



AMELIA ISLAND



SAO & SWSO 2023
ANNUAL SESSION



TIM TEBOW
KEYNOTE
SPEAKER

Omni Amelia Island Resort
October 26-28, 2023



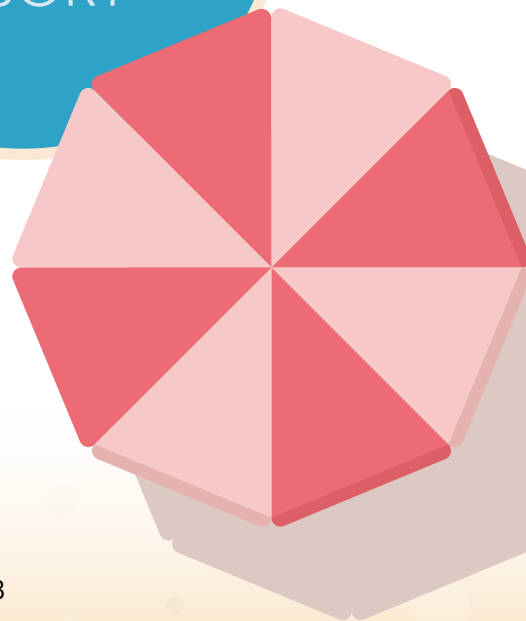
SAO & SWSO 2023 Annual Session October 26-28, 2023



OMNI
AMELIA ISLAND
RESORT

Join Us Seaside

We invite you to join us for the 2023 Annual Session of the Southern Association of Orthodontists and the Southwestern Society of Orthodontists. The pristine beaches that once tempted pirates and adventurers to Amelia Island are now the perfect destination for learning, networking and some relaxation. In addition to clinical and practice management/improvement lectures, two fantastic keynote speakers will inspire and entertain. Two-time national champion Tim Tebow will kick things off on Thursday morning. Actor, comedian and social media sensation Josh Mancuso will join us Friday morning!



Register today

Scan the QR code or visit us online to register at saortho.org or swso.org. Have questions? Call (404) 261-5528 or email saoevents@saortho.org.



Two Powerful Keynotes!

TIM TEBOW

Two-time national champion, Heisman Trophy winner, first-round NFL draft pick, and former professional baseball player.

JOSH MANCUSO

Actor, comedian, and social media sensation known for his clever writing and quick-witted comedy videos.

DAYS & TIMES

Tim Tebow Keynote:
Thursday at 10:30 am

Josh Mancuso Keynote:
Friday at 8:00 am



*Tim Tebow Keynote is sponsored by
GC Orthodontics*



Mini Schedule

THURSDAY, OCT 26

Morning lectures

Opening Ceremony with Tim Tebow

Grab and go boxed lunch

Afternoon free time and extra social/team building activities:

- Golf Tournament
- Golf Cart Scavenger Hunt
- Mini Golf Tournament & Yard Games

Valuations lecture with Chris Bentson

Happy hour in the Exhibit Hall

Beaches & Buyouts for residents and those looking to network with them

S'mores by the firepit

FRIDAY, OCT 27

Sunrise yoga

Breakfast

Day 2 Keynote, Josh Mancuso

Morning lectures

Lunch

Early afternoon lectures

Late afternoon attendee free time

Friday night Luau on the Lawn

SATURDAY, OCT 28

Breakfast

Morning lectures

Head home ... or stay and relax!

FIND YOUR PARADISE

Hello Fellow Members!

We are looking forward to seeing everyone at our combined Annual Sessions. Located just off the coast of northeast Florida, Amelia Island is easy to reach, but hard to forget. With beautiful beaches, abundant native wildlife, and pristine waters, this barrier island has long been a beloved destination for visitors and residents alike. We recommend arriving at the resort on Wednesday, as lectures begin early Thursday morning, including Tim Tebow! At this meeting, mornings are filled with dynamic clinical, team and practice management speakers. Each afternoon, Thursday through Saturday, we built in time to enjoy fun activities, and relax with colleagues and industry friends! There is something for everyone to enjoy ... so bring the family and your whole team for a fall getaway!

See you at the beach ... Dr. Debbie Sema and Dr. Joe Moon



DR. DEBBIE SEMA
SAO President



DR. JOE MOON
SWSO President

Special Thanks!

Thank you to the SAO & SWSO members of C.A.M.P. (the Committee on Annual Meeting Planning), chaired by Dr. John Metz. Your ideas and energy have created a meeting for all to enjoy! Pictured left to right on the back row are Dr. Eric Park, Dr. Don Wilcoxon, Dr. Sundaralingam Premaraj, and Dr. John Metz. In the front row are Dr. Theresa Coleman and Dr. Kyla Swearingen. Not pictured C.A.M.P. member: Dr. Jim Martin.





Getting to the Island

THE OMNI AMELIA ISLAND RESORT

39 Beach Lagoon Road
Fernandina Beach, FL 32034

The Omni Amelia Island Resort offers luxurious oceanfront accommodations with unparalleled views of the Atlantic Ocean. It is nestled on 1,350 acres at the tip of a barrier island off the Florida coast.

Guests can select rooms in the main hotel or in one of the spacious villas. The hotel provides shuttles from 6:00 am – 11:00 pm for convenient access to all locations on the property. Guests can also rent a golf cart, bikes or use their vehicle to access all amenities at the Resort.

The resort is about a 45 minute drive from the Jacksonville International Airport (JAX), which is supported by all major airlines. **We recommend making transportation arrangements to and from Omni Amelia Island Resort in advance**, especially since this year's Florida-Georgia football game takes place in Jacksonville on Oct 28. Call East Coast Transportation: (904) 525-8600 or email jcremer@ectjax.com.



SAO & SWSO 2023 Annual Session

Full Schedule at a Glance

THURSDAY, OCTOBER 26

7:30 am – 5:00 pm	Registration	Registration and badge pick up
8:30 am – 9:30 am	Michelle Shimmin	The Digital Transformation of Orthodontics
8:30 am – 9:30 am	Dr. Sarah Abu Arqub	An Evidence-based Perspective on the Efficacy and Clinicians' Perception on Clear Aligner Therapy
9:30 am – 10:15 am	Tina Byrne	Insurance & Receivables — Anything BUT Business as Usual
9:30 am – 10:15 am	Dr. Christos Vlachos	Using the Carriere Motion 3D Distalizing Appliance — A Perspective
10:30 am – 12:00 pm	Tim Tebow	Opening Ceremony, Keynote & Awards, <i>Sponsored by GC Orthodontics</i>
12:00 pm – 1:00 pm	Lunch	Complimentary grab and go boxed lunches
1:00 pm – 5:00 pm	Golf Tournament*	Golf tournament at Oak Marsh, <i>Sponsored by TP Orthodontics</i>
2:00 pm – 6:00 pm	Heron's Cove Activities*	Mini golf tournament and activities at Heron's Cove
2:00 pm – 4:00 pm	Scavenger Hunt*	Capture Quest golf cart scavenger hunt
4:00 pm – 5:00 pm	Chris Bentson	Valuation and Transitions 101
5:00 pm – 6:30 pm	Exhibit Hall Happy Hour	Drinks and nibbles in the exhibit hall
6:30 pm – 7:30 pm	Networking*	Beaches and Buyouts: Networking for residents and practice owners wishing to connect with them.
8:00 pm – 10:00 pm	Evening Treat	S'mores on the lawn

FRIDAY, OCTOBER 27

7:00 am – 3:00 pm	Registration	Registration and badge pick up
7:00 am – 3:00 pm	Exhibit Hall	Stop by to see products and services offered by our exhibitors
7:00 am – 8:00 am	Breakfast	Complimentary breakfast, <i>Sponsored by Neon Canvas</i>
7:00 am – 8:00 am	AAOPAC Breakfast	Legislative update and breakfast for state AAOPAC and COGA leaders
7:00 am – 8:00 am	CDABO Breakfast*	Breakfast meeting with CDABO peers
7:15 am – 8:15 am	Yoga*	Sunrise yoga on the beach
8:00 am – 12:00 pm	Educators Meeting	Educators, program directors/chairs meet with peers
8:00 am – 8:50 am	Josh Mancuso	Day 2 Keynote: I Can't Feel My Face
9:30 am – 11:00 am	Dr. Brian Rochford	Enhancing Practice Efficiencies with LightForce
9:30 am – 10:30 am	Michelle Shimmin	Financials — Systems for AR/Collections
11:00 am – 12:00 pm	Josh Mancuso	Breakout Session: "Stop The Scroll"
11:30 am – 12:30 pm	Dr. Bart Iwasiuk	Expanding the Aligner Horizon — Invisalign for the Little Ones
12:00 pm – 1:00 pm	Team/Guest Lunch	Complimentary lunch in the exhibit hall, <i>Sponsored by TUSK Partners</i>
12:30 pm – 2:30 pm	Doctor Lunch	Complimentary lunch, <i>Sponsored by TUSK Partners</i>
1:00 pm – 2:00 pm	Dr. Sejal 'Sej' Patel	Inside, Outside & Online: A 360° Plan to Level Up Your Marketing Game
1:00 pm – 2:00 pm	Meeting	Southern Association of Orthodontists Annual Business Meeting
1:00 pm – 2:00 pm	Meeting	Southwestern Society of Orthodontists Annual Business Meeting
2:00 pm – 3:00 pm	Dr. Juan Martin Palomo	Sleep Apnea and the Orthodontist
2:30 pm – 3:30 pm	Chris Bentson	Business Management: Trends, Innovations, & Insights
7:00 pm – 10:00 pm	Special Event*	Luau on the Lawn, <i>Sponsored by Align Technology</i>

(continued on next page)

*additional fee required





SATURDAY, OCTOBER 28

7:00 am – 11:00 am	Registration	Registration and badge pick up
7:00 am – 11:00 am	Exhibit Hall	Stop by to see products and services offered by our exhibitors
7:00 am – 8:00 am	Team/Guest Breakfast	Complimentary breakfast, <i>Sponsored by Reliance Orthodontics</i>
7:00 am – 8:00 am	Doctor Breakfast	Complimentary doctors breakfast and AAO update, <i>Sponsored by the AAO</i>
8:00 am – 9:00 am	Dr. Judith Owens	Pediatric Sleep Studies and Working with Sleep Physicians
9:00 am – 10:00 am	Jackie Dorst	Sterilization: The Orthodontic Challenge
10:30 am – 11:30 am	Dr. Audrey Yoon	Orthodontics for Sleep Disordered Breathing: Past, Present and Future
11:30 am – 12:30 pm	Sean Murphy	Helping the Modern Orthodontic Practice Recognize Legal Issues
1:00 pm – 5:00 pm	CDABO Prep Course*	CDABO Prep Course, separate registration required

Meeting Facts, Fees & Policies

Meeting Date & Location

Oct 26-28, 2023 at The Omni Amelia Island Resort
39 Beach Lagoon Road, Fernandina Beach, FL 32034

Hotel Rooms at The Omni Amelia Island Resort

We contracted a discounted room rate of \$239 per night at the resort. A link to reserve your hotel room will be provided in your registration confirmation email. Hotel reservation cutoff is Sept 29, 2023. Individuals who are not registered for our meeting will be charged the standard room rate instead of the discounted rate upon checkout.

Getting to Amelia Island

See page 5 for info on getting to Amelia Island.

Exhibition Hours & Onsite Registration

Exhibits open on Oct 26 at 5:00 pm and on Oct 27 & 28 at 7:00 am. Registration opens Oct 26 at 7:30 am and on Oct 27 & 28 at 7:00 am.

Badges & Event Tickets

Registered attendees will receive badges and tickets for registered social events. Badges and lanyards can be picked up onsite at the registration kiosks beginning Oct 26 at 7:30 am.

Meeting App

Meeting handouts and details will be available on the SAO/SWSO Meeting App. We will email instructions for downloading the app from the Apple and Google Play Stores.

CE Vouchers

CE vouchers will be available via the AAO CE platform.

Dress Code

Business casual for meetings and resort casual for fun activities including the Friday night luau.

Registration Fees*	FEE	AFTER JUNE 30
Resident	\$0	\$50
New & Young Member	\$160	\$210
Retired Member	\$300	\$350
Team Member	\$489	\$539
Active Member	\$589	\$639
Non-Member	\$1,100	\$1,150

*For complete pricing, visit our website using QR code below.

Help Sponsor a Resident

There is no fee for a student/resident to attend our Annual Meeting, however there is an expense to host them as our guest. They will receive excellent CE, networking and breakfast and lunch included with their complimentary registration. If you are interested in supporting their attendance, you can make a contribution when you register. Minimum donation is \$50.

How to Register

Register online by using the QR code or visit us online at saortho.org or swso.org.



Cancellation Policy

Cancellation requests can be made up until Oct 17, 2023. All requests for refunds or cancellations must be made in writing to the SAO, saoevents@saortho.org. We will provide full refunds if you cancel before Sept 29, 2023. A cancellation fee of 15% will be applied if you cancel between Sept 29, 2023 and Oct 17, 2023. No refunds will be accepted after Oct 17, 2023.

No Smoking Policy

No tobacco products, vaping, or smoking of any kind allowed.

The Digital Transformation of Orthodontics

Michelle Shimmin

8:30 am – 9:30 am | 1 CEU | Team

In this course we will cover the processes and systems needed within your practice to be able to fully maximize the potential of both digital and virtual treatment options. From scripting on the new patient phone call to patient education within the New Patient Exam process and what processes you need to put into place to be able to grow your practice, by working smarter, not harder. Providing you the tools for greatest efficiency and patient experience.

Objectives:

1. Learn the systems, modalities and tools needed for maximum efficiency and profitability.
2. Understand how to implement these successfully into your existing workflows.
3. Know the importance of your team's buy-in as educators and influencers to your patients.

An Evidence-based Perspective on the Efficacy and Clinicians' Perception on Clear Aligner Therapy

Dr. Sarah Abu Arquab

8:30 am - 9:30 am | 1 CEU | Doctor

This lecture will summarize the latest evidence related to the efficacy of clear aligners in achieving various types of tooth movements, as well as their utilization and predictability in treating different malocclusions. In addition, the lecture will give an overview of the most common protocols and practices when using clear aligners for treatment. We will also compare and contrast the efficiency of various commercially available aligner systems in achieving desired tooth positions and movement.

Objectives:

1. Correlate the clinicians' preferences, practices, and protocols related to clear aligner therapy to the current evidence on the efficacy and applications of clear aligners.
2. Highlight the latest evidence in relation to clear aligner therapy.

Insurance & Receivables – Anything BUT Business as Usual

Tina Byrne

9:30 am – 10:15 am | 1 CEU | Team

Management of accounts receivable and patient insurance benefits is a crucial aspect of running a successful orthodontic practice. It has been progressively challenging due to several factors, including insurance carriers' efforts to limit payments to providers and shorter treatment times that make it necessary to extend the length of patient payment plans into the retention stage.

The protocols in many offices haven't evolved over the years and are now obsolete and outdated. Successfully managing both patient and insurance receivables requires a combination of effective policies, efficient processes, clear communications, and an extensive understanding of patient benefits.

Objectives:

1. Identify trends by insurance carriers that are affecting both out-of-network and in-network providers.
2. Establish delinquent communication timelines to maintain on-time payments from patients and carriers.
3. Provide tips for claim submissions to reduce the amount of discounts affecting in-network providers.

Using the Carriere Motion 3D Distalizing Appliance – A Perspective

Dr. Christos Vlachos

9:30 am – 10:15 am | 1 CEU | Doctor

Class II malocclusion affects a reported 33% of all US orthodontic patients. Maxillary molar distalization has become a commonly utilized strategy for Class II correction. A number of treatment modalities are available to that effect. Since its introduction in 2004, The Carriere Motion 3D Appliance has gained widespread popularity among orthodontists. This presentation will review the dental and skeletal changes associated with this appliance and offer a perspective on its use.

Objectives:

1. Identify indications and protocols for use of the Carriere Motion 3D Appliance.
2. Recognize advantages and disadvantages of treatment with this appliance.



Thursday Afternoon Fun Activities

Spend the afternoon relaxing in a poolside cabana (some hosted by sponsors!), or teeing off with colleagues at our annual Golf Tournament. Other extra Thursday afternoon activities to sign up for include a Mini Golf Tournament and a Capture Quest Golf Cart Scavenger Hunt!

Valuation and Transitions 101

Chris Bentson

4:00 pm – 5:00 pm | 1 CEU | Doctor

This course will give doctors the fundamentals of what is involved in a practice valuation, the information required, and the benchmarks in orthodontics today. A discussion of how OSO valuation is different will also be discussed; doctors will understand what EBITDA is and the various choices for corporate transitions that exist for orthodontists. The course will also discuss end-of-practice lifecycle transitions (heading toward retirement), bringing in a partner for the first time, a partner exiting a practice and a look at options for new and younger doctors. This is a packed hour of practice valuation, transition, and associate options for all doctors in any phase of their practice lifecycle.

Exhibit Hall Happy Hour: 5:00 pm – 6:30 pm

Our Exhibit Hall Happy Hour is the perfect time to come back together and share the highlights from your day while enjoying drinks, food, and networking with exhibitors!

Beaches & Buyouts: 6:30 pm – 7:30 pm

Beaches & Buyouts, Coastline & Colleagues, Seashore & Sales — However you say it, this event is for you if you are evaluating practice transitions! This event gives our orthodontic residents and new grads the opportunity to meet and mingle with orthodontists who are exploring practice transitions, potentially adding an associate or considering selling their practice. Enjoy refreshments and networking for \$15 per person.

S'mores on the Lawn: 8:00 pm – 10:00 pm

All attendees are invited to end their evening with the sweet treat of s'mores. Located on the Magnolia Garden Lawn, this complimentary event is a sweet ending to a perfect day.

3. Compare treatment effects when using mandibular Lingual Holding Arch (LLHA) vs. invisible removable retainer (Essix).
4. Recognize alternative protocols including "chair side" fabrication of distalizing device.
5. Understand how to integrate clear aligner therapy with the Carriere Motion 3D Appliance.
6. Compare the dentoalveolar effects of the Carriere Motion 3D Appliance with the effects of other popular Class II correctors.

Opening Ceremony & Awards Keynote Address by Tim Tebow

Tim Tebow

10:30 am – 12:00 pm | All Attendees

Sponsored by GC Orthodontics

EVERYONE is invited – members, team, exhibitors and sponsors – to attend this special event! Together we will honor and recognize our award winners for their service and dedication to our profession. Then we kick off our Annual Session with energy, excitement and fun as we welcome our Keynote Speaker, Tim Tebow, to the stage! Tim Tebow is a two-time national champion, Heisman Trophy winner, first-round NFL draft pick, and a former professional baseball player. The five-time New York Times best-selling author, speaker, and football analyst will motivate and inspire as he speaks to overcoming adversity and setting goals and benchmarks for success. A grab-and-go lunch is included for all attendees so you can head to a planned afternoon activity or spend Thursday afternoon relaxing in the Florida sunshine and ocean breezes!





Annual Session Fun Extras

Golf Tournament Oak Marsh Golf Course

Thursday, October 26, tee off at 1:00 pm

Sponsored by TP Orthodontics

Our Golf Tournament is a member favorite and staple at our annual session. Attendees will enjoy the Oak Marsh Golf Course, a classic Pete Dye-designed golf course. This course is noted for its tight fairways and small greens, meandering along serpentine salt marsh creeks and through the moss draped heritage oaks for which Amelia Island is famous. The \$140 fee includes green fees, shuttle and prizes for the top three. The tournament will have a shotgun start. Clubs are available to rent for an additional fee.

Mini Golf & Activities at Heron's Cove

Thursday, October 26 from 2:00 pm – 6:00 pm

We reserved this entire section of the resort to run a mini golf tournament and give you exclusive access to the area's yard games. This is great way to mix and mingle with friends and colleagues, or spend time with teams and families. Entertainment options are endless with giant chess, giant checkers, giant Connect 4, corn hole, ping pong and of course, miniature golf! The miniature golf tournament will have a prize for the top three.



Capture Quest Golf Cart Scavenger Hunt

Thursday, October 26, from 2:00 pm – 4:00 pm

You can't miss our Golf Cart Scavenger Hunt! Participants will use a smartphone application, a golf cart and a property map, to solve brain teasers and complete team challenges while exploring the resort. Teams will work together to earn points by capturing photos of themselves performing tasks and relaying the answers creatively.

Sunrise Yoga on the Beach

Friday, October 27 at 7:15 am

Enjoy a relaxing and peaceful start to your day with sunrise yoga on the beach. Yoga is well known for its amazing health benefits and this experience is enhanced by the fresh ocean air and relaxing sound of the waves crashing. Water and a towel to use during yoga are provided.

Friday, October 27 

Day Two Keynote Address: I Can't Feel My Face

Josh Mancuso

8:00 am – 8:50 am | All Attendees

Sponsored by Align Technologies

Actor, comedian, and social media sensation Josh Mancuso opens our Friday morning session with a keynote you won't want to miss. Known for his clever writing and quick-witted comedy videos, you will enjoy Josh's hilarious relatable stories and observations from life, sports, and of course, orthodontics. Not only did Josh have braces as a kid, he has two daughters with braces, and he's now in the middle of Invisalign treatment himself. With his unique style of stand-up comedy and motivation, you will start your morning encouraged and fully entertained.

Enhancing Practice Efficiencies with LightForce

Dr. Brian Rochford

9:30 am – 11:00 am | 1.5 CEUs | Doctor

This course aims to provide an in-depth understanding of the importance of customization in orthodontic treatment, particularly in relation to indirect bonding with LightForce and digital treatment planning.

Objectives:

1. Discover the significance of customization in orthodontic treatment and the various benefits it can offer such as improved patient experience, reduced chair time, and enhanced treatment outcomes.
2. Uncover how to incorporate indirect bonding into your practice to achieve optimal results.
3. Explore the LightPlan tools and techniques for creating accurate and efficient treatment plans the first time around.
4. Discuss how to maximize clinical efficiencies by utilizing a custom orthodontic bracket system.

Financials — Systems for AR/Collections

Michelle Shimmin

9:30 am – 10:30 am | 1 CEU | Team

In this course we will cover how to ensure you have the proper systems in place within your practice to be able to setup, account for and collect all monies owed to you.

We will cover how to put safeguards in place to ensure that the proper checks and balances exist to not let anything fall through the cracks as well as how to setup effective follow up processes to keep your delinquencies to a minimum. Most practices do not know how much revenue is left on the table. Through this lecture, you will know how to identify and resolve for maximum profitability and growth!

Objectives:

1. Understand how to protect your practice from financial inconsistencies.
2. Learn what specific reporting tells you about the health of your practice.
3. Arm yourself with the best growth strategies through your own historical data and growth opportunities.

Breakout Session: "Stop The Scroll"

Josh Mancuso

11:00 am – 12:00 pm | 1 CEU | Team

Social media is a crazy world, and navigating it can seem impossible. In this important session, actor and comedian Josh Mancuso will show you the value of building a social media presence you can be proud of, and how to engage your audience with unique and engaging content.

Expanding the Aligner Horizon — Invisalign for the Little Ones

Dr. Bart Iwasiuk

11:30 am – 12:30 pm | 1 CEU | Doctor

As the technological innovations in the field of aligner orthodontics expand, so does the patient population that can benefit from this treatment modality. What was once considered an adult orthodontic appliance has evolved in to a fully comprehensive orthodontic tool, dealing with all malocclusions. As we gained confidence in treating first adults then teens, we now reach full capabilities in taking care of young children. This presentation will focus on using Invisalign First and Comprehensive products to treat younger patients in mixed dentition. A comprehensive review of how this appliance can be used as an expander, a distalizer, and a replacement for the traditional 2X4 appliance will be covered. Assess the many benefits, that can be gained by using aligners over traditional braces or removable retainers in this population segment. A number

(continued on next page)

Friday, October 27 

of common objections encountered during a consultation visit will be discussed and appropriate rebuttal provided. Reach for this final frontier to be comfortable and confident in treating your entire patient population with Invisalign aligners.

Objectives:

1. Understand the different applications of the Invisalign appliance in mixed dentition.
2. Learn common objections from parents and patients, and how to overcome them.
3. Focus on the importance of having a Phase 1 objective, and stick with it.
4. Learn to set up ClinCheck in Phase 1 treatment to make Phase 2 treatment as efficient as possible.
5. Consider how to transition patients from Phase 1 to Phase 2 treatment

Inside, Outside & Online: A 360° Plan to Level Up Your Marketing Game

Dr. Sejal 'Sej' Patel

1:00 pm – 2:00 pm | 1 CEU | Team

Who's got a killer plan in place for hitting up all the ways in which new patients find you? Are you simultaneously building relationships with everyone that's already in your practice... your patients, your team members? Outside your practice... referring doctors, schools? Online with those local moms on Insta? If you'd like to level up your marketing game, this is the place! Come play!

LUAU ON THE LAWN

Sponsored by
Align Technology

Friday October 27

7:00 – 10:00 pm

Say ALOHA to our Luau! Come lounge on the Lawn and enjoy this tropical paradise and festive party. Guests will enjoy food, drinks, fun and entertainment provided by a Hula Dance team.



Saturday, October 28

Pediatric Sleep Studies and Working with Sleep Physicians

Dr. Judith Owens

8:00 am - 9:00 am | 1 CEU | Doctor/Team

Course Objectives:

1. Present a brief overview of childhood disordered breathing from a pediatric sleep medicine perspective.
2. Describe the key elements of optimal pediatric sleep clinical care.
3. Summarize the results of the Pediatric Craniofacial Sleep Disordered Breathing Screening tool (PCSS) in routine dental practice study.

Sterilization: The Orthodontic Challenge

Jackie Dorst

9:00 am - 10:00 am | 1 CEU | Doctor/Team

Orthodontic plier sterilization that meets the current "Standard-of-Care" is a challenge. Why? Orthodontic plier hinges and carbide inserts are subject to corrosion when exposed to moisture for an extended time. In the 1980's, an orthodontic dry heat sterilization system was marketed for sterilizing orthodontic pliers on a rack without sterile wrap. Dry heat sterilization limits moisture on orthodontic pliers but limits sterile packaging because of the extreme heat. This type dry heat sterilization system has now been discontinued because the unwrapped pliers do not meet the current standard for sterile packaged instruments. The current standard is that instruments are wrapped before sterilization and remain wrapped until used for patient treatment. Sterile instrument packaging provides sterility protection and contamination prevention.

Autoclaves or steam sterilization are the most common and cost effective sterilization choice for all of healthcare for sterile instrument kits.

The orthodontic challenge is "How does an orthodontic practice replace a dry heat sterilizer with an autoclave and protect orthodontic pliers?"

Jackie Dorst's presentation provides a comprehensive review of cleaning and sterilization equipment that protects orthodontic pliers and meets the "Standard-of-Care" for sterile packaged orthodontic instrument kits. She shares

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Friday, October 27

Sleep Apnea and the Orthodontist

Dr. Juan Martin Palomo

2:00 pm – 3:00 pm | 1 CEU | Doctor

With more than 80 respiratory disorders, the orthodontist can play a big role helping children and adults, specially regarding Obstructive Sleep Apnea (OSA). This presentation will show how the orthodontist can help identify and manage OSA in pediatric and adult patients, the difference between treatment and management, the potential effects or orthodontic treatment, and possible solutions ranging from expansion, oral appliances, and surgical options. As healthcare providers, there is a lot more that we can do to our patients, but this does not mean that it need to interfere with the efficiency and the practice flow already in place.

Business Management: Trends, Innovations, & Insights

Chris Bentson

2:30 pm – 3:30 pm | 1 CEU | Team

Asking how your practice will stay competitive is one of the simplest, yet most important questions you can ask. Trends come and go - but it's always business as usual. The way orthodontists are doing business is changing in many ways and one must understand these shifts to adapt and stay aggressive. In this lecture, Chris will examine consumer demographics, explore today's rapidly changing market trends, dive into real practice data, and much more.

Objectives:

1. Identify how current market trends have already affected your business model and their future effects.
2. Recognize growth opportunities in today's orthodontic landscape.
3. Understand the difference between disruption vs. innovation.

Saturday, October 28

valuable tips on preventing corrosion, handpiece cleaning & sterilization, and how to sterilize plastic patient care items, photo mirrors and retractors. Instrument sterilization is a complex process. Sterilization errors can damage instruments and equipment plus cost the practice time and money. Attendees will learn tips and techniques for the entire instrument process from cleaning to package to sterilization to sterile chairside care.

Ensure safe and sterile orthodontic patient care by meeting the sterilization challenge!

Orthodontics for Sleep Disordered Breathing: Past, Present and Future

Dr. Audrey Yoon

10:30 am - 11:30 am | 1 CEU | Doctor/Team

Most current orthodontic treatments for obstructive sleep apnea have focused on changing the anatomy to increase airway space. However, most orthodontists do not understand the mechanism of how anatomical changes affect the pathophysiology of obstructive sleep apnea. Dr. Yoon will show her extensive research for a better understanding of the relationship between anatomical factors and the physiology of OSA. Dr. Yoon will discuss the early identification of the etiology and understanding the pathophysiology to prevent diseases. She will also discuss the orthodontic approach for modifying orofacial growth and development with the newest technique to achieve ideal skeletal structures and reprogramming of orofacial muscle function. She will go over the new scientific evidence to change the paradigm and discuss the future of orthodontics for sleep disordered breathing.

Objectives:

1. Understand the orthodontist's role in identifying airway disorders in everyday practice.
2. Learn the screening protocols and spectrum of available therapies.
3. Comprehend tongue posture and craniofacial development.
4. Integrative and functional approaches to craniofacial structure modification: an interdisciplinary approach.



Helping the Modern Orthodontic Practice Recognize Legal Issues

Sean Murphy

11:30 am - 12:30 pm | 1 CEU | Doctor/Team

Sean's course will discuss some of the common legal issues currently facing orthodontic practices, including options for dealing with: difficult patients, divorced parents, requests for treatment refunds, and third-parties and contractors who work with your practice. This informational course for both orthodontists and their team members will not provide legal advice, but will include such topics as how to obtain legal counsel. The format for the course, which involves real world hypotheticals, is meant to be both entertaining and engaging. Sean presented to a packed room at SAO's 2021 meeting and had multiple attendees tell him how much they enjoyed the course, so he looks forward to the 2023 meeting.

CDABO Prep Course

1:00 pm – 5:00 pm | 4 CEUs | Doctor

Separate Registration Required at www.cdabo.org

The College of Diplomates Prep Course is designed to assist participants in preparing for the American Board of Orthodontics Scenario-based Clinical Examination to achieve board certification. The course includes tips on how to prepare and maximize your effectiveness during the ABO Virtual Clinical Examination. Attendees will be invited after the course to join the College Prep Course Facebook Study Group for continued dialogue and sample case practice. Space is limited to the first 50 paid registrants. No refund after October 1, 2023. This is a separate registration from the SAO/SWSO Annual Session. To register, visit www.cdabo.org.



Meet Our Speakers



Dr. Sarah Abu Arqub

Dr. Abu Arqub completed a Masters in Dental Science (M. Dent. SC) and received a Certificate in Orthodontics from the University of Connecticut School of Dental Medicine, Farmington, CT in 2019. She is an American Board of Orthodontics Certified Orthodontist and currently is a clinical assistant professor

at the University of Florida Department of Orthodontics.. Dr. Abu Arqub is involved in several research projects. Her research is primarily focused on clinical and evidenced-based orthodontics in the areas of clear aligners, TADs in orthodontics, systemic reviews and meta-analysis, AI, teledentistry and dental monitoring, clinical trials, and more recently social media and orthodontics. She has more than twenty publications in high-impact journals including AJODO, Progress in Orthodontics, EJO, Journal of Dentistry, The Angle Orthodontist, and OCR. She has several pending publications and a number of others in progress. Dr. Abu Arqub currently has more than 200 citations for her publications. She is a peer reviewer for the American Journal of Orthodontics and Dentofacial Orthopedics, the AJODO Clinical Companion, the European Journal of Orthodontics, the Angle Orthodontist, and Progress in Orthodontics. She is also an editor for Seminars in Orthodontics.



Chris Bentson

Chris Bentson is a partner of Bentson Copple & Associates, LLC based in Greensboro, North Carolina. The company serves the orthodontic community by performing practice valuations, providing recruiting services, and negotiating transactions with both buyers and sellers.

Chris has been working with orthodontists regarding the business aspects of their practices for over thirty years, and was recently awarded the "Outstanding Contribution to the Specialty Award by a Non-Orthodontist" from the AAO. He spends much of his time working within the orthodontic industry. He currently serves as President of



the American Association of Orthodontists Foundation (AAOF). In addition, he is a frequent guest lecturer at AAO meetings, regional orthodontic society meetings, orthodontic resident programs, study clubs, and orthodontic user meetings. Chris has authored dozens of articles published on the business of orthodontics in numerous orthodontic trade publications. Chris has personally visited over one thousand orthodontic practices in the United States, Canada, and Australia during his career. He enjoyed excellent relationships with consultants and vendors within the orthodontic community.



Tina Byrne

With 40 years of experience working and consulting in the field of orthodontics, Tina has gained success and recognition for her well-founded proficiencies in clinical, business, and administrative functions. She has extensive knowledge and understanding of systems innovation and

efficiency, data analysis, strategic business planning, and marketing implementation. She has lectured and helped guide the success of leading practices, both large and small, throughout North America and abroad. Tina is the only industry consultant who has extensively trained and lectured on orthodontic insurance. She has developed an orthodontic benefit maximization software for in-network providers, scheduled for release by OrthoFi and OrthoBanc in 2023. Her leadership qualities and upbeat presentation style offer a fresh perspective on the challenges faced daily by the entire orthodontic team. She offers a unique combination of industry knowledge, humor, wisdom, motivation, and practical solutions to maximize practice productivity and profitability.

Meet Our Speakers



Jackie Dorst

From the AIDS Pandemic to the COVID Pandemic, Jackie Dorst has helped AAO members provide safe care for patients and the orthodontic team. You've probably seen her Glitter Bugs, Beach Balls or Red Nose in her AAO lectures and AAO webinars. Jackie always includes Fun, Humor plus a BIG dose of Sparkle & Shine for

the normally dull topics of Infection Control, Sterilization, and OSHA! Jackie understands the infection control challenges that the Orthodontic Team faces everyday with busy schedules, changing guidelines and limited staffing during the Pandemic and now for the New Normal. Her goal is to provide orthodontists with accurate information and practical methods for compliance with CDC, State Dental Board, and OSHA Standards. Jackie received her microbiology degree from the University of Georgia and her dental hygiene degree from Clayton State University. She has been honored as a Clayton State University Distinguished Alumnus. She has been a featured speaker at the International Orthodontic Congress in Paris, the International Congress of Dental Technology in Japan, the American Association of Orthodontists, the American Association of Endodontists, the American Dental Association, and the American Association of Oral and Maxillofacial Surgeons.

Jackie is a member of:

- Organization for Safety, Asepsis and Prevention, OSAP
- Association for Professionals in Infection Control and Epidemiology, APIC
- Editorial review board for Infection Control in Practice
- Served on the AAO COVID19 Task Force during the Pandemic

She is a graduate of the OSHA Training Institute and OSHA approved to provide safety training courses. You will enjoy her "Infectious Enthusiasm" for Orthodontic Instrument Sterilization!



Dr. Bart Iwasiuk

Dr. Bart Iwasiuk has been in private practice since 2002 and using Invisalign since his residency training. He achieved Elite Provider status in 2012, and continues to push the limits of what can be accomplished using Invisalign aligners. He received his DDS from the University of Toronto

and his Orthodontic Certification from the University of Rochester. His Interest in multidisciplinary dentistry stems from spending two years at the University of Washington and being influenced by the Seattle Study Club. He is an Associate Professor at the University of Rochester, as well as a personal instructor on YourOrthoCoach.com. He is an International Keynote Speaker, Research Consultant and a member of the Key Opinion Leaders for Align Technology, Inc.. With advancements of Aligner products aimed at growing patients he is also a Member of the Global Growing Patient Speaker Group and the North American Mandibular Advancement Clinical Expert Panel. He is an Invisalign Diamond Provider practicing in the Greater Toronto area.



Josh Mancuso

Josh Mancuso is a writer, actor, and comedian. A transplant from L.A. to Northeast Tennessee when he was only 4 years old, Josh embodies a unique hybrid of West Coast/Appalachian personality. As an actor, he has appeared in TV shows, short films, feature films, dozens of commercials, and

has won multiple awards. He is the owner of Switchmen Studios, a production company that produces films and TV series.

Josh has gained an enthusiastic following on social media with his unique brand of sports humor and observational comedy viral videos, gaining millions of views and likes nationwide. Playing a variety of original characters, his sketches are witty, relatable, and wrapped up with slick green screen editing and laugh-out-loud quips.

Prior to working in entertainment, Josh spent many years in video production and marketing, creating over 250

Meet Our Speakers

videos for clients of all sizes. With experience working for a marketing agency, as well as being a small business owner, Josh has led many workshops and seminars on marketing, social media, and content creation. In 2019, Josh founded and directed the Johnson City Film Festival and helped co-found the Northeast Tennessee Entertainment Alliance. He graduated with a B.A. in Communications from Emory & Henry College in Southwest Virginia, and a M.A. in Leadership from Luther Rice University in metro-Atlanta. He received a 40 Under 40 Award in 2016, and has been featured on multiple podcasts, news outlets, and even ESPN.



Sean Murphy

Sean Murphy currently serves as the CEO for the Harris County Medical Society (HCMS), the country's largest county medical society, representing approximately 13,000 Texas physicians in the Houston area. In this role, Sean works with the 24-person HCMS team

to provide advocacy, financial savings, informational resources, continuing education, and valuable benefits to Texas physicians and their practices. Prior to joining HCMS, Sean worked at the Arizona Dental Association (AzDA) and the American Association of Orthodontists (AAO) and brings with him a wealth of association and advocacy experience. As an attorney, Sean's responsibilities included managing the AAO's legal and advocacy department, overseeing the AAO's regulatory and legislative priorities, administering the AAO's state Component Legal Support Fund, assisting with AAO governance, and handling the AAO's legal issues. Sean has lectured throughout North America on various dental topics, many involving the business and legal aspects of running a practice. During his career, Sean has been awarded AzDA's 2020 President's Award, Missouri's statewide 2019 In-House Counsel Award for the healthcare profession, and was chosen as a Leading Lobbyist as part of the Association TRENDS 2018 Salute to Association Excellence in DC. Sean obtained his Juris Doctorate (JD) from Saint Louis University School of Law, where he graduated cum laude while also obtaining his Health Law Certificate, and is a Certified Association Executive.



Dr. Judith Owens

Dr. Judith Owens is senior faculty in the Pediatric Sleep Center at Boston Children's Hospital in Boston Massachusetts and a Professor of Neurology at Harvard Medical School. She is an internationally-recognized authority on pediatric sleep and the author of over 175

original research and review articles in peer-review journals, chapters, and books on the topic. Her particular research interests are in the neurobehavioral and health consequences of sleep problems in adolescents and the role of school start times, sleep health education, and cultural and psychosocial issues impacting on sleep. She was the lead author on the AAP 2014 Policy Statement on healthy school start times and is on the Board of Directors of national non-profit Start School Later/Healthy Hours. She is currently President of the International Pediatric Sleep Association (IPSA).

Dr. Owens received her undergraduate and medical degrees from Brown and a Master's in Maternal and Child Health from the University of Minnesota. She completed fellowships in Behavioral Pediatrics at Minneapolis Children's Medical Center and in Child Psychiatry at Brown University.



Dr. Juan Martin Palomo

Dr. Juan Martin Palomo is a tenured professor and the Orthodontic Residency Director at Case Western Reserve University in Cleveland, Ohio. Dr. Palomo's contributions to craniofacial imaging, informatics, and airway analysis have been recognized through medical

and dental research awards, national and international presentations, and numerous peer-reviewed publications. He is a member of the AAO Committee on Conferences, AAO Council on Education, the Associate Editor for the Digital Orthodontics section of the AJODO, Associate Editor for the Sleep and Breathing Journal, the AAO representative for Image Gently, and the past chair of the AAO Committee on Technology. He was also a member

(continued on next page)

Meet Our Speakers

of the AAO Task Force that provided a white paper on the orthodontist's role in treating patients with Sleep Apnea. He is a board-certified orthodontist, an Angle Society member, and an active member of the American Association of Orthodontics, the American Academy of Oral and Maxillofacial Radiology, as well as the American Academy of Sleep Medicine.



Dr. Sejal 'Sej' Patel

As the founding #bossbabe of OMFG! (Orthodontic Marketing Feel Goods!), Sej has curated a small business to give ortho practice relationships a glow up! After the colossal success her marketing efforts have had on her and her husband's mom & pop start-up, SmileOn Orthodontics, friends and

colleagues from all over the country have hit Sej up to pick her brain and get fresh ideas. Sej has put her 22 years of schooling and 9+ years of orthodontic administration together to create OMFG!, offering her clients the ability to look like the rockstars they are... with minimal effort.

Outside of owning and operating SmileOn Ortho with her husband Akash (aka "Doc Ak"), Sej runs a household of 3 littles and two pups, and also teaches Health Behavior at GWU's Milken School of Public Health. The product of this cross-discipline experience is a marketing mind that knows exactly what it takes for an ortho practice to stand out from the noise!



Dr. Brian Rochford

Dr. Brian Rochford is an orthodontist in Indianapolis, Indiana who's all about perfecting smiles and having a little fun while doing it. Dr. Rochford obtained his dental degree from Indiana University School of Dentistry and went on to complete his orthodontics residency from

the University of Colorado School of Dental Medicine. As the owner of Glander Rochford Orthodontics, Dr. Rochford had the privilege of practicing alongside his childhood orthodontist, Dr. Skip Glander, until the end of 2022 when Dr. Glander retired. At Glander Rochford

Orthodontics, Dr. Rochford uses cutting-edge digital technology like LightForce, Invisalign, and Motor City Lab Works to give his patients the best possible fully custom and personalized treatment. When he's not straightening teeth and perfecting smiles, Dr. Rochford is all about spending time with the most important people in his life — his wife, Tara, and their two adorable daughters, Marie and Claire, plus their furry friend Bernie. And when they're not having fun at home in Indy, they're out exploring the world through travel, hiking, and skiing.



Michelle Shimmin

Michelle Shimmin is an international lecturer, trainer and consultant who has been in the field of orthodontics since 1990, working as a Registered Dental Assistant, teaching orthodontic assisting, marketing, financials, treatment coordinating and practice management. Michelle travels

the country and helps transform orthodontic offices on their systems to promote training, growth, and success through a comprehensive practice approach. Michelle is one of the most sought-after trainers with many lecture events every year, both domestic and international.



Tim Tebow

Tim Tebow is a two-time national champion, Heisman Trophy winner, first-round NFL draft pick, and a former professional baseball player. The five-time New York Times best-selling author, speaker, and football analyst is most passionate about his work with the Tim Tebow Foundation

(TTF), whose mission is to bring faith, hope and love to those needing a brighter day in their darkest hour of need. The Tim Tebow Foundation is currently fighting for people who can't fight for themselves in over 70 countries and counting through 4 primary ministry focuses with 16 initiatives. Tim is married to Demi-Leigh Tebow, a speaker, influencer, entrepreneur, and Miss Universe 2017. Tim and Demi live in Jacksonville, Florida, with their three dogs, Chunk, Kobe, and Paris.

Meet Our Speakers



Dr. Christos Vlachos

Dr. Christos Vlachos holds dental degrees from the University of Athens, Greece and the University of Alabama at Birmingham (UAB). In addition he received a Master's degree in Occlusion and the treatment of Temporomandibular Disorders (TMJ) from the University of Michigan in Ann Arbor (1984) and completed his specialty

training in Orthodontics at UAB (1986). Dr. Vlachos served as full time faculty at UAB, Department of Orthodontics from 1992 to 1997, teaching undergraduate, graduate and continuing education courses in orthodontics and occlusion. Since 1997, he has maintained private orthodontic practices in Homewood, Pell City, and Calera, while teaching part-time at UAB. In addition to orthodontic care for children and adults, Dr. Vlachos offers treatment to patients with TMJ problems as well as Obstructive Sleep Apnea. As of 2008, he has served as Director of the Postdoctoral Program in Orthodontics at UAB. Effective June 2022, he has been serving in the same capacity on a full-time basis.

Dr. Vlachos is a diplomate of the American Board of Orthodontics as well as a member of the American Association of Orthodontists, Southern Association of Orthodontists, UAB Orthodontic Alumni Association, American Dental Association, Alabama Dental Association, and the Birmingham District Dental Society.

He is married to Margaret Nichols Vlachos and they have one son, William. He is an avid University of Alabama football fan and also enjoys reading, traveling, and being outdoors.



Dr. Audrey Yoon

Dr. Audrey Yoon is a dual-trained orthodontist and pediatric dentist who specializes in sleep medicine. She has established World Dentofacial Sleep Society and serves as a founding president. She is also a diplomate of the American Board of Dental Sleep Medicine and a diplomate of the American

Board of Orthodontics.

She completed her orthodontic and pediatric dentistry residencies at the University of California Los Angeles (UCLA). She also earned her Doctor of Dental Surgery and Master of Science degree, completing extensive research in Obstructive Sleep Apnea (OSA) at UCLA. She is program director of Pacific Ortho-Dental Sleep Medicine Fellowship at University of Pacific, a clinical associate professor at Stanford Sleep Medicine Center at Stanford University, and a clinical assistant professor in Orthodontics at the University of Pacific. She is also a co-director of the Pediatric Dental Sleep Mini-residency program at Tufts University.

She practices the full scope of non-surgical and surgical orthodontics from pediatric to geriatric population for airway management including growth modification, pediatric palatal expansion, customized Miniscrew-Assisted Rapid Palatal Expansion (MARPE), Distraction Osteogenesis Maxillary Expansion (DOE), Orthodontic treatment for Maxillomandibular Advancement (MMA), clear aligner therapy and oral appliances for sleep apnea.

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