

Management of Knowledge  
is the Key

Karen Moawad: My intention is to help you juggle the complex elements of orthodontic treatment, management, and the plethora of knowledge.



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Hummingbird Associates  
Invites you...visit Booth #2041

2018 WASHINGTON DC

A Capital Destination,  
A Monumental Experience



"There are many benefits when you use information effectively — you can implement faster, drive innovation, improve decisions, empower the team, and increase accountability."



Tracy Moawad, Hummingbird's business operations consultant



"To develop an effective knowledge management program, your practice needs a systematic strategy, not just a general plan to help employees share knowledge."



Susan Klembeck,  
Hummingbird's Financial Auditor



"Knowledge management is the systematic administration of an organization's knowledge to create value, to meet tactical and strategic goals, and to promote innovation."



Garrett Burnett, Hummingbird's Strategic Marketing Consultant



"Knowledge management enhances decision-making and helps achieve operational efficiency and effectiveness."



Cassie Kellner, Hummingbird's Clinical Consultant, with one of our clients who said her knowledge was a "game changer."



"Storing and sharing knowledge in a changing environment is the challenge. Often, only a small group of staff hear what is changing. We should leave no one behind."



Raylyn Nelson, Computer Utilization and Financial Consulting



MARKETING



Candy Wall







**Mom's Groups Share Information**

mom's group  
help for moms, from moms

Autism  
Delay  
Developmental  
Disabilities  
Challenges  
Aspergers

**There are many Mom's Groups of Special Needs Children**

mom's group  
help for moms, from moms

Autism  
Delay  
Developmental  
Disabilities  
Challenges  
Aspergers



Garrett says: "From your signage on the building to your paperwork to your website to Facebook to YouTube to Instagram to Google, your overall brand should be consistent. You want consumers to see the same logo and branding every time so that the recognition is immediate."

**i LOVE**

Calling ALL GIRL SCOUT TROOPS! i-Ortho wants your cookies! We'll buy two cases of cookies from any Girl Scout Troop that comes to our office in uniform for a group picture. Please email [ashly@i-ortho.com](mailto:ashly@i-ortho.com) to arrange a time! Cookies will be donated to Denver charities! Like and share this post to get the word out to fellow Troop Leaders. We love supporting our local community! #welovethecookiestoos #girlscoutcookies #denvergirlscouts #orthodontics Girl Scouts of Colorado

**Call Center takes all calls so front desk staff are relating to people**

**Patient Managers**

**Hummingbird Reports — Actives Beyond ECD (by Team)**

Team	Chiropractic	Chiropractic	Massage	OT	PT	Yoga	Total
Team 1	10	15	20	5	10	5	65
Team 2	12	18	22	8	12	7	79
Team 3	8	14	18	6	9	4	59
Team 4	11	16	21	7	11	6	72
Team 5	9	13	17	5	8	4	56
Team 6	14	19	24	9	13	8	87
Team 7	7	11	15	4	6	3	46
Team 8	13	17	22	8	11	6	77
Team 9	10	15	20	6	9	5	65
Team 10	12	16	21	7	10	5	71
Team 11	8	12	16	5	7	4	52
Team 12	11	14	19	6	8	5	63
Team 13	9	13	17	5	7	4	55
Team 14	13	17	22	8	11	6	77
Team 15	10	14	18	6	8	5	61
Team 16	12	16	21	7	10	5	71
Team 17	8	11	15	4	6	3	47
Team 18	14	18	23	9	12	7	83
Team 19	9	13	17	5	7	4	55
Team 20	11	15	20	6	9	5	66
Team 21	13	17	22	8	11	6	77
Team 22	10	14	18	6	8	5	61
Team 23	12	16	21	7	10	5	71
Team 24	8	11	15	4	6	3	47
Team 25	14	18	23	9	12	7	83
Team 26	9	13	17	5	7	4	55
Team 27	11	15	20	6	9	5	66
Team 28	13	17	22	8	11	6	77
Team 29	10	14	18	6	8	5	61
Team 30	12	16	21	7	10	5	71
Team 31	8	11	15	4	6	3	47
Team 32	14	18	23	9	12	7	83
Team 33	9	13	17	5	7	4	55
Team 34	11	15	20	6	9	5	66
Team 35	13	17	22	8	11	6	77
Team 36	10	14	18	6	8	5	61
Team 37	12	16	21	7	10	5	71
Team 38	8	11	15	4	6	3	47
Team 39	14	18	23	9	12	7	83
Team 40	9	13	17	5	7	4	55
Team 41	11	15	20	6	9	5	66
Team 42	13	17	22	8	11	6	77
Team 43	10	14	18	6	8	5	61
Team 44	12	16	21	7	10	5	71
Team 45	8	11	15	4	6	3	47
Team 46	14	18	23	9	12	7	83
Team 47	9	13	17	5	7	4	55
Team 48	11	15	20	6	9	5	66
Team 49	13	17	22	8	11	6	77
Team 50	10	14	18	6	8	5	61

**Patient Managers**

- Consistency
- Improved Communication
- Builds Relationship
- Improved Compliance
- Fewer Missed Appts.
- Patients and Parents Know Where to Go in the Clinic

**PATIENTS FINISH  
MORE QUICKLY!**

Are you still  
using cold  
sterile?



**One Scanner is not  
enough anymore**

**Uses for a scanner:**

- Start for New Patient in lieu of impressions
  - Scan for Invisalign
  - Scan for appliance
  - Scan at debond
- 

- Contract Signed and Initial Paid Before the Scan
- The Scan is the Start

We discuss monthly payments on the phone and prepare patients to start the same day as their exam if they wish.

“Most of our patients pay \$175-\$250 a month with a low initial payment, and those with insurance pay even less. Does that work within your budget?”

“Mrs. Wonderful, we know everyone’s time is valuable. If treatment is indicated, we will be more than happy to start Eli’s treatment the same day as his exam so you don’t have to miss school and work twice.”

“The choice is yours, but most of our patients appreciate the convenience and elect to get started the same day.”

Some offices have a float in a non- scheduled chair side doing Same Day Starts and even some Same Day Debonds

**Retention is Your Responsibility**

**Retention Visits**  
 Your retention period is 12 months from your date of debond and is included in your treatment fee. We will schedule your first visit 6 weeks after your completion of active treatment. It is your responsibility to call and schedule any additional appointments if you have concerns. We will be more than happy to see you! There will be an office visit fee for any visits after one year of active retention.

**Retention is Your Responsibility**

**Replacement Cost:**  
 Each Hawley retainer costs \$250 to replace. Each clear retainer costs \$125. Each fixed retainer costs \$250 to replace.

**Retention is Your Responsibility**

**Wear Instructions: Removable Retainers in Conjunction with Bonded Lingual Retainers**

- Wear the removable retainer every night at bedtime – forever!
- Expect to have increased salivary flow for the first few days.
- The plastic taste will disappear in a few days.
- Do not wrap retainer in a napkin or place in a lunch bag or pocket. This is an easy way to have the retainer accidentally thrown away.
- Do not leave around the house for a dog to chew or small child to play with.
- Do not leave in the direct sun, like a windowsill or dashboard of a car – heat will warp it.
- Place in the protective case when out of the mouth (the case will not protect it against a determined dog).
- Store in a safe place when not wearing.

**Retention is Your Responsibility**

**Cleaning Instructions**

- Keep the retainer clean by brushing it with a toothbrush, toothpaste and cold water. Remove plaque, tarter and food particles, which will harden on its surfaces. Soak in mouthwash to freshen as necessary. White vinegar on a toothbrush is helpful to prevent tartar.
- To sterilize, soak in a denture cleaner for 20 minutes, then rinse thoroughly.
- Do not boil in hot water to sterilize.

**Retention is Your Responsibility**

**Teeth Shift with Age**

As you get older, your face will look different. A great deal of research has proven that just as your face changes and shifts with age, your teeth will shift with age. This is true for everyone whether they've had their teeth straightened or not and is especially true for the lower front teeth. If you want your teeth to stay really straight you must wear your retainers about two nights per week for the rest of your life. The reality is that most people are not willing to wear retainers for the rest of their life and simply accept aging of the face and shifting of teeth.

**Retention is Your Responsibility**

**Wisdom Teeth**

In addition to aging of the face, it is possible that wisdom teeth may contribute to crooked teeth. The best time to consider having wisdom teeth removed is between 16 and 18 years of age. If you would like, we will refer you to the appropriate oral surgeon for removal of the wisdom teeth. Even after removal of the wisdom teeth, you will need to continue to wear retainers about five nights per week for the rest of your life.

**Coordinators Help Manage Knowledge**

- Invisalign
- Growth Guidance
- Marketing
- Clinic
- Sterilization
- New Patient
- Records
- Insurance

Code	Description	Classification of Its Type of service	DMIC	Active	Dr. Service	Cl. Serv.	Lab.	Code
0001	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0002	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0003	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0004	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0005	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0006	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0007	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0008	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0009	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0010	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0011	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0012	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0013	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0014	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0015	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0016	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0017	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0018	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0019	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0020	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000

0021	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0022	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0023	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0024	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0025	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0026	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0027	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0028	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0029	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0030	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0031	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0032	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0033	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0034	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0035	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0036	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0037	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0038	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0039	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000
0040	Orthodontic Treatment - Appliances Only	Orthodontic	1000	1000	1000	1000	1000	1000



**If you aren't using treatment plans, you are not as efficient as you could be in: Time after the Exam Treatment Visits Time in Treatment Staff Time at the Chair Dollars Per Visit**

CA 1 - Non Est. Normal or Deep Bite	CA 2 - Non Est.	CA 3 - Non Est.	CA 4 - Non Est. Normal or Deep Bite	CA 5 - Non Est.	CA 6 - Non Est.	CA 7 - Non Est. Normal or Deep Bite	CA 8 - Non Est.	CA 9 - Non Est.	CA 10 - Non Est.
1001	1002	1003	1004	1005	1006	1007	1008	1009	1010
CA 1 - Non Est. Deep Bite, Upper Arch	CA 2 - Non Est.	CA 3 - Non Est.	CA 4 - Non Est. Deep Bite, Upper Arch	CA 5 - Non Est.	CA 6 - Non Est.	CA 7 - Non Est. Deep Bite, Upper Arch	CA 8 - Non Est.	CA 9 - Non Est.	CA 10 - Non Est.
1011	1012	1013	1014	1015	1016	1017	1018	1019	1020
CA 1 - Non Est. Deep Bite, Both Arch	CA 2 - Non Est.	CA 3 - Non Est.	CA 4 - Non Est. Deep Bite, Both Arch	CA 5 - Non Est.	CA 6 - Non Est.	CA 7 - Non Est. Deep Bite, Both Arch	CA 8 - Non Est.	CA 9 - Non Est.	CA 10 - Non Est.
1021	1022	1023	1024	1025	1026	1027	1028	1029	1030
CA 1 - Non Est. RPE or Guard	CA 2 - Non Est.	CA 3 - Non Est.	CA 4 - Non Est. RPE or Guard	CA 5 - Non Est.	CA 6 - Non Est.	CA 7 - Non Est. RPE or Guard	CA 8 - Non Est.	CA 9 - Non Est.	CA 10 - Non Est.
1031	1032	1033	1034	1035	1036	1037	1038	1039	1040
CA 1 - Non Est. Pkg Lateralis or Missing Teeth	CA 2 - Non Est.	CA 3 - Non Est.	CA 4 - Non Est. Pkg Lateralis or Missing Teeth	CA 5 - Non Est.	CA 6 - Non Est.	CA 7 - Non Est. Pkg Lateralis or Missing Teeth	CA 8 - Non Est.	CA 9 - Non Est.	CA 10 - Non Est.
1041	1042	1043	1044	1045	1046	1047	1048	1049	1050
CA 1 - Non Est. Pkg Lateralis, Maxillary	CA 2 - Non Est.	CA 3 - Non Est.	CA 4 - Non Est. Pkg Lateralis, Maxillary	CA 5 - Non Est.	CA 6 - Non Est.	CA 7 - Non Est. Pkg Lateralis, Maxillary	CA 8 - Non Est.	CA 9 - Non Est.	CA 10 - Non Est.
1051	1052	1053	1054	1055	1056	1057	1058	1059	1060
CA 1 - Non Est. Missing Teeth, Maxillary Space or Prosthesis	CA 2 - Non Est.	CA 3 - Non Est.	CA 4 - Non Est. Missing Teeth, Maxillary Space or Prosthesis	CA 5 - Non Est.	CA 6 - Non Est.	CA 7 - Non Est. Missing Teeth, Maxillary Space or Prosthesis	CA 8 - Non Est.	CA 9 - Non Est.	CA 10 - Non Est.
1061	1062	1063	1064	1065	1066	1067	1068	1069	1070
CA 1 - Non Est. Missing Teeth, Lower	CA 2 - Non Est.	CA 3 - Non Est.	CA 4 - Non Est. Missing Teeth, Lower	CA 5 - Non Est.	CA 6 - Non Est.	CA 7 - Non Est. Missing Teeth, Lower	CA 8 - Non Est.	CA 9 - Non Est.	CA 10 - Non Est.
1071	1072	1073	1074	1075	1076	1077	1078	1079	1080
CA 1 - Non Est. Missing Teeth, Lower Space or Prosthesis	CA 2 - Non Est.	CA 3 - Non Est.	CA 4 - Non Est. Missing Teeth, Lower Space or Prosthesis	CA 5 - Non Est.	CA 6 - Non Est.	CA 7 - Non Est. Missing Teeth, Lower Space or Prosthesis	CA 8 - Non Est.	CA 9 - Non Est.	CA 10 - Non Est.
1081	1082	1083	1084	1085	1086	1087	1088	1089	1090
CA 1 - Non Est. RPE, Pkg Lateralis	CA 2 - Non Est.	CA 3 - Non Est.	CA 4 - Non Est. RPE, Pkg Lateralis	CA 5 - Non Est.	CA 6 - Non Est.	CA 7 - Non Est. RPE, Pkg Lateralis	CA 8 - Non Est.	CA 9 - Non Est.	CA 10 - Non Est.
1091	1092	1093	1094	1095	1096	1097	1098	1099	1100
CA 1 - Non Est. RPE, Missing Teeth, Maxillary Space	CA 2 - Non Est.	CA 3 - Non Est.	CA 4 - Non Est. RPE, Missing Teeth, Maxillary Space or Prosthesis	CA 5 - Non Est.	CA 6 - Non Est.	CA 7 - Non Est. RPE, Missing Teeth, Maxillary Space or Prosthesis	CA 8 - Non Est.	CA 9 - Non Est.	CA 10 - Non Est.
1101	1102	1103	1104	1105	1106	1107	1108	1109	1110
CA 1 - Non Est. RPE, Missing Teeth, Maxillary Space or Prosthesis	CA 2 - Non Est.	CA 3 - Non Est.	CA 4 - Non Est. RPE, Missing Teeth, Maxillary Space or Prosthesis	CA 5 - Non Est.	CA 6 - Non Est.	CA 7 - Non Est. RPE, Missing Teeth, Maxillary Space or Prosthesis	CA 8 - Non Est.	CA 9 - Non Est.	CA 10 - Non Est.

**If 7's not in at start, bond them at the Repo to minimize visits**

**TREATMENT EFFICIENCY REPORT** shows number of anticipated visits, number of actual visits, estimated and actual number of months, number of emergency visits, dollars per visit.

Consider: Combining Phase I and II fee. Take the comprehensive fee and multiply by 125% (6325 x 125%= \$7907 total fee); initial fee of \$947 then 48 payments of \$145 or 60 payments of \$116. Less if insured.

**A PATIENT APP TO ACCESS:**  
 Appointments  
 Account Balance  
 Patient Photos & X-rays  
 Instructional Videos  
 Make a Payment

**ON THE APP, PATIENTS SHOULD BE ABLE TO:**  
 Make a payment  
 Complete questionnaires  
 View shared documents  
 Sign forms  
 Write a review of the practice  
 Make an appointment!

**If you have a templated schedule, even new patients should be able to schedule their exam through your website.**

**ALL QUESTIONNAIRES SHOULD BE TWO-WAY**

- Any information entered into the computer from the phone call should automatically be entered into the Super Questionnaire so the patient doesn't have to enter it again. When sent to them, they should be asked to check for any misspells or missing information.
- Once the patient submits their questionnaire, all the information should go directly into the computer.

Ready for Treatment	128	EX	
Ready for Treatment, Start Sched	925		Start Sched
Ready for Treatment, Same Day Start	926		Same Day Start
Ready for Treatment, Start Needed	927		Start Needed
Ready for Treatment Consult Sched	928		Cons Sched
Ready for Treatment Consult Needed	929		Cons Needed
Ready for Treatment to Growth Guidance	930		Growth Guidance
Ready for Treatment, Refer to Specialist/GP	931		Specialist
Ready for Treatment, No Tx Needed/Declined	932		Inactive
Ready for Treatment, Waiting on Benefits	933		Waiting on Benefits
Growth Guidance, pan & photos	150	TC2	Growth Guidance
Phase II Pending Check	160	TC2	Phase II Pending

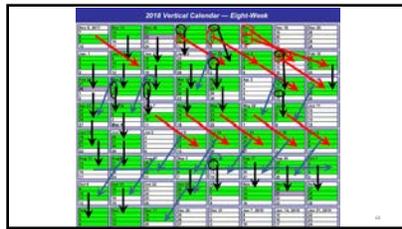
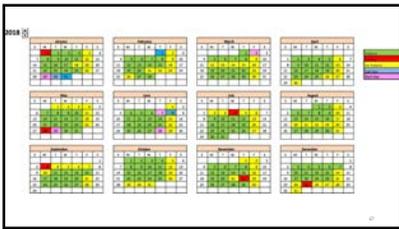
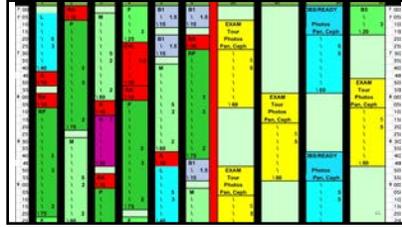
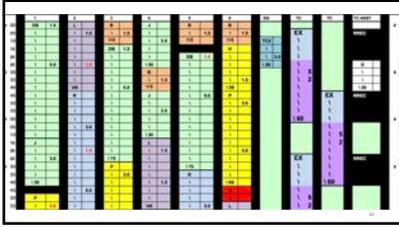
Scan, Invisalign START	120ST	Scan
Scan / Imp, Phase I Appliance START	121ST	Scan
Scan / Imp, START	122ST	Scan
Septs, START	123ST	Scan
Bond 1 Arch, Phase I START	406ST	H
Bond 2 Arches, Phase I START	407ST	K
Fit 1-2 Bands, Imp START	411ST	D
Direct Bond Upper Arch START	412ST	K
Direct Bond UL 6-6 START	414ST	P

**Types that Enqueue Insurance Form**

All these enqueue an insurance form		
Initial Invisalign Insert	351	L
Bond 1 Arch, Phase I	406ST	H
Bond 2 Arches, Phase I	407ST	K
Fit 1-2 Bands, Imp START	411ST	D
Direct Bond Upper Arch START	412ST	K
Direct Bond UL 6-6 START	414ST	P
IDB 1 Arch	415	H
IDB 2 Arches	416	P
Deliver Splint	500	D
Deliver LLHA / YPA	510	H
Deliver Space Maintainer / Nance	512	H
Deliver RPE	513	H
Deliver Tongue Crib / Habit / Bluegrass	515	H

<b>Adjust/Checks</b>			
Check Appliance	602	B	
Check to Debond	603	J	
Retention Check #1 - 8 weeks	604	B	Inactive
Retention Check (Up to one year)	607	B	
Retention Check (Post Retention after 1 year)	608	B	\$50
Place Surgical Hooks	628	H	
IPR & Repo	631	J	
Specific Assessment	632	B	
<b>Wires</b>			
NAW Simple (1-2)	641	H	
NAW Complex (1-3)	643	H	
NAW Detail (1-2)	643	J	
SAW Simple (1-2) / Ratte	645	H	
SAW Complex (1-2)	646	H	
SAW Detail (1-2)	647	J	
Remove / Replace AW's	629	B	
Remove AW, Remove Bracket	636	B	

<b>DELIVERIES</b>			
Deliver Splint	500	H	
Deliver Bonded Retainer - Upper / Lower with Fee	502	H	
Deliver Bonded Retainer - Upper / Lower w/o Fee	503	H	
Deliver Essix	505	A	
Deliver Essix Reset	506	B	
Deliver Facemask	510	G	
Deliver Forsus / Power Scope	509	B	
Deliver Hawley	508	H	
Deliver Herbst	511	P	
Deliver LLHA	512	G	
Deliver LLHA with Distalizer	513	G	
Deliver Nance	515	G	
Deliver RPE	521	H	
Deliver RPE with Distalizer	522	H	
Deliver Phase I Essix	500	B	
Deliver Pontic	523	L	
Deliver RPE, LLA	533	L	
Deliver Tongue Crib / Habit	507	G	
Deliver YPA	518	G	
Deliver Twin Block	519	H	
Deliver Vivara Retainers	539	B	



- Pretreatment Statuses**
- New Patient Added
  - Same Day Start
  - Start Scheduled
  - Start Needed
  - Consult Scheduled
  - Consult Needed
  - Specialist
- Active Statuses**
- Active – Phase I
  - Active – Phase II
  - Active – Comprehensive
  - Active – Invisalign / Aligner Therapy
  - Active – Surgical
  - Active – Limited
  - Active – Retreat

**SMS to People with New Patient Added Status**

This is Dr. \_\_\_\_\_ from \_\_\_\_\_ Orthodontics. You had contacted our office about orthodontic treatment. Please give us a call at <<practice phone>>. We will work with you to make payments affordable, and we look forward to creating a functional bite and a beautiful smile. Straight teeth are a gift that builds confidence.

- Miscellaneous Statuses**
- Maintenance (for Financial Reasons – 60 day limit)
  - Retention (sometimes skipped)
  - Inactive
  - Do Not Contact
  - Deceased
  - Start Needed Castaway – Braces
  - Start Needed Castaway -- Invisalign

