ORTHO2
EMPOWERING PRACTICES

Quarterly Newsletter

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The Newsletter for Members and Friends of Ortho2

Ortho2 Perspective

The act of giving, whether through time, resources, or simple acts of kindness, holds immense power to not only improve the lives of others but also significantly enhance our own well-being. It can foster a sense of purpose, connection, and happiness while simultaneously contributing to a more positive and supportive

Ortho2 Perspective *continued on next page*

Ortho2 Perspective *continued from previous page*

community. This is certainly true at Ortho2.

Giving Time: In 2019, Ortho2 enacted a new volunteer time off policy, allowing all employees to request one paid day off per calendar year to volunteer at a nonprofit organization. Many employees have taken time to help serve meals to those in need or volunteer with youth in their communities.

Giving Resources: The Ortho2 Team gives resources to several organizations but most notably, the United Way, which focuses on "leading the fight for the health, education, and financial stability for every person." The United Way reimagines what's next for individuals, families, human services, and communities – all with a vision of improved quality of life for everyone.

For more than 25 years, Ortho2 has partnered with the United Way's annual giving campaign. And Ortho2 employees have really stepped up to help those in our community. Throughout the last decade, the Ortho2 Team has donated more than $134,000 to the United Way to further this mission. Additionally, Ortho2 partners with the annual United Way Food Drive, donating the most dollars in Story County earlier this year. Through this donation, the United Way is able to provide nearly 8,000 pounds of food to those in need.

Another organization Ortho2 has partnered with is the American Association of Orthodontists Foundation (AAOF). Since 1992, Ortho2 has pledged and donated more than $25,000 to advancing the specialty of orthodontics.

Simple Acts of Kindness: Whether it's a friendly good morning to a coworker or going above and beyond for a customer request, the Ortho2 Team strives to embody kindness in all things. I see and hear these things throughout our organization every day and hope you have personally experienced them too. We frequently receive Extra Mile submissions for Ortho2 team members who have provided exceptional service. A couple recent examples include:

> *"Exceptional service provided to our office for more than 30 years! We appreciate all of the many helpers who help with great efficiency and excellent customer service!"*

> *"I am very grateful for the Implementation Team's expertise, professionalism, and willingness to assist me every step of the way. Their commitment to excellence and customer service does not go unnoticed, and I feel very fortunate to have had the opportunity to learn Edge Cloud. Exceptional support, and unwavering dedication to helping me navigate the Ortho2 Edge Cloud program consistently exceeds expectations. Thank you again!"*

These messages are shared company-wide through our online Kudos board, a platform that also allows us to acknowledge each other for a job well done. If you'd like to share how an Ortho2 team member has gone the extra mile for you, check out page 11 to see how you can submit a form.

Giving comes in many forms. In a world that can often focus on the negative, giving can not only help others but also benefit you. I hope you will consider giving your time, your resources, and/or simple acts of kindness in 2025.

Amy Schmidt

Amy Schmidt, Ortho2 President

THE EVENT OF THE YEAR

Get ready for an unforgettable experience! Our Users Group Meeting is your chance to connect, learn, and share ideas with fellow users and industry experts. It's the perfect place for fresh insights and networking opportunities. You don't want to miss out – the next time you can experience our in-person meeting is in 2027.

There's still time to secure your spot, so register today! We can't wait to see you in Austin!

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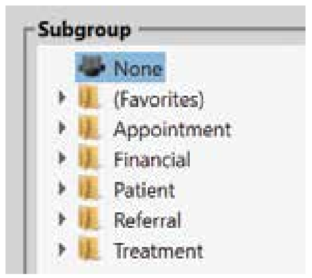
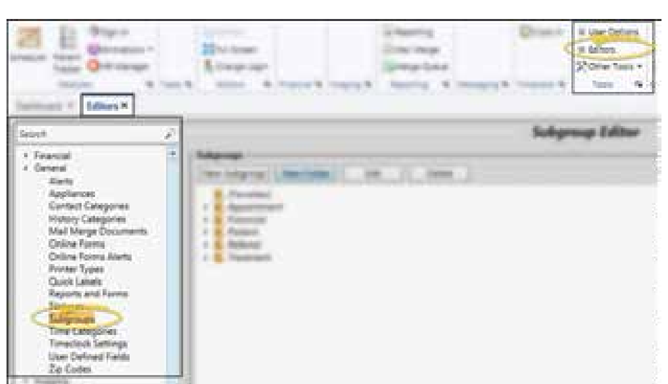
Subgroups for Reports and Reminders

Every time you open a report, a mail merge document, or check on your scheduled reminders, you see it in the corner – subgroups. You may have used these for pulling a list of your past due patients in your statement reports, or even have one on your dashboard. They are handy and seemingly everywhere!



These subgroups are great, but what do they actually do? Let's start by imagining your data as a big pool of manila folders; patients, professionals, and all kinds of records. Maybe you want to find all of your patients in a particular status, or the responsible parties with balances greater than a certain amount. You can pick a folder at random, (metaphorically grab a big armful of them) counting the totals as you go, and hoping your mental arithmetic is up to par. You will quickly find this process without any other tools makes what you have a rather unusable pile of data.

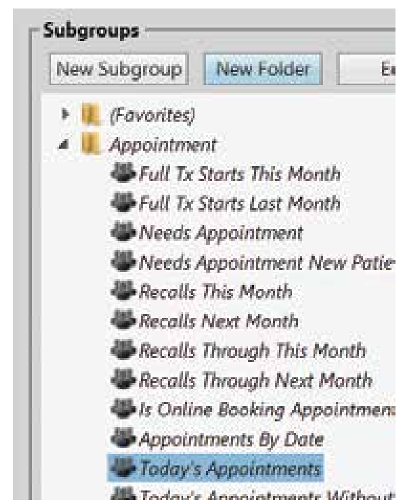
This is where subgroups come into play. A subgroup is similar to a specialized funnel, taking the large troves of data your practice has collected and filtering it to just what you need with simple logic. While there is much more subgroups can do, this article's purpose is to show that depending on where you use them, subgroups can help you retrieve focused reports or target (or even avoid targeting) patients for reminders.



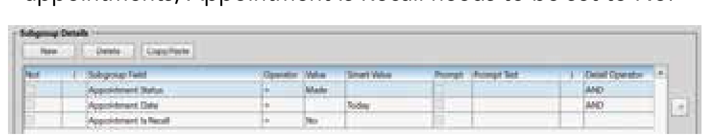
Your Subgroups

Subgroups in your database are all stored in Home > Editors > Subgroups.

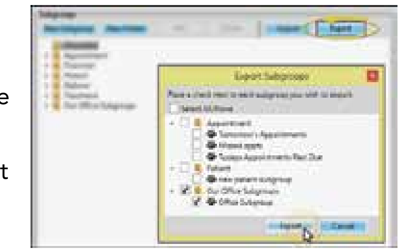
The folders listed in italics come with your database and are universal to all Edge Cloud users. Everything else listed is specific to your database. You can always add a new folder, or add a new subgroup to any existing folder. One example of a commonly used subgroup in the Appointment folder is the Today's Appointments subgroup which is used to pick only today's appointments.



If you click on the subgroup, you get to look at its details which helps explain the behavior of the subgroup, and fortunately for humans like you and me, it reads like a book! The first line is the appointment status. You do not want just any appointment today, you only want the ones that are made. This will filter out canceled, deleted, missed, etc.. The second line has a smart value (such as 11/11/2024 or Missed or Active) but which ones you use depends on other factors. In this case, it is for the appointment date. Therefore this one is appropriately set to the smart value of Today. The last line is another filter; there are two kinds of made appointments in Edge Cloud – regular scheduler appointments and recalls. If we only want regular appointments, Appointment Is Recall needs to be set to No.



And there you have it, a subgroup! There is one more feature to mention – namely at the top in the editor there are buttons labeled Import and Export. Export will let you create a file on your computer that you can later import into other databases – very handy if you are a consultant or otherwise manage multiple databases, the work you did in one subgroup editor can be transferred to another!

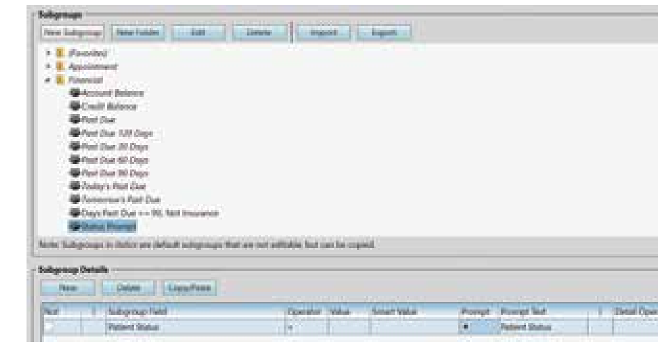


Reporting – Find Certain Types of…

Subgroups are invaluable in taking existing reports and making them concise. Let's say you have a busy week and you want to address patients coming in who are significantly delinquent, say 90 days or more. While you can use your Scheduled Appointments report and click each patient to check their days past due, you can save a lot of time by leveraging subgroups instead.

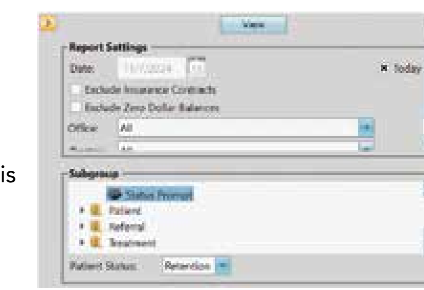
Back in the Subgroup Editors, create a new subgroup that looks similar to an existing one. Pro tip – if you select a subgroup and right-click it, you can copy it. Then paste it into a folder to make an exact duplicate to modify without changing the original one. This is great for experimenting!

If you add the above details to a subgroup (including a check that avoids the patient's insurance dues), you now have a subgroup that can be used on your Scheduled Appointments report that will only show those patients coming in for their appointment who are delinquent. Feel free to mix and match report settings and subgroup details to get the right amount of control over your reporting.



For another example: what if you are looking at your accounts receivable, but only want to target patients in a particular status, like Retention, to determine who may have just debonded while still owing. You can use a prompt field for flexibility. Prompt allows you to choose the setting when you use the subgroup in a report, which is particularly useful if the item you are filtering may change in the near future.

Simple as that, you now have a report for just your Retention patients. And you can use this subgroup again for other statuses on other reports, like



Subgroups *continued on page 10*

Joe Randazzo

Joe Randazzo is an Ortho2 Advanced Support Tech and international Software Trainer with a background in Software Engineering and a healthy-ish obsession with technology. While hands are off the keyboard, he frequents karaoke venues, yaps about his electric compact car, and performs culinary crimes currently featuring Sichuan peppercorns.

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5 Ways to Simplify Your Practice's Insurance Protocols for the New Year

As a new year begins, it's an ideal time to evaluate and refresh your practice's systems and protocols to ensure they're running smoothly. While many practices focus on updating operational or clinical processes, financial systems—particularly insurance protocols—often go overlooked. Yet, in an ever-evolving insurance landscape, outdated procedures can put a practice at a disadvantage. Here are five practical ways to update and simplify your practice's insurance protocols for the new year.

1. Regularly Review In-Network Participation

Evaluating your in-network participation annually can make a significant difference to your practice's bottom line. As costs of supplies and overhead increase, some in-network contracted rates may no longer be sustainable. Conduct an in-network analysis at the start of each year to assess the amount that has been written off from the prior year per insurance company. This will help your practice determine if current contracts are still financially beneficial. Making necessary adjustments can help ensure that in-network participation aligns with the practice's financial goals.

2. Simplify With Bundled Billing

Orthodontic practices have an advantage when it comes to billing due to the limited number of CDT codes that can be used for orthodontic services. Most insurance carriers consider these codes to be "all-inclusive," encompassing all treatment appliances and retainers in just seven main codes. By sticking to this bundled billing approach, financial coordinators can avoid the complexities of billing for each type of appliance, which streamlines the process and minimizes potential billing errors.

3. Avoid Upcharges on Select Services

For practices that consider adding upcharges for specific treatments, like aligners or clear brackets, it's essential to evaluate whether these upcharges are truly necessary. Many insurance carriers do not permit these additional fees for in-network providers, and attempting to include them can complicate billing and claims processing. If a regular upcharge seems warranted for most treatments, consider whether the practice

Insurance Protocols
continued on page 11

Megan Wyrick and Brittani Wyrick

Founded by TWO sisters, Megan and Brittani Wyrick, The Wyrick Outlook is an orthodontic coaching agency specializing in remote orthodontic financials and insurance, digital courses, and private coaching. This dynamic has helped hundreds of practices achieve and sustain financial success across the orthodontic industry.

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How to Avoid Employee Overload

Welcome to the New Year. One of the struggles for offices during the past year was staffing issues including hiring, training, and retention. Employee overload can be a big contributor to staffing issues.

What do you do when an employee isn't performing like they used to?

All sorts of causes could be to blame. The workload they have been assigned can be one of the causes of lower performance levels. Employee overload is a growing concern among our offices, especially for managers who care about their team members' overall well-being — not just their job performance.

What is employee overload? Employee overload is when team members in an office have more work assigned than can be accomplished during their workday. Technology can be one of the contributors if the team does not have proper training and designated time to manage it. An early burst in productivity soon gives way to stress, declining performance, burnout, and even physical and mental health concerns. Before long, staffing and retention can begin to suffer.

Red Flags of Employee Overload

Employee overload doesn't look the same in every employee. If you're concerned that some of your employees may be dealing with overload, look for these red flags.

1. **Decreased Levels of Productivity and Task Completion.** Overloaded employees will quickly become overwhelmed juggling too many tasks, diminishing productivity and task completion. Productivity drops because of the time lost by switching between tasks, or constantly checking what's most actively on fire at the moment.

   And task completion also suffers, team members switch to the on-fire task before finishing their current one, and who knows when (or if) they'll find time (or remember) to switch back to the unfinished task.

2. **Decreased Work Quality.** With a growing backlog of tasks to complete, an overloaded employee may feel significant time

Employee Overload *continued on page 12*

Andrea Cook

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.

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Mentoring Makes a Difference: Empowering Women in Work and Life

After 50 years in the dental/orthodontic industry, I have realized the valuable impact on our work and personal lives when engaging in the relationship of mentoring (or mentorship).

By definition, "Mentorship is a relationship where a more experienced or knowledgeable person, called a mentor, helps a less experienced person, called a mentee, grow professionally and personally."

My path from registered dental assistant, treatment coordinator, and marketing specialist to a full-time orthodontic management consultant and international speaker was based on a great mentor in my professional life, Karen Moawad of Hummingbird Associates.

I was fortunate enough to attend some weekend seminars facilitated by Karen, and on one such occasion sat next to her at dinner. We discussed my career to date: ten years as a registered dental assistant (four in general dentistry and six in orthodontics) and my desire to accomplish more. At that time, I thought of going back to school to get my degree in psychology so I could work as a counselor for junior high and high school students. Karen suggested I mail her a resume before I left the dental field.

Multi-generational mentorship harnesses the unique strengths and perspectives of each generation, fostering an inclusive culture that enhances employee engagement, productivity, and knowledge transfer.

Karen was generous in her willingness to share her world of expertise and management systems as she guided me through the process of gaining more wisdom and experience that I could then share with orthodontic practices and dental audiences. As a mentor, Karen saw something in me that I did not see in myself at that time. She gave me the wings to fly along with the freedom to create a treatment coordinator training program, a marketing program and offer team building seminars.

Fast forward ten years later, almost 30 years ago, I had the opportunity to mentor Alena Pacheco, when she entered my life as a part-time assistant in my consulting business. At the time, Alena was attending our local university and had no experience in the dental field, yet she was organized, dependable, and willing to take on a new challenge. We came from vastly different backgrounds and ages yet bonded over braces (pun intended of course).

Our orthodontic journey brought us together and for the next several decades we learned from and mentored each other through a myriad of challenges that face women in the workplace. Not only did Alena assist me with my growing consulting business, but she also trained and applied for a TC position with one of my former employees and became an invaluable colleague in the world of logo design along with custom promotional and print materials.

Alena has acknowledged that her "20-something" view of me back then might have been a little skewed by her young age and inexperience. After all, I was only in my 40s at the time! Now that we are both well "seasoned," we have had the opportunity to look back on our decades-long relationship to see how amazing it was. And, more importantly, we are exploring how we could have shown up differently to support each other at the time. I was a single mom raising a teenage daughter as she completed college, married, and started a family of three. Later, when her adult children were grown and exploring life on their own, I was now remarried and a grandmother of two. Our lives and individual challenges throughout those years were always at different stages yet our shared experiences nurtured and guided each other along the way.

Transformations in Mentorship

In today's rapidly evolving work environment, the dynamics of mentorship are undergoing significant changes. The increasing diversity in the workforce, characterized by multiple generations working side by side – from Baby Boomers to Generation Z – presents both challenges and opportunities. Multi-generational mentorship harnesses the unique strengths and perspectives of each generation, fostering an inclusive culture that enhances employee engagement, productivity, and knowledge transfer.

Benefits of Mentorship:

1. Develop Confidence
2. Learn New Skills
3. Navigate Challenges
4. Feel More Secure in Asking for Advice
5. Build a Strong Identity
6. Learn to Take Action
7. Improve Diversity, Equity, and Inclusion
8. Nurture Talent
9. Enhance Employee Satisfaction

As a mentor encourages a mentee, they help with problem-solving by using active listening techniques. A mentor becomes a "guidance counselor" as they help guide the mentee's behavior, values, and attitudes; sharing values and deep-level similarities. A mentor can help a mentee reach their goals (professionally and personally) as they raise awareness, confidence, and leadership skills.

Now, before you get worried that you must have it all together in your own life before you can help someone else, let me reassure you that you don't! Most of us are facing challenges in our lives, no matter our age or circumstances. Most of us are dealing with difficulties. When we surround ourselves with other people who genuinely care about showing up and supporting us, we can deal with those problems together and leverage the life experience that we each bring to the table. Let's be honest, age doesn't give us fewer problems. It does, however, give us a depth of experience that we can share with others when they are going through similar circumstances.

Can you list people in your life who have been your professional or personal mentors? Have you taken the time to thank them and tell them what they have helped you accomplish? Are you currently mentoring someone as you share your skills and life experiences with them?

Alena and I were fortunate that the universe brought us into each other's lives almost 30 years ago. Neither of us had it all together then, and, in fact, we're still a work in progress now. That's the beauty of having authentic mentoring relationships. None of us are perfect and we don't need to be. We do, however, need to cultivate a framework and daily practice that creates a supportive mentoring environment in our work and in our lives. And we know how challenging that can be in an orthodontic office.

Mentoring *continued on page 14*

Carol Eaton

Carol Eaton has devoted 50 years to the field of dentistry; primarily in the orthodontic environment as a well-recognized consultant, leader, and speaker. Together with Alena Pacheco, the duo focuses on empowering women to pursue their dreams and enhance their work environment and personal development.

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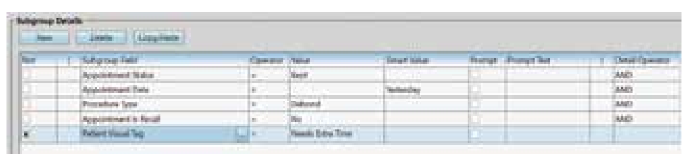
Subgroups *continued from page 5*

Observations in the Patient List report, or Clear Aligners on your Exceeds Length of Treatment report. The possibilities are really only limited by the list of subgroup details and your imagination!

Reminders – Target Who You Want

Have you heard about our visual tag system? Visual tags allow you to tag patients and responsible parties with colorful symbols to, at a glance, share information internally. This could be as innocuous as a little green dollar sign symbol for patients with financial troubles, yellow stars for patients who are awesome with compliance, or red squares for those patients or responsible parties that just need a little extra TLC.

Did you know you can use visual tags in subgroups, including ones for Reminders? If you add a visual tag or other criteria to the subgroup being used for a Scheduled Reminder, it can exclude individuals with that visual tag from that message set, without removing them out from the entire Reminder system.



Subgroups - Food for Thought

As a bonus for sticking with me thus far, here are two more subgroup examples and what they do. The first is a relatively simple example of a tweak for missed appointments. By adding the Has Appointment = No detail, if the patient reschedules – no harm no foul! They will not be notified of their missed appointment because they rescheduled, saving a superfluous message about them missing the appointment and rescheduling again when they already have. *Note:* this is only recommended if you normally schedule one appointment in advance at a time.

The second example is casting a wide net for happy birthday reminders – this will include your active statuses, patients with appointments, and patients who recently had appointments – so nobody is truly missed out on their special day!

Subgroup pros take note: this particular subgroup uses OR and parentheses to help organize the logic. Another way of reading it would be, "Patients whose birthdays are today, and who have either had an appointment within the last sixty days or require a new appointment." If that is not everybody who deserves a happy birthday message to your practice without overrun, let us know!

In summary, there is quite a lot you can do with subgroups, and we have only begun to scratch the surface here. If you have ideas for more subgroup details, please let us know at ortho2support@ortho2.com - we look forward to your ideas! As a friendly reminder, if you need any help setting these up or if you get stuck during this process, our stellar Software Support Team is available on demand to remote in and help at 800-346-4504.

EDGEucate Yourself With EDGEpisodes

Looking for EDGEucational content to help you become an Edge Cloud guru? Our brand new EDGEpisodes series is perfect for you! These bite-size videos will provide you with quick and easy tips to master all things Edge Cloud and are easily accessible on Facebook and Instagram.

Insurance Protocols *continued from page 6*

truly benefits from being an in-network provider. Oftentimes, the insurance benefit remains the same for in vs. out-of-network providers, which may make out-of-network participation a more straightforward and profitable choice.

Note: New in 2025, the CDT has introduced the D8091 code specifically for surgical cases. This would replace the previous D8090 code for surgical cases and may offer a higher contracted rate, thus eliminating the need to upcharge for surgical cases.

4. Stick to Paper Checks for Payments

As more insurance carriers push for practices to accept EFT payments or virtual credit cards, managing these forms of payment can become cumbersome. EFT reconciliation requires financial coordinators to track and reconcile direct deposits into the practice's bank account. This can be tricky when the majority of doctors aren't comfortable providing their financial coordinator with that information.

On the other hand, virtual credit card payments incur additional merchant fees, increasing costs for the practice. Sticking with paper checks is a simple and cost-effective alternative, making reconciliation easier for financial coordinators without adding extra fees.

5. Set Clear Timing for Insurance Claim Submission

Many practices activate insurance contracts as soon as a financial agreement with the patient is signed. This date may differ from the date that the appliances are delivered, which is the date required on the insurance claim. While entering a contract at financial commitment may look good as a conversion statistic, it can create billing challenges if there isn't a clear process for notifying the financial coordinator of the appliance delivery date. Delayed submissions can result in timely filing denials, creating extra work and potential revenue loss. Establish a protocol for when insurance claims should be submitted to prevent these issues and make the billing process more straightforward for coordinators.

In summary, simplifying your practice's insurance protocols can have a substantial impact on efficiency, accuracy, and overall financial health. By regularly evaluating in-network participation, adopting bundled billing, avoiding unnecessary upcharges, choosing straightforward payment methods, and establishing clear timing for claim submissions, your practice can reduce administrative burdens and improve cash flow. These proactive steps help ensure your practice is well-prepared for the new year, leaving more time to focus on patient care and practice growth.

Service Excellence

We invite you to recognize Ortho2 employees by submitting an Extra Mile form. The form is available online from the Contact Us page of our website. Our goal is to uphold our tradition of excellence in customer service, and with our Extra Mile program, you can let our employees know when you appreciate their extra effort. We encourage you to submit an Extra Mile form whenever an Ortho2 employee goes the extra mile for you. The recognition is valued by the recipient and is acknowledged by our management team. We continue to look for better ways to serve you. Thank you for helping us recognize excellence.

Employee Overload *continued from page 7*

pressure. When people constantly feel under the gun, they tend to cut corners, skip final checks, and move just a little faster than they should. This may lead to digital workflow not getting submitted or an increase in emergency visits.

3. **Decreased Energy and Motivation Toward Work.** If you notice once happy and motivated team members starting to look lethargic and disengaged, you'll certainly want to investigate. Numerous causes could contribute, including office culture, mental health, and overload or overwork.

4. **Increased Distractedness.** The more overworked a team member feels the worse things get in terms of energy levels. Before long, focusing on anything becomes difficult, which can manifest as a constant stream of distractions, inattention during appointments, etc.

Given the red flags and symptoms I described above, most doctors and managers seek to avoid overloading their team members. But how can doctors/managers do this consistently in a world where they're being asked to do more with less?

These five tips are a great place to start assessing and balancing workload, reducing overload, overwhelm, and overwork for your team members.

1. **Create a Time Budget.** A time budget sets aside blocks of time for the highest priority work. A time budget only works if you have certain capabilities in place, though. You still have to have a way to forecast how long various tasks will take. You also need a way to track and quickly view tasks that have been assigned to your team members.

   But once you get those capabilities in place, budgeting your team members' time (and your own) is a great way to take control of schedules and timelines, rather than letting them control you.

2. **Set Clear Goals and Milestones.** In most offices, there will be inevitable, unavoidable short bursts of intensity from time to time. This is especially common in orthodontics where big pushes for production are frequent. Great managers encourage their team members to push themselves through a particularly tough period and relax during our slower periods.

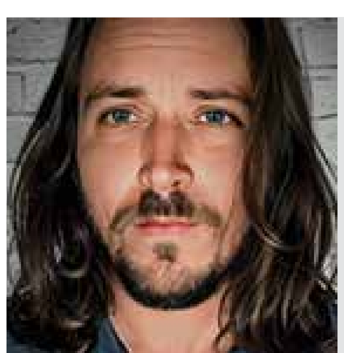
   The trouble comes when this kind of intensity seems to last forever, with no clear goal or milestone to work toward. Prevent overload from becoming the norm by setting up clear goals and milestones — and planning for periods of lower intensity once teams reach them.

   Celebrating when milestones are reached is very reenergizing for the team. Continually focusing on future goals can be an exhausting treadmill effect if we don't look back, recognize, and celebrate the accomplishments we have made.

3. **Delegate Tasks to the Appropriate Team Members.** On some teams, overload isn't immediately obvious. Certain members of the team might even have noticeable downtime. If some team members are relatively bored while others are badly overloaded, the problem is workload balancing — or a failure to delegate properly.

   Sometimes rethinking work assignments can help, too. You may encounter an overloaded employee who is simply not very good at the primary assigned task but would succeed or even thrive with different work.

Employee Overload *continued on next page*



Career Development

Congratulations to Ben Lievens on becoming a certified Henry Schein Culture Ambassador! Ben is an Implementation Expert and has been with Ortho2 for almost a year. As a Culture Ambassador, Ben will promote and encourage Henry Schein's DEI values within the organization and its subsidiaries, market offerings and opportunities for resources that are sent out by Henry Schein, and mentor new hires. We're so proud of this accomplishment!

Chat Support

Do you need to call in to our Support Team for a question, but it's difficult to wait on hold, even for a few minutes? Ortho2 has you covered! Use our chat support to get in contact with us. When you use the chat support feature, you will be added to the same queue as phone calls. You can choose to chat with the Software Support, Implementation, or Network Engineering Teams.

In Edge Cloud, you can find links to chat support through the Help menu. In ViewPoint, click the Help button in the bottom right of the Daily Activities menu.

Employee Overload *continued from previous page*

4. **Review Tasks to Determine if They Need to be Done.** Some tasks can be put on hold until staffing increases and stress decreases. Move tasks into different buckets to address need and time from team members. These buckets might be:

   Keep Doing – there are certain tasks that must be maintained such as spore tests, managing digital workflow, etc.

   Stop Doing – as you evaluate tasks it may ease the workload if some are discontinued. If your emergency rate is at an acceptable level, this tracking may be on hold. These can be restarted as needed.

   Start Doing – prioritizing data that is impacting the office may be a reason to implement tasks. If your patients over ECD is very high, it may be beneficial to implement a system to reduce the number. This will ease the schedule and patient flow as well as increase your financial picture.

5. **Utilize Technology.** The world of productivity tools and project management software has evolved to a staggering degree in the past few years. Offices using the latest technology, software, and platforms can produce more and stay better organized, but this can be overwhelming for teams if not managed.

   If you're still managing projects in spreadsheets or manually tracking who's doing what, it may be time to look at options that may make the jobs easier to manage. The are some great options for outsourcing certain tasks in your office, from virtual assistants to remote tracking. Utilizing these may help with reducing overload issues before they turn into burnout and retention issues.

Offices and teams are under a high level of stress and burnout now. With the new year beginning, getting a handle on the level may help offices and team members move through the coming year more easily.

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.

Mentoring *continued from page 9*

There's a great quote by Arthur Ashe that says, "Start where you are. Use what you have. Do what you can." What better place to start than in the orthodontic offices where you work every day? What better gift to give than the unique lived experience that you have to share? And what better thing to do than to inspire transformational change? Let's start together and let's start today!

New Adventures

Alena and I are collaborating once again in our new adventure of empowering women of all ages and stages of their lives. Our passion is not only focused on mentorship, but also women in orthodontics. We look for ways that women can help each other grow in the workplace and, more importantly, in life. Our goals are to help women:

- Redefine or reframe success
- Identify and harness core values
- Recognize perfectionism and hustling for worthiness
- Create genuine mentorship relationships in work and in life

Stop by our booth at the 2025 Ortho2 Users Group Meeting to see what we are cooking up and what our favorite ingredients are for the spices of life!

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.

Retraining

Have you hired new team members since your original software training? Have you had team 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 by using the QR code to the left.

Celebrating Ortho2 Anniversaries

Congratulations to these Ortho2 team members who celebrated anniversaries during the fourth quarter of 2024

Thirty-Two Years
Todd Schuelka

Thirty Years
Michele Eich

Twenty-Six Years
Lowell Davis
Denise Sargent
Jennifer Shaffer

Twenty Years
Corey Schmidt

Nineteen Years
Derek Dohrman

Twelve Years
Drew Humphrey

Eleven Years
Steve Volcko

Three Years
Zach Benjamin

Two Years
Alex Richardson

One Year
Ashley Hurt
Ana Lopez
Dexter Pierre-Louis

Contact Support

By Phone: 800.346.4504

By Email: ortho2support@ortho2.com

And Don't Forget Our Website: support.ortho2.com

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

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

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

Customer Alert

Have you noticed the customer alerts on our website? Probably not, as they aren't there that often. But if there ever is an issue with one of our products, you will see an alert letting you know what is going on. Once things have been resolved, the alert will go away. You won't see these often, but they are a good source of information when things do arise.

ORTHO2
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