

January 28, 2021
Dr. Scott O. Schulz

Council on Orthodontic Practice (COOP)

Report to the Board, February 2021

The council met face-to-face in St. Louis on October 31, 2020. Below is a summary of our discussion.

Orthodontic Staff Achievement Awards:

COOP proposes three AAO Staff awards:

- AAO Orthodontic Staff Lifetime Achievement Award
- AAO Orthodontic Staff Rising Star Award
- AAO Orthodontic Team Achievement Award

These awards shall be presented each year at the Annual Session at the Excellence in Orthodontics luncheon by the current AAO President (or virtually if the award recipient is unable to attend in person). Budget implication for 2023 will be \$3,750.

The annual award cycle will proceed as follows with the first nomination cycle beginning in 2022:

- May 2022 - August 2022 – applications are completed and nominations accepted
- August 2022 - September 2022 – nominations reviewed by subcommittee
- December 2022 – nominations will be presented to the BOT for approval
- January 2023 – winners informed and will advise the AAO if they will accept the award in person at the Annual Session or whether the award ceremony should be presented virtually
- May 2023 – winners recognized at Annual session

AAO Patient Transfer

COOP recommends AAO amend the Guidelines on Transferring Patients in Active Treatment form to include suggestions on handling the financials upon transferring from one orthodontist to another with the following content:

RECOMMENDED PROCEDURE FOR HANDLING FINANCES FOR THE PATIENT TRANSFERRING OUT

1. The best way to address disputes with patients regarding transfer finances is to prevent them. In this effort, the AAO encourages every orthodontist to include in the initial treatment contract/financial agreement a breakdown of how fees are earned and how the practice will determine whether monies are still owed by the patient or whether a refund is due to the patient upon transfer. This way the patient will not be surprised about what is owed by them or to them at the time of transfer.

2. A sample Financial Agreement was prepared that can be customized by each practice. Items in open fields should be tailored to individual orthodontist preference and include sample content an orthodontist may wish to include or omit. None of this content is considered required or standard of care, and is provided by the AAO to its membership as a suggestion.

AAO Office Design Manual

While the AAO manual is in need of an update, the ADA has produced an office design manual with many salient ideas for ortho offices. It is COOP's opinion that trying to compete with the ADA's printed booklet would not be the best use of the AAO's time. COOP recommends that the AAO develop a series of recorded Business of Orthodontic 30-minute lectures on appropriate office design and business planning topics, including downloadable companion content for members.

Practice Transition and AAO Career Center Update

Report by Lauren was given on program and planning updates provided post-August BOT approved funding allocation for the AAO to develop and expand year-round practice transition resources via the AAO member website. This would be used in lieu of the traditional face-to-face lecture series at the Annual Session.

Orthodontic Staff Appreciation Week

COOP recommends that the First Wednesday in June be recognized as Orthodontic Staff Appreciation Day.

The council will meet again November 5-6, 2021 in St. Louis.

Thank you!

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