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](http://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 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

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](http://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

Leslie Canham & Associates, LLC
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](http://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
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](http://www.andreacookconsulting.com)  
Email: andrea@andreacookconsulting.com

**COST:**  
Fees are determined by each individual client’s needs.
Ortho Assist

**CONTACT INFO:**
- **Contact:** Carolyn Friedman (over 30 years experience)
- **Phone:** 850-668-3633
- **Website:** [www.orthoassist.com](http://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](http://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/](http://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
- Chairsde 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@relanceorthodontics.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](http://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](http://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](http://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](http://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:
- Call for Pricing
- Membership packages now available exclusively for AAO Member doctors
- Monthly Practice Pricing Plans Available
- Per-user Practice Pricing Plans Available