

Quarterly News**letter**

April 2025

Volume 43 | Issue 2

The Newsletter for Members and Friends of Ortho2

Page 4

Financial Reporting in
Edge Cloud

Page 6

Simple Service

Page 7

How Leadership and
Coaching Can Take Your
Ortho Practice from Meh
to Thriving

Page 8

Unlock Your Potential – The
Ultimate Edge



Ortho2 Perspective

It was great to gather in Austin, Texas at the end of February for the 40th annual Ortho2 Users Group Meeting! This meeting is always a wonderful event, and

somehow keeps getting better each time we have it. The UGM opened with Drew Humphrey, Ortho2 Sales and Enterprise Manager, and myself discussing the

Ortho2 Perspective *continued on next page*

orthodontic landscape and how Ortho2 reacts and evolves with it. Aaron Smalls gave a phenomenal keynote address titled The Sound of Leadership, offering a fresh perspective on navigating the complexities of leading through change. Over the next two and a half days, attendees participated in more than 40 classes led by Ortho2 team members and 26 industry-leading orthodontic consultants and doctors. The event fostered incredible team-building and networking opportunities—both among offices and with the Ortho2 team. And of course, the Ortho2 World Tour party on Friday night was a hit!

But what’s better than one meeting in Austin? Two meetings of course! The meeting continued Saturday afternoon with an Ortho2 Development Conference. This was the 16th annual ODC and was attended by doctors, team members, and many from the Ortho2 team to help shape the future of

Ortho2 development. We discussed a number of features about to be released, like significant Edge Reminders and Edge Signature enhancements as well as adding existing patient self-scheduling. This conference is a great way for our product development team to hear directly from our users.

And the Ortho2 team isn’t done. Beyond hosting the Users Group Meeting and Ortho2 Development Conference, Ortho2 is gearing up for the largest industry event we attend—the American Association of Orthodontists (AAO) meeting. Behind the scenes, our team has been working hard to secure a prime booth location, plan for booth updates, finalize travel logistics, and much more. We are gearing up for a great AAO in Philadelphia. If you’re planning to be in Philly, please stop by to say hello and see what new features you can look to incorporate into your practice soon! ☺

Amy Schmidt
Amy Schmidt, Ortho2 President

2025 Users Group Meeting Recap

Thank you to everyone who attended the 2025 UGM in Austin! We had such a wonderful time connecting with you, sharing knowledge, and celebrating the orthodontic community! Did you miss out on this year’s action? Fill out the form at go.ortho2.com/ugm2026 to be in the loop about next year’s virtual meeting.



Financial Reporting in Edge Cloud

As I’m sure you are already aware, there are a lot of reports in Edge Cloud. I’m sure you are also aware that it can be a little overwhelming to try and find the right one for what you need. So, I would like to take some time to talk about some of the basic financial reports that every practice should be looking over at least once a month or so.

Daily Transactions Report Summary

You can’t start a conversation about financials without beginning with the Daily Transactions Report Summary. This is the building block for most other financial reports, so this report must be studied daily. You want to ensure that you have verified for accuracy what is on this report and finalize it every day.

Be sure that at the end of the day, once business has stopped, to review this report to ensure all contracts have been entered and are correct, and all transactions have been entered for the right amount and to the right account. This is far easier to do when you are only looking at one day’s worth of information that is still fresh in everyone’s mind. The old saying garbage in, garbage out is relevant here as now is the time to prevent this. It’s important to take 15 minutes to check this report each day. Even if that means you find something that maybe you can’t fix immediately, there is nothing wrong with waiting to finalize the next morning. All reports that are based on the Daily Transaction Reports are based on the report numbers, not dates. This is important to remember.

Transaction Report Log					
Saturday, January 1, 2022 - Saturday, December 31, 2022					
Office: All, Doctor: All, Specialty: All					
Report #	Date	Time	Closed By	Office	Doctor
265	4/14/2022	4:21 PM	OADM	LNK	JS, CJ
264	4/14/2022	4:20 PM	OADM	NOR	JS, CJ
263	4/14/2022	4:14 PM	OADM	LNK, PWC, TEC, NOR, WAH	JS, CJ

Transaction Report Log

Another very useful report is the Transaction Report Log. This report gives you the report number, time stamp, and the operator of every finalized transaction report within the date range you set. This is useful to make sure that there is a finalized transaction report for each day within a given date

range. There are many reports that are based on finalized transactions, so it is important to ensure each report you are expecting to be finalized is.

Transaction Summary

The big one is the Transaction Summary report. This is essentially just a daily transaction report but for a given date range, normally a month or a year. Most people view this report by just plugging in the date range they are interested in and calling it good. But it is always a good idea to double-check the Transaction Report Log first to make sure that you have finalized all the reports that you are interested in. This is where it can be better to use the report numbers instead of a date range to filter information.

Transactions by Type

Another useful report that is based on transaction reports is the Transactions by Type report. This report gives you the option to isolate a particular type of transaction. For example, you can see all your cash transactions for a given month. One of my favorite uses is to look up adjustments. This report allows you to see each time a particular adjustment type was used and for what dollar amount. This comes in useful in an infinite number of ways. From the number of paid-in-full discounts you give out to how much you are writing off in bad debt. You can see each patient and the amount of the adjustment given.

Posting Date Based Reports

There are three reports that I want to talk about that are not based on finalized transaction reports. They are the A/R Aging report, Contract Totals, and Charge and Receipt Summary report. These are great reports, but they are not comparable to the aforementioned reports that are based on finalized transaction reports.

These reports are based on the posting date or the date you enter into the system when you input the data. This could be the start date of a contract or the posting date of a credit card transaction. This can be useful for many reasons, versus basing a report on finalized transaction reports. Finalized

transaction reports are just that, final, meaning they cannot be changed once finalized. Any mistake you may make is permanently part of the report. You see why it is so important to make sure they are correct before you finalize. This is also useful if you are entering in contracts earlier than when a patient officially starts treatment. For example, you can enter the contract today but add the start date as next week when the patient comes in for their first appointment. A transaction report-based report is going to show this as production for today, and a posting date-based report will show this as production for next week. The same can be said if you have a patient who hasn’t started treatment but a contract has already been entered. A posting date-based report would update once the contract has been deleted. Now, these are not common things, but they can and do happen, probably more than you think.

A/R Aging

An A/R Aging report is most useful for looking up delinquent accounts. Normally, this report is subgrouped,

or some kind of filter is applied to only give you certain patients. The A/R Aging report is important as it can give us past due accounts and a list of patients that we may need to contact to set up a payment plan or accounts that are a lost cause and need to be written off. This is important as these accounts can falsely inflate other production-based reports.

Contract Totals

The Contract Totals report is a basic report that gives you all contracts that have a start date within the date range you set. Just a clean, simple look at contracts. This report can also be subgrouped for any number of reasons: based on patient status, age, zip code, and or any other data point in Edge Cloud.

The Charge and Receipt report is a great report, but there is some confusion on what information it is displaying and how it gets there. This is a posting-date report, meaning contracts are calculated by start date and receipts and adjustments are calculated by posting date. Then there are two sections to this report, Sections A and B. Section A calculates the total amount of the contract

as of the start date. This means that for a \$5,000 contract that has a start date of January 1, section A will show the whole \$5,000 as production as of January 1. Section B gets a little more interesting as it reflects the individual charges as they are posted. So, let’s go back to the \$5,000 contract.

Charge and Receipt Summary			
Office: All, Doctor: All, Specialty: All			
Section A - Includes the full Treatment Fee at the start date, not as charges become due.			
	1/1/2010 - 1/31/2010	Same Period Prior Year	% Difference
Treatment Fee Charges Due:	\$5,000.00	\$0.00	∞
Tx. Fee Adjustments Due:	\$0.00	\$0.00	NaN
Adjusted Tx. Fee Charges Due	\$5,000.00	\$0.00	∞
Other Charges	\$0.00	\$0.00	NaN
Other Adjustments	\$0.00	\$0.00	NaN
Adjusted Other Charges	\$0.00	\$0.00	NaN
Total Charges	\$5,000.00	\$0.00	∞
Total Adjustments	\$0.00	\$0.00	NaN
Adjusted Total Charges	\$5,000.00	\$0.00	∞
Receipts	\$0.00	\$0.00	NaN
Receipt Adjustments	\$0.00	\$0.00	NaN
Adjusted Total Receipts	\$0.00	\$0.00	NaN
Section B - Includes Treatment Fee Charges as they fall due, not the full fee at Start Date.			
	1/1/2010 - 1/31/2010	Same Period Prior Year	% Difference
Treatment Fee Charges Due:	\$1,500.00	\$0.00	∞
Tx. Fee Adjustments Due:	\$0.00	\$0.00	NaN
Adjusted Tx. Fee Charges Due	\$1,500.00	\$0.00	∞

Financial Reports continued on page 10



Sean Gildersleeve

Sean has worked at Ortho2 for the last 13 years and has always enjoyed the ever-changing challenges that the software industry has to offer. When he’s not working, Sean enjoys watching Iowa State football and basketball with his wife (who he met at Ortho2) and their three-year old daughter, Arlette.

Contact Info: ortho2support@ortho2.com • 800.346.4504

Simple Service

Providing good service to patients, customers, and clients is not difficult. Countless books have been written about how to do this. Essentially, they are rooted in the basics of service identified by the Ritz Carlton Hotels in the early 90s:

Three Steps of Service

1. A warm and sincere greeting. Use the guest's name if and when possible.
2. Anticipation and compliance with guest needs.
3. Fond farewell. Give them a warm good-bye, and use their names if and when possible.

In my work with clients, I have adjusted the above to be:

1. SMILE! After all, you are in the smile business.
2. Use the patient's name whenever possible.
3. Maintain good eye contact.
4. Listen! If you maintain eye contact, you will also hear what is not being said and will be able to meet requests before the person asks.

Simple! So why is it often absent?

For example, a couple of weeks ago, I was shopping at the local grocery store and went through

the checkout line with a real person racking up my purchases. As she was sliding the items over the scanner, I started bagging them. She finished scanning and then leaned back on the ledge behind her with her arms crossed. There were at least four customers lined up behind me waiting to check out. I had to ask her to help me bag the items, which she did with what seemed to me to be annoyance. As we finished, I asked her if she was new at this job and she simply said "No." Besides not offering to bag the items, she also did not offer a smile, make eye contact with me, or thank me for my patronage. And she apparently had no concern for the other customers waiting to check out.

In the total scheme of things, this is no big deal. It also has not been a deal breaker for me as I have continued to shop there for reasons that have nothing to do with the attitude of the checkout lady. (Also, I can avoid having contact with her again by using self-checkout or going to another line.)

Unfortunately, this is not an isolated incident since I have noticed a consistent lack of the

Service continued on page 10



Joan Garbo

Joan can be described as one who "walks her talk." She is a premier change agent who is dedicated to her work and her clients. Throughout the past 34 years, Joan has led more than 2,500 seminars on effective communication, public speaking skills, team building, and customer service. She has facilitated hundreds of practice owners in achieving their goals and trained their employees in turning the patients into a powerful volunteer sales force.

Contact Info:

joangarbo@aol.com
joangarbo.com

How Leadership and Coaching Can Take Your Ortho Practice from Meh to Thriving

In today's orthodontic world, having strong clinical skills is just one piece of the puzzle for running a successful practice. Sure, delivering great treatment results is essential, but there's more to it than that. Your practice also needs a solid, coordinated team who knows how to work together like a well-oiled machine. Getting to that point takes thoughtful leadership and a commitment to ongoing coaching.

Unfortunately, many orthodontic practices focus so heavily on clinical training and technology that they overlook leadership and team development. When there's no clear leadership or formal coaching in place, inefficiencies creep in, communication breaks down, and turnover skyrockets. As you can imagine, it doesn't take long for patient experiences and case acceptance rates to drop.

In an increasingly competitive field, orthodontic leaders have to step up as vision-setters and actively invest in their team's growth. Leadership points everyone in the right direction, while coaching helps each team member confidently carry out the plan. By making leadership and coaching a priority, you'll build a culture that's both productive and rewarding – paving the way for long-term success.

Leadership: More Than Just a Title

When we talk about leaders in an ortho practice, the first person who comes to mind might be the orthodontist or practice owner. But in reality, effective leadership is a team-wide effort. Great leaders don't just make the big decisions – they also inspire, empower, and set an example.

The difference is palpable when there's strong leadership at every level; team members feel valued and confident in their roles and the overall morale is high. On the flip side, if leadership is lacking, you'll see confusion, inefficiency, and employees who are basically just going through the motions. Look at any successful ortho office and you'll find leaders everywhere – from the office manager to the treatment coordinator – who understand communication, accountability, and the importance of empowering their colleagues.

Leadership continued on page 12



Alisha Holbert

Alisha grew up in orthodontics. From her first job out of high school as a dental assistant, to business manager, she has worn every hat from scheduling to insurance to TC – Alisha has seen it all. As a TC, she learned firsthand what works and what doesn't in a modern ortho office.

Now, Alisha brings all the insights gained as a world-class sales leader, combined with a natural gift for fostering thriving patient-team communities to her work at Straight Consulting.

Contact Info:

alisha@straightconsulting.com
straightconsulting.com

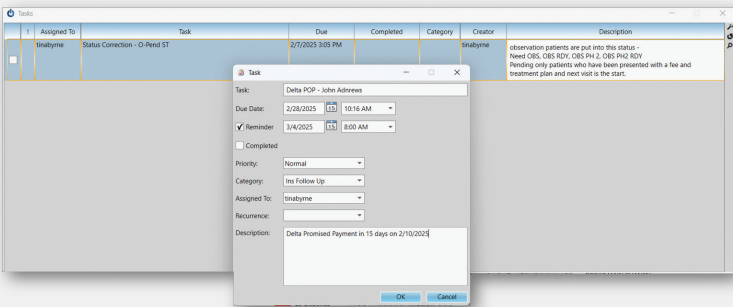
Unlock Your Potential – The Ultimate Edge

As an orthodontic practice consultant with more than 25 years of consulting experience, I have had the privilege of working with hundreds of practices and thousands of team members. One of the greatest challenges in this field is shifting a team member’s perception when discussing role expansion, especially when they already feel overwhelmed by their current responsibilities. Helping them develop the skills to enhance efficiency and effectiveness is deeply rewarding. However, the most gratifying moment comes when I introduce them to the powerful tools and resources already at their fingertips – hidden efficiencies they never realized they had – unlocking new levels of confidence and capability.

For this reason, I want to highlight some of my favorite features within Ortho2’s Edge Cloud platform; solutions designed to streamline workflows, improve productivity, and empower team members to work smarter, not harder. These tools not only simplify daily tasks but also create opportunities for growth, helping teams maximize their potential with greater ease and effectiveness.

Tasks: Maximizing Efficiency and Accountability

Not everyone is a natural multi-tasker; in fact, very few people are. Yet, in the fast-paced environment of an orthodontic practice, team members are constantly juggling responsibilities, including crucial follow-ups for the office, patients, and third parties. So what’s the key to staying organized and ensuring nothing falls through the cracks? Ditch the sticky notes!



By leveraging tasks, you can establish a fail-proof system for tracking obligations – whether they belong to you, a fellow team member, a patient, or even an insurance carrier. Tasks serve as built-in reminders, keeping everyone accountable and streamlining communication across the practice. Instead of relying on scattered notes or memory, you can create, assign, and monitor tasks efficiently, leading to improved productivity, reduced stress, and a smoother workflow for the entire team.

Workflows: The “Automated Intelligence” You’ve Had All Along

Imagine having a built-in assistant that ensures no critical step is overlooked. That’s the power of Workflows within Edge Cloud. This automation tool has been at your fingertips all along, silently waiting to transform the way your practice operates.

From automatically updating a patient’s status field to triggering reminders or messages when scheduling specific procedures, Workflows act as your practice’s fail-safe system. Whether it’s prompting a team member to confirm financial details, ensuring timely patient communication, or seamlessly routing a patient’s name to another department via stack entry, Workflows remove the guesswork and manual follow-up.

Gone are the days of missed emails, overlooked letters, or forgotten follow-ups. With Workflows, your team can work smarter, not harder, enhancing efficiency, accuracy, and patient experience while reducing stress and human error.

Stacks: The Digital Solution to Seamless Task Routing

For those who have been in orthodontics for more than a decade, the challenges of managing paper charts are all too familiar. Moving a chart from place to place, or from team member to team member, was once the standard method for ensuring tasks were completed in sequence. While checklists attached to charts helped guide the process, they often led to frustrating scavenger hunts when a chart was

misplaced or urgently needed.

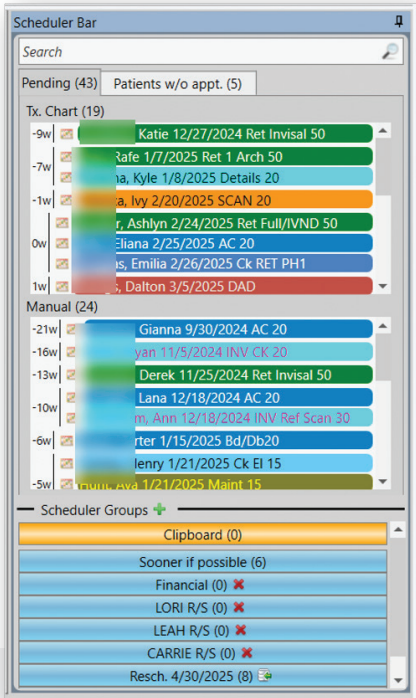
Thankfully, Edge Cloud’s Stacks eliminates these inefficiencies by bringing chart routing into the digital era. Much like their paper predecessors, Stacks organizes and tracks patient tasks, but with a critical difference – they can never be lost or forgotten. With Stacks, tasks flow in multiple directions at any given time, ensuring that necessary actions are clearly assigned, easily accessible, and seamlessly completed by the right team members.

No more misplaced charts. No more bottlenecks. Just a smarter, more efficient way to keep patient workflows moving smoothly, exactly when and where they’re needed.

Subgroups: Precision in Patient Management

One of the first things I assess when working with an orthodontic practice using Edge Cloud is their custom subgroup setup. Why? Because the way a practice filters and organizes patient data speaks volumes about its efficiency and workflow optimization.

If my review reveals only the standard folders and subgroups that come with the system, I immediately see a huge opportunity to elevate the practice’s efficiency, productivity, and patient communication.



Subgroups are the key to precision in patient management, allowing practices to go beyond generic lists and drill down into the most specific patient situations. This functionality enables teams to:

- **Generate Highly Targeted Reports:** Quickly access the exact data you need.
- **Create Real-Time Dashboards:** A simple refresh puts up-to-the-minute insights at your fingertips.
- **Enhance Patient Communication:** Automate outreach for specific patient needs based on predefined conditions.

By leveraging custom subgroups, your practice gains better organization, clearer insights, and the ability to take highly specific actions—all in a way that feels effortless.

Scheduler Bar: Keeping Active Patients Front and Center

The Scheduler Bar is a powerful tool for keeping unscheduled patients visible and prioritized, but only when it is properly utilized and managed. When structured effectively, it becomes a game-changer in maintaining treatment timelines, balancing the schedule, and

Ultimate Edge *continued on page 14*



Tina Byrne

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

Contact Info: tinabyrne@byrne-consulting.com, byrne-consulting.com

Let’s say this contract has an initial fee of \$1,500 that is due on January 1 and period fees of \$250 due on the first of the month starting on February 1. If I were to run the Charge and Receipt report for January, section B would only show the \$1,500 dollars that is due, whereas Section A would show the whole \$5,000. So think of Section B as more what is owed to you during the period you set, whereas Section A is more a reflection of overall production during this period. Remember, this also means that Section B will reflect period fees due in January from contracts started much earlier. This is similar

to a Transaction Summary report, but it doesn’t care if the transactions are on a finalized report or not.

This is just the tip of the iceberg of financial reporting, but these are the most common ones to run to get a finger on the heartbeat of your practice. In next quarter’s newsletter, I will dive into insurance and appointment-based reports and some tips and tricks that can apply to any report in Edge Cloud. ☺



EDGEucate Yourself With EDGEisodes

Looking for EDGEducational content to help you become an Edge Cloud guru? Our brand new EDGEisodes 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.

very basics of service in almost every industry with which I have interacted: cell phone carriers, clothing stores, various doctor offices, restaurants and delis, and the list goes on.

While there seems to be a sense of malaise among a significant portion of workers, it is unwittingly supported by the explanation that people are not paid enough, these are dead-end jobs, inflation has diminished their buying power, and a host of other reasons owing to the circumstances of life that essentially reduce one to being a victim in life.

WARNING: DO NOT BUY INTO THAT! Circumstances do not determine your sense of joy, satisfaction, and fulfillment in life. Your reaction/interpretation of the circumstances are the key to your happiness and are totally in your power! If you rely on external forces, people, and things outside of you in order to be happy or satisfied, you unwittingly become subject to the winds of time in order to be happy.

There are countless examples of people who have been born into or swept into dire circumstances and have risen above them to create outstanding success for themselves and have used their experiences as platforms for success.

One of the more inspiring and poignant examples of this is Viktor Frankl, a German psychiatrist who survived imprisonment in two Nazi concentration camps. After his rescue in 1945, he wrote a bestselling book, *Man’s Search for Meaning*. In it he states, “Everything can be taken from a man but one thing. The last of human freedoms is to choose one’s attitude in any given set of circumstances.” He had suffered unimaginable loss and pain at the hands of the Nazis; yet he came to the realization that they cannot take away his freedom to choose his response. He further writes in his book that, “Between stimulus and response there is a space. In that space is the power to choose our

response. In that power lies our growth and our freedom.”

Fortunately, most of us will never be confronted with such dire circumstances; and I think it is important to take Frankl’s lesson to heart and apply it to our ‘ordinary’ lives.

The average person spends 35 or more hours each week at work. It is important that your work experience supports your well-being beyond the size of your paycheck. In my world, you cannot get paid enough to suffer! While many jobs may appear to be more rewarding, important, fun, meaningful, etc., the truth is all work is important and can be all of the above by virtue of a person’s interpretation about the job, not the job itself. To quote Henry Giles,

“Man must work. That is certain as the sun. But he may work grudgingly or he

may work gratefully; he may work as a man, or he may work as a machine. There is no work so rude, that he may not exalt it, no work so impassive, that he may not breathe a soul into it, no work so dull that he may not enliven it.”

Orthodontics provides a unique opportunity for people to experience a sense of fulfillment and satisfaction while working in great environments, doing meaningful work, participating with teammates in fun activities, expanding education both in personal and professional lives, while earning good salaries and benefits.

Despite this background, I know that work can be stressful: some people are difficult to please; some co-workers do not always pull their own weight; personal issues outside of work can bring someone down; mistakes can mess up a schedule; patients come late and expect to be seen and are argumentative; and the list goes on. In other words, we do not live in Utopia with unicorns and daisies, and we are all human!

This is where Frankl’s message is so important. Between stimulus and response there is a space, and in that space, you can choose your response, rather than just react. Use the basics of service to make smart choices to the stimulus: make eye contact and LISTEN before you speak. If you are in a bad mood, SMILE! Science has found that a smile releases endorphins, dopamine, and serotonin, which then can reduce stress, improve heart beats, and boost energy. And when you smile, it has the same effect on anyone who sees you smiling and often creates a smile in them as well.

In what I am now calling ‘Frankl’s space’ there is the power to choose your interpretation of the situation. Renowned motivation speaker Zig Ziglar told the story of a problem

at the Phoenix airport one day. The scheduled flight had been canceled for some reason, and all the passengers were lined up waiting to speak with just two ticket agents to rebook their flights. As you can imagine, there were many upset people and not all were pleasant with the agents. When Ziglar approached the agent he said, “How are you?” and the young man barely looked up at Ziglar and tersely replied, “Not good, terrible in fact.” And Ziglar said, “Compared to what? You’re in an air-conditioned building, doing work that is not strenuous, wearing a professional uniform...you’re not repaving roads in the hot sun or standing on an unemployment line waiting for a handout.” The agent stopped and looked at Ziglar and said, “Yes sir! You are so right. Thank you!” His shift in attitude benefited everyone else he worked with that day. Besides rebooking flights, he provided real service to the passengers; and I suspect, he went home feeling like he had had a good day.

Two other observations: First, when you provide service to others, you are actually serving yourself. Life acts as a boomerang; what comes back at you is what you have put out there.

Second, because the general sense of malaise regarding work is so prevalent, following the simple service steps sets you apart and creates raving fans.

Finally, I leave you with a quote from Dr. Albert Schweitzer, noted humanitarian, “I don’t know what your destiny will be, but one thing I know: the only ones among you who will be really happy are those who have sought and found how to serve.”

And SMILE! ☺

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.

Five Key Leadership Traits

- 1. **Clarity of Vision:** Make sure everyone is on board with the mission and big-picture goals.
- 2. **Accountability:** Own up to mistakes and address issues head-on instead of playing the blame game.
- 3. **Empowerment, Not Micromanagement:** Equip your team with the right tools and trust them to do their jobs.
- 4. **Communication and Transparency:** Keep everyone in the loop and be upfront about challenges.
- 5. **Adaptability:** In a rapidly changing field, the ability to pivot or innovate can make all the difference.

Coaching: The Secret Sauce of a High-Performing Team

Leadership is the compass that sets the course, but coaching is what keeps the ship on track. It's an ongoing process of refining skills, boosting confidence, and helping team members perform at their best. Without coaching, employees can get stuck, feel overwhelmed, or struggle to meet expectations.

In the best-run orthodontic offices, coaching is baked into the culture; regular training, mentorship, and feedback aren't just reserved for when something goes wrong. By making coaching a priority, you'll see:

- **Stronger Collaboration:** Everyone knows how their role fits into the bigger picture, creating better team synergy.
- **Higher Case Acceptance:** Well-coached treatment coordinators nail financial conversations and convert consults into starts.
- **Improved Efficiency:** Assistants and front-desk team members learn how to perfect their workflows, which

cuts down on wasted time.

- **Better Patient Experience:** A team that's confident and well-supported delivers top-notch service.
- **Lower Turnover:** People stick around when they feel challenged, supported, and appreciated.

What Should You Coach Your Team On?

1. Communication and Patient Experience

Every interaction shapes your patients' perception of your practice. Coach the front desk team on friendly greetings and confident phone conversations, train treatment coordinators on financial presentations, and help clinical assistants strengthen their chairside manner. Don't forget a smooth hand off between departments – little details like that can make a huge difference.

2. Case Acceptance and Financial Conversations

To thrive, your practice needs to convert consultations into actual treatment starts. That means teaching your treatment coordinators to present financial plans in a straightforward, positive way and preparing them for the most common patient objections. The more comfortable they are, the more likely patients are to say "yes."

3. Time Management and Workflow Efficiency

Running behind schedule irritates both patients and team members. Simple coaching around time-blocking, refining chairside procedures, and sharpening scheduling techniques can dramatically reduce bottlenecks and keep appointments flowing smoothly.

4. Leadership Development at Every Level

Leadership isn't just for the boss. Train your treatment coordinators, lead assistants, and office managers on

Leadership continued on next page



Windows 10 End of Life

Microsoft is ending support for Windows 10 in October 2025. You should not take this matter lightly. If you have not updated your operating system by October, you will no longer be HIPAA or PCI compliant if you accept payment by credit cards. New computer viruses and other malware are developed all the time and, without the security updates to fight them off, your data and your system are vulnerable.

Contact the Network Engineering Team today at engineering@ortho2.com, or 800.346.4504, option 2 to discuss the best path forward.

Don't just like your software.

Love it.



We all like ViewPoint, but we know you are going to love Edge Cloud. And in the city of brotherly love, get the best deal of the year!

AAO Sale | Save \$2,000

Terms and restrictions apply. Offer expires April 27, 2025.



giving and receiving feedback, resolving conflicts, and taking initiative. When every member of the team steps up as a leader, you'll notice higher productivity, better morale, and fewer headaches all around.

Building a Coaching Culture

If you want coaching to stick, make it part of your regular routine. Weekly team huddles, one-on-one check-ins, and role-playing exercises help keep everyone on the same page. Encourage your senior team members to mentor newbies and set aside a budget for continuing education – whether it's through industry conferences, webinars, or leadership workshops.

Ready to Thrive? Start With Your Team

If your orthodontic practice feels bogged down or chaotic, the issue might not be your scheduling software – it could be a lack of leadership and coaching. A well-led, well-coached team is the backbone of any thriving office. With a clear vision and the right support, your team will be more efficient, your patients will be happier, and your practice will steadily grow.

Rather than pouring all your resources into marketing or the latest tech gadget, remember to invest in your people first. Because when your team is thriving, so is your business. ☺

preventing unnecessary delays in patient care.

Proactive Strategies for Managing the Scheduler Bar

- **Automate Weekly Reminders:** Set up automated emails and text reminders for unscheduled patients, reinforcing the importance of staying on track with their treatment.
- **Monitor Weekly to Take Action:** The Scheduler Bar isn't a "set it and forget it" tool. It should be actively managed on a weekly basis.
- **Analyze Impact on Schedule Capacity:** The number of unscheduled active patients directly impacts overall scheduling demand.

By strategically using the Scheduler Bar, automating patient reminders, and proactively managing scheduling demand, your practice can stay ahead of unscheduled patient overload while keeping treatment progress on track and the schedule running smoothly.

Dashboard: Every Team Member's Control Center

The Dashboard is an invaluable tool that allows team members to customize reports, lists, tasks, and essential patient information all in one central hub. When utilized effectively, it enables teams to prepare, review, and execute their workload with ease and efficiency, keeping daily operations streamlined and organized.

Maximizing Your Dashboard for Productivity

- Identify daily, weekly, or monthly tasks requiring reports or lists.
- Customize the Dashboard to reflect the most relevant information.
- Use subgroups for smarter list management and clearer patient insights.

Unlocking the Full Potential of Your Practice Management Software

With decades of experience working alongside orthodontic teams as a coach and consultant, I can confidently say that most practices utilize only 50-60% of the functions available within their practice management software. This means that a significant number of powerful tools and efficiencies remain untapped—tools that could streamline operations, improve patient care, and enhance overall productivity.

Ortho2's Edge Cloud offers unique features and functionality not found in any other practice management system. The question is: What's your current utilization percentage?

Increasing your utilization by just 10% can have a transformative impact on your practice. Not only will it enhance efficiency and workflow, but it will also ignite a drive to explore even more ways to optimize performance and elevate patient experience.

The potential is already in your hands—are you ready to unlock it? 🗝️



Free Cutting Edge Webinar Series

The Cutting Edge Webinar Series features industry-leading consultants and doctors presenting on their expertise in the field. These webinars are free and for anyone - from resident to experienced doctors and staff.



Scan the QR code for a full calendar of webinars and recordings. Webinar recordings can be found at the bottom of the page and will be available for three months after the webinar takes place.

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.

Celebrating Ortho2 Anniversaries

Congratulations to these Ortho2 team members who celebrated anniversaries during the first quarter of 2025

Forty-Three Years

Dan Sargent

Thirty-Four Years

Diane Lyon

Twenty-Seven Years

Coreen Magnuson
Mike Vest

Twenty-Six Years

Doug Olsan

Twenty-Four Years

Joe Levenhagen

Twenty-Three Years

Danetta Hiatt
Amy Schmidt

Twenty-One Years

Chad Kellner
Tony Kooima

Nineteen Years

Chris Bennett

Sixteen Years

Jim Powell

Fourteen Years

Mike Gude

Thirteen Years

Mark Hoffmann

Eleven Years

Lori Backous
Linda Cooley
Amia Sult

Six Years

Joe Randazzo

Four Years

Kimberly Betke

Three Years

Noah Parks

Two Years

Monica Duarte
Montana Horras
Leslie Mehalek
Jordan Neumayer

One Year

Kay Duran
Anthony Vieger

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.

 **ORTHO2**
Newsletter

April 2025 Volume 43 | Issue 2



Inside This Issue

Page 4

Financial Reporting in Edge Cloud

Page 6

Simple Service

Page 7

How Leadership and Coaching Can
Take Your Ortho Practice from Meh
to Thriving

Page 8

Unlock Your Potential – The
Ultimate Edge