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**"PUSHING CLOUD
COMPUTING to
NEW HEIGHTS"**



Corporate Profile:

ORTH02

CUTTING- EDGE ^{of} CLOUD CAPABILITIES



Orthotown Magazine catches up with Dr. Craig Scholz, director of emerging technologies at Ortho2. Starting out as one of the first orthodontic computer systems in 1982, Ortho2 has grown to become the largest independent orthodontic management software company. Scholz discusses recent advances in its cloud-based Edge platform, the new Practice Connect patient app and what's on deck for Ortho2's future.

Dr. Scholz, start by telling us your background with Ortho2.

Scholz: I started working for Ortho2 in 1986 when it was a very small company and only a handful of orthodontists were using computers. I had just graduated from college and my father (Dr. Bob Scholz) purchased an interest in Ortho2 at the same time. I became one of the first sales reps and used to carry around a giant Compaq 386 computer to do all my demos. Eventually I purchased stock in Ortho2 and joined the board of directors. Today, I am the director of emerging technologies for the company and am happy to say that I get to carry around an iPad for demonstration purposes!

How has Ortho2 evolved since you first started with the company?

Scholz: We are a much larger company today, with **more than 2,000 offices using our software.** We've grown from 10 employees in 1986 to more than 60 today, and have successfully developed and released three different platforms of practice management software. We began developing our cloud-based product, Edge, in 2006 and released it in 2010. At the time, it was the first cloud-based orthodontic management system on the market, and today it is thriving in its fourth version. Developing Edge from the ground up was no small matter, as we spent four years and over \$2 million building it. But it was worth it, as we can now fully leverage all that the cloud has to offer, including a variety of mobile applications and real-time access to data. It is estimated that both tablet and smartphone sales will each easily outpace PC sales this year, and we're excited to have a platform that allows us to leverage these devices.

Although we have grown significantly, we have remained independent throughout our history and solely focused on orthodontics. We feel this gives us a big advantage over larger, public companies that are more focused on dental markets and monitoring their stock valuations. I have visited hundreds of practices and in my experience, the ones that thrive have crafted and marketed their unique personalities and specialized skills. Ortho2 does the same thing, only with software. We believe orthodontic software needs to do much more than just schedule appointments and manage your accounts receivable. It should help increase efficiencies throughout your practice and help you grow your business. With the development of Edge, we can help you do this better than ever by delivering a platform that is scalable, mobile and cost effective.



“Ortho2 leads orthodontic cloud computing in innovative new directions.”

What makes cloud computing so relevant to the orthodontist?

Scholz: Cloud computing is advancing rapidly across all of health care, and orthodontics is no exception. There are many reasons for this escalation, including improved Internet infrastructure, better security, better availability of health records and more reliable data backup techniques. Soon, all medical professionals with access to patient data will have to utilize electronic medical and health records (EMR and EHR) or face penalties. Dental specialties won't be far behind. Private cloud-hosting solutions provide many advantages to help HIPAA-, EHR- and PCI-compliance efforts than can normally be handled by an individual orthodontic office. The advantages of moving to the cloud are many and only likely to increase as all health records become digital.

The cloud also offers many instant benefits over local area networks. Backups are eliminated since all data is stored offsite. We host all our customer data in a private cloud (versus a public cloud), which we feel is essential given the sensitive nature of the data stored. The cloud also offers much better accessibility of data. Your data is available anytime from any office, home, phone or tablet, just as patients and referrers can access their appropriate data. No more VPNs, multiple servers or data transfers. Similar to moving to an electronic treatment card, when you experience the mobility and accessibility of the cloud, it is hard to imagine doing things the old way.

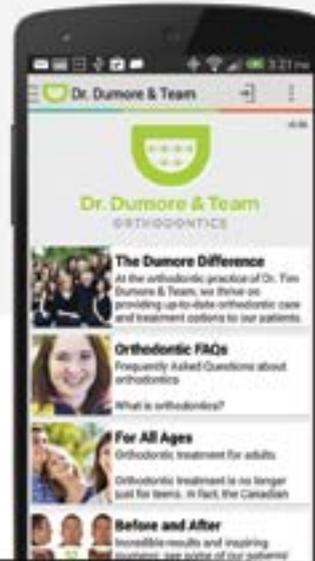
In terms of costs, cloud computing can reduce expenses in several key areas. This is especially true over the long run because the cloud eliminates pricey servers, Microsoft SQL and other server software and updates as well, decreasing ongoing IT costs. Sometimes the cost savings can be dramatic and immediate. I recently spoke with a customer with three large offices who needed to upgrade the hard drives in his server to accommodate a database that had grown too large. He just needed hard drive space, but his only options were to replace the server (\$10,000) or upgrade his hard drives and operating system (\$6,000). With Edge, there are no file size limits for the hosted data, so there would have been absolutely no cost to do this upgrade.

Are there any major limitations in moving to the cloud?

Scholz: Because you are running 24/7 over the Internet, you need a solid, fast connection. In most areas, good broadband Internet is not an issue, but if it is not available you are not a good candidate to move your practice to the cloud. Some doctors still worry about their Internet going down, but a simple cellular router can operate as a 24/7 backup to your regular Internet to prevent any downtime.

What differentiates Edge from the other existing management cloud-based systems?

Scholz: Most of the existing orthodontic management companies call themselves cloud, but in reality they are legacy systems that were developed long before the cloud and have merely been moved to an offsite server. **This is in stark contrast to software like Edge, which was developed on an entirely new platform and designed specifically for the cloud.** Several of these systems use software similar to remote desktop to connect the office to an offsite server. This approach eats up much



greater bandwidth and has major limitations when it comes to deploying exciting cloud features like mobile applications and scalability. We thought it was important to build our cloud product from the ground up so we could fully leverage all the cloud has to offer.

In terms of development, there are a variety of approaches to building a cloud-based system. After weighing the pros and cons, Ortho2 chose to use a rich Internet application for Edge, which provides users with a robust app they download on their computer. Like most technology businesses, we know that this approach is much more user-friendly and stable than limiting the program to a browser experience, even on secure office- or home-based computers. Edge is truly optimized for the end user, which is illustrated through features like a local image cache that helps images load and save quickly. **Edge's approach allows users to access their practice information from anywhere, through whichever pathway is most functional (mobile app, web portal, PC or Mac).** This allows us to deploy the software on a variety of different devices all connected to our hosted cloud servers.

Edge is also extremely robust and includes everything you need to run your practice in one place. This is great from an efficiency standpoint, in that all your software and support are coming from one place. For years we had customers tell us they were tired of paying fees to third-party companies and having to call them for support, so we made sure to include these components in Edge. Our Edge Complete system includes the standard management features like scheduling, charting and reporting, but also includes modules like imaging, appointment reminders, patient rewards, a patient and doctor web portal, mobile applications, treatment and compliance animations, staff management resources and our new office-branded patient app, Practice Connect. Our overarching goals were to craft software that was exquisitely designed for the orthodontist, easy to use and helped to expand each office's practice community. I believe we succeeded on all counts.

What do you mean by expanding an office's practice community?

Scholz: With a true cloud-based platform, it is much easier to make your system accessible to anyone relevant to your practice. This can include you, your patients, their families and friends, staff, referrers, potential patients and other treating specialists. By including modules and features that are easily available to members of your community, you are actively expanding your practice to them with very little effort on your part. Our Practice Connect module is a great example of this. Practice Connect is an app that patients and potential patients can download from the App Store or Google Play

that provides them with a wealth of data about their practice. It is completely branded, so each office has their own unique version. It works like an expertly developed website in an app form. But even more than that, Practice Connect pushes data automatically—like a GPS login for appointments and real-time rewards updates and notifications that keep your patients engaged. These days, a typical person spends much more time using a smartphone than a personal computer, so making your practice accessible via a smartphone app really makes sense. Similarly, we have had offices report that by creating custom videos with our Edge Animations and Premier Imaging modules and adding them to their Facebook page, they received exponentially greater views and likes. This kind of built-in branding and advertisement goes a long way in today's social-media-driven market.

What advice would you give an orthodontist looking to purchase a practice management system?

Scholz: First, ask your sales rep, "Was this software developed specifically for the cloud or is it a legacy product that existed before the cloud?" If the answer is the latter, I would look elsewhere. There are just too many limitations with software that is using a virtualized solution that has been retrofitted to function in the cloud. They can sugarcoat it any way they want, but the fact is you will be buying outdated, legacy software. It is similar to building a new house versus



remodeling an old one. You can use semantics or *cloudwashing* to try and conceal these limitations, but over time the differences will become increasingly apparent and more frustrating as new cloud-based functions, opportunities and integrations are developed.

Then I would do my homework and try to choose a system that will grow with you throughout your career. I know several orthodontists who have switched management systems four or five times! Anyone who has gone through a conversion even once knows what a headache it can be. Also, I can count at least 15 management companies that were bought, sold or went out of business over the last 20 years. Go with a company that is well-established and progressive and has documented, top-notch support. Ultimately we always say, “Buy the company—not the software,” because software features come and go and are often not incredibly hard to replicate, but building a strong company that will grow with you and provide outstanding support is an entirely different matter. Being happy with your practice management choice in the long run is less about specific eye-catching features today (because the top companies tend to leapfrog each other). It’s ultimately based on long-term stability, progressive innovation and dependable, helpful support.

What’s in store for the future with Ortho2?

Scholz: More app functions! We really feel that we are just beginning to scratch the surface of developing new ways to pair

devices with specific functionality. Edge’s platform gives us the ability to develop features that exemplify the adage of “form follows function.” Rather than creating one basic software program to run on a computer, we can now create very specific functions to be performed on specific devices. We all see this in our home lives, where we use different devices (smartphone, tablet, computer, laptop, smart TV) based on the activity we are engaging in. The same is true in an orthodontic practice. Some tasks, like scheduling and entering detailed chart notes, are easiest to do on a computer, while watching treatment videos are best on a tablet and patient access to rewards are best on a smartphone. We’re proud to be developing apps that will take mobility to entirely new levels, significantly improving access of data and efficiencies of usage for everyone involved in an orthodontic practice.

Orthodontics is undergoing so many rapid changes in technology, as well as the constant threat of new competition. It’s such a different world than when I first started in 1986! Throughout, **Ortho2 has always focused on just one thing—delivering the best software to orthodontists to help them succeed.** We keep pushing the envelope to create products that not only enable practices to function, but also to become far more efficient and help them grow. As long as we keep perfecting our craft and specializing in what we deliver, our future looks incredibly bright and exciting—just like orthodontics. ■