a portion of the class time will be dedicated to discussing and answering those questions.

In addition to the annual Users Group Meeting, Ortho2 provides many free resources to you. If you haven't already, check them out!

Help Menu: Both Edge Cloud and ViewPoint have a help menu with resources for almost every need. In Edge Cloud, click the large blue question mark labeled Help in the Home Ribbon Bar, then click Online Help. In ViewPoint, click the blue Help icon on the main page, then click Online Help. The help menus in Edge Cloud and ViewPoint dive deep into topics with step-by-step

President's Perspective *continued on page 14*

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. If you haven't already, register now at ugm.ortho2.com!

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.

Save the date, share the news, and prepare for a day filled with professional growth and networking opportunities. See you on February 23!

Edge Cloud 7.2 Release

We are excited that Edge Cloud 7.2 is currently being released to customers. If you haven't received an email about updating yet, don't worry. We will be sending the update to you shortly.

With Edge Cloud 7.2 being released, it means Edge Proposal is finally here, too! We know, it's been a hot minute since the announcement of Edge Proposal, and we're still just as excited to get it into your hands. And the best part is that it is free to use for all Edge Cloud users!

Note: In the System Financial Settings Editor, use the Proposal Mode dropdown to enable or disable Edge Proposal. If you use the current proposal system in Edge Cloud, this setting will default to Legacy. If you haven't created a proposal through Edge Cloud in more than six months, it will default to Edge Proposal. You can optionally choose to be prompted about which system to use when creating proposals.

Other features in this release include:

- Gender Identity Support – You can now identify both the patient's clinical gender and gender preferences.
- Online Scheduling Form Required Cell Phone Option – You can augment the URL to require new patients to provide a cell phone number.
- Canadian ACH Transaction Support – Canadian Edge Cloud users can now save ACH payments on file.
- Treatment Chart Required Fields – You can now set up your Treatment Chart styles to require users to fill in certain fields before the chart or plan can be saved in the patient folder.
- New Reports – The Treatment Chart/List and Treatment Chart Styles List reports
- Filter Online Forms – You can now create URL and QR code links for your online forms that filter the submitted form by doctor, office, and any other data you choose.
- Online Scheduling honors procedure start and end times if they exist in the Appointment Types/Procedures editor.
- The Patient Sign In confirmation screen now uses the patient nickname if one is available.
- System Integrations Editor – Users must now have full security access to open the System Integrations editor. With this update, your security access to the System Integrations editor will match your current access to the Offices editor.

You can see more information about each of these items, as well as links to the Help menu by visiting edgereleasenotes.ortho2.com.

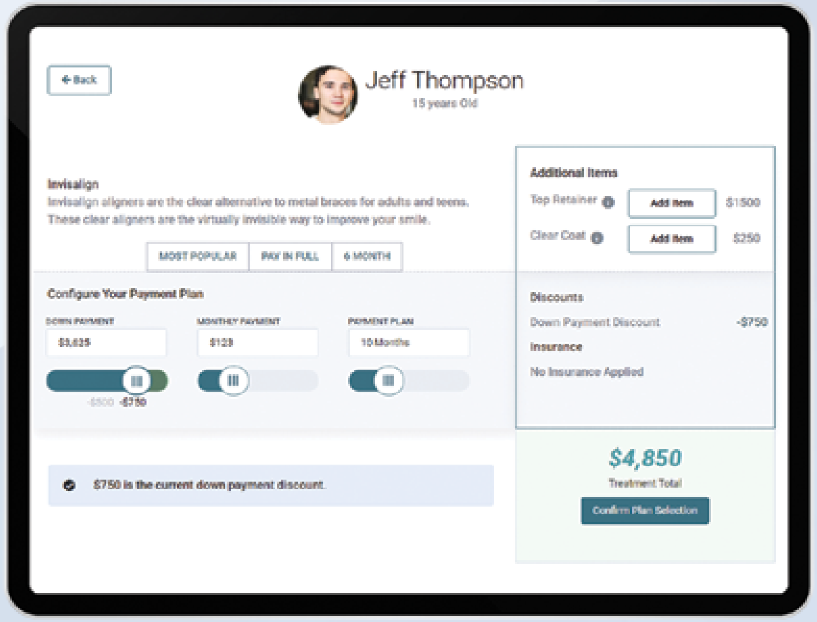
EDGE PROPOSAL

Ortho2's new Edge Proposal module gives your patients' families the freedom to electronically adjust the terms of their orthodontic contract to best fit their treatment and financial needs, while you retain control over the contract parameters.

Edge Proposal Set Up

System Financial Settings Editor

In the System Financial Settings Editor, use the Proposal Mode dropdown to enable or disable Edge Proposal. If you use the current proposal system in Edge Cloud, this setting will default to Legacy. If you haven't created a proposal through Edge Cloud in more than six months, it will default to Edge Proposal. You can optionally choose to be prompted about which system to use when creating proposals.



Edge Proposal Add-Ons Editor

Use the Edge Proposal Add-Ons editor to create the list of additional options available to your patients. You can find the Edge Proposal Add-Ons editor in the Financial section of your Editors. Each add-on includes a description, fee, and optional image. When your patients' families use the Edge Proposal app to adjust their contract structure to their liking, they will be able to see add-ons linked to their proposal template and select the ones they want to include in their treatment plan.

Edge Proposal Templates Editor

Use the Edge Proposal Templates editor to manage the parameters your patients' families will work within as they use the Edge Proposal app to set up their personalized contract structure. Each template defines the default treatment fee and months, finance charge, and available discounts. You can also set up default payment structures and choose which add-ons can optionally be added to the treatment plan.

You can find the Edge Proposal Templates editor in the Financial section of your Editors. Click the Create New Template box to begin creating a new template.

The Create Edge Proposal Template wizard walks you through all the required fields needed to create an Edge Proposal template. The first screen includes the template name. This is the name of the template that will be used internally when you are selecting templates for patients. These should be descriptive so you can differentiate your various templates. Also, select the treatment(s) this proposal will be used for. Click Next.

Fill in the information your patients and responsible parties will see in the app on the Card Display screen. The title of the proposal can be different than the name in the previous screen. Use the image select icon to open the Select Image window where you can choose a stock image, upload an image from your device or import a web URL. Click Next.

In the final page of the wizard, add the total treatment amount, minimum down payment (if applicable), and payment months. The Maximum Payment Months defines the furthest out a responsible party can extend payments. The Payments Months Defaulted to is where the financial slider will default to. Click Finish.

You can now edit any of the information you added in the wizard and add discounts, add-ons, and default payment options. Click Save.

Create Proposals

To create a proposal for a patient, open the Finance page of the patient folder. Then, select New Proposal from the Contract section of the Patient ribbon bar. From there, you will use the three tabs of the Create Proposal window to select the proposal details to offer the patient.

Treatment Options Tab: Use the Select Treatment Options tab to select the treatment and Edge Proposal template combinations to offer to the patient. First, select a treatment, then apply one or more templates available for that treatment. You can offer the patient a single treatment/template combination or apply as many treatment/template combinations as you wish to offer the patient a wide range of treatment choices.

Members and Insurance Tab: Use the Members and Insurance tab of the Create Proposal window to choose who will be financially responsible for the contract. The amounts you enter on this tab are not yet set in stone but will be used to calculate the initial template proposals.

Confirmation Tab: Use the Confirmation tab of the Create Proposal window to assign a treatment coordinator and initial treatment dates for the contract, set an expiration date, define when payments will begin, and review all of your choices from the previous tabs.

When you are happy with all of your proposal details, click Create at the bottom of the window to return to the Finance page of the patient folder.

Manage Proposals

After you create one or more proposals for a patient, you can review and change the proposal templates from the Finance page of the patient folder to better fit their treatment and financial goals. You also activate the proposal, share it with responsible parties so they can use the Edge Proposal app, and update the proposal status from this window.

Activate/Share the Proposal

When you have finished reviewing and editing the proposal, click Activate Proposal at the right of the window to finalize your proposal settings. Once you activate a proposal, you can no longer edit the details.

As soon as you click Activate Proposal, the Proposal Communication window opens so you can send invitations to responsible parties to the app via email, text message, a copied URL link, or QR code.

Edge Proposal Widget

Use the Edge Proposal widget to review and manage your patient proposals. The widget lists the proposal expiration date, whether the responsible party has viewed the proposal with the Edge Proposal app, the assigned treatment coordinator, and the status. To use the widget, select Edge Proposal from the Widget Library toolbar, and choose to open the widget as an Application or Dashboard widget.

Settings

Click the Settings wrench on the widget sidebar to select which proposals you want to view: You can choose to filter the widget by office, doctor, treatment coordinator, status, and created date range.

For more information, go to support.ortho2.com to review a video tutorial and documentation on Edge Proposal.

TRAINING THE NEWBIES TO BE OLDIES

While good help may be hard to find, it seems it is also difficult to keep the ones you do find. There are many reasons for this, starting with the hiring process itself. When you hire out of desperation or believing any one is better than no one, or you if don't do due diligence in checking references or backgrounds, then expecting to find good help is a crapshoot.

When a doctor finds someone who shows great potential for becoming a long-term and productive employee, the orientation and training of the newbie is critical to the success of becoming an oldie. There are several important ideas to embrace in training and teaching which I will explain in more detail:

1. Orient new employees to the entire practice and not just their specific job.
2. You've known what you know for so long that you've forgotten what it's like not to know.
3. Lower your initial expectations for performance.
4. Be interested in what they think and what their experience is.
5. Focus on what they have done well so that at the end of the day they leave wanting to come back to work.

Orient New Employees to the Entire Practice

The first week of work for new employees can set the tone for the relationship they will have with the practice and can inspire loyalty and motivation. As Simon Sinek's book *Start with WHY* says, start with that question.

Regardless of a person's prior experience, it is important that the hiree have a direct experience of your practice. Once the new hiree has completed reading the employee manual, signing off on policy and other HR administrative requirements, have the person start the orientation by following the new patient process. For the first hour or two, have the person sit with the front desk team and be familiarized with the meet and greet of patients, answering the phone, scheduling procedures, etc. Have the hiree actually answer the phone or meet and greet patients.

The next step would be to spend an hour with the TC, to sit and observe the new patient exam and conversation. From there, spend time with the financial coordinator, the records team and lab, and then with the clinical team.

At each step, the team member should explain the why of their job, and not just the doing of it, with the emphasis on service to the patient and how the mission and core values of the practice are being realized.

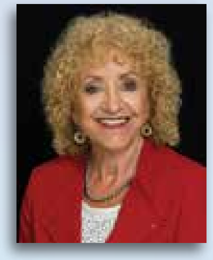
This will encompass the first day and the newbie has not yet spent time in training on the specifics of their job. At the end of the day, the trainer for the job should meet with the hiree and ask questions about what that experience was like for him, what s/he felt most comfortable with, what aspect s/he liked most, etc. End the day with a warm welcome from the team.

The Rest of the List

Whether someone has prior experience or not, we tend to have expectations of that person that frequently exceed reality. We forget what we didn't know when we first learned the job we have now mastered. As a result, activities or procedures that are now simple and done automatically for us creates an expectation that the newbie

New Hires *continued on page 14*

About the Author



Joan Garbo is a premier change agent who is dedicated to her work and her clients. Throughout the past 30+ years, Joan has led more than 2,500 seminars on effective communication, public speaking skills, team building, and customer service. Her book, *Monday Morning Messages: Kick-Start Your Week with the Power of Positivity*, was published in 2022.

Contact Info: joangarbo@aol.com • 631.608.2979

STERILIZATION, ORGANIZATION, AND EFFICIENCY

As 2024 has just begun, it is great time to review and reset your goals for the New Year. With the high rate of turnover many offices are experiencing, increasing your efficiency will take some of the load off your team members.

It is also an important time to review the duties, tasks, and reports that your office has in place. Prioritizing these may give the team some breathing room with time shortages. Some tasks must be continued (spore tests, equipment maintenance, etc.) while some can be put on hold until the team has available time (emergency tracking, patients over ECD, etc.) to allow them to focus on the immediate needs of the office such as training.

Instrument reprocessing can be a task that teams struggle to find the time to keep up with. I also see times when shortcuts are taken in the process to turn the instruments over more quickly. This can be due to staff shortages but can be also caused by not having enough instruments. It is also important to have all instruments in good working condition (no dull cutters, bent tips, etc.) so clinicians do not have to stop during an appointment to retrieve a replacement instrument.

Sterilization

With the current hiring, training, and retaining challenges these systems and protocols will help maintain consistency during team transitions. I often hear team members state, "Mary did that but when she left, we stopped." This is most often not an intentional act of non-compliance but a gap in training a backup team member to step in to make sure protocols continue as needed.

Annual staff training is required for both OSHA and CDC compliance. Prior to any training, an in-depth review of your current processes and protocols is the first step. A written protocol for instrument reprocessing will help with maintaining the system during times of turnover and aid with training new team members. The current CDC Summary of Infection Prevention Practices in Dental Settings requires offices to develop and maintain written infection prevention policies and procedures appropriate for the services provided by the facility and based on evidence-based guidelines, regulations, or standards.

Organization

Having your clinical and sterilization areas organized well and consistently will help make sure team members have the instruments/supplies needed and can quickly access them. It takes several minutes for a clinician to retrieve a forgotten item when they are chairside. They must deglove, wash their hands, retrieve the item, and reglove with new gloves to continue with the appointment.

Prior to reorganizing your sterilization and clinical areas make sure to schedule a "dumpster day". This is where you remove items that are not used so you are organizing only the items that you do use. I often see an office having items that many of the team members have never seen or used. Do not let these clutter your storage and organization.

There are three basic areas for clinical storage:

1. Cassette/tray set ups

   This is the area where clinicians will go to get the instruments and items needed for today's scheduled procedures. This will be the storage area for cassettes or trays with set ups, and drawers for additional items such as handpieces, retractors, etc. This should be an organized area to retrieve all items needed for any procedure in one place.

Instrument Reprocessing *continued on page 15*

About the Author

Andrea Cook is a clinical consultant and trainer for premier orthodontic offices across the country with more than 20 years experience chairside. She offers a variety of services to train your staff and improve your practice.

Contact Info: www.andreacookconsulting.com • 253.332.3376

EXCELLENT CUSTOMER SERVICE IN THE WORLD OF TECHNOLOGY

2024 marks my 50th year in the dental/orthodontic field. I have seen many changes in the industry over the past half century, from the advancement in technology to the decline of personal customer service. I am amazed at the technical changes that have taken place in orthodontics, from alginate impressions to scans, bands to brackets, and headgear to Class II correctors, however I am dismayed that in many instances, technology has overshadowed personal customer care.

How many of you can honestly say that you have not been frustrated by automated telephone response systems? Within ten seconds of a telephone call, are you punching zero on your phone trying to reach a real person? Are you ignoring the website assistant hoping to talk to a live person regarding your questions or concerns? Since I am formally retiring in June 2024, I am going to go out on a limb and encourage orthodontic teams to take a step back to reflect on what you consider excellent customer service.

We recently purchased a house build in 1900 that we are updating, while maintaining the integrity of a home that is 123 years old. It is our intention to cherish the foundation on which it was built, while updating it to 2023 safety standards and technology. Our goal is to take the old, solid construction built on the values of honesty and integrity from 1900 and integrate new technology, allowing us to create something that is unique to meet today's needs.

Take a step back and reflect on what is important to you. When a friend, relative, or colleague refers you to a specialist, isn't one of the first things they tell you is that they are great to work with, easy to get an appointment, and are readily available to answer all of your questions or concerns? Yes, they may mention advanced technology, however customer service typically is at the top of the list.

Let's explore some of the ways you can offer excellent customer service, while staying ahead of the technological changes that are happening on a daily basis in the orthodontic field.

1. Offer adequate telephone coverage so your calls can be answered by a real person by the second or third ring. Understandably this can be difficult, especially if you require your scheduling coordinator to answer the telephone while greeting patients and checking them in and out. Consider having someone behind the scenes to be first on the telephone, whether they work in a designated space in the office or cover the telephones from a remote location. When patients (or potential new patients) call the office, they want to speak to someone now, not leave a message and wait for a call back.
2. New patient intake calls can often take 8–10 minutes, depending on the information needed to set you up for a successful initial evaluation. Having a designated team member (either on-site or remote) to take these critical calls will set the stage for a better conversion rate. Take the time to answer their questions and sell the new patient on the benefits of your practice before they walk into the office. Often patient conversion happens before they ever walk into the office.
3. Take the time to really listen to your patients. Remember that orthodontics is not their first or second language; in many cases this is new territory for them. Speak to them in layman's terms in a way that they can understand. Often patients think overbite is how far the upper teeth protrude, when in the orthodontic field overbite is how far the upper teeth overlap the lower teeth. Validate their questions or concerns; the burden to explain everything thoroughly rests on your shoulders. It is not second nature for patients and parents to know the meaning of midlines, occlusion, crossbite, Class I, II, or III, curve of spee, etc.
4. Respect your patients' time, one of life's most precious commodities. Just because you have earned the degree to use the title doctor in front of your name, it does not mean that your time is any more valuable than that of your patients. Make it your goal to not only see patients on time, but also finish their appointment within the time frame scheduled. If you are going to extend the estimated finish time of the appointment for any reason, check with the patient and parent before you do extra procedures. It might work out with your schedule, however, it can cause problems with patients who have other appointments or obligations. Even if their schedule allows for an extended appointment time, evaluate the impact that it might have on other patients scheduled around that time.
5. Take the time to make a personal care call following the start of treatment or placement of an orthodontic appliance. A three-minute call will reassure patients and parents as they travel on an unknown road, giving them the opportunity to ask questions that they might have following the appointment. I can't tell you how many times a parent or patient has brought it to my attention that they were impressed by the personal call. It is called taking an extra step to ensure excellent customer service.
6. Ensure that all financial information is 100% accurate and transparent, from the total investment to what exactly is included in the fee. Practices are typically on top of patient accounts when there is a balance owing, however, too often I find accounts that have a credit balance (overpayment of the total fee) with no communication with the responsible party. I recently encountered a practice that had over $80,000 in patient overpayments and they had made no attempt to let the patients know that they were due a refund. Do not post a patient or insurance payment that will result in a credit until you thoroughly investigate the account to ensure that no charges were missed. It is difficult to contact a patient months or years after the overpayment was made to let them know that we have used their money with no interest instead of promptly issuing a refund.
7. Take the time to thoroughly train every employee, from the scheduling coordinator to the sterilization technician. Create a detailed job description for each position, including the steps required to fulfill each of their duties. Utilize appropriate response guidelines to answer patients' questions, including the correct words to describe appliances or products used over the course of treatment (elastics vs. rubber bands, elastic tie vs. o-rings, etc.) All team members must be on the same page when answering questions. If not, patients can become confused or often will decide which answer they like the best.
8. Build time in your template for comfort and repair visits. As much as we educate and encourage patients to follow instructions, sometimes the lure of Milk Duds, taffy, or tortilla chips overpowers everything they have been told. Life happens, don't lecture the patient on what they did wrong. Instead offer substitution solutions to use next time they get a craving for something on the try to avoid list of foods.

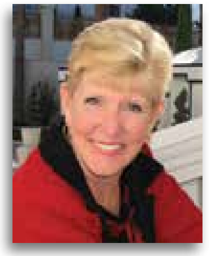
Over the years, I have recommended Ortho2 to clients who are looking for a software company. The company embodies excellent customer service, from the product to the support offered. They have done an incredible job of staying on the cutting edge of technology while continuing to provide personal and knowledgeable support and training.

It is bittersweet to leave a profession that I have given my heart and soul to, however there are upcoming consultants who are ready to take over the reins. Be sure to do your research and choose wisely.

Take a step back and embrace the ethics that our ancestors lived and died by. Thank you for all of the wonderful

Customer Service *continued on page 15*

About the Author



Debbie Best, practice management consultant and lecturer for Debbie Best Consulting Network has 50 years of experience in the dental and orthodontic field. Debbie consults in a variety of areas including staffing needs, plans for practice productivity, customizing schedules, job descriptions, and team handbooks, and more.

Contact Info: debbiebestconsulting@gmail.com • 206.310.6055

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 fourth quarter of 2023.

Thirty-One Years
Todd Schuelka

Twenty-Nine Years
Michele Eich

Twenty-Five Years
Lowell Davis
Denise Sargent
Jennifer Shaffer

Nineteen Years
Corey Schmidt

Eighteen Years
Derek Dohrman

Eleven Years
Drew Humphrey

Ten Years
Steve Volcko

Two Years
Zach Benjamin

One Year
Alex Richardson

REFERRAL REWARDS

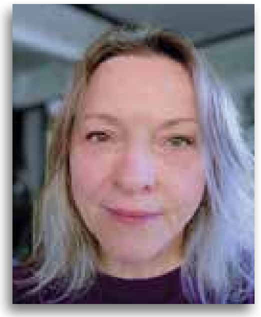
You can earn a $500 credit for each referral that results in an Ortho2 system purchase within six months. You can apply the credit toward any current or future charge or purchase—it never expires. We frequently hear from doctors that they wish we had contacted them before they purchased their current 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.

ON A PERSONAL NOTE

Congratulations to Mikayla Morrison, Project Manager/Business Analyst and her husband on the birth of their daughter Savannah! Savannah was born on July 21, weighing 7 pounds, 14 ounces and was 21 inches long. She is joined at home by big sister Dakota.

Savannah

CAREER MILESTONES AND DEVELOPMENT



Congratulations to **Jo Jacobson**, Software Support Manager, on her retirement at the end of October! Jo was with Ortho2 for 33 years, holding the titles of Software Support Technician and Trainer and Software Support Manager. Jo said she enjoyed the every day challenges that came her way and all of the memories from her time here (too many to mention just one).

Jo's supervisor Todd Schuelka, Vice President Operations, said, "Jo has been essential to Ortho2's success. From managing Software Support and Trainings, to doing support and trainings herself, to handling innumerable customer and employee issues, she has been in the thick of it! I have worked with Jo for so long, it is hard for me to imagine her not part of the Ortho2 day-to-day. We appreciate Jo's many years of service with Ortho2 and the contributions she has made to its success."

Jo is looking forward to spending time as she wishes. "When I walked through the doors of Ortho2 on my very first day, I couldn't have imagined that I'd still be here more than three decades later. It's been a journey and I am grateful to Ortho2 for all the opportunities and the challenges," she said.

Congratulations to **Lindsey Spieker** on accepting the role of Implementation and Software Support Manager! Lindsey has been with Ortho2 since 2006, serving in various roles, and most recently as the Implementation Supervisor. In her new role, Lindsey will lead the Software Support, Advanced Support, Training, and Implementation Teams.

Three new team members joined the Product Development Team in September. Help us in welcoming:

Omar Karim, Senior Software Engineer. Omar comes to Ortho2 with more than four years of experience as a Senior Software Engineer, and most recently worked for DragonSpears.

Jon Basniak, Senior Software Engineer. He most recently worked with Hyland Software and has more than nine years of software engineering experience.

Greg Van Riper, Software Developer. Greg has been working in software development for more than ten years and most recently worked with World Group, Inc.

Welcome aboard, **Ashley Hurt**! Ashley joined the Accounting Team as an Accounting Specialist in November. Ashley previously worked with FM Systems, and has more than ten years of accounting experience.

Congratulations to **Michelle Kinnaman** on accepting the role of Lead Implementation Expert! Michelle has been with Ortho2 for 18 years as an Implementation Expert. In her new role, she will monitor all new accounts, work with OSOs, and will maintain and track internal processes. Please help us in congratulating her.

Welcome to Ortho2, **Ben Lievens**! Ben joined the Implementation Team in November as an Implementation Expert. Ben came to Ortho2 from Teleion where he was a Customer Support Coordinator.

INSIDE ORTHO2

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

LOG INTO SUPPORT.ORTHO2.COM

There are many resources available to you on our website. You will find visual help videos, printed documentation, request forms, information on upcoming meetings, and more.

If you haven't already created an account to access the Customer Site of our website, you will need to do that. Each doctor and team member can create their own account. Visit support.ortho2.com, and click Register New User under the Login fields.

You will be prompted for your full name, main office phone number, and Ortho2 customer number. Finally, enter your individual email address, a password of your choice (at least five characters), and a display name that will be publicly visible.

MEET THE TEAM – SALES

This quarter we are featuring the Regional Managers from the Sales Team. You have probably encountered one of the Regional Managers at a conference and no doubt have interacted with them through email when you need anything Ortho2 related. The Regional Managers include Jeff Brockway, Jess Huennekens, Marley Probasco, and Steve Volcko.

What do you really do here at Ortho2?

JB: Push the limits on expense reports at trade shows.

JH: I help new customers find Ortho2 and current customers optimize their Ortho2 experience.

MP: I'm the West Coast Regional Manager. My job is to go to bat for my customers to find them solutions to their problems.

SV: I help practices who need new management software.

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

JB: Sincerely love helping people who are stuck on another system migrate over to Edge Cloud.

JH: I really enjoy learning about all of the different practices in my territory, especially when I get to see you in person at various meetings during the year. Always stop by to say hi!

MP: I enjoy traveling attending meetings, where I get the chance to meet doctors and their staff in person.

SV: People are always the best part, whether they are fun/funny or challenging (or both!).

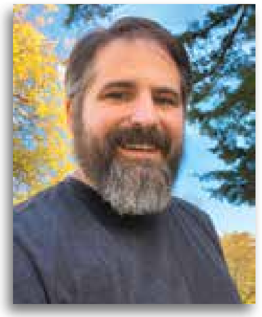
What do you want our users to know about the Sales Team?

JB: Each one of us really cares and wants to make you a happy customer.

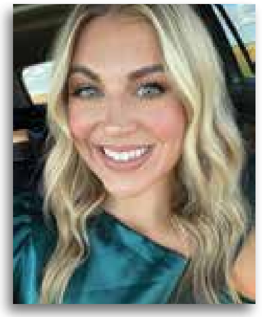
JH: We're all pretty well versed in the industry, so if you have any questions about something, even outside of Ortho2, feel free to reach out. Some of us have been around for a long time!

SV: It's truly a team. Close to family. Shockingly selfless. We always help and support each other, often putting each other above our own personal gain.

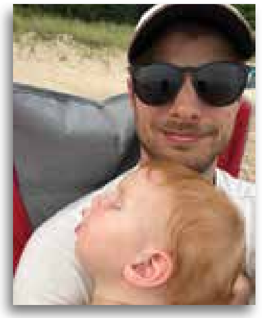
Jeff Brockway
Vacation destination: A month in Kauai without a cell phone or Wi-Fi
Three people I would like to have dinner with: Anthony Bourdain, Conan O'Brien, David Letterman
I can't go a day without: COFFEE
What are you listening to right now? Phish/Tame Impala/My Morning Jacket/Radiohead
<u>Favorites</u>
Team: Georgia Bulldogs/Atlanta Braves
Software Program: Edge Proposal
Movie: *Goodfellas*
Book: *It* by Stephen King



Jess Huennekens
Vacation destination: Two months exploring Iceland, Scotland, Portugal, and anywhere else I feel like going during that time followed by a month of rest at home.
Three people I would like to have dinner with: My high school orchestra teacher Mr. Elder, Nick Offerman seems really chill, and my wife provided there's no kids and I don't have to cook or do dishes.
My role model: I want to be as good a dad as Bandit Heeler someday.
I can't go a day without: Home roasted coffee
What are you listening to right now? Lately I enjoy silence while my kids aren't home.
<u>Favorites</u>
Team: Ortho2 Sales and Marketing Team OBVIOUSLY
Software Program: Adobe Lightroom
Movie: WAY too many to list, but *Hot Fuzz* never fails to make me laugh.
Book: I'm currently reading Bram Stoker's *Dracula*
Phone App: The camera



Marley Probasco
Vacation destination: Ireland
Three people I would like to have dinner with: George Strait, Mark Cuban and my grandfather that passed away when I was little
My role model: My mother, Mindy
I can't go a day without: A sweet treat!
What are you listening to right now? Big country music fan! Currently listening to Cody Johnson's new album Leather
<u>Favorites</u>
Team: Minnesota Vikings - SKOL
Software Program: Edge Cloud
Movie: *How to Lose a Guy in 10 Days* – a true classic!
Book: *Mind Gym* by Gary Mack and David Casstevens
Phone App: Pinterest



Steve Volcko
Vacation destination: New Zealand
Three people I would like to have dinner with: My wife, my parents, my kids.
My role model: Jemaine Clement
I can't go a day without: Laughing
What are you listening to right now? Dance Mode – Bluey, Joff Bush
<u>Favorites</u>
Team: Sports Team
Software Program: Teams
Movie: *Top Gun* or *Barbie* or *LOTR*
Book: *The Name of the Wind* by Patrick Rothfuss
Phone App: iMessage

President's Perspective *continued from page 1*

instructions on how to set up and use your software.

Ortho2 Support Website: The Ortho2 support website, support.ortho2.com, is a wealth of information at your fingertips. Here you will find visual and written help, forms to request custom projects or updates to your Edge Reminders, and links to our blog and digital versions of past newsletters.

Visual Help: The visual help section of the support website features videos to walk you through the main sections of Edge Cloud and ViewPoint. Look through various topics such as the basics, financials, the scheduler, and more. There is even an Edge Cloud training program for new users to view.

Cutting Edge Webinars: This free weekly webinar series is hosted by an elite group of experienced orthodontic professionals and covers everything you need to know to run a successful orthodontic practice. Topics include everything from starting a new practice to how to transition your practice at retirement and everything in between.

Blog: Check out blog.ortho2.com to see a variety of articles about the ins and outs of Edge Cloud. In addition, you'll find articles from leading-industry consultants with information about how to make your practice the best it can be.

I hope your practice takes advantage of these resources from Ortho2. And I hope to see you on February 23!

Amy Schmidt

Amy Schmidt, Ortho2 President

New Hires *continued from page 6*

should be able to do it effortlessly or at least learn faster!

Make it clear that the first job is to be trained! (This is also important for the trainer to understand and to manage expectations of the trainee.) This means mistakes are part of the process of being trained and that mistakes are great moments for learning, not something to be ashamed of or hidden. What is important when a mistake is made is for the trainee to identify what happened and how to correct it. While directing/telling the trainee what to do is appropriate in the initial instruction phase, the trainer will engage the trainee by asking questions. Throughout the training process the focus will be on elevating awareness by asking what worked and what didn't work, as well as what to repeat and what to correct. Even when the trainee has made a mistake, the trainer needs to use praise and acknowledgment for identifying the error and for self-correcting.

At the end of the day, the trainer should ask the trainee: What did you learn and what can you do on your own? What are you most proud of today? What can I (the trainer) do to make your training better?

At the end of the week, the trainer should point out other accomplishments of the trainee especially in how s/he is serving patients, participating as part of the team, and building aspects of the relationship that are important to developing loyalty to the practice and to the team. Most important, the doctor needs to end the week in praise of the whole team for their performance even if it was a rough week (we made it!), and to highlight the newbie's participation. As my mother used to say, "Put the acCENT on the right sylLABle!" The book *Whale Done*, the story of how SeaWorld trained orca whales to perform using the power of positive reinforcement, validates the axiom that success breeds success.

Following this basic outline will support training the new hire with patience and empathy. Most people come to a new job wanting to do well and to validate the employer's choice in hiring them. Manage your own expectations for performance to provide the space for the new hire to learn, to succeed and to thrive.

Customer Service *continued from page 9*

experiences, fond memories and cherished clients/colleagues and friends that I have met and worked with over the past 50 years. To the next generation, remember to take the old and blend it with the new to create a better orthodontic experience for the future.

Be the reason why someone feels included, welcomed, valued, listened to, supported and loved.

Instrument Reprocessing *continued from page 7*

The cassettes or set ups should include all instruments a clinician uses 75% of the time for a planned procedure. This will allow the clinician to easily grab one package (cassette or pouch) to take chairside instead of needing to grab several and increasing the opportunity to forget a needed instrument.

2. Chairside

Side units should be well organized and consistent between all units. This will allow a clinician to move between chairs and have the same items organized in the same order. The items in the chairside units should include all items that a clinician would need for turning a planned procedure into a different one. If a patient comes in with a loose bracket in a regular adjustment appointment, the clinician should have everything they will need to rebond the bracket without leaving the chair. Instruments stored chairside would include additional cutters, instruments that the doctor requests during the appointment that was not planned, etc. These items will be color coded so as they go through the sterilization process, they will automatically come back to their home chair.

Chairside units should be stocked with:

- Etch, sealants, and adhesive for traditional bonding protocols
- Elastic o-ties, ligature ties, and spools of coil
- Disposable items including cotton rolls, gauze, microbrushes, and suction tips
- Extra instruments needed during an appointment (ligature cutter, distal end cutter, etc.) These should be color coded so they will automatically go back to their correct unit after sterilization and be individually packaged and sterilized for proper storage.
- Gloves, bibs, and masks

If you do not have room in your side units for these items, organizational procedure tubs can be purchased through your dental supplier. These also work great for satellite offices and for transportation of necessary items.

3. General storage

This is where instruments and items that are not used on a frequent basis will be stored. Items are individually packaged and sterilized for proper storage.

Efficiency

The goal for clinicians is to have the instruments and supplies readily available during a procedure so they do not need to leave the patient to retrieve items. Degloving, washing hands, retrieving the items, and regloving is an expensive, time-consuming process that should be reduced as often as possible.

The use of cassettes for your procedural setups is a great way to gain efficiency. Clinicians can spend more time seeing their patients and less time in the sterilization area.

Starting off your year with organized, efficient clinical and sterilization areas will make your days run more smoothly and have less stress on you and your team. Here is to a great 2024!

ORTHO2
1107 Buckeye Ave., Ames, Iowa 50010

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ORTHO2
EMPOWERING PRACTICES