

# topsFest<sup>TM</sup> 2012

**February 2-4  
Hyatt Regency  
New Orleans, Louisiana USA**

## **PROGRAM**

*Revised (ever so very slightly): December 18, 2011*

## topsFest 2012 — Guest Lectures

### Ken Alexander

#### **Think Right, Do Right and Be Right**

How does a practice move beyond controlled and mechanical behaviors to a place filled with excellence, excitement and joy? In this fun and rewarding lecture, Ken Alexander will share the vital secrets of Think Right, Do Right and Be Right that allows a practice to grow up into super success while having fun doing it. Change is never easy – and often not sustainable – unless you first understand correct thinking and making proper choices that lead to excellence of service and the best you can be. In this session, you'll learn key concepts and principles that lead to proven successful outcomes in new patient enrollment, customer service, scheduling, patient cooperation and team building.



For more than 25 years, [Ken Alexander](#) has been teaching winning principles for orthodontic practice success in new patient enrollment, customer service, scheduling, patient cooperation and team building. As the owner of Millenium Management Services, he works to help orthodontists become more efficient, profitable, and have more enjoyment at work. Ken consults with practices large and small, among the most successful in the world. He has also lectured to thousands of orthodontic practices in North America, Europe and Australia. Ken has a master of divinity degree and four years of graduate training in psychology, communications, human relations and public speaking from Biola University in La Mirada, Calif.

### Andrea Cook

#### **The Patient Care Manager System: Is it right for your office?**

The patient experience (or lack of it) is a powerful thing. It's what your patients talk about when they discuss your practice with their family and friends. Implementing the patient care manager system into your practice can help improve your patient experience. We will discuss how to determine if it's right for your office, and how to implement it smoothly into your practice.



#### **Patients Are Watching! Instrument reprocessing and sterilization protocol in the orthodontic office**

Today's open concept in the operatory of many orthodontic offices allows patients and parents to observe every move we make. Patient awareness has challenged the clinical team to assure patients that every step is in place to protect their health. This course will help the team understand basic compliance with CDC guidelines and how to implement changes into your busy practice.

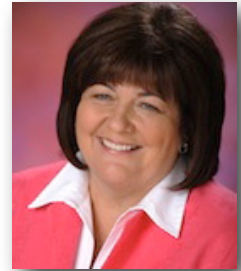
[Andrea Cook](#) is a clinical consultant and trainer for orthodontic practices across the United States. Her in-office, hands-on training – based on practical knowledge gained through 20 years of chairside experience – motivates and energizes clinical teams. Andrea helps them to increase efficiency and improve communication, which, in turn, increases clinical productivity and profitability. Andrea has worked in single, double and multi-doctor practices, and was clinical coordinator for a multi-doctor practice with more than 120 patients a day.

## topsFest 2012 — Guest Lectures

### Char Eash

#### **Office Policy, Salary Scales and Hiring Protocols: A discussion of revenue**

This session, for doctors only, will address hiring protocols and salary scale design for new and existing employees, while outlining office policy requirements for the progressive orthodontic practice. Payroll is a large part of the overhead for every small business: monitor it, control it, and attract great people for your practice.



#### **Branding Your Practice Through Positive Communication**

The growth of your practice will be determined by how well your team communicates as a unit. The vision for the practice must be clear and communicated well to the team, patient and community. This session explains the “why” in “Why should I choose your practice?” A guide for promoting the doctor, asking for referrals and retaining the current patient network will be provided.

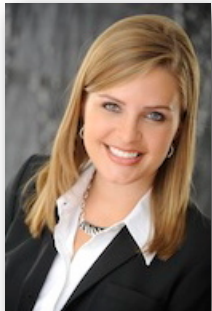
***Char Eash** is the founder and CEO of Profit Marketing Systems South, which helps orthodontic practices enhance their systems and communications. As a consultant, Char strives to create systems that provide a positive platform for each team member to contribute to the practice at the highest level on a day-to-day basis. She has an extensive background in communication, leadership training, and systems development strategies for the progressive specialty practice. Through her training programs, emphasis is placed on cultivating the talent within the team and communicating the vision of the practice to maintain profitability and efficiency.*

### Kayla Hoorelbeke

#### **Turning Your Marketing Plan Into a Marketing Epidemic**

Using insights from Malcolm Gladwell’s best-selling book, “The Tipping Point,” we’ll discover the characteristics and laws of an epidemic and how they can help your practice’s message spread like wildfire. We’ll focus on precision marketing by looking at specific examples, past studies and unique ideas. In this presentation, you’ll:

- Learn how an epidemic starts through real-life examples from a variety of industries
- Apply the traits of an epidemic to your practice’s marketing plan so you can create your own epidemic
- Identify specifics of your marketing plan that will have the greatest impact and can be the tipping point for your practice



***Kayla Hoorelbeke** has nearly a decade of experience in orthodontics working with AccounTrac, Inc., and JM Shoemaker Consulting, Inc. As founder of Informed Image, LLC, she helps practices with marketing and new patient processes. Kayla has an MBA and a bachelor’s degree in marketing with an accounting minor from the University of Miami. She offers a unique combination of creativity, analytical thinking and management insight.*

Each hour★ at topsFest  
= one AGD Continuing  
Education (CE) credit!  
★ in class. The AGD doesn’t give  
credit for boozing it up on  
Bourbon Street.



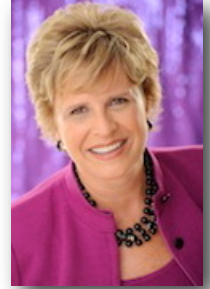
## topsFest 2012 — Guest Lectures

### Jackie Shoemaker

#### Preserving Your Financial Levees

In this interactive discussion for doctors only, Jackie will identify accounting and technology safeguards that should be put into place in orthodontic practices. Topics discussed will include:

- Basic, intermediate and advanced financial safeguards for your practice
- Real-life examples of embezzlement scenarios to avoid
- The nuances of topsOrtho's financial controls



#### Counting your Beads: Maximizing cash flow

Patient Delinquency, Insurance Filing, Insurance Delinquency and Financial Arrangements: all the components of cash flow. But do you know how to measure these components in topsOrtho and how to maximize them so your collection ratio is at its optimum level? Which of the components most affects the monthly collections figure, and which staff member can most affect these results: the treatment coordinator, insurance coordinator or financial coordinator? In this presentation, Jackie will discuss how to analyze your practice's cash flow success, which is the cornerstone of your financial strength. You will learn to:

- Assess the components involved to maximize cash flow
- Understand the expectations for optimizing each of the cash flow components
- Adapt the techniques to topsOrtho

\* tops props to Jackie for the creative New Orleans-style lecture titles!

**Jackie Shoemaker** is a financial strategist for patient accounting in orthodontic practices. Her experience spanning nearly 30 years in the orthodontic industry is supplemented by an accounting degree and foundation in corporate accounting. She enables orthodontists to develop more satisfying and profitable practices by increasing income and improving staff skills. As the founder and president of two companies – her consulting company, [JMShoemaker Consulting, Inc.](#), and her payment compliance program, [AccounTrac, Inc.](#) – Jackie's expertise and services enhance patient accounting, accounts receivable control, patient relations, and the financial nuances of practice management software systems.

### Charlene White

#### 30 Laser-Sharp Ideas to Accelerate Your Practice

Use these tips to increase referrals coming to your practice, get patients excited about being in your chairs, and create a fun, effective and profitable environment for you and your team. Ignite your enthusiasm, ratchet up your marketing plan, lead new patients to 'yes,' and start to schedule for success!



As a management consultant and speaker to orthodontic professionals throughout the United States, Canada and abroad, **Charlene White** works to inform, motivate and entertain. In addition to maintaining a full schedule of speaking engagements, she has authored more than 15 training products, two books, and numerous articles published in dental journals. Before founding her consulting firm, Progressive Concepts Inc., Charlene worked for five years as a registered dental hygienist and office administrator. Her flexible, realistic approach emphasizes how each listener can adapt Charlene's methods to his or her own personal style.

# topsFest 2012 — tops Skills Classes

## General Interest

### topsOrtho Reports—Administrative and Clinical

Navigate the Reports menu to discover your clinical and administrative practice statistics and learn what they mean. Learn the uses for each administrative report, where the numbers come from on some reports, how to adjust the reports to get the readouts you prefer, in what instances specific reports will be helpful, and which topsOrtho lists can also serve as administrative and clinical reports.

### topsOrtho Reports—Financial

Navigate the Reports menu to find all of your financial practice statistics. See how to interpret those statistics to set goals for improvement. This class will also teach you how to use the Lists menu in financial reporting. Learn the uses for each financial report, where the numbers come from on some reports, how to adjust the reports to get the readouts you prefer, in what instances specific reports will be helpful, and which topsOrtho lists can also serve as financial reports.

### Reporting and Data Analysis

In this Q&A session about topsOrtho financial reporting, you'll get a deeper understanding of the statistics you need to see in your practice, and learn how to use them on a regular basis.

### Practice Monitor

Learn what the Practice Monitor is telling you about your patient tracking and financial statistics. Understand what each Practice Monitor statistic means, and how it's derived.

### Treatment Coordinator / Office Manager Roundtable

An open discussion of topics that are germane to the jobs of Office Manager and Treatment Coordinator in an orthodontic office. Our panel will help you work through your day, offering advice, workflow assistance, and general guidance for the situations that you experience every day.

### The List Menu—Administrative

This class focuses on managing the Recall and Appointment lists. Learn the purpose of each topsOrtho Administrative List, how Lists compare with Reports, how to use Lists to communicate with your patients and referrers, keep track of policy holders, insurance companies and employers, and how to track patient statistics.

### The List Menu—Financial

This class focuses on managing financial transactions. Learn the purpose of each topsOrtho financial list, how they compare to Reports, how to use Lists to balance at the end of each day, and how to track the day's financial receipts with the Transaction/Audit Trail List.

### Creating a Paperless Office

Learn what you need to make your office truly paperless. Find out how topsOrtho can help you go paperless, the steps to prepare your office, and the systems and equipment that will make the transition easier.

### Cool Mac Stuff

In addition to topsOrtho, there are plenty of amazing applications and tools available for the Mac. After this session—led by a tops programmer who's a former Apple employee—you'll be able to pick and choose the ones calling your name loudest.

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Education (CE) credit!  
★ in class. Jamming with the  
Preservation Hall Jazz Band  
doesn't count.



# topsFest 2012 — tops Skills Classes

## Administrative Focus

### Patient Administration Know-How

There's more to the topsOrtho Patient Administration window than you ever expected. Find out what each field represents and how to move from the Patient Admin window to other windows. You'll get detailed knowledge of each area of the Admin window, learn which fields are important for patient communication integration, how to use the Door-To-Door™ feature, how to read the contract snapshot, and how to use each Admin page tab.

### Appointment Book, Schedule Templates and Patient Flow

Learn appointment book shortcuts and mechanisms for rescheduling and canceling appointments. See how to customize the topsOrtho schedule templates to maximize the flow of traffic in your office. Understand the general calendar settings and learn how to track appointment information. You'll also get an in-depth look at the update to the topsOrtho Patient Flow.

### Beginning Letters

Great letters enhance your communication with patients and colleagues, and can speak volumes about your practice. This class teaches the creation and use of letters in topsOrtho for communication and case presentations. You'll learn how to create a letter using topsOrtho templates, edit a letter, edit and create letter templates, edit and create forms, and send letters.

### Advanced Letters / Workshop

*This class is offered twice during topsFest, with each class limited to 30 participants. Bring your own Mac laptop.*

Take your correspondence to the next level. Get the hands-on experience you need to create amazing letters in topsOrtho. Use your laptop and work with team tops to edit a letter's flow between multiple pages, add logos and letterhead, alter letter styles, and align multiple objects in a letter. All of these skills are essential to making your letters **stand out!** After completing this class, you'll be able to create and format fully custom letter templates in topsOrtho.

### Insurance

Upon completion of this course, you'll know what information you need to get from patients, policy holders and insurance companies in order to file insurance with topsOrtho. You'll know how to enter this information into topsOrtho and how to track it. You'll also know how to create insurance contracts and post insurance payments.

### eClaims

Processing insurance claims electronically makes insurance management so much easier! You'll learn how to configure your practice for this, and how to manage claims. We'll review the patient and insurance information required to transmit eClaims, the Claims list and its use in filing claims electronically, the reports generated by electronic claim filing, and the role of our clearinghouse partner, Emdeon, in the process.

### Beginning Contracts

Get the building blocks for creating contracts in topsOrtho. We'll teach you how to set up a contract—or just make sure you've been doing it the best way. Get details of the contract worksheet, the patient ledger, and the best ways to enter different types of contracts. Learn how to handle contracts with and without insurance, those with multiple account holders or multiple treatment plans, and how to create automatic payment plans for contracts. You will also learn how to read the patient ledger.

### Advanced Contracts

Got a financial contract that isn't so straightforward? Learn how to enter even the most complicated financial arrangements, simply. We'll include discussion of multiple insurances, account holder changes and contract renegotiation.

### Advanced Contracts / Workshop

*This class is offered twice during topsFest, with each class limited to 30 participants. Bring your own Mac laptop.*

Hone your topsOrtho financial contract skills as we walk step by step through different contract scenarios. You can follow along on your laptop with a topsOrtho demo that will be available. When you've finished this class, you'll be able to enter any type of financial contract into topsOrtho with ease.

# topsFest 2012 — tops Skills Classes

## Clinical Focus

### Clinic Know-How

Here's everything a clinical assistant needs to know in topsOrtho. We'll cover treatment notes and treatment planning, lists and reports that will assist you in day-to-day activities. We'll also show you how to add and modify items in Practice Setup. At the end of this class, there will be time for an informal discussion with your peers.

### Diagnosis and Treatment Planning

After this class, you'll know how to complete a clinical exam in topsOrtho. You'll be able to use the interface of the clinical exam for treatment planning, to create multiple treatment plans for each patient, and use all of these tools to create letters for correspondence.

### Clinic Coordinator Roundtable

A brief open discussion of items critical to the Clinical Coordinator position in an orthodontic practice. Our panel of expert Clinic Coordinators will offer advice, workflow assistance and general guidance for your days.

Each hour★ at topsFest  
= one AGD Continuing  
Education (CE) credit!  
★ in class, not at Emeril's. BAM!



### Keeping Your Clinic On Time

*Guest instructor: Andrea Cook.* Use doctor time scheduling and the topsOrtho Patient Flow to keep your clinic running on time—taking into account late patients, emergencies, and all of the twists and turns that a typical day brings.

### Imaging in topsOrtho / Workshop

*This class is offered twice during topsFest, with each class limited to 30 participants. Bring your own Mac laptop.*

There's no need to buy (or pay support fees for) an imaging program when you own topsOrtho! The imaging feature automatically scales images being imported and lets you see patient photos, X-rays and models from anywhere. It also allows you to create fabulous letters and present your case beautifully to prospective patients. In this class, you'll learn how to import images and X-rays into your topsOrtho database, use imaging for case presentation, edit the imported images, and import images into topsOrtho Letters.

### topsCephMate / Workshop

*Requirements: Bring your laptop with topsCephMate already installed, your topsCephMate eve key, and have a sample case with photos and X-rays.*

Get the hands-on experience you need during this practice session guided by advice from Team tops. You'll learn to identify landmarks on X-rays and contours on photos, measure points on the X-ray analysis, create treatment objectives and superimpose treatment plans using topsCephMate.

*Note:* This class is not a substitute for the recommended topsCephMate training session.

## topsFest 2012 — Schedule at-a-Glance

All topsFest events (except evening receptions) take place on Level 2 of the Hyatt Regency

<i>Thursday, February 2</i>					
3-4:30 p.m.	<b>Registration</b> <i>Central City hallway</i>				
5-6:30 p.m.	<b>Welcome Reception</b> <i>The Federal Ballroom, located in the Security Center Building, 147 Carondelet St. (about a 10-minute/10-block walk; be sure to get directions at Registration)</i>				
Evening	<b>Dinner on your own</b>				
<i>Friday, February 3</i>					
7:30-8 a.m.	<b>Registration / Exhibits open / Coffee and light breakfast in Exhibit Hall</b> <i>Central City hallway</i>				
8-8:45 a.m.	<b>Dr. Mark Sanchez, tops Software founder and CEO—Welcome</b> <i>Empire Ballroom IV</i>				
	<b>All Staff</b>	<b>Doctors</b>	<b>Clinical Staff</b>	<b>Admin Staff—Beginner/Intermediate</b>	<b>Admin Staff—Intermediate/Advanced</b>
9-10 a.m.	<b>Ken Alexander—<i>Think Right, Do Right, Be Right</i></b> <i>(This presentation is from 9-11:15 a.m.)</i>	<b>Ken Alexander—<i>Think Right, Do Right, Be Right</i></b> <i>(This presentation is from 9-11:15 a.m.)</i>	<b>Imaging Workshop</b> <i>(Limited to 30; pre-registration is required. Bring your own Mac laptop.)</i>	<b>Beginning Contracts</b> —or— <b>Patient Admin Know-How</b>	<b>Imaging Workshop</b> <i>(Limited to 30; pre-registration is required. Bring your own Mac laptop.)</i>
10:00-10:15 a.m.	<b>Coffee and snacks in Exhibit Hall</b> <i>Central City hallway</i>				
10:15-11:15 a.m.	<b>Ken Alexander—<i>Think Right, Do Right, Be Right</i></b> <i>(continued)</i>	<b>Ken Alexander—<i>Think Right, Do Right, Be Right</i></b> <i>(continued)</i>	<b>Clinic Know-How</b> <i>(This session is from 10:15 a.m.-noon)</i>	<b>Advanced Contracts</b>	<b>topsCephMate Workshop</b> <i>(Limited to 30; pre-registration is required. See full class prerequisites in online registration.)</i>
11:30 a.m.-12:30 p.m.	<b>Charlene White—<i>30 Laser-Sharp Ideas to Accelerate Your Practice</i></b>	<b>Charlene White—<i>30 Laser-Sharp Ideas to Accelerate Your Practice</i></b>	<b>Clinic Coordinator Roundtable</b> <i>(This session is from 12-12:30 p.m.)</i>	<b>Beginning Letters</b>	<b>Advanced Contracts Workshop</b> <i>(Limited to 30; pre-registration is required. Bring your own Mac laptop.)</i>
12:30-1:45 p.m.	<b>Lunch</b> <i>Empire Ballroom IV</i>				

## topsFest 2012 — Schedule at-a-Glance

<b>Friday, February 3 (continued)</b>					
	<b>All Staff</b>	<b>Doctors</b>	<b>Clinical Staff</b>	<b>Admin Staff– Beginner/ Intermediate</b>	<b>Admin Staff– Intermediate/ Advanced</b>
1:45- 2:45 p.m.	<b>Jackie Shoemaker— Counting Your Beads: Maximizing Cash Flow</b>	<b>Jackie Shoemaker— Counting Your Beads: Maximizing Cash Flow</b>	<b>Imaging Workshop</b>  <i>(Limited to 30; pre-registration is required. Bring your own Mac laptop.)</i>	<b>Jackie Shoemaker— Counting Your Beads: Maximizing Cash Flow</b> –or– <b>Insurance</b> <i>(This session is from 1:45-4 p.m.)</i>	<b>Treatment Coordinator/Office Manager Roundtable</b>
2:45- 3 p.m.	<b>Coffee and snacks in Exhibit Hall</b> <i>Central City hallway</i>				
3-4 p.m.	<b>Andrea Cook— The Patient Care Manager System: Is It Right for Your Practice?</b>	<b>Andrea Cook— The Patient Care Manager System: Is It Right for Your Practice?</b>	<b>Andrea Cook— The Patient Care Manager System: Is It Right for Your Practice?</b>	<b>Appointment Book, Schedule Templates and Patient Flow</b> –or– <b>Insurance</b> <i>(continued)</i>	<b>Advanced Letters Workshop</b>  <i>(Limited to 30; pre-registration is required. Bring your own Mac laptop.)</i>
5-6:30 p.m.	<b>Reception</b> <i>Celestin Ballroom IV — Hyatt Regency, Level 4</i>				
Evening	<b>Dinner on your own</b>				
<b>Saturday, February 4</b>					
7:30- 8 a.m.	<b>Exhibits open. Coffee and light breakfast in Exhibit Hall</b> <i>Central City hallway</i>				
	<b>All Staff</b>	<b>Doctors</b>	<b>Clinical Staff</b>	<b>Admin Staff– Beginner/ Intermediate</b>	<b>Admin Staff– Intermediate/ Advanced</b>
8-9 a.m.	<b>The List Menu– Administrative</b>	<b>Char Eash– Office Policy, Salary Scales and Hiring Protocols</b>	<b>Diagnosis and Treatment Planning</b>	<b>eClaims</b> –or– <b>The List Menu– Administrative</b>	<b>eClaims</b>
9:15- 10:15 a.m.	<b>The List Menu– Financial</b>	<i>(For doctors only. This presentation is from 8-10:15 a.m.)</i>	<b>Creating a Paperless Office</b>	<b>Creating a Paperless Office</b> –or– <b>The List Menu– Financial</b>	<b>Advanced Letters Workshop</b>  <i>(Limited to 30; pre-registration is required. Bring your own Mac laptop.)</i>
10:15- 10:30 a.m.	<b>Coffee and snacks in Exhibit Hall</b> <i>Central City hallway</i>				

## topsFest 2012 — Schedule at-a-Glance

<b>Saturday, February 4</b> (continued)					
	<b>All Staff</b>	<b>Doctors</b>	<b>Clinical Staff</b>	<b>Admin Staff– Beginner/ Intermediate</b>	<b>Admin Staff– Intermediate/ Advanced</b>
10:30- 11:30 a.m.	<b>Kayla Hoorelbeke— Turning Your Marketing Plan Into a Marketing Epidemic</b>	<b>Kayla Hoorelbeke— Turning Your Marketing Plan Into a Marketing Epidemic</b>	<b>Cool Mac Stuff</b>	<b>topsOrtho Reports– Administrative –or– Cool Mac Stuff</b>	<b>Advanced Contracts Workshop</b>  <i>(Limited to 30; pre-registration is required. Bring your own Mac laptop.)</i>
11:45 a.m.- 12:45 p.m.	<b>topsOrtho Reports– Financial</b>	<b>Jackie Shoemaker— Preserving Your Financial Levees</b>  <i>(For doctors only)</i>	<b>topsCephMate Workshop</b>  <i>(Limited to 30; pre-registration is required. See full class prerequisites in online registration.)</i>	<b>topsOrtho Reports– Financial –or– Insurance</b> <i>(This session is from 11:45 a.m.-3 p.m.)</i>	<b>topsOrtho Reports– Financial</b>
12:45- 2 p.m.	<b>Lunch</b> <i>Empire Ballroom IV</i>				
2-3 p.m.	<b>Andrea Cook— Patients Are Watching! Instrument Reprocessing and Sterilization</b>	<b>Dr. Mark Sanchez— Securing Your Financial Information</b>  <i>(For doctors only)</i>	<b>Andrea Cook— Patients Are Watching! Instrument Reprocessing and Sterilization</b>	<b>Insurance (continued) –or– The topsOrtho Practice Monitor</b>	<b>The topsOrtho Practice Monitor</b>
3-3:15 p.m.	<b>Coffee and snacks in Exhibit Hall</b> <i>Central City hallway</i>				
3:15- 4:15 p.m.	<b>Char Eash— Branding Your Practice Through Positive Communication</b>	<b>Dr. Mark Sanchez and tops programming team— Panel Discussion</b>  <i>(For doctors only)</i>	<b>Andrea Cook— Keeping Your Clinic on Time with topsOrtho</b>	<b>Char Eash— Branding Your Practice Through Positive Communication</b>	<b>Reporting and Data Analysis</b>

◆ **Available throughout topsFest** ◆  
**tops Support in Oasis**  
**Exhibitors in Central City hallway**

## topsFest 2012 — Venue and Accommodations

### See you in N’awlins!

Yeah, baby! topsFest 2012 takes place at the luxurious, recently renovated [Hyatt Regency New Orleans](#).

The hotel has just opened its doors after a top-to-bottom overhaul and it’s absolutely spectacular. Located downtown – just a short walk to the world-famous French Quarter and a proverbial stone’s throw from the Mississippi River – you’ll appreciate the amazing price we’ve negotiated for rooms, which includes:

- free in-room WiFi/high speed Internet
- free access to the Hyatt’s 24-hour StayFit fitness center
- a 2,000-square-foot Starbucks in da house, whoop-whoop!

**Special topsFest rate:  
\$159/night (plus taxes)  
Call (888-421-1442 or  
504-561-1234)  
or [book online](#)  
Must reserve by Jan. 12!**

