



Orthodontic Staff Training Resources Guide



Listing in the *Orthodontic Staff Training Resource Syllabus* does not constitute endorsement of the firms or their services by the American Association of Orthodontists, unless otherwise expressly indicated. You are encouraged to independently investigate the organizations listed prior to entering a relationship with them.

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AccounTrac, Inc.

TYPE OF TRAINING MATERIAL

Financial Staff

TEACHING METHOD

- Lecture
- Remote Access Consulting *AccounTrac*, Inc, Web-Based Software

TOPICS COVERED

- Accounts Receivable Control
- Outsourcing of Payment Compliance Activity Maximization of Cash Flow

CONTACT INFO:

Phone: 772-770-2000

Fax: 772-770-1957

Website: www.accountrac.com

Email: results@accountrac.com

COST: Monthly fee varies based upon delinquency rates and practice management system



American Association of Orthodontists

TYPE OF TRAINING MATERIAL

Administrative staff

Clinical staff

Business of Orthodontics Live Webinar & Online

TEACHING METHOD

- Online Lectures

TOPICS COVERED

- Clinical
- Financial
- Office management
- Patient administration

CONTACT INFO:

Phone: 314-997-6968

Outside US and Canada Toll Free: 800-424-2841

Fax: 314-997-1745

Website: www.AAOinfo.org

E-mail: orders@aaortho.org

COST: Online Lecture education lectures - \$30 each, or - \$100

Doctor Annual Subscription — Orthodontic Staff Club \$50 per-practice



American
Association of
Orthodontists®



American Dental Assistants Association

CONTACT INFO:

Phone: 312-541-1550

Toll Free: 877-874-3785

Fax: 312-541-1496

Website: www.adaausa.org

TYPE OF TRAINING MATERIAL

Administrative staff

Clinical staff

TEACHING METHOD

- Online
- Hard copy materials

TOPICS COVERED

- Intraoral functions
- Treatment of Diseases/Conditions
- Radiology
- Practice Management
- Pharmacology
- Infection control and Occupational Safety
- Hazardous Materials in the Dental Setting

COST: Member and non-member prices vary



American Dental Association

CONTACT INFO:

Toll Free: 800-947-4746

Website: www.adacatalog.org

TYPE OF TRAINING MATERIAL

ADA Catalog Professional Resources

TEACHING METHOD

- Online Lectures

TOPICS COVERED

- OSHA
- Infection Control
- HIPAA
- Coding

ADA Store



COST: Member and non-member prices vary

Bauer Seminars (Rita Bauer)

TYPE OF TRAINING MATERIAL

Seminars & In-office clinical photography training with customized camera instruction.

Customized photographic marketing templates for thank you cards, patient certificates, composites designed with the following in mind:

- Orthodontists
- All dentists, dental specialists and team members
- Private practice
- State & Regional Societies
- Study clubs

TEACHING METHOD

- Half to full-day seminars
- Full day, In-House consult/training Hands on workshops
- CE seminars and workshops for referring doctors
- Appreciation seminars for referring doctors

TOPICS COVERED

- Patient Photography in the Orthodontic Practice Made Easy -- camera set up and patient positioning for reliable, standardized clinical photographs to achieve consistent results in record time.
- What's New in Dental Photography (cameras and accessory choices from \$500.- to \$2500.- and up)
- Clinical Photography as an effective marketing tool -- show off your great work and use your photographs for patient referrals
- Improve your Image(s) photographic techniques to achieve reliable results for patient photography in record time.
- Photographic tips and tricks to capture images with that WOW effect for social media to give your website and marketing material a unique style.

CONTACT INFO:

Phone: 1-416-508-1045

Mobile: 1-416-508-1045

Website: www.ritabauer.com/dental-specialists/

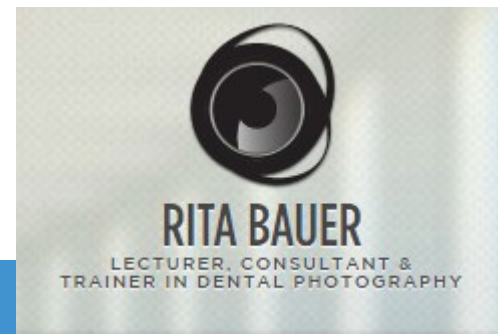
Email: rita.bauer@utoronto.ca

COST:

\$2000 plus travel expenses for in-house staff training

\$2000 to \$2500 plus travel expenses for lectures and seminars,

\$3500 to \$4500 plus travel expenses for full day hands on workshops (limited attendance 12-20 participants from different practices)



The Bio-Engineering Co.

(Dr. Dean C. Bellavia)

TYPE OF TRAINING MATERIAL

Services & Products for Orthodontists and staff in:

- Practice Organization
- TC Systems
- Effective Team Hiring
- Practice Transition
- Scheduling Design
- Setting and Attaining Goals
- Team Member Training

TEACHING METHOD

Self Training:

- Self-Training Management Kits, OSHA systems and Orthodontic concepts and systems
- Online Personality Evaluation
- Manuals & workbooks and Videos and workbooks

Dr. Bellavia's Personal Training:

- Customized Systems Design with Doctors & Team.
- Personalized in-office training to install designed systems.
- Monthly Super Support & Reports to refine your team & systems.

TOPICS COVERED

Team Organization & Hiring:

- Evaluation of all team members: mental skills, personality, attitude and work ethic, with work position recommendations.
- Team Hiring—the right person the 1st time.

CONTACT INFO:

Phone: 1-716-834-5857

Fax: 1-716-834-4923

Website: www.deanbellavia.com

Email: bioengineering@twc.com



TOPICS COVERED (Continued)

Team Organization & Hiring:

- An organizational Structure based on accountability and decision-making

Design of Daily Schedule:

- Efficient Dr-Tx-Time Schedule
- Calculation of exact staffing needs.
- Maintaining a daily schedule

Team Training:

- Legal & Orthodontic Orientations
- Quick & Effective Day-by-Day training program for every practice position.
- Effective demonstration techniques

PLUS MORE ...

The Bio-Engineering Co. (Dr. Dean C. Bellavia)

TOPICS COVERED (Continued)

TC Program Design & Training Including:

- The Ultimate New Patient Experience
- All Communications
- All Forms
- Financial Negotiations
- TC room layout

Goal Setting & Training:

- Goals & Reporting Systems
- Creating change
- Effective marketing
- Effective Selling
- Effective website design

Creating Successful Partnerships:

- Choosing the ideal partner / associate
- Integrating the new associate into the team
- Practice valuation

CONTACT INFO:

Voice: 1-716-834-5857

Fax: 1-716-834-4923

Website: www.deanbellavia.com

Email: bioengineering@twc.com

COST:

Ultimate Management Kits: \$200 to \$300

Orthodontic Reference Library: \$360

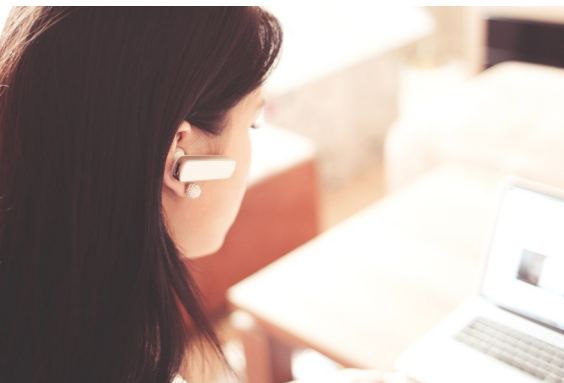
Monthly Super Support Program: \$350/month

6-Month Optimization Program: \$29,000, which includes two years of Super Support, all Management Kits and Reference Library worth about \$10,000.

Schedule Design: depends on practice

Office Design: about \$6,000

Speaking Engagement: \$5,000 per day



Rosemary Bray

CONTACT INFO:

Phone: 760-268-0760

Fax: 760-268-0760

Website: www.RosemaryBray.com

E-mail: rosemarybrayortho@gmail.com

TYPE OF TRAINING MATERIAL

- Front Office Team
- Entire Team
- Doctor
- New Patient Coordinator

TEACHING METHOD

Lectures via:

- In office consulting
- Team Retreats
- Workshops
- Seminars

TOPICS COVERED

- Customer service
- Teamwork
- Communication
- Practice image
- Leadership
- New Patient Process



COST:

Varies according to numerous parameters – call to discuss

Consulting Network — Lori Garland Parker

CONTACT INFO:

Lori Garland Parker 805-552-9512

Email: LoriGParker@gmail.com

TYPE OF TRAINING MATERIAL

- Orthodontic Assistants
- Clinical Coordinators
- Orthodontists

TEACHING METHOD

- On-site training/coaching
- Lectures/workshops
- Management & leadership courses
- Clinical Coordinator courses/coaching
- Customizable training and procedure manuals

TOPICS COVERED

Clinical/Lab:

- Clinical organization and efficiency
- Clinical assistant training and/or training manual
- Verbal skills for patient motivation & education
- Indirect bonding
- Role of the Clinical Coordinator
- Patient education and motivation
- Patient manager system
- Treatment protocol development

COST:

Manuals with CD-ROM from \$295-\$595

For consulting, lectures and courses contact Debbie (administrative) or Lori (clinical) for additional information

Leslie Canham & Associates, LLC

TYPE OF TRAINING MATERIAL

- Orthodontist
- Front Office Team
- Clinical Team

TEACHING METHOD

On-Site Training:

- Lectures
- Hands on Workshops
- OSHA Training DVD
- Workbooks
- Exposure Incident book
- New Employee Checklist and Training book
- Home Study Courses
- Webinars
- Telephone Coaching/Consulting

TOPICS COVERED

- OSHA for Dentistry
- Infection Control Workshop
- Calif. Dental Practice Act
- HIPAA for Dentistry
- Infection Control Teamwork: How to Meet CDC Guidelines
- Your Role in Infection Control
- Conduct your own OSHA Inspection

CONTACT INFO:

Phone: 209-785-3903

Website: www.lesliecanham.com

Email: Leslie@LeslieCanham.com

COST:

- Lecture fees available upon request
- On-site training /consulting fees available upon request
- Call for pricing on Webinars, Telephone Consulting/
- Coaching and any other package of services to accommodate the needs of the practice.

- CSI Dental Office: Criminal Microbes
- Hand Hygiene Workshop
- 8 Hr Infection Control Course for Unlicensed Dental Assistants
- Accommodating Deaf and Hard of Hearing Patients
- Treating patients who are living with HIV/AIDS
- Treating patients who have Autism
- CSI Dental Office: Criminal Microbes



Char Eash Profit Marketing Systems South, Inc.

TYPE OF TRAINING MATERIAL

- Orthodontic Efficiency/Profitability Systems
- Practice Building- Marketing Through Written Communication and Scripts
- Electronic Forms
- Video Marketing
- Website Development

TEACHING METHOD

- In House Consultation and Team Training
- Distant Learning Management Systems
- Social Media Coaching/Webinars

TOPICS COVERED

- Over 100 Standard Operating Systems/Team Efficiency and Profitability protocols evaluated
- Leadership, Profitability, Team Building, and Patient Marketing
- Presentation of skill sets needed to communicate and brand practice vision.

CONTACT INFO:

Phone: 813-891-6002

Website: www.OrthoLync.com

www.pmsconsulting.com

Email: Info@OrthoLync.Com

COST:

Fees determined based upon required installation needs per practice.

Fees quoted based on # of days, locations and practicing orthodontists

ORTHOLYNC



Andrea L. Cook

Orthodontic Clinical Consultant

TYPE OF TRAINING MATERIAL

- Clinical staff
- Sterilization Technician

TEACHING METHOD

In Office training

- Lectures
- Clinical courses

TOPICS COVERED

- Infection Control & OSHA Training
- OSHA Recordkeeping, plus CDC & OSHA Protocol Templates
- Sterilization review, design and implementation
- Basic and advanced chairside duties
- Schedule templates/efficient procedures
- Clinical training system & manual
- Indirect bonding
- Clinical coordinator
- Verbal skills to encourage compliance
- Reduction of emergency visits
- Personalized clinical manual
- Inventory control
- Instrument set ups and organization in the operatory
- Reduction of patients beyond estimated completion date

CONTACT INFO:

Phone: 253-332-3376

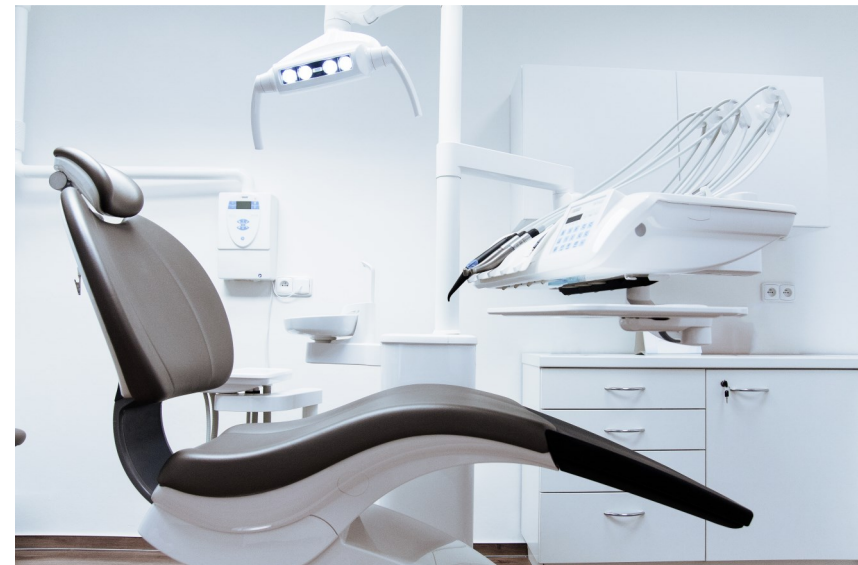
Fax: 253-862-6570

Website: www.andreacookconsulting.com

Email: andrea@andreacookconsulting.com

COST:

Fees are determined by each individual client's needs.



Ortho Assist

OrthoAssist™
Training for orthodontic assistants

CONTACT INFO:

Contact: Carolyn Friedman (over 30 years experience)

Phone: 850-668-3633

Website: www.orthoassist.com

TYPE OF TRAINING MATERIAL

- Training programs for all staff members
- On-line training for staff, clinical, Treatment Coordinator, Insurance filing

TEACHING METHOD

- Interactive on-line program
- On-line pre-employment test

TOPICS COVERED

- Orthodontic basic & advanced terminology
- Appliances and procedures
- Instruction on how procedures work
- Instruct- why procedures are done
- What information you should cover so they start treatment
- Insurance filing codes
- Ortho information to increase referrals
- Pre-employment test covers tooth identification, procedures, terminology, etc.

COST:

On-line training \$99.00 each

Bundle of all trainings \$399.00

Pre-employment evaluation test \$29.95

Ortho Referral Systems



CONTACT INFO:

Contact: Nancy Hyman

Phone: 323-308-9817

Fax: 323-726-8301

Website: www.orthoreferralsystems.com

Email: nancy@hymanortho.com

TYPE OF TRAINING MATERIAL

- Front Office Team
- Treatment Coordinator
- Marketing Team
- Manager

Printed referral materials for patient, community and DDS referrals and promotions.

TEACHING METHOD

- Winning Marketing Strategies Workbook (including TC bonus section)
- Remote Coaching

TOPICS COVERED

- Professional, Community and Patient to Patient Referrals
- Phone Skills
- Full Team Marketing Approach
- Patient Enrollment
- Kids' Club System

COST:

\$249 for WMS Workbook

Remote coaching \$495 per segment

Orthosynetics

TYPE OF TRAINING MATERIAL

Seminars, In-office Consulting/Coaching & Training, Resource Center: with forms and letter templates. OSHA Webinars provided by TMC.

Training for the following team members:

- Doctors
- Treatment Coordinators
- Financial Coordinators
- Administrative Staff
- Team Leaders

TEACHING METHOD

Trainers use a variety of techniques that include:

- Lecturing
- In office consulting
- Demonstrating, Role Playing.
- Telephone Coaching /Consulting
- Webinars (live and recorded)
- Hands on Workshops
- Online training with quizzes.

TOPICS COVERED

- Leadership
- New Patient Experience and Conversion
- Customer Service
- Financial Management
- Office management
- Patient administration
- Patient flow and scheduling

CONTACT INFO:

Rebecca Kuma

Mobile: 407-496-4218

Orthosynetics: 888-622-7645

Training Website: <http://osi.syneticsdev.com/prc/>

Company Website: www.orthosynetics.com/services/

Email: rkuma@orthosynetics.com

COST:

Lecture fees available upon request. Based on topics & time.

On-site Training /Consulting fees based on days travel and topics presenting but, available upon request.

Bundled Package Pricing Available for:

- Webinars
- Telephone Consulting/Coaching
- Customized Services Available to accommodate the needs of the practice.



Peniche & Associates

TYPE OF TRAINING MATERIAL

Training for:

- Treatment Coordinators
- Administrative staff
- Clinical staff
- Doctors
- Marketing Coordinators
- Office Managers
- Start-Ups

TEACHING METHOD

- In Office Training
- Hands on
- Lectures
- Workshops
- Treatment Coordinator Intensive™
- Office Management Academy™
- Signature Marketing Course™
- Millennial Marketing Academy™

TOPICS COVERED

- Case Acceptance
- Treatment Coordinating
- Observation & Pending Programs
- Marketing
- Scheduling
- Practice Management

CONTACT INFO:

Phone: 503-666-8538

Fax: 503-666-4937

Contact: LeeAnn Peniche

Website: www.leeannpenicheandassociates.com

COST:

Fees are determined by each individual client's needs



Reliance Orthodontic Products, Inc.

TYPE OF TRAINING MATERIAL

- Instructional videos
- Reliance University
- www.RelianceU.tech
- Chairside technique cards
- Bonding DVD

TEACHING METHOD

- Self-taught video
- Laminated reference cards
- Animated training videos
- Literature Support
- Livestreams
- Webinars
- In office training

TOPICS COVERED

- Tooth preparation prior to bonding
- Direct bonding or Indirect bonding
- Bonding trouble shooting
- Bonding to atypical surfaces
- Bonding lingual retainers
- Bonding large acrylic appliances
- Band cementation
- Debonding
- Wet field bonding
- Self-etching primers
- Crown cementation
- Clear aligner solutions
- Keeping up with the 3D evolution

CONTACT INFO:

Phone: 630-773-4009

Toll Free: 800-323-4348

Fax: 630-250-7704

For any bonding questions:

PaulGangeJr@RelianceOrthodontics.com

Orders: orders@relianceorthodontics.com

COST:

CD - \$14.95; reg. \$19.95

Cards - Free!

Reliance U – Free!

Special prices for Training Resources



Vickie B. Rudd

Management Consultant & Digital Imaging Training

TYPE OF TRAINING MATERIAL

Training, workbooks and easy to use reference materials for:

- Orthodontist
- Financial Coordinator | Scheduling Coordinator | Treatment Coordinator
- Clinical Coordinator
- Records Technician
- On disc to download: worksheets, forms, letters- everything you need.

TEACHING METHOD

- Hands-on training in your practice with staff to clean-up and implement simple systems for:
- A/R delinquencies
- OBS recall/ready list
- Digital imaging quality
- New patient presentation
- On-time Tx completion
- Build doctor time schedule
- Includes detailed how-to management workbook!
- Fun, relaxed, effective.

TOPICS COVERED

- Job descriptions for 4 Coordinator positions to achieve fair & efficient work distribution.
- Organize simple systems and procedures to achieve practice goals.
- Increase case acceptance.
- Decrease delinquency rate.
- Increase patient compliance.

CONTACT INFO:

Phone: 276-650-4000

Website:

www.vickiebrudd.com

E-mail: vickie@vickiebrudd.com



COST:

- Based on services requested.
- Visit website vickiebrudd.com for complete fee information.
- Call to arrange cost effective package of services.

TOPICS COVERED (CONTINUED)

- Build referrals; Market practice.
- Doctor time scheduling to run on time.
- Integrate imaging technology.
- For the Doctor: Set your goals; 6 simple steps to profits; Essential management reports; Lead a motivated team. Improve your Image(s) photographic techniques to achieve reliable results for patient photography in record time.
- Photographic tips and tricks to capture images with that WOW effect for social media to give your website and marketing material a unique style.

Safe Practices

Jackie Dorst, RDH, BS

TYPE OF TRAINING MATERIAL

Seminars, In-office consultations & training, Manuals, OSHA Manuals & Webinars, OSHA & Infection Control seminars for referring dentists and dental hygienists:

- Orthodontists
- Orthodontic Assistants
- Practice Managers
- OSHA Coordinators
- Professional Relations Coordinator
- Study clubs
- State & Regional Societies

TEACHING METHOD

- Half- to full-day seminars
- Full-day consult/training
- CE seminars for referring dental Practices
- Customized OSHA Manuals
- Training booklets
- OSHA Safety Tune-Up | Sterilization Tune-Up | Infection Control Tune-Up
- Webinars

TOPICS COVERED

- Orthodontic Instrument Sterilization
- Infection Control
- OSHA Safety
- Sterile Field Laser & TADS procedures
- Sterilization and disinfection efficiency
- Sterilization room design
- Clinical attire
- Patient communication of practices IC and sterilization
- CDC Infection Prevention
- SDS and the GHS Chemical labeling system
- Professional Image
- OSHA Coordinator Training

CONTACT INFO:

Phone: 949-842-1747 **Mobile:** 949-842-1747

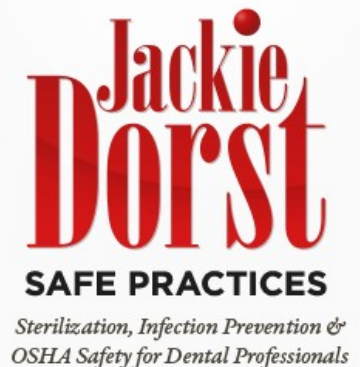
Fax: 904-206-4361

Website: www.JackieDorst.com

Email: safepract@gmail.com

COST:

- \$2000 - \$5000 for seminars and consulting
- \$300 for manuals
- \$2000 Webinars



JMShoemaker Consulting, Inc.

TYPE OF TRAINING MATERIAL

- Financial staff
- Insurance staff

TEACHING METHOD

- Lectures
- On-site Consulting
- Remote Access Consulting

TOPICS COVERED

- Financial Computerization Efficiency
- Accuracy of Accounting Policies & Procedures
- Financial Arrangements & Credit Ratings
- Cash Flow Management
- Derivation & Maximization of Orthodontic Ratios
- Embezzlement Controls



CONTACT INFO:

Phone: 772-770-2000

Fax: 772-770-1957

Website: www.jmshoemakerconsulting.com

Email: jackie@jmshoemaker.com

COST:

- Lecture fees available upon request
- On-site Consulting fees available upon request
- Remote Access Consulting – Based on Hourly Rate



Trapezio – home of the Academy of Orthodontic Assisting (AOA)

TYPE OF TRAINING MATERIAL

- AAO endorsed comprehensive course teaching the fundamentals of orthodontic assisting through a user-friendly, web-based course.
- Beginner, Intermediate and Advanced Programs Available
- Orthodontic assistant programs for varying levels of experience.
- OSHA Safety program which meets federal OSHA guidelines for initial and annual training.
- Non-clinical courses authored by industry-leading consultants covering areas of Treatment Coordinator, Financial Coordinator, QuickBooks® Ortho, and Insurance Coordinator.

TEACHING METHOD

- Online: Curriculum and tests available via the Internet for convenient study. Online support instructor available via e-mail to assist with curriculum questions.
- Hands-on teaching offered periodically at the Trapezio home office, orthodontic conferences, and remotely through a Chompers kit and mentor's guide.

TOPICS COVERED

- Dental and oral anatomy and terminology
- Tooth development
- Identification & numbering of teeth
- Tooth surfaces and directions
- Orthodontic appliances
- Types and stages of orthodontic treatment

CONTACT INFO:

Toll Free: 877-976-4536

Phone: 770-428-8891

Fax: 678-370-9848

Website: www.trapezio.com

Email: info@trapezio.com

COST:

- Call for Pricing
- Membership packages now available exclusively for AAO Member doctors
- Monthly Practice Pricing Plans Available
- Per-user Practice Pricing Plans Available



Trapezio – home of the Academy of Orthodontic Assisting (AOA)

TOPICS COVERED

- Archwire placement & selection
- Clinical photography
- Orthodontic radiography & x-ray safety
- Bonding technique and preparation
- Intra-oral & extra-oral auxiliaries
- Charting
- Headgear and retainer adjustments
- Biology of tooth movement
- PVS impressions
- Emergencies and repairs
- Infection control
- TADs and lasers
- Risk management
- Clinical efficiency
- International tooth numbering
- Safety and OSHA
- The new patient process
- Credit Management and Credit Ratings
- Delinquency and Collections
- Financial Coordinator Responsibilities
- Submission of Insurance Claims
- Insurance Protocols
- Common Struggles in Insurance Collections

CONTACT INFO:

Toll Free: 877-976-4536 **Phone:**

770-428-8891

Fax: 678-370-9848 **Website:**

www.trapezio.com **Email:**

info@trapezio.com

COST:

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- Monthly Practice Pricing Plans Available
- Per-user Practice Pricing Plans Available

