

Quarterly **News**letter

July 2025 Volume 43 | Issue 3

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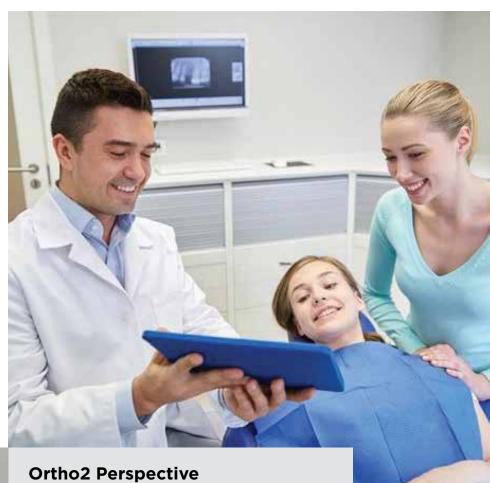
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At Ortho2, our mission is simply "To help our orthodontic partners succeed". We care about our client base and the orthodontic community deeply. And, in order to

be able to support you, we also need to support each other.

Culture has always been important at Ortho2. I believe it's a big part of what sets us apart, both

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in the community in which we work and in orthodontics. I've often said Ortho2 is like a family, with employees truly caring about and supporting each other and those in the community. You can see this in countless ways every day from Microsoft Teams chats trying to gather information to help with customers' questions, to employees checking in on each other's well-being both virtually and in person. Covid definitely tested our culture, as most Ortho2 employees began working from home with some never returning to our corporate office. Those who had previously worked from the office at least had some knowledge of what things were like "before," but many new hires didn't. Our challenge was to retain this strong culture even from afar.

One way we support our culture is by hosting fun companywide giveaways and events. We have celebrated Customer Service Week for years, including a week's worth of recognizing our employees with breakfast pizza, games, puzzles, lunches, snacks, and gift card giveaways. We also hosted a lot of office events - Halloween parties including dressing up and a pumpkin contest, summer grill outs, an annual chili cookoff, and a holiday party with prizes, to name a few.

Today, these events have a slightly different feel, alternating between in-person events for those who live closer and mailed treats for everyone, including those who live farther

away. Some of my favorite new additions include shipping cupcakes in a jar for Valentine's Day, Ortho2 personalized Yeti cups, nationwide chain gift cards for National Donut Day or National Ice Cream Day, and Bombas socks. It's small things like this that help retain a strong culture and attract and keep great employees!

This leads me to some impressive stats. The average Ortho2 employee has been a part of the Ortho2 family for 13.5 years. 13.5 years, wow! Additionally, there are 25 employees with more than 25 years of service. That's amazing!

These are just some of the ways Ortho2 celebrates our culture and community. We have found a culture that works well for us. What do you do for your team? Consider a variety of ways to show your appreciation for the work they do for your practice. It's a simple way to say thank you.

One final thought: You may remember from the January newsletter about giving – of your time, resources, or simple acts of kindness. I am happy to share that Ortho2 is still embracing this giving mindset. As summer starts, our local food pantries often end up short with kids needing additional meals to supplement those they aren't getting in school. The Ortho2 team stepped up in a big way, leading Story County in the most dollars raised for the United Way food drive. I'm proud of our team and how we are serving the community. **o**

Amy Schmidt

Amy Schmidt, Ortho2 President

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Midwestern Society of Orthodontists **OP** Summit Canadian Association of Orthodontists Great Lakes Association of Orthodontists Middle Atlantic Society of Orthodontists

September 12-13, 2025 September 18-20, 2025 September 18–20, 2025 September 19–20, 2025 September 26–27, 2025







2025 AAO Recap

Thank you to everyone who stopped by our booth at the AAO! We would like to thank the following team members who worked hard in the Ortho2 booth at the AAO and contributed to our success!









Gina Good – Good Orthodontics Diane Julius – Feldman Orthodontics Jodi Miller – Quintero Orthodontics







Reporting in Edge Cloud

n part one of this article, we discussed financial reporting. (If you missed part one of this article, you can find it at ortho2.com) Now, in this quarter, we'll review other reports that can help in your practice.

Insurance Reports Open Insurance Report

You can't talk about insurance without talking about the Open Insurance report.

This report will show every insurance contract with a balance; once the balance is down to zero, the patient is automatically removed from the report. This means that every person in this report will require action. Most of this is just staying on top of submitting insurance forms, but you need to keep an eye out for contracts that will no longer be paid for by the insurance company and address them accordingly.

Two functions of this report will tell you the date and amount of the last receipt posted to each contract. If the last date a form was submitted has an "E" in front of the date, the last submission was done electronically. This report can also be ordered by insurance company, giving you an easy way to get a list of every patient in active treatment for any given insurance company. This is useful when you need to reach out to a specific insurance company to review where each policy stands.

Scheduled Insurance Report

Another report to take notice of is the Scheduled Insurance report. This report will give you a list of patients who have forms due. This can be useful to review before your monthly submissions.

Insurance Receipts by Company

This report will give you a list of all insurance payments and the description listed for the payment. You can sort by company, giving you a list of all insurance checks posted in a date range. This report is useful to have pulled up if you are on the phone with a specific insurance company.

Appointment-Based Reports

Our next section is about appointment reporting. This can be a little tricky to talk about in broad terms, as it's so unique to each practice or even location. How you set up your schedule, if you use classes, the Smart Scheduler, what type of procedures you have, and for what reasons, will all factor into what information you want out of the system.

A primary goal of every office is to be as efficient as possible with both your time and your patients' time. Let's face it, our patients don't want to spend all day at the office. The faster you can get them in and out, the better, and as you can't rush the appointment itself. Making sure that appointments are scheduled for the correct length of time can go a long way in decreasing wait times.

Arrival Log Report

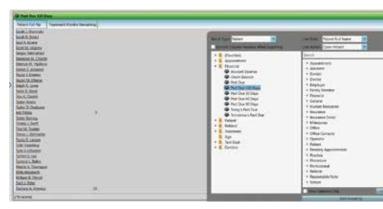
This is where the Arrival Log report comes in. This report is based on the Patient Tracker more than the Scheduler, but it may be the most useful appointment report. This report will give you the length of time each appointment is taking from the time the patient spends in the waiting room to the time in the chair, and how long or short of the scheduled time each appointment took. The best way to use this report is to break down the different types of appointments instead of looking at them as a whole.

For example, you could pull up all of your bonding appointments that have taken place so far this year and look at the average length of time these appointments are taking. If you are seeing patterns of a certain type of appointment taking longer or shorter than what is scheduled, then this is something you would want to review and better understand why. Are there things you could do more efficiently, or are you just not setting enough time as the default length, or maybe too much time? This would allow you to go back and reset your procedure lengths in the Procedure editor to better match how long they are taking in the real world. This can make a big difference in wait times for patients, getting them in and out faster, and potentially giving you better reviews.

Team Meeting Reports

Something else that can help with efficiency is to just make sure everyone is on the same page about how the day is going to go before it starts. Which is why a lot of offices sit down and have a morning meeting. The Morning Meeting report tells you who your new patients are, how many records appointments there are, as well as who your starts and debonds are going to be. Something else that can help with efficiency is to just make You can create a "what", though, using the Subgroup dashboard widget. This is a very useful tool that allows you to take any subgroup and create a report of almost any data point in Edge Cloud. Creating a report with this tool has countless uses, but a common example is when you need to export certain information for a third party. Often, a third party will ask for basic biographical information that can't be

But I also like to look at the Appointment Day Sheet report. This report tells you when these patients are going to be coming in so you can plan who will assist each patient. Knowing what needs to be done beforehand goes a long way in running your practice. This report can also give you account balances and amounts due, so you can see if you have any patients who need to discuss payment options with the financial team.



Reporting With Subgroups

One thing that everyone needs to have at least a basic understanding of is subgroups. A subgroup is the "who" you want information about. Subgroups can not change the "what" of a report, i.e., the columns, which are part of the



Sean Gildersleeve

Sean has worked at Ortho2 for the last 14 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.

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report itself. Subgroups are just used to filter down which patients show up on the report.

Use these additional criteria:	Transaction summary RECEIPTS Description. Count	
Find results:	8 Cash D Check	5 10
Joiner, Jack	Patient	Res Party
Joiner, Carla Joiner, Jack	Cise, Nate	Etona, Stephen
	Friday, test	Friday, test
	Hetkecu, Jimmy	Etahehi, Junsik
	Joiner, Carla	Joiner, Jack
	Jriner, Carla	Joiner, Jack
	Kearney, Jacob	Kearney, Jacob
SearchClear	Nichols, Amanda	Risirtial, Ekzabeth
Use Advanced Search Options	Nichols, Amanda	Risirtial, Ekzabeth
	Nichols, Amanda	Risktial, Elizabeth
	Temmy, Testar	Tommy, Tester

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Building the Ultimate Orthodontic Practice

rthodontics is a great specialty with many opportunities now and in the future. The key will be implementing the right strategic approach to build all aspects of a practice to reach maximum potential. This includes management systems, the treatment coordinator (TC) process, financial management, referral marketing, and team building. Practices that maximize each of these opportunities will be in the top 25% as the opportunities for growth and expansion continue to develop.

World-Class Management Systems

The first step in building an outstanding orthodontic practice is to implement world-class management systems that are efficient and effective. Just like the systems in the human body, management systems all connect to each other. So, when one thing isn't working, everything else declines. For example, a practice whose marketing efforts generate a healthy number of new patient phone calls might not be effective at scheduling those patients for a consult with the treatment coordinator (TC). If the TC consult system is also inefficient, a lower percentage of patients will elect to move

forward with treatment, resulting in a loss of even more production for the practice. In some cases, these types of inefficiencies go unnoticed due to a very high number of new patient inquiries that masks the "leakage" of potential patients at both the scheduling and TC consult stages. This is the orthodontic version of "leaving money on the table".

To avoid any inefficiencies that are detrimental to practice performance, practice management systems should be developed with step-by-step instructions that are documented and tested. Testing occurs by setting specific numerical targets that are to be achieved and measuring results. Examples include:

- Production Increase 18% in 12 months
- Referrals Increase 12% in 12 months
- Collections 98% or higher within 30 days
- Overhead Not to exceed 49% in any 12-month period
- Team Compensation 22% of revenue (might be higher depending on difficulty of hiring in a given geographic area)

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Roger P. Levin

Roger P. Levin, DDS is the CEO and Founder of Levin Group, a leading practice management consulting firm that has worked with over 30,000 practices to increase production. A recognized expert on dental practice management and marketing, he has written 67 books and over 4,000 articles and regularly presents seminars in the U.S. and around the world.

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Answer Engine Optimization: The SEO Upgrade You Didn't Know You Needed

n the past, when someone wanted to find an orthodontist, they would type something like "braces near me" into Google. But search is changing. Now, more prospective patients are asking full questions, like "How much do braces cost for teens?" or "What's the difference between Invisalign and braces?"

And they're not just using Google. They're asking Siri, Alexa, and even AI tools like ChatGPT.

This is where Answer Engine Optimization (AEO) comes in.

If you run an orthodontic practice, it's time to understand AEO and what it means for your website, and the future of your new patient flow.

What Is Answer Engine Optimization (AEO)?

Answer Engine Optimization is the process of making your website content easy for "answer engines" to find and use. It's not just about providing helpful answers to the most common orthodontic questions, but also presenting them correctly.

Answer engines are tools that respond to user questions in a direct, conversational format. These include:

- Google's featured snippets and AI overviews (the box at the top of the search results)
- Voice assistants like Alexa and Siri
- AI chatbots like ChatGPT or Google Gemini

These tools work differently than traditional search engines. They focus on understanding questions and finding clear, trustworthy answers.

If your content is well-optimized for AEO, these engines are more likely to feature your practice when someone searches for orthodontic information.

Why This Matters for Orthodontic Practices

Let's be honest-most patients don't understand the ins and outs of orthodontics.

They're searching online for answers to things like:

• How long do braces take?



Jeff Slater

Jeff Slater is the Vice President of Operations at Kaleidoscope. He is a local business expert with more than 12 years of experience in online marketing, SEO, website development, social media, reputation management, Google Maps, and digital advertising for orthodontics.

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Key Reports to Keep You on Track

A s 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.

Running a successful orthodontic practice like a well-oiled machine involves much more than providing excellent care for your patients. It requires managing numerous aspects that ensure the practice operates smoothly, maintains financial health, and achieves long-term growth. The management of daily tasks, from tracking patient progress with status codes to ensuring accurate financials, is crucial in making sure everything runs efficiently. This article will explore key factors, such as the importance of accurate status codes, financial management, over-treatment time, and more, that contribute to the success of an orthodontic practice.

Status Codes: Tracking Patient Progress and Practice Efficiency

Status codes serve as the backbone of a well-organized orthodontic practice. They are essential for tracking the progress of each patient, ensuring that patients receive appropriate care at the right time. The proper use of status codes, such as active, retention, growth guidance, pending, or completed treatment, ensures the team remains aligned on the patient's treatment plan and next steps.

Without accurate status codes, a practice faces the risk of disorganization and inefficiency. If status codes aren't

updated to reflect a patient's progress, the clinical team may fail to schedule necessary follow-ups. This results in wasted resources, delayed treatment, and a lack of timely patient care.

Moreover, status codes serve as a tool for administrative tasks such as billing and scheduling. An up-to-date status code helps the front desk team quickly determine whether the patient needs an active appointment, treatment start, growth guidance, or a retention check-up. Accurate codes streamline daily operations, ensuring no patient falls through the cracks.

Reports generated from accurate status codes provide insights into patient flow and treatment progress. These reports can be analyzed to assess the volume of patients at various stages, identify bottlenecks, and help with resource allocation. Properly working with status code reports also supports financial management by helping the practice track treatment timelines and identify cases of extended care or overdue treatments that may require follow-up.

Financials: Managing Accounts Receivable

Effective financial management is vital for the long-term success of any orthodontic practice. One of the most important elements of financial management is ensuring that accounts receivable (AR) is properly tracked. AR management involves collecting payments from patients and insurance companies in a timely manner. Without this, the practice's cash flow would be compromised.

Both patient AR and insurance AR need to be carefully monitored. While patient AR represents money owed directly by patients, insurance AR accounts for claims pending payment from insurance companies. A wellorganized AR management system ensures that the practice doesn't miss out on collections and that any overdue payments are addressed promptly.

Running financial reports regularly is key to tracking these balances. Aging reports help identify overdue balances. These reports should be run regularly to monitor any issues that could affect the practice's cash flow.

A proactive approach to managing AR involves following up with patients and insurance companies. It's important to send payment reminders, review unpaid claims, and ensure claims are processed correctly. Regularly running financial reports allows orthodontic offices to stay ahead of any financial issues before they escalate.

Over-Treatment Time: Tracking Progre and Maximizing Revenue

Over-treatment time refers to any additional time patients spend in treatment beyond the expected timeline. This extreatment time may be necessary due to a variety of factor such as complications or patient-specific needs. While the situations may arise, it's crucial that orthodontic practices track over-treatment time in order to maximize revenue ar avoid undercharging for the services rendered.

The practice can consider charging for additional sessions, as in charging for treatment delays due to missed appointments or broken appliances. While this may sometimes be necessary, we emphasize that these situation should be handled with care to maintain goodwill on a case-by-case basis. The goal is always to ensure that the practice operates efficiently while preserving the trust and satisfaction of the patients.

Orthodontic practices can track over-treatment by generating the Exceeds Length of Treatment report, which highlights patients whose actual treatment duration has exceeded the initially projected estimated length of treatment. If a patient's treatment time exceeds the agree upon timeline, the practice should consider (on an individ basis) charging for the additional months of treatment needed. If this is not tracked properly, the practice could l losing revenue that is rightfully owed.

For instance, a patient's braces may require six months longer than anticipated due to complications. In this case, the orthodontist should ensure they're charging the patien

Cathy Jugovic

Cathy is meticulous, detail-oriented, and she will educate you on how to run your business; and yes, it is a business. She brings her legendary skills such as front desk management, accounts receivables, collections, insurance billing, and treatment coordination. She offers detailed reports meant to steer any practice in the right direction by coaching doctors, front desk members, office managers, financial coordinators, and treatment coordinators on how to run and analyze weekly and monthly reports.

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s s s	Exceeds Length of Treatment report regularly ensures that these situations are not overlooked, preserving revenue for the practice.
ors, ese nd	The Exceeds Length of Treatment report also helps manage the operational efficiency of the practice. By identifying instances of over-treatment early, the orthodontist can adjust treatment protocols and schedules to avoid delays in the future, leading to better utilization of time and resources.
,	Selling Your Practice: Planning Ahead
ons	for a Successful Transition One of the most important aspects of preparing a practice for sale is ensuring that all reports are accurate and up-to- date. Selling an orthodontic practice is a major decision that requires careful planning and attention to detail. A key part of this planning involves ensuring that the practice is financially sound, organized, and ready for transition.
ed- ual	Potential buyers will need to review the practice's financial performance, patient data, and overall operational efficiency. Accurate and comprehensive financial records, including up-to-date AR reports, treatment reports, the number of patients in each essential status code, and patient histories, give the buyer confidence in the practice's value.
be	By preparing accurate reports and ensuring the practice's financial and operational health, the seller can maximize the sale price and minimize the risk of complications. Financial
, nt	reports, such as income statements, balance sheets, and

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Edge Cloud Reports continued from page 5

feature. If you click in the white space of the report (making sure not to click on a patient name, as that will just take you to their chart), and hit CTRL + F, it opens a search box where you can do a keyword search. This is very handy when trying to find a a specific check number, dollar amount, or similar detail on a transaction report.

These are some of the lesser-known features of Edge Cloud's reporting that I have found handy on more than one occasion. I hope these features can make your lives easier, as that's what reporting is for. ${f o}$

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.

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• Marketing – 3% of revenue and possibly more depending on the status of the practice and length of years in practice. The more competitive challenges to the practice, or the younger the practice, the higher the percentage will be.

Practices can concentrate on these key targets or develop a set of targets that better fits their own situation. Remember, your goal in building the ultimate orthodontic practice is to be in the top 25%. Practices that have the extra desire and motivation can be in the top 10%.

World-class Referral Marketing System

Referral marketing might be the most critical factor in building the ultimate orthodontic practice. This often goes unrecognized as the most important factor because orthodontists and team members must deal with many dayto-day practice activities and issues.

However, I would strongly encourage every ortho practice to develop a referral marketing plan for the next 12 months. At Levin Group, we refer to this as the annual marketing calendar, which captures the deadlines of every marketing activity and the daily steps that must take place for those activities to be completed on time. Orthodontic practices should be marketed in five key areas: patients, parents, referring doctors, social media, and the community. Here are some things to consider for each of those areas:

1. Patient marketing is mainly about fun. Customer service can include fun activities for kids and strategies focused on a positive culture and convenience for adults. In any marketing scenario, it is always important to periodically evaluate the customer service of any type of marketing program. Remember, five-star customer service doesn't happen by accident. You must work at it.

2. Parents are often ignored. Parents are very important to the practice. Of course, they bring their kids to the office and pay the bills, but they are also a major referral source. As I have often joked in orthodontic seminars, "The 'mother-net' is much bigger than the Internet." Ortho practices should develop a series of marketing strategies focused on them because they will be talking to other mothers, and you want to help shape the message that they are delivering.

3. Referring doctors are often resented by orthodontists. Orthodontists don't like to be dependent on referring doctors; however, ignoring them is a huge mistake. In one of Levin Group's annual orthodontic practice surveys, we recently demonstrated that \$3.6 billion

> Ultimate Practice continued on next page

Ultimate Practice continued from previous page

per year of orthodontic practice revenue is referred by you won't stay in shape for long. dentists. It may have been higher in the past, but it is still The World-Class Orthodontic Team an enormous opportunity, and you want to make sure If you want to build the ultimate orthodontic practice, you they are referring to your practice. A referral marketing must have a fantastic team. It won't happen by accident program focused on general dentists is a scientifically and, often, you won't get there with the same people who proven approach that will virtually guarantee an increase you started with. You must create a positive culture with in referrals when properly conducted. positive people who want to do positive things every day. 4. Social media is a big part of the ortho practice In fact, I would argue that positivity is more important than marketing, but it can be haphazard. Social media is one the required skill sets. As an age old saying goes, "Hire of those areas that can be hit or miss and also eat up personality, and train skill." significant marketing dollars if not properly evaluated, Another component of creating a world-class team is having analyzed continuously, and revised. We do suggest the a great leader. The good news is that this is something "buyer beware" approach, as we recently evaluated that can be studied and learned. After 41 years of teaching a new orthodontic practice that spent over six figures leadership to orthodontists, we have seen amazing on social media and demonstrated very little results, transformations of introverts to extroverts and semi-positive significant losses, and, now, financial challenges. or even negative individuals to positive and motivating 5. Community marketing is really community branding. people. However, you must keep in mind that leadership Community branding is a longer-term approach and involves both the orthodontist and team. As you become a does not immediately result in a large number of new more positive and inspirational leader, you will simply raise referrals. However, community branding builds on itself, everyone around you. and, once established and maintained, it will drive many To build the ultimate orthodontic practice should be the referrals to the orthodontic practice. There are two goal of every orthodontist. Practices that do not rise to the aspects to understanding branding. The first is that you top 25% will find that they have erratic results. The good need to establish your brand message. What do you news is that any orthodontic practice can be in the top 25% want the community to know about your orthodontic by following the right strategies, implementing the right practice? The second is that you must be consistent. management systems, understanding scientific referral Community branding is outstanding until you stop market, and building a great team. This is a worthwhile goal focusing on it, and when you don't stay focused, it will for the practice, and you can have a lot of fun getting there. • go away very quickly. This is similar to what happens when you stop exercising. When you stop working out,

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.

AEO continued from page 7

- What's the best age for Invisalign? •
- Do I need a referral for an orthodontist? ٠

If your website answers these questions clearly and directly, you have a much better chance of showing up first-whether someone is typing into Google or asking their phone.

That visibility can turn into calls, consultations, and new patients.

AEO vs. Traditional SEO: What's the Difference?

You've probably heard of Search Engine Optimization (SEO) That's still important. But AEO takes things a step further.

Here's how they compare:

SEO

- Focuses on keywords
- Aims to rank on Google's search pages
- Optimizes for clicks and traffic
- Works best with longer, informative pages

AEO Focuses on questions

- Aims to be featured in voice search and AI results
- direct answers
- Works best with short, structured responses

SEO Is Still Important—But It's Not

Enough

Search engines are evolving. Relying only on traditional SEO might mean you're missing out on the newest, most valuable search traffic.

To stay competitive, your practice needs both SEO and AEO.

Is Your Website AEO-Ready?

Now's the time to take a hard look at your orthodontic website. Ask yourself:

- Are we answering common questions in a clear way?
- Is the content written for humans, not just search engines?
- Is our site easy to navigate?
- Are we using structured headings and bullet points?

If the answer to any of these is "no", your practice could be losing out.

Key Elements of AEO-Friendly Websites:

To help answer engines find and feature your content, make sure your website has:

Question and Answer Sections

Write content around the actual questions your patients ask. This could signal the triumphant return of the FAQ page!

• Simple, Readable Language

Avoid jargon. Keep it clear and conversational.

Headings and Bullet Points

These help break up your content so it's easier to understand—for both people and bots.

Local Relevance

Mention your city, neighborhood, or region naturally in your content.

• Fast, Mobile-Friendly Design

Speed and mobile usability still matter for SEO and AEO.

AEO continued on next page

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. **AEO** continued from previous page

7 Common Orthodontic Questions You Should Be Answering

If you're not sure where to start, here are some common questions you can address on your site:

- 1. How much do braces or Invisalian cost?
- 2. What's the difference between an orthodontist and a dentist?
- 3. What age should my child see an orthodontist?
- 4. How long does orthodontic treatment usually take?
- 5. Are there payment plans available?
- Who is the best orthodontics in [your city name]? 6.
- 7. Is Invisalign right for teens?

By creating short, helpful answers to these, you make your website more useful-and more likely to show up in answerbased searches. Put yourself in the mind of your prospective patient, and reverse-engineer the answers to their most common questions.

Urgent: The Digital Landscape Is Moving Fast

If you're unsure how to optimize your website, consider Answer engines are getting smarter every day. AI tools like working with a digital marketing agency that specializes ChatGPT, Google's SGE (Search Generative Experience), and Microsoft Copilot are already changing how people search. in orthodontic practices.

If your practice isn't optimized for these tools, you may be invisible to a growing number of potential patients.

Here's what's happening:

- More users are skipping websites and going straight to Al assistants.
- Google is rolling out more answer-focused search features.
- Younger patients and parents are used to asking full questions, not just keywords.

That means evaluating your content regularly, structuring it clearly, and writing in a way that both people and AI can This shift is happening right now. Waiting too long to adjust understand. With the right strategy, you can show up firstyour strategy could put you behind your competitors. whether someone's asking Google, Siri, or an AI chatbot.

and answers Optimizes for clear,

How to Get Started with AEO for Your Practice

You don't need to be a tech expert to get started. Here are a few simple steps you can take:

1. Add an FAQ Page

A good frequently asked questions page is a great foundation for AEO.

2. Update Existing Pages

Go through your main service pages. Add headers like "How long does Invisalign take?" with short, clear answers.

3. Use Schema Markup

This is code that helps search engines understand your content. A web developer or digital marketing agency can help you set this up.

4. Write for Real People

Forget the keyword stuffing. Write like you're having a conversation with a curious parent or teen.

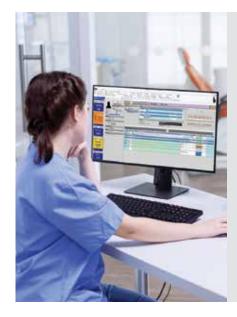
5. Work With Experts

Final Thoughts: Stav Ahead or Fall Behind

Answer Engine Optimization isn't just a trend. It's the future of how people find information—and healthcare providers.

As an orthodontic practice, you can't afford to ignore it. Your future patients are asking questions. Make sure your website has the answers.

The best time to optimize your website was yesterday. The second-best time is today. o



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 concerns. To learn more and to schedule one for your practice, contact your Ortho2 Regional Manager today at 800.678.4644 or sales@ ortho2.com.

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aging reports, should be thoroughly reviewed and organized before listing the practice for sale.

In addition to financial records, maintaining a detailed patient record history and up-to-date status codes demonstrates to the buyer that the practice is well-managed and operationally sound. Providing clear and accurate treatment timelines, patient progression data, and retention reports creates transparency and helps the buyer make an informed decision.

In conclusion, the efficient management of an orthodontic

practice hinges on the accurate and organized use of status codes, financial management, and treatment progress tracking. By consistently working with status codes, financial reports, and exceeds length of treatment time reports, orthodontic practices can maintain smooth operations, maximize revenue, and provide exceptional patient care.

By mastering these elements of practice management, orthodontic professionals can position their practices for long-term success, sustainability, and growth.



EDGEucate Yourself With EDGEpisodes

Looking for EDGEucational content to help you become an Edge Cloud guru? Our 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.

Celebrating Ortho2 Anniversaries

Thirty-Five Years Ken Hoffmeier Craig Scholz

Thirty-Three Years Kim Barker

> Thirty Years Clarence Bryan

Twenty-Four Years Ron Benifiel Cathie Morton

Twenty-Three Years Barb Williams

Twenty-One Years

Micky Augustin

Our Corporate Office is Closed on the Following Holidays:

New Year's Day	
Memorial 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.

Referral Rewards



Did you know 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.

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

Nineteen Years Lindsey Spieker

Fourteen Years Sean Gildersleeve Michelle Haupt Jess Huennekens

Thirteen Years Elizabeth Nordeen

Eleven Years Michael Lasley Gabrielle Schaaf

Nine Years Brooke Hawke

Eight Years Joe Skluzacek

Seven Years Isaiah Austin Sam Rubenstein

Five Years Larry St. John

Four Years Nicole Cook

Three Years John Diercks Amanda Moore

Two Years Aaron Sader

One Year Charla Webb

Independence Day Labor Day

Thanksgiving Day Friday after Thanksgiving Christmas Day



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