ORTHO2
EMPOWERING PRACTICES

PRESIDENT'S PERSPECTIVE

Leading up to the AAO earlier this year we put together a 'What's New for Edge Cloud' document. If you attended the meeting in New Orleans, you likely received a copy. It included many exciting enhancements that were released earlier this year including Edge Proposal, which allows your responsible parties to select the terms of their contract with easy-to-use interactive sliders, and requiring cell phone numbers for new patients scheduling via Online Scheduling. It also included an Upcoming Enhancements section. If you're like me, you are always interested in what's coming next, so I thought I'd provide an update.

Canadian Insurance. *Canadian orthodontic customers will soon be able to submit and manage electronic insurance claims using the CDANet/ITRANS integration.* Since the AAO, we have completed development on this new feature and began piloting it with beta offices. Canadian customers, stay tuned for more information on this exciting new feature coming very soon.

Doctor Time Enhancements. S*upport will be added for partial minute doctor time. You will soon be able to create and edit Scheduler templates with doctor time for multiple doctors, and assign doctor schedules to Scheduler templates.* This summer development also concluded on the Scheduler portion of this feature and it is also deployed to a handful of offices for testing. There is currently a Light Bar component in active development. We look forward to rolling this enhancement out to all users once both pieces are fully tested.

inVisit Customizations. *In addition to the six standard photo types in inVisit, you will be able to customize your own photo templates and image types, which can include non-patient images such as insurance cards. The non-patient image types can even be captured into the patient's correspondence history. You will soon have the ability to customize image type descriptions and instruction given to your patients.* Active development continues on inVisit including the items mentioned above as well as the ability for users to override default videos with custom videos. We look forward to rolling out these upgrades soon.

Treatment Road Map. *Treatment Road Map is an enhancement for creating a library of robust treatment templates. Treatment can be broken up into stages, each with its own timeline and goals. Stages can contain expected appointments, chart notes, wire changes, etc.* Treatment Road Map is also advancing and in active

INSIDE THIS ISSUE

Edge Mobile is Back!

Edge Mobile is back in both the Play Store and iOS App Store. Because Edge Mobile was one of the first orthodontic apps available, we needed to update the app to meet new standards in both stores and go through the stores' approval process. Both stores have reviewed and approved the app, and it is now available in both app stores again! Search either Ortho2 Edge or Ortho2 Edge Mobile in the app stores to find the app.

Installing Edge Mobile

Once downloaded, enter your Customer Identifier in Edge Mobile settings. To find this number, in Edge Cloud click on the File button, then click About. Next to the Customer Identifier is an Envelope icon. If you have Outlook installed, click the envelope next to the Customer Identifier to email the Customer Identifier to an email account your device can access. We recommend using copy and paste to email the Customer Identifier to yourself if you do not have Outlook installed.

Exit Edge Mobile settings by clicking the back button in the top left corner. Then, log in with your Edge Cloud operator email and password. Your Edge Cloud operator record must have this email address associated with it, and you must use a password that is not blank.

There are six areas to explore in Edge Mobile:

- **Patients:** Use the search field to search for patients. Open their record to see biographical information, images, upcoming appointments, and responsible party information. Touching a patient's contact information will call, text, email, or show their address on a map, respectively. Touch TX in the upper right corner to bring up the patient's treatment chart.
- **Professionals:** Use the search field to search for your professional contacts. View the professional's contact information and a list of the patients you share.
- **Schedule:** Touch to view your schedule as it appears in Edge Cloud. The Scheduler comes up on the current day. Select either the day before or after by using the arrows at the top, or you can use the calendar to choose a date to view.
- **Appointments:** View a list of appointments for the day. The list shows the patient's name, the appointment class, and the length of the appointment. Use the arrows at the top to select a day before or after today or use the calendar to choose a date. Touch a patient's name to open their patient folder.
- **Stacks:** View the patient records in each Stack. Touch the icon in the upper right corner to choose which Stack to view.
- **Charts:** Displays the charts that are currently on your Edge Cloud Dashboard. To add more charts to your mobile version, add them to your Dashboard in Edge Cloud. Use the arrows at the top right to scroll through your charts.

COME VISIT US AT THESE FALL MEETINGS

Great Lakes Association of Orthodontists/ Middle Atlantic Society of Orthodontists	October 18–20, 2024
Midwestern Society of Orthodontists	October 25–26, 2024
Northeastern Society of Orthodontists	November 8–9, 2024
Western Orthodontic Conference	November 14-16, 2024

ORTHO2 USERS GROUP MEETING

UGM
Austin

FEB 27- MAR 1 2025

AUSTIN, TX

Join us for the 40th annual Users Group Meeting at the Austin Marriott Downtown in Austin, Texas! Register today at ugm.ortho2.com. Visit the website to view the speakers and class list, learn more about the Ortho2 World Tour Party, and everything you need to know about the Users Group Meeting.

If you have questions, contact Kim Barker, Meeting and Event Coordinator at 800.678.4644 or ugm@ortho2.com.

With over 40 classes tailored for every member of your team—from doctors to treatment coordinators, marketing professionals to clinical staff—our meeting offers something for everyone. Our diverse lineup of presenters features industry-leading doctors, expert consultants, and members of the Ortho2 team, ensuring that you gain insights from the best in the business.

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STACKS: THE DIGITAL ORGANIZER

Stacks are one of those things people tend to ignore until they fully understand what they do and how powerful they can be to a practice. Once an office understands stacks, they go all in on them. Let's see if we can get you there, too!

First, what is a stack? I like to think about stacks using the paper example. When you have paper charts in the office, you grab the chart and place it in your file organizer. The chart is there for you to come back to and finish something up at a later point in time. When you go paperless, you don't have that chart sitting on your desk anymore, so stacks are simply a digital way to still have that chart there ready for follow up.
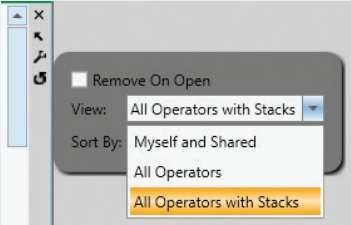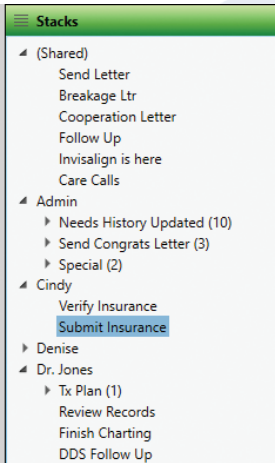
Stacks can be manually added to a folder, which means someone places a specific patient into the stack. Or stacks can be automated, meaning patients are added to a stack when an event happens. This is usually based on when a patient keeps an appointment or from a specific entry made in the treatment chart.

Some common examples I see of stacks follow the new patient process. Once a new patient exam is made, you can place the patient into a verify insurance stack. Once the exam is kept, you can place it into the TC's stack to remember to send a letter out to the dentist. Finally, you can place the patient into the doctor's stack to treatment plan.

A manual example of a stack is when the patient is being seen in the clinic and a letter needs to be sent to just that patient. Or the doctor needs a reminder to follow up with a patient to finish the treatment chart entry on them. Stacks are only limited by your imagination.

Creating Stacks

How do we create a stack? First, make sure you have Stacks on your Dashboard. If it's not already there, you can add

stacks to the Dashboard by going to the Widget Library, choose Stacks, and then select Dashboard. Before creating your stacks, it's also a good idea to first update the settings. Click on the wrench in Stacks to open the settings. The View defaults to Myself and Shared, but I recommend changing that to All Operators with Stacks, or All Operators. Shared stacks is a group of stacks that multiple people work out of; for example, this could be care calls or letters to print. Whoever gets to it first does it.

To create a stack, right click on Shared or the User who needs the stack and choose Add Folder. Name the folder the reason for the stack. Examples include verify insurance, treatment plan, and care calls. It really can be whatever you need.
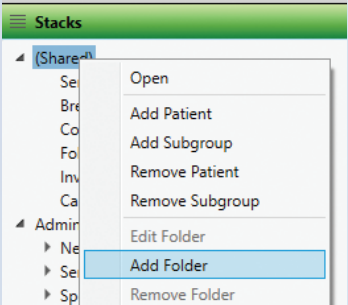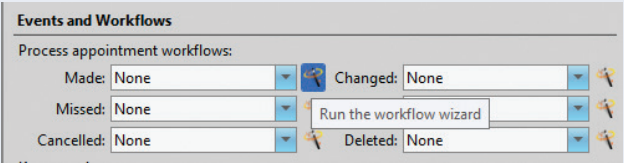
To manually add a patient to the stack, right click on the stack and choose Add Patient. Or even better, from the patient folder you are already in, go to Other Actions > Add to Stacks. Remember, you're not adding the patient to a particular team member; you're adding the patient to that team member's stack. Be sure to click on the Arrow next to the team member's name to expand their list and choose the specific stack.
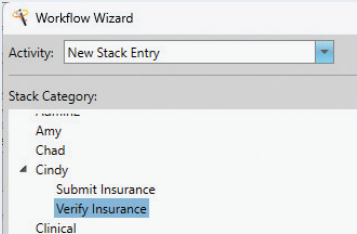
Automating Stacks

Automating stacks brings out the true power of the stacks system. Automation uses the workflow system within Edge Cloud. Most workflows are started when something happens with an appointment. Going back to one of the first examples, let's set up a Verify Insurance Stack Entry workflow when a new patient exam is made. Create your stack first, then go to Editors > Procedures.

First, select your exam code. Then, in the Events and Workflows section, you see that a workflow can be fired when the appointment is made, missed, cancelled, changed, kept, or deleted. To the right of Made, click on the Workflow Wizard icon to create a new workflow. Select New Stack Entry, and choose the stack you want to add the patient into; in this case, Verify Insurance. Click Ok and you're done. If you have a second or third exam code that needs the same workflow, you do not need to create the workflow again; it will be in the drop-down list.

Should you already have something happening when the new patient exam is made, like a welcome letter, you can combine multiple activities into the same workflow. That can be created in the Workflow editor.

Another example of automating stacks would be from a treatment chart entry. Let's say the doctor wants a stack to review records or submit a treatment plan to Invisalign after a scan. If you have a drop-down list in the treatment chart, simply choosing an item in the list can fire the workflow and add the patient to the stack.

To automate a stack based on a treatment chart entry, go to Editors > Treatment Chart List. Find or create a new list to use. Choose the item in the list that will start the workflow, and click on the Workflow Wizard icon to the right of Workflow. Rinse and repeat for each item in the list as needed.
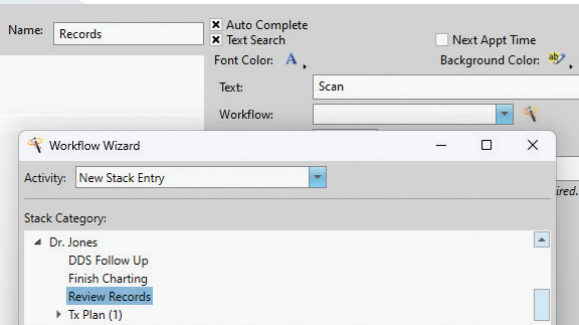
Although it's not the topic of this article, you can also apply logic to these workflows when setting up a workflow in the Workflow editor. If you have multiple orthodontists, you can assign the patient to a stack based on their assigned orthodontist.

To wrap things up, stacks are a very powerful tool that every office should utilize. They are used in the internal processes you already have but they tend to simplify the process and save you from running reports or writing down the names of the patients you need to follow up with at a later time.

As a reminder, our Software Support Team is available to help you set up any of these processes. If you get stuck or have questions, feel free to call us at 800.346.4504 or email us at ortho2support@ortho2.com. ⟳

About the Author

Derek, Ortho2 Software Support Advanced Tech and Lead Trainer, has been with Ortho2 for 18 years. He has traveled to almost all 50 states through his travels while training offices. In his free time, Derek enjoys gaming, spending time with his wife, and traveling the world.

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THE POWER OF PURPOSE

How many of you have read or sat in on a presentation, webinar, podcast, conference, seminar (I can keep going) that talked about the power of team building? All of you? Yep, that's what I would have guessed. The fact of the matter is that rhetoric around how to create an amazing team is everywhere. Everyone is offering you a secret sauce, a magical potion, the perfect formula, all of which promise to make your team perfect. So, here's mine: I want you to go outside on the night of a full moon, hold your typodonts high above your head, and scream as loud as you can. Doing this will satisfy the ortho gods, and you will now have their favor.

I am totally kidding. But in all honesty, the amount of team-building information out there can feel a little hokey sometimes. "Just do this, and you'll get this result," right? Well, as we know, orthodontic practices are not one-size-fits-all, and they certainly don't have the same people copy-pasted working within them. With that said, I want to take the time to talk to you on a real level about what I see when it comes to team building and motivation. I want to give you the most practical application of what I know so we can avoid that whole full moon situation.

Orthodontists are, by nature, driven individuals. In many ways, you're perfectionists who aim to do more than just create beautiful smiles; you transform lives. The same can be said for your team. I would be willing to bet that many of the people working for you didn't grow up dreaming of working in an orthodontic practice. But I would also be willing to say that when they entered the role, they fell in love with the same aspects of orthodontics as you did. They get the opportunity to transform lives, too.

The fact of the matter is that life is hard, and the day-to-day grind can feel less glamorous and uninspired over time. It's for this reason that I believe it is so incredibly important to constantly remind your team of the impact they have on patients' lives. Remind them that the work they do means something. The reality is that we can spend more time with our 'work family' than we do with our own flesh and blood, and if you are going to be spending time away from the people that matter most to you, you better make it count. This is the power of purpose, and when we imbue our teams

with this sentiment, it's an incredible thing to witness.

Start by regularly sharing patient success stories during team meetings. Celebrate the milestones that your practice has achieved and how each team member played a role in that success. Remember birthdays and work anniversaries. Bring them coffee for no reason and compliment their work in the moment. I want you to sweat the small things because these are the things that add up over time. These are the things that reinforce a sense of purpose AND belonging, and that is what builds a strong team.

I think it's also important to recognize that building a purpose-driven team isn't something you can set and forget. It takes constant, consistent effort and, truthfully, a lot of work as a leader. You have to own the purpose, embody it, live it, breathe it, and prioritize it above all else. It's only when a team really knows the practice's purpose that they can thrive.

So, I challenge you to define your purpose. And don't be afraid to use your team to help you do it. Talk to your team, your friends, family, peers, and confidants. Create a core values system that upholds your practice's purpose. All other team-building efforts will be for nothing if you don't start here. This is where the work begins, but it's also where it ends. So, forget all the other solutions, equations, and 'how to do business better' books, and dig in here. Craft a purpose that is authentic to you, your team, and the community you serve, and I can promise you that it will give you the practical results you need. ⚘

About the Author

Jill Allen is an international orthodontic consultant dedicated to helping doctors achieve their dreams. Her core strengths lie in guiding orthodontists through practice start-ups, acquisitions, comprehensive team training, and supporting practitioners at every stage of their orthodontic careers. Jill is a trusted leader in the orthodontic field.

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THE VITAL ROLE OF THE OFFICE COORDINATOR

In my last article, I wrote about the importance of the clinical coordinator, and so for this article, I figured I'd stay on a similar topic and speak to another vital position in the practice: the office coordinator. As a practice is growing, it's important that the management structure grows with it. Each doctor must examine their own organizational structure and determine if it will get them to their desires and ultimate goals.

A first principle of management is to "organize the work, not people". Orthodontics falls into three main categories of work: clinical, front office administration, and sales/marketing. As the practice grows it is important to have one person responsible for each of these main areas upon whom orthodontists can depend to get the work done according to the guidelines they have established and in a manner that they approve.

The office coordinator (OC) is most often a person tasked with front office and administration duties who is asked to take on various team management responsibilities. The OC frees up the doctor to focus on the clinical aspect of orthodontics by taking care of the front office work and dealing with team vacations and time off. Sometimes the OC is considered the manager of the team, especially in dealing with team issues, as they listen to team concerns and complaints trying to play referee between team members.

1. Why should an orthodontist have an OC? Is this best suited to any particular type or size of practice?

Every office can benefit from an OC no matter the size, but the role and work will change significantly as the practice increases in size. The position of the OC often evolves in the smaller practice by necessity as the doctor cannot be both in the clinical area and at the front desk so they must have a trusted person who will deal with immediate administrative issues. With a team of four to five members, this system works well as the doctor can now focus more on the clinic.

Once a practice gets beyond three to four clinical team members it is ideal if the practice decides on a clinical coordinator to function as an equal with the OC, or function

under the authority of the OC to manage the clinical area. At 10+ team members, the OC begins to take on a significantly different role as they give up more of the everyday duties at the front desk or financial area to focus on managing the team and keeping operations in the entire practice functioning smoothly.

OCs who were once the front desk coordinator and bookkeeper may find that five to ten years later they are delegating most of these duties as the practice gets large enough to warrant full-time attention to practice administration. The degree to which the OC continues to help out at the front desk or work with financial systems depends on the administrative workload, but usually once a practice crosses the 18+ team member level it requires a full-time OC to take the burden of management off of the doctor's shoulders.

2. What are the benefits to the practice?

The main benefit of middle management is to share the burden of management so that the doctor is freed up to practice orthodontics and not spend an inordinate amount of time running the business. It is not a good use of doctor time to be dealing with administration, customer issues, and managing the team, especially when the right OC can be trained to do these tasks better than the doctor and they can then devote the time necessary to obtaining superior results.

About the Author

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

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UNLOCKING THE POWER OF EMOTIONAL INTELLIGENCE IN YOUR PRACTICE

In a world driven by people, emotions are never far behind. Yet, discussing feelings often feels like venturing into uncharted territory, especially within many businesses and practices. But why is that?

As business owners, we rely on our teams to operate our business, perform tasks, and provide exceptional care and service to our patients and parents. So, why aren't we focusing on the emotional intelligence (EQ) of our team members?

Many people think EQ is just about being in tune with their own feelings or assume that certain genders, social groups, or generations are naturally better at it. But that's a misconception.

Emotional intelligence is about being aware of, understanding, controlling, using, and managing one's own emotions while handling interpersonal relationships with empathy and judiciousness. It's the perfect blend of mind and heart – in other words, leading with your heart. However, emotions often seem like a wild beast that can't be tamed, especially in a workplace where tasks and priorities take center stage.

But here's a secret: Emotional intelligence is the number one factor in a practice's success, accounting for 75-80% of a business's achievements! Now is the perfect time to prioritize EQ within your organization and join the ranks of the 75-80% who see outstanding success. But that's just the beginning. Let's dive deeper into the incredible benefits of prioritizing emotional intelligence in your practice:

1. **Decreased Occupational Stress:** When you know how to regulate your emotions, overthinking and stress melt away. Challenges become opportunities to shine.

2. **Improved Decision Making:** With higher EQ, decisions are made with empathy and clarity, not clouded by negative emotions.

3. **Reduced Team Turnover:** Teach your team to manage their emotions and inter-office relationships, leading to a more stable and committed workforce.

4. **Increased Personal Wellbeing:** A workplace filled with safety, clarity, and understanding boosts everyone's mental and emotional health.

5. **Enhanced Team Performance:** Happy team members are productive team members. They handle stress positively and build consistent, positive relationships.

6. **Strengthened Leadership Abilities:** High EQ is a hallmark of true leadership. As your team's EQ grows, so will their leadership skills.

From a personal perspective, prioritizing emotional intelligence offers these benefits:

- **Work Performance:** Navigate social complexities, lead, motivate, and excel in your career.

- **Physical Health:** Manage stress to avoid serious health issues like high blood pressure, weakened immune system, and increased risk of heart attacks or strokes.

- **Mental Health:** Reduce the risk of anxiety and depression by controlling stress.

- **Relationships:** Communicate effectively and forge stronger connections, both at work and in your personal life.

- **Social Intelligence:** Recognize social cues, reduce stress, and feel happier and more connected.

So now that we have reviewed both the professional and personal benefits of emotional intelligence for your team members, let's now talk about how to start developing it within your team.

To begin, we'll define the four cores of emotional intelligence and explore different ways to improve them. Understanding and strengthening these components can be a game-changer for your practice.

Self-Awareness
Self-awareness is the ability to recognize and understand your own emotions, triggers, and responses. It involves being mindful of your emotional state and how it affects your thoughts and actions.

Ways to Improve:

- **Mindfulness Practices:** Encourage mindfulness exercises such as meditation or journaling. These practices help team members tune into their emotions and understand their underlying causes.

- **Feedback Mechanisms:** Implement regular feedback sessions where team members can receive constructive insights about their behavior and emotional responses. Peer feedback can also be valuable in building self-awareness.

- **Emotional Check-Ins:** Start meetings with quick emotional check-ins, where team members share how they're feeling. This practice fosters a culture of openness and helps individuals become more attuned to their emotions.

Self-Management
Self-management is the ability to regulate your emotions and behaviors in different situations. It involves controlling impulses, maintaining composure, and managing stress effectively.

Ways to Improve:

- **Stress Management Techniques:** Provide training on stress management techniques, such as deep breathing, progressive muscle relaxation, or time management strategies.

- **Setting Goals:** Encourage team members to set personal and professional goals. This helps them stay focused and motivated, reducing the likelihood of emotional outbursts.

- **Positive Reinforcement:** Recognize and reward self-control and composure. Positive reinforcement can motivate team members to continue practicing self-management.

Social Awareness
Social awareness is the ability to understand and empathize with the emotions of others. It involves being aware of social dynamics and reading emotional cues accurately.

Ways to Improve:

- **Active Listening Training:** Conduct workshops on active listening skills. Teach team members to listen attentively, ask clarifying questions, and provide empathetic responses.

- **Diversity and Inclusion Initiatives:** Promote diversity and inclusion within the team. Exposure to different perspectives enhances empathy and social awareness.

- **Team-Building Activities:** Organize team-building activities that require collaboration and communication. These activities help team members understand each other's strengths, weaknesses, and emotional triggers.

Relationship Management
Relationship management is the ability to build and maintain healthy, productive relationships. It involves effective communication, conflict resolution, and teamwork.

About the Author

Laryssa Loya has been working in the dental industry for nearly 15 years and has extensive knowledge and experience with startups, treatment coordinating, customer service, marketing, leadership, development of policy and systems, and managing multiple offices. As a Business Analyst, she uses Shimmin Consulting's comprehensive practice approach, transforming orthodontic practices to reach their highest potential.

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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 2024.

Nineteen Years
Michelle Kinnaman

Sixteen Years
Cal Rebhuhn

Fifteen Years
Judy Denny

Thirteen Years
Brent Jacobsen
Steve Mahan

Eleven Years
Wesley DeShaw

Ten Years
Nathan Hemmings
Jorge Rios

Six Years
Darcy Dakovich

Four Years
Jeff Brockway
Marley Probasco

Two Years
Samantha Armstrong
Jasmine Snell

One Year
Omar Karin
Greg Van Riper

HOLIDAYS

Our corporate office is closed on the following holidays:

New Year's Day
Memorial Day

Independence Day
Labor Day

Thanksgiving Day
Friday after Thanksgiving
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.

Christmas Eve and New Year's Eve are optional holidays. We offer limited support on those days.

HELP US HELP YOU

Please be prepared to provide your customer number, practice name, and office location when you call our support teams for assistance. You can find your customer number in Edge Cloud by clicking File > About. If you use ViewPoint, you will find your customer number by clicking the Help menu and choosing About. Please be sure to provide this information—and repeat your phone number—when leaving a phone message requesting support.

CAREER MILESTONES AND DEVELOPMENT

Happy retirement to Sara Harbacheck, Ortho2 Help System Developer! Sara's last day with Ortho2 was on August 2. We hope you enjoy every moment of relaxation and the freedom to do things on your own schedule. Wishing you endless days of fun and adventure!

Before leaving, Sara wrote about her career at Ortho2:

I began my career with Ortho Computer Systems, now Ortho2, nearly 37 years ago when I answered an ad in the Help Wanted section of the local newspaper, the Ames Tribune. When I first started, the four of us worked together in a small, otherwise unused section of an industrial office building. Dan Sargent was busy coding, and the rest of us were busy doing everything else.

We answered support and sales calls, stuffed and stamped marketing materials, copied floppy disks by hand, and snail-mailed them to customers so they could update their systems. We dragged computers and sales brochures along with us as checked baggage when we traveled to regional orthodontic meetings, the AAO, and our fledgling Users Meeting.

Each new customer's name was printed on a piece of paper and taped to the wall. Every month we used a different color of paper, so we could see how many new customers we had each month that year. And we knew all of their names by heart. Without Internet access, we used landline telephones and verbal communication skills to guide customers through support questions keystroke by keystroke, visualizing their computer screen as we went.

Between support phone calls, I revamped the printed documentation that Dan had put together and helped create the mail merge letter library for our customers. I used emerging technology to design and create our first online help system that co-existed with our printed Users Manual. Through many iterations and leaps of technology, that rudimentary system grew into the comprehensive online help system that we have today.

For a short time, I managed a small documentation team, but life and fate had other plans that made full-time work impossible for me. Rather than accept my resignation, Dan threw me a lifeline, offering me the opportunity to continue working however I could, whenever I could. I took that opportunity and continued working for Ortho2, developing help systems and other user documentation for another 20 years.

I believe the culture of pursuing elegant solutions that support both our people and our products makes Ortho2 different from any other company anywhere. I am proud to have contributed to that culture, and to the growth and success of the tiny software company that is now the practice management solution for orthodontists around the globe.

Thank you, Ortho2. I am so grateful that I answered that newspaper ad 37 years ago. I know great things are still to come for all of us.

MEET THE TEAM – EXECUTIVE TEAM

In our final edition of Meet the Team, we are featuring the Executive Team, which is made up of Chad Kellner, Vice President of Development; Dan Sargent, Senior Advisor; Amy Schmidt, President; Craig Scholz, Vice President of Emerging Technologies; and Todd Schuelka, Vice President of Operations.

What do you really do here at Ortho2?

DS: I participate in executive level discussions and assist as requested.

AS: Sometimes I feel like I sit at a computer and answer emails. But in reality, I collaborate and strategize to keep advancing the software and services we provide to stay top-notch.

CS: I really focus on growth opportunities (currently DSO/OSOs and strategic partnerships) and establishing new connections with Henry Schein.

TS: I oversee the day-to-day interactions with our customers primarily through our Implementation, Internal Services, Network Engineering, and Software Support Teams, wihle also involving regulatory and legal developments.

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

CK: I've been with Ortho2 for 20 years, and I don't know if any two days have been the same. I enjoy the challenge of growing and adapting our platform and services to meet the industry's ever-changing demands and contributing to the success of our partner practices.

DS: I enjoy following the Executive Team as they move the company forward. I also appreciate a less active role than I had as president.

AS: I truly enjoy the people. Ortho2 is an amazing team, not to mention all the customers and others in the industry we get to work alongside.

CS: I get to work with very bright, highly motivated people who are focused on growing their company, too.

TS: The fact that I have emails older than some of our employees.

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

CK: The Executive Team strives to keep our community of partners, customers, and employees at the forefront of everything we do. I'm proud to be involved with a team whose decisions value people first.

DS: They have exceptional talent, tenure, and expertise to guide Ortho2 via our mission "to help our clients succeed".

AS: We work every day to keep innovating and advancing.

CS: We've all been here for a long time and love our Ortho2 history, customers, and employees.

What else would you like to add?

DS: It's been an exciting ride… 40+ years and counting!

CS: Since I'm in LA, I have to miss the weekly Executive Team meeting at Applebee's in Ames, sadly. :(

Chad Kellner
Vacation destination: I love to travel and have a few destinations left to check off my list, with the most outlandish being someday vacationing in outer space.
I can't go a day without: Giving back and showing appreciation to those around me while striving to be the best version of myself..is what I'd like my answer to be. But it's coffee.
Favorites
Team: Unfortunately, by the time I realized you could actually choose which teams to root for, the damage was already done, and I'm a Minnesota sports fan.
Software Program: Ortho2 Edge Cloud, followed by ViewPoint, with Cakewalk a distant third.

Dan Sargent
Vacation destination: A guided Colorado River tour through the Grand Canyon would be an amazing experience.
Three people I would like to have dinner with: Sam Harris, Stephen King, and Paul McCartney
My role model: My father (WWII vet, entrepreneur, eternally happy optimist.)
I can't go a day without: Coffee
What are you listening to right now? Eva Cassidy and Laura Marling
Favorites
Team: Iowa State Football, Men's and Women's Basketball
Software Program: Excel and currently enjoying the game LIMBO
Movie: *2001: A Space Odyssey*
Book: *Lonesome Dove*
Phone App: Google Keep

Amy Schmidt
Vacation destination: Kauai, Hawaii
My role model: My dad. He is a true entrepreneur, co-founding Ortho2 over 40 years ago and growing it to an amazing company, while always remembering the team who helped make it that way.
I can't go a day without: Caffeine
What are you listening to right now? The sound of kids playing before heading back to school!
Favorites
Team: ISU Cyclones, NY Jets, LA Lakers
Software Program: Ortho2 Edge Cloud of course!
Movie: *Top Gun*
Book: *Tuesdays With Morrie*
Phone App: Google Keep

Craig Scholz
Vacation destination: Portofino, Italy
Three people I would like to have dinner with: Carl Jung, Sam Harris, Jim Morrison
My role model: The Buddha
I can't go a day without: Coffee and wine (although I try sometimes)
What are you listening to right now? Lots of Steely Dan
Favorites
Team: Golden State Warriors
Software Program: Outlook
Movie: *Parasite*
Book: *The Moral Animal* by Robert Wright
Phone App: Spotify

Todd Schuelka
Vacation destination: White sand beach with unlimited funds and no "cataracts and hurricanoes".
Three people I would like to have dinner with: Jim Lovell, William Shakespeare, and my great grandfather Gus.
My role model: Superman (Christopher Reeve's version)
I can't go a day without: Oxygen
What are you listening to right now? Most likely something on Audible.
Favorites
Team: Cyclones, White Sox, and the Niners (going back decades before Purdy!)
Software Program: F-15 Strike Eagle II, though I haven't played it since the 90's (so, so many hours back then)
Movie: Most of the James Bond movies
Book: *Islands in the Stream*
Phone App: My non-stock calendar app

development. We will keep you updated as developments progress and this feature nears release.

Edge Reminder Enhancements and Patient Self-Scheduling. We have spent significant time researching the best approach to ensure Edge Reminders remains top-of-class long into the future. Similar research, storyboarding, and coding have been occurring on a parallel track for Patient Self-Scheduling. We are working to bring these exciting new features to you as quickly as possible.

In addition to these features, Ortho2 has also been working on a significant Edge Signature revamp, with beta testing scheduled to start within the next few weeks. We have also invested heavily into a new API platform, which will allow customers unique access to their data for the purposes of BI, reporting, and integrations with external services. We remain committed and excited to roll out these and other Edge Cloud 8.0 features to you in the coming months! ☉

Ways to Improve:

- **Communication Skills Training:** Offer training on effective communication techniques, including assertiveness, non-verbal communication, and constructive feedback.

- **Conflict Resolution Workshops:** Teach conflict resolution strategies, such as active listening, empathy, and finding common ground. Encourage a problem-solving mindset.

- **Mentorship Programs:** Establish mentorship programs where experienced team members guide and support newer members. This fosters strong relationships and promotes a collaborative culture.

To successfully integrate EQ development into your practice, consider the following steps:

1. **Leadership Commitment:** Ensure that leadership is committed to fostering emotional intelligence. Leaders should model EQ behaviors and support team members in their development.

2. **Training and Workshops:** Invest in regular training and workshops focused on the four cores of EQ. Provide resources and tools that team members can use to practice and improve their emotional intelligence.

3. **Continuous Improvement:** Create a culture of continuous improvement by regularly assessing and addressing the emotional needs of the team. Encourage open communication and provide opportunities for feedback.

By defining and actively working on the four cores of emotional intelligence, you can create a more cohesive, resilient, and high-performing team. We urge you to act and propel your team and practice toward greater success.

Emotional intelligence can profoundly transform the workplace. When leaders and team members alike display high EQ, it sets a positive tone for the entire organization. So, will your practice be part of the 75-80% that achieves outstanding success, or will you miss the chance to revolutionize your team and practice? ☉

Doctors who have a strong organizational structure led by the right OC have fewer worries and burdens of running the business compared to those who are trying to manage everything themselves. Other benefits include the fact that patients and parents often will sense a much stronger bond with the coordinators in the office resulting in many patient/parent questions getting resolved before they get to the doctor.

Team members often prefer to be able to vent to a middle manager instead of the doctor, especially concerning peer-to-peer issues, and want to test the waters with the OC before taking ideas or requests to the doctor. Perhaps most importantly the doctor has a second pair of eyes and ears to help keep them focused on the needs of the practice before a mountain is made out of the molehill. A free flow of communication from the team to doctor and doctor to the team is a vital ingredient to the success of any business, but especially needed in the larger practice that the OC facilitates.

3. If a doctor wants to establish this position, what are some steps to take?

Some form of middle management help is necessary for every doctor once the practice has reached the size of five to six team members. Before establishing the position of the OC a doctor should consider a few things:

1. What is the office size and is the organization better off with just one OC or perhaps instead two coordinators: one clinical and one front office? Often, having more than one pillar in the practice is best as it is desirable to keep management as horizontal as possible. Also, one OC cannot be at two places at once, nor can they truly manage front and clinical areas without selecting someone from within the area they do not work to co-manage this area.

2. The first place to look for an OC is within the group of present team members. Many times a leader has already been recognized by the rest of the team and all that is required is to continue to develop that individual

by giving them greater responsibility along with defining the necessary authority to get the job done. If there is no one on the current team who shows true leadership qualities, then one must go outside the practice in search of someone who has already had a leadership role in dentistry or any small business. It may be best to integrate the new OC into the team for a trial period in a specific role, such as a front desk coordinator or financial coordinator, prior to becoming the OC. In this way, they can develop the necessary relationships with the other team members and learn the practice systems without having to be thrust immediately into the politics and issues of the practice. Being an OC, instead of a manager, requires that they be considered a part of the team and not simply a coach.

3. Once the new OC has been identified, and accepts the new role, the doctor must give a specific list of tasks that they are to accomplish, along with a description of how the doctor sees this role being successfully implemented into the practice. Perhaps this second part is most neglected, yet it is so vital to the overall success of the position.

The ideal OC is one who will take much of the burden of management off of the doctor's shoulders. The OC has the respect of the team, treats them as equals, and leads by example, modeling the very ideals that they are coaching in the team. The OC is a practice champion giving enthusiastic praise and appreciation to the team along with coaching the doctor on how to do the same. The OC tries to remain an objective and neutral liaison between doctor and team by facilitating open, honest, and gentle communications. Most of all, the OC believes in the doctor and the practice, and through their work wants to foster great relationships and super practice success.

Often the difference between a small orthodontic practice and a mega-practice can be found not simply in the practice's efficiency and marketing, but in its management and the ability to get the job done through people. Great ideas and systems do not run themselves. ☉

ORTHO2

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ORTHO2
EMPOWERING PRACTICES