



Constituent
American
Association of
Orthodontists®

Midwestern Society of Orthodontists

Electronic Newsletter Articles Spring 2021

A compilation of the news articles that were posted on the MSO web site in Spring 2021.

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MSO Components

IOWA

Nick Smith, President

Mike Crall, President-Elect

Rachel Stiles, Vice President

Clayton Parks, Secretary/ Treasurer

The 2020 ISO Annual Meeting was held via Zoom on Sunday, October 4, due to COVID-19 restrictions. Our main discussion at this meeting was regarding Expanded Function training for Registered Dental Assistants. Currently, the law addresses general dental concerns, which does not translate well to orthodontic practices. One of our members is putting together a training program specifically for orthodontic assistants to present to the Iowa Dental Board for approval.

On the legislative front, there are currently several bills working their way through the Iowa Legislature of interest to orthodontists:

1. Regarding SF54, after weeks of negotiations, the Iowa Dental Association has reached a compromise for the orthodontics bill. The bill creates the following requirements for **new patients** before beginning orthodontic treatment:
 - An initial in-person or teledentistry examination of the teeth and supporting structures; or
 - The patient provides the portion of the dental record related to a dental examination of the teeth and supporting structures from within the prior six months to the dentist providing orthodontic treatment.
 - When conducting an initial dental examination, it must include any appropriate radiographs or digital imaging that is necessary to develop an orthodontic diagnosis and treatment plan.

For purposes of this bill, a new patient is one that the dentist has not provided care for or otherwise consulted with during the two-year period immediately prior to the patients' most recent appointment.

2. HF390 - Requires notice prior to discontinuing fluoridation in public water supply systems.
3. HSB71 - Provides dentists with the ability to administer vaccinations for influenza and COVID-19.

The 2021 ISO meeting is scheduled for October 10-11 in Iowa City, and the Iowa Mission of Mercy is scheduled for November 5-6 in Des Moines.

I'm looking forward to starting my journey as the Iowa Director to the MSO and hope to meet many of you in person soon!

Melissa Bernhardt

West Des Moines, Iowa

ILLINOIS

Eric Barnes, President

Scott Prose, President-Elect

Libby Graham, Vice President

Pranav Patel, Secretary-Treasurer

Upcoming/Recent Meetings – Speakers/Topics:

- Vertical Problems: Deep Bite and Open Bite Treatment with Clear Aligner Technique: Dr. **Sandra Tai**; *Changed to an on-demand virtual lecture.*
- April 12, 2021: Conference Call for ISO Officer & Trustee elections.

Illinois State Updates:

As I write this report, COVID-19 vaccination distribution to dentists across the state has progressed, after some big stumbles, to the point most dental personnel who want the vaccine have been able to receive it. The Illinois State Dental Society and Chicago Dental Society sent out periodic updates of vaccine distribution, on a county-by-county basis, to its members. The ISDS also lobbied to have dentists and dental hygienists administer COVID-19 vaccines, however the Illinois Department of Financial and Professional Regulation chose to only allow dentists to administer the vaccine. The ISDS created a one-hour online training course, that once passed, allows Illinois dentists to administer the COVID-19 vaccine at vaccination sites under the coordination and supervision of a medical facility or local health department.

With in-person meetings greater than 50 people still not allowed in Illinois, the Chicago Dental Society's Midwinter Meeting has gone virtual. The ISDS has also made its Capital Conference in April a virtual meeting, but the hope is to have the Annual Session and House of Delegates in-person this September. Fingers crossed.

The ISDS is asking Illinois dentists to contact their legislators to oppose **House Bill 3360**, which if signed into law, it would result in the following:

- Potential to harm the profession of dentistry by encouraging an explosion of frivolous lawsuits
- Allow plaintiffs to accumulate 9 percent interest for up to 2 extra years
- Unfairly targets those being sued and penalizes them with mounting interest
- Unfairly harms thousands of small businesses (dental offices), which may result in closures and loss of needed healthcare providers.

Due to the COVID-19 pandemic, the IDFPR has become aware that opportunities for in-person CE courses have diminished and as a result, licensees may not be able to

complete their in-person CE requirements. The IDFPR issued guidance that they are proposing an emergency rule change effective in May 2021 to allow all continuing education (CE) for both Dentists and Dental Hygienists to be completed online either by live, real-time presentations, or through prerecorded video provided by approved CE sponsors. Under current rules, a minimum of 50% of the total CE hours required, being 24 hours for dentists and 18 hours for hygienists, must be obtained through face-to-face, in-person instruction or experience.

Starting in 2020, all Illinois employers are required by law to train employees on sexual harassment prevention by December 31, 2020, and on an annual basis thereafter. This requirement applies to all employers with employees working in Illinois. Separate but related to the employer's responsibility is that one hour of sexual harassment CE credit is required every three-year license renewal period for dentists and hygienists. In addition, dentists with Controlled Substances Registrations are required to complete 3 hours of continuing education (CE) on safe opioid prescribing practices to renew their Controlled Substances Registration.

D. Spencer Pope
Flossmoor, Illinois

MANITOBA

Susan Tsang, President

Jared Rykiss, Secretary/Treasurer

Future meeting dates of the Manitoba Orthodontic Society (MOS):

Arrangements for a 2021 Spring meeting have not been set due to uncertainties related to the COVID-19 situation.

Recent activities:

- Dentists in Manitoba will be vaccinated earlier if they volunteer to administer the doses in one of the vaccination centers.
- The Canadian Association of Orthodontists (CAO) canceled its annual meeting this year in Quebec City due to Covid-19. The CAO is beginning a new approach to develop consumer awareness by choosing specific social media influencers to make posts about the value of treatment from an Orthodontic Specialist.
- All three third-year residents in the Division of Orthodontics of the University of Manitoba successfully passed their National Dental Specialty Examination (NDSE) last Fall.

Fabio Pinheiro

Winnipeg, Manitoba

MINNESOTA

Nellie Kim-Weroha, President
Alisa Madson, President-elect
Heather Horton, Secretary/Treasurer



Meetings

The 2021 MAO Annual Session was held on January 8, 2021 in a first-time virtual format. There was good attendance, and we received excellent feedback about the content and format. There

were doctor and staff tracks and a noon hour business meeting. Dr. **Estee Wang**, President of the MAO, moderated the meeting and facilitated the question and answer interaction with participants. The doctor track was kicked off by HR specialist **Paul Edwards** and attorney **Nora Gustafson** of CEDR HR Solutions who presented *An A to Z HR Update for Minnesota Orthodontic Practices + Live Q&A* covering a broad range of HR topics



with emphasis on federal and state policies related the COVID-19 pandemic and the new presidential administration. The morning session was followed by our annual business meeting during which we reviewed the initiatives of the past year including the letter to Governor **Walz** that was drafted by an MAO committee of member orthodontists chaired by Dr. Wang to allow for safe reopening or our practices; discussion and meetings with the Minnesota Board of Dentistry; and MAO committee creation to address the shortage of licensed dental assistants in cooperation with the Minnesota Dental Association; and a new initiative and committee to address tele-dentistry orthodontics activities in our state through the Minnesota state legislature. We also received updates from the Minnesota Dental Foundation and the University of Minnesota and Mayo Clinic orthodontic residency programs.

The business meeting was followed by three speakers: Dr. **Christian Groth** who presented on digital enhancements of fixed appliances, Dr. **Joel Johnson** who presented on CBCT technology, and Dr. **Kervin Mack** who presented on the pursuit of happiness in private practice. The staff track meeting presenter was **Tracy Martin** from Straight Consulting, who presented on Millennial Marketing.

We thank our President, Dr. **Estee Wang** and Executive Secretary, **Heidi Hemmen** for their hard work in organizing a very successful virtual meeting during a challenging year.

Philanthropy

MAO continues to support the AAOF with \$1,000 donation every year for 5 years (began in 2016).

University of Minnesota Honors program – AAO award for exceptional interest in the development of the oro-facial complex (\$500) and the MAO award for the student showing special ability, interest and promise in orthodontics (\$500 + textbook).

Minnesota's Heroes Orthodontic Program, launched by Minnesota Dental Foundation, provides free orthodontic treatment to children and spouses of Gold Star Families (immediate family of those killed in service to our country after September 11, 2001). So far two children have completed treatment and two children are being treated by Dr. **Estee Wang** and Dr. **Dan Sletten**.

Minnesota Dental Foundation Gala and Minnesota Mission of Mercy have been postponed until the pandemic situation has improved.

Members Update

We would like to thank Dr. **Deb Lien**, chair of the legislative affairs committee, for helping to run the AAOPAC for Minnesota. This year she is also heading the MAO committees to address the shortage of dental assistants and tele-dentistry.

We would like to thank Drs. **Deb Lien** and **Nellie Kim-Weroha** for serving on the AAO House of Delegates on behalf of the MSO. Dr. Kim-Weroha is also serving on the AAO Committee for Women Orthodontists.

Estee Wang

Maplewood, Minnesota

Missouri

John Firth, President

Jeffrey Cavanaugh, Secretary/Treasurer

Mike LaFerla, Past President

This report, as last time, is short because COVID-19 has resulted in the cancelation of about all in-person meetings. Unfortunately, the Missouri Kansas Ortho Meeting that is scheduled for every other year in Kansas City had to be delayed indefinitely. The past two times it has been held in the Boulevard Brewery meeting room. The speakers have been very informative and the location has been great. 2021 starts with renewed optimism in the hope for normality but so far the new normal is still with us.

In Joplin, KCU's new dental school has continued forward. They have hired the first dean of the dental school, Dr. **Linda Niessen**, and she has been working on getting accreditation completed. The ground breaking is planned for later this year and opening is scheduled for fall of 2022 with an initial class size of 60. They have a rural and underserved health plan focus to expose their students to areas of need for the underserved.

Hopefully, with the inoculations proceeding forward, the AAO will be able to have the annual meeting in Boston and the MSO will be able to hold the fall meeting in Milwaukee.

Michael LaFerla

Joplin, Missouri

NORTH DAKOTA

Daniel Keith, President

Emerson Ehlis, Vice President

Jeremiah Danel, Secretary

2021 is a legislative year in North Dakota and there are a few dental-related bills being proposed. Most notable of these bills relates to tele-dentistry and its applicability across the various sectors of the dental profession. This bill is being advocated for by a broad spectrum of individuals from across the country and is being opposed, in its current form, by the North Dakota State Dental Board. More to come on this as it is currently in committee.

North Dakota's Dr. **Daniel Keith** and Dr. **Dennis Sommers** will have the privilege of serving on Dr. **Alison Fallgatter's** delegation as 2021 delegates to the AAO's House, which will be conducted virtually in April 2021.

With COVID-19 restrictions loosening in North Dakota, most, if not all, practitioners are back and operating at full speed.

Daniel Keith

Bismarck, North Dakota

SOUTH DAKOTA

Ryan VanLaecken, President

Keri Barrow, Secretary/Treasurer

The component has not met since the September report was submitted and does not have any new activity to report.

Keri Barrow

Sioux Falls, South Dakota

WISCONSIN

Doug Barden, President

Todd Rash, President-Elect

Todd Connell, Vice President

Pam Hanson, Secretary/Treasurer

The WSO Fall Conference was held virtually on September 25, 2020. Our featured presentation, *Clinical Pearls for Your Practice*, was presented by Dr. **Neal Kravitz**.

The WSO Spring Conference will be held virtually on April 9, 2021 and will feature *The Role of TADs and Orthognathic Surgery with Clear Aligner Technique* presented by Dr. **Sandra Tai**.

For more information, please contact the Wisconsin Society of Orthodontists at 920-560-5626; Fax 920-882-3655; or visit our website at

www.wisconsinsocietyoforthodontists.com

Mike Maslowski

Oshkosh, Wisconsin

Graduate School Programs

MAYO CLINIC

Warm greetings from Mayo Clinic and Rochester, Minnesota

Mayo Clinic and the division of orthodontics wish to express our sincere thanks and congratulations to **John E. Volz**, D.D.S., M.P.A. as he completed a tremendous 10-year term as Program Director in June, 2020. His tireless effort in nurturing the program and its residents will never be forgotten by all those who have benefited from his leadership and service. Dr. Volz continues to teach and mentor both myself and the current resident staff, and provide excellent care to the patients of Mayo Clinic.



Dr. John Volz

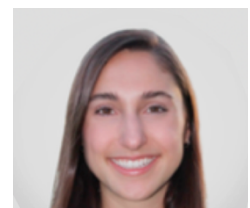
I am also pleased to introduce our resident staff for 2020-21. Their grit and determination throughout the pandemic could not be more appreciated. Through extensive PPE wear, N95's, and in-room air filtration, Drs. **Abby Jewell**, **Michael Tewes**, and **Lauren Wright** have persevered and continued to provide quality patient care. They truly have put the needs of the patient first, and I am proud of their commitment and values.



L to R: Chief Resident Dr. Abby Jewell (PGY3, UM-Kansas City), Dr. Michael Tewes (PGY2, Creighton University), and Dr. Lauren Wright (PGY1, University of Indiana).

Dr. Tewes was recently appointed the position of Chief Resident in Orthodontics by the Mayo Clinic School of Graduate Medical Education, and we look forward to his continued growth and leadership in that role. We congratulate Dr. Jewell for her excellent year as Chief, and wish her all the best as she graduates with her Master of Science degree and pursues opportunities in her hometown of Kansas City. Dr. Wright has proven a vital member of our team in just her first year of residency, and we look forward to a continued return to normalcy in the final two years of her training.

Lastly, we are pleased to welcome Dr. **Elisa Herrman** as Mayo Clinic's 61st resident this July. Dr. Herrman is a native of Michigan and comes



to Mayo Clinic after undergraduate work at the University of Notre Dame and dental training at Oregon Health and Science University.

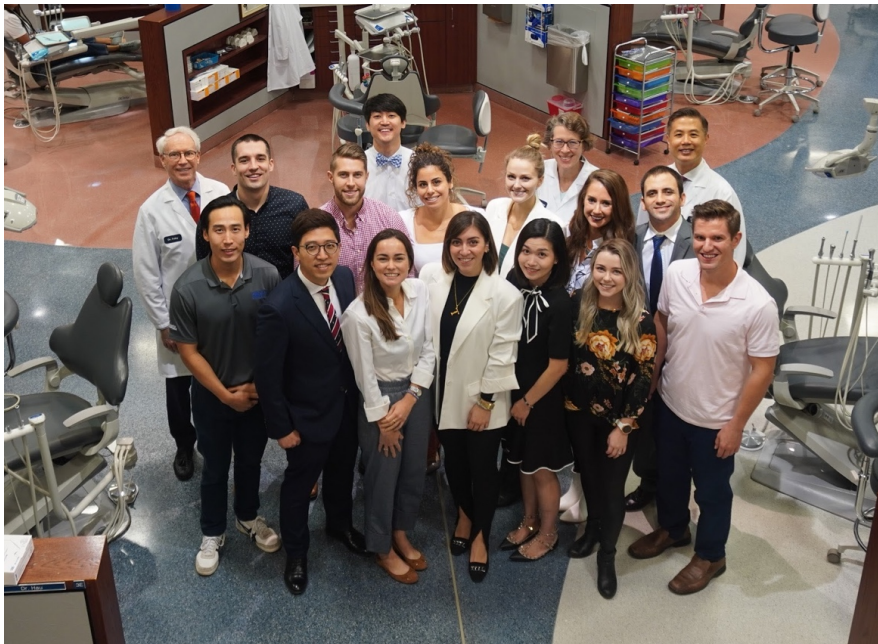
Wishing you all a happy and safe 2021,

Chad M. Rasmussen
Rochester, Minnesota

SAINT LOUIS UNIVERSITY

Fourteen residents graduated in December of 2020. They have scattered across the U.S. and abroad and are expected to serve their patients and specialty admirably. They include:

- **Fernanda Arruda** (University of Sao Paulo, Brazil)
- **Kalynn Foster** (Nova Southeastern University)
- **Jessica Green** (Southern Illinois University)
- **Thomais Ioannou** (Charles University, Czech Republic)
- **Elizabeth Ivey** (University of Louisville)
- **Pimsiri Kanvonkit** (Chulalongkorn University, Thailand)
- **Nickolas Koenig** (Universidad Cientifica del Sur, Peru)
- **Edward Lee** (Texas A&M, Baylor)
- **Sam Lee** (University of Alabama)
- **Kyle Malstrom** (University at Buffalo)
- **Byron Schroeder** (University of Oklahoma)
- **Sivan Shemer** (The Hebrew University, Israel)
- **Hun Shim** (Case Western University)
- **Zachary Smith** (University of Louisville)



Dr. Mitchell R. Levine joins as a full-time faculty member at SLU CADE

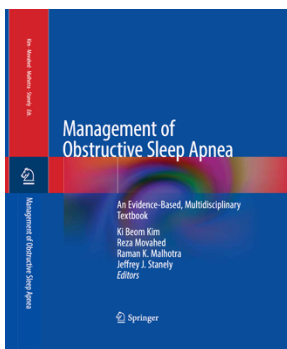


Dr. Levine received his dental training from University of Pittsburgh and finished his orthodontic training at Temple University. He had been in private practice over 30 years in Jacksonville, Florida. He received additional postgraduate training in dental medicine from Tufts University. He worked as an associate professor at the University of Tennessee Health Science Center, College of Dentistry, Orthodontics and Director of Dental Sleep Medicine. He has been serving as the president of the American Academy of Dental Sleep Medicine since May 2020.

Dr. Steve Harrison has retired.

Dr. Steve Harrison (clinical adjunct professor) retired from his position as a clinical instructor at the end of December 2020. He has been teaching at SLU for over 19 years. His expertise of surgical orthodontics was particularly helpful for many residents over the years. He is working at the Missouri Conservation Commission and is going to serve as an associate editor on the new AJO/DO Clinical Companion Journal. We wish him well in his future endeavors.

Management of Obstructive Sleep Apnea: An Evidence-Based, Multidisciplinary Textbook



Dr. Kim and Dr. Movahed have written a new book that provides comprehensive information on the etiology, pathophysiology, medical implications, diagnosis, and surgical and nonsurgical treatment of obstructive sleep apnea (OSA). Divided into five parts, the book begins with principles and fundamentals of OSA and its diagnostic considerations. Subsequent parts then address non-surgical management, surgical management, and maxillomandibular advancement for OSA. Chapters seek to approach this common disorder from the viewpoint of multiple specialists, thereby promoting the development of a broad strategy for the evaluation and management of OSA patients that draws on each of them.

GORP 2021

SLU will host GORP 2021 on July 29 - August 1, 2021 at the St. Louis Union Station Hotel. Attendees at the 32nd Annual Graduate Orthodontic Residents Program (GORP) will enjoy a variety of clinical and scientific lectures, social activities and sightseeing - as well as the opportunity to visit the AAO headquarters.



OERF Annual Meeting

The Orthodontic Education and Research Foundation will hold its next meeting in St. Louis, Missouri, September 24 - 26, 2021. Many fine speakers will enlighten the audience. Please Contact **Jayni Conley** (jayni.oerf@gmail.com) for information on the meeting.

In Memory of Dr. Catherine Holman Thornton

Catherine Holman Thornton, DMD, a beloved resident at Saint Louis University's orthodontic program, sadly passed away on December 31, 2020. Catherine, known as Cat by her friends and co-residents, had a heart of gold, a smile that lit up any room, and a gift for making others instantly love her. Catherine grew up in Tupelo, Mississippi with her loving family. Very early in life, she had a keen interest in dentistry. She went to the University of Mississippi for college and dental school where she began her lifetime goal of becoming an orthodontist. She graduated in May of 2020 with a Doctor of Dental Medicine (DMD) and was accepted into the graduate orthodontic residency at Saint Louis University. She and her husband, Kirk, moved to St. Louis in the summer, and she had just completed her first semester of her 30-month residency right before Christmas.



Catherine's final years of hard work were spent pursuing her dream of joining and expanding her dad, Kevin's, orthodontic practice in Tupelo.

Though Catherine's life was much shorter than any could have imagined, those who knew and loved Cat were blessed to learn valuable life lessons from her on how to live joyfully. Soon after beginning residency, she quickly became her class' self-appointed social chair. She had a knack for bringing everyone around her together. She created wax animals that decorate our Tweed Room and constantly entertained her co-residents with stories. She often taught her classmates what her dad would do in private practice, and she looked forward to working with him one day. Her combination of clinical skills, eagerness to learn, and chairside manner made her an excellent orthodontic resident. In her short time at SLU, her inner beauty was evident to faculty, residents, and patients alike. She will be missed dearly, but her legacy will live on as we treat her patients and all the patients here at SLU.

—by Dr. Mary Linda Remley, SLU Orthodontics Class of 2022

Ki Beom Kim

Saint Louis, Missouri

UNIVERSITY OF ILLINOIS – CHICAGO

Greetings from University of Illinois at Chicago (UIC)! We have exciting developments to share with our colleagues. First of all, I would like to start off thanking our residents, staff, and faculty for showing incredible resilience during the COVID-19 pandemic. Each and every one rose above and beyond of what was expected of them. With support from our College Administration, we made substantial changes in our clinic operations to successfully navigate the pandemic. I am thankful to our program and clinic director Dr. Budi Kusnoto for taking the lead in transforming and adapting our clinic operations to the challenges posed by the pandemic landscape. Several operational changes that we made were developed following multiple rounds of discussions with our residents and staff who played a pivotal role in successfully running our clinical enterprise and making sure that were able to care for our patients in a safe environment. We successfully deployed remote health monitoring using artificial intelligence tools. Every stakeholder was involved in decision-making and a TEAM Science approach was successfully used. I would also like to take this opportunity to thank the AAO, MSO and AAOF who have been extremely pro-active during the pandemic stage and were always willing to provide guidance and were supportive of our program. I have had several conference calls with fellow Chairs and Heads of Departments during the pandemic and they were very willing to share information on their operations and measures they have taken to mitigate COVID-19. I am grateful to every one of them.

In May 2021, an outstanding cohort of residents will graduate from our program continuing the long tradition of excellence in orthodontics. The future of our profession rests in the hands of our residents and I am very confident that our residents will excel and serve as role models in our communities. I am very proud of each and every resident that is graduating soon from orthodontic programs across the country. Below is our Class of 2021. Our new class (Class of 2024) of residents (Evan Booth – University of Michigan; Emelia Marie Karkazis – Marquette University; Mathew Aaron Rhee – UIC; Analia Tahir – Western University; Zachary Tho Skabelund – Ohio State University; Stephen T. Treacy – University of North Carolina at Chapel Hill; Hsuan Rebecca Tsuei – University of California at Los Angeles; and Shirley Zhang – University of Pennsylvania) will be joining us on July 1st! We look forward to warmly welcoming them to Chicago.

Welcoming New Faculty Members

This year, two outstanding faculty members joined our department.

Dr. Maysaa Oubaidin joined UIC Orthodontics in July 2020 as Clinical Assistant Professor. Dr.



Oubaidin grew up in Aleppo, Syria. She earned her DDS degree from University of Aleppo College of Dental Medicine. Upon her graduation from her dental school she received Al-Bassel Award for Outstanding Academic Excellence and First Graduate. Dr. Oubaidin moved to United States right after her graduation to pursue her passion in orthodontics. She received her MS Oral Sciences and Orthodontic specialty certificate from the University of Illinois at Chicago College of Dentistry in 2019. She works on multiple research areas including CBCT, accelerating orthodontic tooth movement, bone biology, and microCT. She directs the ABO Written Exam Preparation course. Dr. Oubaidin has been

supported by the Research Aid Award from the AAOF in 2020.



Dr. Min Kyeong “Irene” Lee has joined UIC Orthodontics as the “Robert and Donna Litowitz Term Chair” earlier this year. Dr. Lee graduated Summa cum laude from Wellesley College in 2006, Cum laude in a special field from the DMD program at the Harvard School of Dental Medicine in 2010, and thereafter obtained a DMSc in Oral Biology and CAGE – residency training in Orthodontics at the Harvard School of Dental Medicine in 2014. Dr. Lee completed the Cleft Palate and Craniofacial Orthodontics Fellowship program at Children’s Hospital of Los Angeles in 2015. While a resident at the Harvard School of Dental Medicine, Dr. Lee was the recipient of the Harvard University Presidential Scholarship from 2010 until 2014. This prestigious scholarship provided full tuition support for her DMSc and Orthodontics residency programs. Dr. Lee is also a

prolific big data analytics researcher with an interest in examining hospital-related outcomes using nationwide datasets such as the Nationwide Inpatient Sample and Nationwide Emergency Department datasets. She has published 41 scientific articles in peer reviewed journals, presented 79 oral/poster presentations at regional/national meetings, and was the recipient of the American Association of Orthodontists Craniofacial Anomalies and Special Care Training Award in 2016.

Department of Orthodontics Scholarships and Awards

We are very thankful to our alumni and friends for their continued support to the UIC Department of Orthodontics. This year, we moved to a fixed compensation model to financially support our residents. Starting July 2020, our first year residents are given a compensation of \$12,000 annually. Second and third year residents receive compensations of \$15,000 and \$18,000 respectively annually. Our alumni and friends supported Endowments that are enabling us to conduct high quality research and support resident scholarships. The Dr. Allan G. Brodie Craniofacial endowment (for which I serve as the Chair) funds clinical and translational research to bring the most advanced 21st century technology, leadership and innovative science to the Brodie Institute and accelerate discovery that brings novel treatments and interventions to patients in Chicago and around the world. Our model of translational research is based on bioinformatics and to use massive repositories of clinical genetic data in order to identify patterns relevant to the delivery of clinical care. This year, we provided three scholarships (Dr. Allan G. Brodie Chair Endowed Scholarships which provides \$6,600 in additional stipend) to residents who write successful proposals to conduct research in the area of Big Data Analytics. With support of our alumni and friends, we have created endowed scholarships (Dr. Jerome and Mrs. Joy Fein Endowed Orthodontic Resident Scholarship which provides \$20,000 in tuition support to a third year resident; Dr. Eugene Blair and Mrs. Pauline Gucker Blair Scholarship which provides \$4,000 in tuition support to a third year resident; and three Department of Orthodontics Scholarships which provide \$2,200 in tuition support to third year orthodontic residents). The recipients of the scholarships are:



Dr. Stephen Degenhardt



Dr. Leslie Cohen



Dr. Katerine Cardona Salazar



Dr. Galina Bulatova



Dr. Insia Virji



Dr. Raj Desai



Dr. Jessica Begley



Dr. Sophie Moon



Dr. Ruidan Ma



Dr. Dmitry Shungin

- **Dr. Stephen Degenhardt** received the Dr. Jerome and Mrs. Joy Fein Endowed Orthodontic Resident Scholarship.
- **Dr. Leslie Cohen** received the Dr. Eugene Blair and Mrs. Pauline Glucker Blair Scholarship.
- **Drs. Galina Bulatova, Insia Virji and Katerine Cardona Salazar** received the Department of Orthodontics Scholarships.
- **Drs. Ruidan Ma, Sophie Moon and Dmitry Shungin** received the Dr. Allan G. Brodie Endowed Chair Research Scholarship award.
- **Dr. Jessica Begley** won the 2020 UIC College of Dentistry/ADA Health Literacy in Dentistry Essay Contest Award in the Post-doctoral student category. Dr. Begley's essay titled "Why Your Dentist Recommends the HPV Vaccine" was written for people with all levels of health literacy. It explains what is HPV, how HPV affect our mouth, whether HPV vaccine is safe, and summarize some common symptoms of HPV cancers in your mouth.
- **Dr. Raj Desai** received the **"Dr. Kalpesh Shah and Dr. Ami K. Shah Scholarship"** for his outstanding inter-disciplinary clinical care.

Grants and External Funding

I am very thankful to the AAOF for supporting faculty and residents to further science and move our profession forward. We were faced with unprecedented circumstances due to COVID-19. My kudos to AAOF for their efforts to adapting to the current healthcare landscape and opening up a pathway for researchers to conduct studies to examine how our profession is dealing with COVID-19 pandemic. UIC Orthodontics obtained three AAOF awards to examine COVID-19 related outcomes this year. We are also in the forefront of research pertaining to use of Artificial Intelligence in Orthodontics clinical care. We obtained two awards from AAOF this year to examine how artificial intelligence can be effectively deployed in clinical care settings. Below is the list of AAOF awardees from UIC this year.

1. **Dr. Phimon Atsawasuwan** (Associate Professor) - Biomedical Research Award of the American Association of Orthodontists Foundation (PI: Atsawasuwan P, Co-investigators: Allareddy V, Viana G, Kadkol S, Ravindran S). Title “Evaluation of positivity rate of COVID-19 in orthodontics practices”. Project Period: 2021 to 2022.
2. **Dr. Flavio Sanchez** (Assistant Professor) - Orthodontic Faculty Development Award of the American Association of Orthodontists Foundation (PI: Sanchez F; Project Mentor: Allareddy V; Co-investigators: Kusnoto B, Elnagar M, Miloro M). Title “Evaluation of Anterior Open Bite Treatment Strategies and Outcomes Using Artificial Intelligence”. Project Period: 2021 to 2022.
3. **Dr. Mohamed Elnagar** (Assistant Professor) - Orthodontic Faculty Development Award of the American Association of Orthodontists Foundation (PI: Elnagar M; Project Mentor: Allareddy V; Co-investigators: Kusnoto B, Atsawasuwan P). Title “Optimizing Orthodontic Appliances Efficiency with Remote Dental Monitoring and Artificial Intelligence Algorithms”. Project Period: 2021 to 2022.
4. **Dr. Karen Homsy** (Second Year Orthodontics Resident) - Research Aid Award of the American Association of Orthodontists Foundation (PI: Homsy K; Project Mentor: Elnagar M; Co-investigators: Allareddy V, Atsawasuwan P, Oubaidin M, Arroyo M). Title “Factors Perceived by Patients and Providers to Influence the Use of Teleorthodontics during the COVID-19 Pandemic and Beyond”. Project Period: 2021 to 2022.
5. **Dr. Pheba Abraham** (First Year Orthodontics Resident) - Research Aid Award of the American Association of Orthodontists Foundation (PI: Abraham P; Project Mentor: Nicholas C; Co-investigator: Allareddy V). Title “A longitudinal investigation of COVID-19's impact on economic security, food insecurity, and access to dental and orthodontic care”.

Project Period: 2021 to 2022.

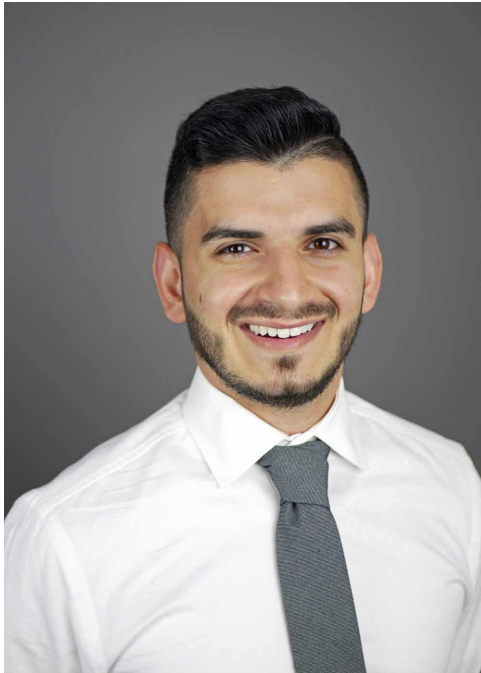


UIC is taking the lead in developing the Specialty and Unique Population (Cleft Lip/Palate) nodes of the National Dental Practice Based Research Network (funded by NIH/NIDCR). I serve as the Director of the Specialty Node of the Network. 15 studies are currently under progress. 6 of these studies are related to COVID-19. I am serving as the Node Director on two COVID-19 studies (National Dental PBRN COVID-19 Research Registry and Pragmatic Return to Effective Dental Infection Control Through Triage and Testing). More information about the Network and the studies that are currently in progress

can be found at <https://www.nationaldentalpbrn.org/recruiting-ongoing-upcoming-completed/>

Involvement with AAOF

Dr. Samim Taraji (Second Year Orthodontics Resident) has been selected to serve on the board of AAOF as the resident director. We are very thankful to AAOF for providing such opportunities for residents.



Dr. Samim Taraji

Publications/Presentations from UIC Orthodontics

We have had a productive year doing high quality research. Since July 2020, our faculty members and residents published 21 articles in peer-reviewed journals. Several of our faculty members and residents will be presenting at the 2021 AAO Annual Session (Boston). Below are the details -

Department Peer Reviewed Publications (July 2020 to March 2021)

1. Talaat S, Kaboudan A, Talaat W, Kusnoto B, Sanchez F, Elnagar MH, Ahmed Ghoneima A, Bourauel C. Improving the accuracy of publicly available search engines in recognizing and classifying dental visual assets using convolutional neural networks. Int J Comput Dent.

2020;23(3):149-160

2. Elnagar MH, Handelman CS, Lippincott JS, Kim MR, BeGole E. Alveolar cortical plate changes associated with incisor retraction and its influence on the limits of orthodontic tooth movement. *Orthod Craniofac Res*. 2021 Jan 21. doi: 10.1111/ocr.12469. Epub ahead of print. PMID: 33475228.
3. Talaat S, Kaboudan A, Elnagar MH, Talaat W, Kusnoto B, Sanchez F, , Ahmed Ghoneima A, Bourauel C. Artificial Intelligence For Detecting, Assessing Malocclusion And Treatment Needs. *Semin Orthod*.
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Presentations from Department of Orthodontics at AAO Meeting in Boston (June 2021)

1. Allareddy V. Use of Artificial Intelligence and Big Data Analytics to Examine Patient Centered Outcomes. Doctor's Scientific Program: Lecture Presentation.
2. Elnagar MH, Kwon Tae-Geon, Shirazi S, Miloro M, Han MD. Orthodontic correction of anterior open bite using skeletal anchorage; Systematic Review and Meta analysis. Oral Research presentation.
3. Allareddy V, Makhija S, Kau CH, Gilbert GH, National Dental PBRN Collaborative Group. Overview of the Cleft Lip and Palate Node of the National Dental Practice-Based Research Network. Oral Research Presentation.
4. Cohen L, Lee MK, Sanchez F, Oubaidin F, Allareddy V. Prevalence and Impact of Obstructive Sleep Apnea in those with Craniosynostosis Undergoing Orthognathic Surgeries. E-poster presentation.
5. Degenhardt S, Lee MK, Oubaidin M, Elnagar M, Allareddy V. Use of Neural Network Model to Predict Obstructive Sleep Apnea in those Undergoing Orthognathic Surgeries. E-poster presentation.
6. Kusnoto B, Ayas M, Sanchez F, Vianna G, Elnagar M. Assessment of HLDI Scoring Methods and Their Effect on Orthodontic Medicaid

- Approval/Denial Rates. E-poster presentation.
7. Cardona Salazar D, Alrayyes S, Caplin J, Nicholas C. Examining the Link between Dental Development, BMI and Diet. E-poster presentation.
 8. Oubaidin M, Elnagar M, Sanchez F, Viana G, Atsawasuwan P. Three-Dimensional Evaluation of Maxilla and Cranial Base from Different Craniofacial Pattern Adults. E-poster presentation.
 9. Seelig M, Kusnoto B, Elnagar MH, Alrayyes S, Viana G, Caplin J. A comparison of Outcomes between Tandem Mechanics and Guided Eruption Therapy. E-poster presentation.
 10. Sanchez F, Bulatova G, Chimill C, Dashan S. A multidisciplinary treatment approach of a severe deep bite associated with generalized amelogenesis imperfecta. E-poster presentation.
 11. Bulatova G, Tsay TP, Kusnoto B, Viana G, Sanchez F. Assessment of automatic cephalometric landmark identification using AI convolutional neural networks. E-poster presentation.
 12. Virji, I., Susarchick L., Viana G., Allareddy V., Lukic H., Megremis S., Atsawasuwan P. Evaluation of translucency change of two retainers materials after staining and destaining. 121th Annual session-American Association of Orthodontists. E-poster presentation.
 13. Susarchick L., Virji I., Viana G., Allareddy V., Lukic H., Megremis S., Atsawasuwan P. Study of destaining ability of cleaning solutions on stained retainer materials. 121th Annual Session- American Association of Orthodontists. E-poster presentation.

I am very thankful to our residents, faculty, staff, alumni, and friends for fostering a culture of excellence at UIC!

Sath Allareddy
Chicago, Illinois

UNIVERSITY OF IOWA

Hello from The University of Iowa! First-year residents, Drs. **Jacqueline Crawford** (VA Commonwealth), **Nile Eckermann** (U of IA), **Jayne Kessel** (U of MI), **Aden Peterson** (U of MN), and **Regine Torres** (Marquette U) neatly completed their first semester, bringing to the department high energy and intelligence, great decision-making skills, and a volume of compassion and good care for patients. Second-year residents, Drs. **Mitchell Hemann**, **Samantha Marti**, **Megan Utter**, **John Welk**, and **Andrew Welling** have been excellent role models and confidants. They are gearing up for their thesis defense and taking the ABO Written Examination in early April. **Megan Utter** and **John Welk** each got married during the fall semester, as well!

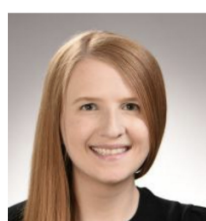
We are happy to announce the incoming Class of 2023! Drs. **Brennan Alford** (VA Commonwealth), **Melissa Morawski** (U of MD), **Emma Mueldener** (U of IA), **Lea Sarment** (U of MI), and **Daniel Taylor** (Creighton U) will be beginning July 2021. We are fortunate to have such an outstanding group to be joining our residency program and anticipate great things to come from them.



**Brennan
Alford**



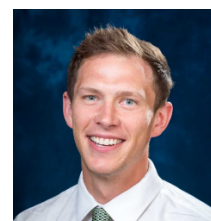
**Melissa
Morawski**



**Emma
Mueldener**



**Lea
Sarment**



**Daniel
Taylor**

It has been a very challenging year, but the UI Department of Orthodontics, residents, faculty, and staff rallied hard and created a safe and positive environment for patients and each other.

Sue Wollrab and Thomas E. Southard
Iowa City, Iowa

UNIVERSITY OF NEBRASKA

I. Postgraduate Student Update:

December 2020 Graduates

Dr. **Alaina Allen** (UNMC) – Private practice in Omaha, Nebraska
Dr. **Kristopher Keller** (Texas A&M) – In practice in Texas
Dr. **Landon Peterson** (UNMC) – Private practice in Lincoln, Nebraska

Graduating in December 2021

Dr. **Ehsan Mostaghni** (Michigan)
Dr. **Anna Schoettger** (UNMC)
Dr. **Ece Agirgol** (Boston U.)

Graduating in December 2022

Dr. **Amanda Busch** (Creighton)
Dr. **Donte Nesbitt** (Iowa)
Dr. **Behnoush Bakhtiari** (Michigan)

- Incoming Class of 2023

We are happy to welcome the following candidates who have been matched with our program:

Dr. **Teresa Bae** (Midwestern)
Dr. **Lyndzie Brace** (UMKC)
Dr. **Nuo 'Stella' Dong** (UCLA)

They will begin their training on July 1, 2021.

II. Scholarly Activities

2020 Orthodontic Resident Master's Theses:

Dr. **Alaina Allen**: *Inflammatory Cytokine Expression of Immune Cells on Exposure to Invisalign Material: An In Vitro Pilot Study*

Dr. **Kristopher Keller**: *Stress Relaxation in Orthodontic Aligner Plastics: An In Vitro Comparison Study*

Dr. **Landon Peterson**: *Outcomes of Unilateral Alveolar Clefts Grafted Using Recombinant Human Morphogenetic Protein-2: A Retrospective Volumetric Analysis Using CBCT*

Publications (Since Jan. 2020):

Premaraj T, Vella R, Chung J, Lin Q, Hunter P, Underwood K, **Premaraj S** and Zhou Y, *Ethnic variation of oral microbiota in children*, Nature Scientific Reports, 2020, 10(1): 14788.

Ishani Afousi P, Premaraj T, and **Premaraj S**, *Effects of Flash-Free Bonding Technique on Plaque Retention and Development of White Spot Lesions: A Randomized Clinical Trial*, Sri Lanka Journal of Orthodontics, 2020; 2(1): 26-35

Soyland R, Ye J, Premaraj T, and **Premaraj S**, *An in vitro comparison of shear bond strength, adhesive remnant cleanup and microleakage of a flash-free and conventional orthodontic adhesive*, Sri Lanka Journal of Orthodontics, 2020; 2(1):38-45

J. Patel, K. Sung, **S. Premaraj** and T. Premaraj, *Root Apex Displacement and Root Resorption (RR) During Orthodontic Treatment*, J Dent Res, 99(Spec Iss A): 3573, 2020

J. Patel, K. Sung, T. Premaraj and **S. Premaraj**, *Volumetric Evaluation of Root Resorption during Orthodontic Treatment with Extractions*, J Dent Res, 99(Spec Iss A): 3573, 2020

M. O'Brien, K. Sung, **S. Premaraj** and T. Premaraj, *Retrospective Cephalometric Study of Upper Airway Dimensions and Skeletal Landmarks*, J Dent Res, 99(Spec Iss A): 3573, 2020

Vishwanath M., Janakiraman N., Steinbacher D.M., Uribe F. (2020). *Orthodontic and surgical management of a patient with severe mandibular deficiency and asymmetry with condylar hypoplasia using 3-dimensional surgical planning in combination with a modified surgery-first approach*. Am J Orthod Dentofacial Orthop. 2020 Sep; 158(3): 426–442.

Sadr, A., **Bakhtiari, B.**, Hayashi, J., Luong, M. N., Chen, Y.-W., Chyz, G. Tagami, J. (2020). *Effects of fiber reinforcement on adaptation and bond strength of a bulk-fill composite in deep preparations*. Dental Materials, 36(4), 527-534.

Invited Presentations and CE Presented:

Vishwanath M. Contemporary Orthodontic Biomechanics: Presented via Zoom to orthodontic faculty and students at the Texas A&M School of Dentistry, Oct. 2020.

Vishwanath M., Marshall J, Skar, B. Collaborating for excellence: An interdisciplinary approach to prevent and manage caries, malocclusion and trauma in children, UNMC, College of Dentistry, Fall 2020 CE, September 18, 2020.

Vishwanath M. Force System of V-bends: Two vs. Three Dimensional Analysis of Tooth Movements, The 47th Annual Moyers Symposium, Pre-symposium, Session 1, Ann Arbor, Michigan, February 28, 2020.

Vishwanath M. Dento-Facial Diagnosis Based on Esthetic Principles, Tri-Valley Dental Society, Fremont, Nebraska, January 20, 2020

Vishwanath M. Orthodontic Diagnosis Based on Esthetic Principles, Nebraska Dental Hygiene Society, Omaha, Nebraska, January 24, 2020

III. Awards and Honors:

Dr. **Meenakshi 'Minnie' Vishwanath** was awarded the Case of the Month in September 2020. She was invited by the American Journal of Orthodontics to publish a video of the paper titled *Orthodontic and surgical management of a patient with severe mandibular deficiency and asymmetry with condylar hypoplasia using 3-dimensional surgical planning in combination with a modified surgery-first approach.*

IV. Orthodontic Program News

- Dr. **Thyagaseely 'Sheela' Premaraj**, an Associate Professor within the UNMC College of Dentistry Orthodontics Program, left UNMC in June 2020 to take the Orthodontics Program Director position at Nova Southeastern University College of Dental Medicine in Fort Lauderdale, FL. Dr. Sheela, who earned her graduate certificate from UNMC in December 2010, served as an Associate Professor at UNMC from July 2017 to June 2020, and as an Assistant Professor from March 2011 through June 2017.

In her time at UNMC, she has secured multiple sources of grant funding, most recently, funding to study the effects of Class II correctors and functional appliances on the periodontal health of lower anterior teeth. She has advised many graduate and undergraduate students on student committees and with thesis projects – and she has authored and published dozens of scholarly articles.

We would like to wish Dr. Sheela continued success. She will be missed here at UNMC.

- Dr. **Meenakshi 'Minnie' Vishwanath** was appointed to the Graduate Faculty at the UNMC College of Dentistry as an Associate Professor in June 2020.
- Drs. **Robert Glenn, Paula Harre, Rebecca Hohl, Joseph Hurd, Robert Schoettger, Kim Stafford and Brian McIntyre** continue to provide excellent clinical instruction for the program on a part-time basis. The contributions by all of these outstanding teachers are what make our program excellent.
- Dr. **Anna Schoettger** is preparing a thesis titled, *The Characterization of Aerosols in the Orthodontic Clinic*.
- Dr. **Ehsan Mostaghni** is preparing a thesis titled, *The Effect of Orthodontic Treatment with Extraction on the Upper Airway Dimensions and Morphology: A Retrospective Study using Cone Beam Computed Tomography*.
- Dr. **Prem Premaraj** was an Examiner, American Board of Orthodontics, Clinical examination, November 2020.
- Dr. **Vishwanath** was married to **Brendon B. Orr** on July 18, 2020.

Sundaralingam Premaraj
Lincoln, Nebraska

AAO and Associated Entities

AMERICAN ASSOCIATION OF ORTHODONTISTS FOUNDATION (AAOF)



AAO Foundation

MSO Board Report

- ❖ *We invite all AAO members to support the foundation by making an annual [donation](#).*
- ❖ *The AAOF has a new expanded mission to support all our recently acquired programs and initiatives in 2021.*
- ❖ *The AAOF Awards Program will announce 2021 winners in mid-March.*
- ❖ *The 2021 Jarabak Award winner is Dr. Laura Iwasaki of PCSO.*
- ❖ *The AAOF will offer the Resident Education Program (formerly Resident Gift) again at the AAO Annual Session in Boston.*

ONE PLACE, MORE OPPORTUNITIES FOR MEMBERS

Along with a new mission, the American Association of Orthodontists Foundation is now offering more opportunities for AAO members to get involved. In 2021, the AAOF welcomed the Donated Orthodontic Services (DOS) program and the Disaster Relief Fund (DRF) to its philanthropic umbrella so members can engage on multiple levels, all in one place.

The new mission, “The AAO Foundation is to advance the orthodontic specialty by supporting quality education and research that leads to excellence in patient care, and by promoting orthodontic charitable giving.”

The AAOF’s passion for education and research, will always be at the forefront of what it does. Expanding the mission statement and gaining two dynamic programs truly gives the Foundation new ways to move the specialty forward. Both programs, DOS and the DRF will bring diversification to the Foundation by adding volunteerism and a way of supporting our supporters, especially during times of natural disaster.

To learn more, please visit:

<http://www.aofoundation.net/charitablegiving>.

2021 AAOF AWARDS PROGRAM

The Planned Awards Review Committee (PARC) met in St. Louis in January of 2021 to review the proposals for grant funding that were received in November. In March, the award winners will be notified. We look forward to telling all AAO members about the exciting research that will be funded by the AAOF in the coming year. In 2020, the Awards Program supported orthodontic research and education through approximately \$750,000 given by the AAOF. Please watch for more details this spring! If you are interested in applying for funding in 2022, the deadline will be in mid-November and the application is being moved online in 2021.

UPDATE ON PROGRAMMING

The AAO Foundation Board of Directors has voted to continue to offer the [Fred A. Garrett Resident Education Program](#) (formerly the Resident Gift Program) at the upcoming AAO Annual Session in Boston. The AAOF believes in education and research and the annual session is a wonderful way for residents to be exposed to some of the best current orthodontic research and education that is available. Thank you to our donors who helped make this program possible. In 2019, the AAO Foundation spent approximately \$330,000 on this program. No paper application or W9 is required for 2021!

AAOF AT THE AAO ANNUAL SESSION IN BOSTON

The AAOF will be very busy at the upcoming Boston meeting!

Sunday, June 27th from 8:50 to 11:25 am we will be presenting a **lecture series** featuring Chris Bentson, John McGill and Ryan Moynihan regarding financial management. These lectures will be worth CE credits. We are looking forward to hearing from these gifted speakers that morning.

On Sunday, June 27th at 7:30 am the AAOF will hold our **Annual Breakfast** where we will be awarding the **Blair Award** to Dr. Lee Graber from MSO. If you can attend this breakfast, please register through the AAO Annual Session meeting site.

The 2021 **Jarabak Award** winner is Dr. Laura Iwasaki from PCSO. Please join us in congratulating her for receiving this honor!

Throughout the meeting, you will find the **AAOF booth** in the Exhibit Hall in case you have any questions or know of a resident who needs to check in for the Resident Education Program.

We look forward to seeing you there!

REMEMBER THE AAO FOUNDATION IN YOUR CHARITABLE GIVING

The AAOF website can now accept online donations! Please consider making an online [donation](#) to the foundation in 2021 by visiting our website. If you are interested in becoming a monthly donor, please consider joining the Century Club. This is for donors who give a minimum of \$100 a month to the AAO Foundation. You can sign up for this option on our [website](#). Also keep the AAO Foundation in mind as you create your estate plans. If you have the AAOF in your will, as a beneficiary on your retirement plan, mentioned in your trust, etc. please notify the AAOF staff office so we can properly steward your donation as a [Keystone Society](#) member.

FOR MORE INFORMATION

If you should have any questions or concerns, please call Jackie Bode, AAOF Senior Vice President, at 314-292-6546 or by email jbode@aaortho.org.

James Klarsch

Town & Country, Missouri

AMERICAN ASSOCIATION OF ORTHODONTISTS POLITICAL ACTION COMMITTEE (AAOPAC)

AAOPAC members met alongside COGA members on February 22, 2021 by virtual format. The AAO then held the Professional Advocacy Conference that evening and the following day, February 23, during which 87 AAO members met with the following Congressmen and women:

- Representative Ann Wagner, Missouri
- Representative Brian Fitzpatrick, Pennsylvania
- Representative Grace Meng, New York
- Representative Yvette Clarke, New York
- Representative Drew Ferguson, DDS, Georgia
- Representative Brian Babin, DDS, Texas
- Representative Jeff Van Drew, DMD, New Jersey
- Representative Mike Simpson, DMD, Idaho
- Representative John Garamendi, California
- Representative Robin Kelly, Illinois

Due to scheduling issues, we were unfortunately unable to meet with our Senate members. Legislators and members agreed this is not the way we hoped to foster new relationships and support existing ones (via Zoom), but the calls went well and our legislative priorities were addressed by all generations involved. Since four of the calls were with members of Congress who are dentists, their concerns matched and aligned with many of our AAO member concerns.

In a review of the AAO's Federal Election Success/Political Giving for 2019-2020, we can see that the AAOPAC's strategic giving successfully aided in the reelection of many of our Representatives and Senators who had supported and sponsored AAO Legislative Priorities. This includes leaders who are advocates for consumer protection issues, student loan reform, small business COVID relief, McCarren-Ferguson insurance industry antitrust changes and many other priorities of AAO orthodontists.

Overall, the AAOPAC raised a total of \$500,519 from its members in the 2019-2020 federal election cycle. The AAOPAC contributed a total of \$508,800 to candidates and committees. A total of 95 candidates backed by the AAOPAC won their election this year, and eight candidates lost their election. Overall, 92 percent of AAOPAC-backed candidates won during the 2019-20 federal election cycle. AAOPAC-backed Democratic Senators won 100 percent of their seats. AAOPAC-backed Democratic House candidates won 89 percent of their races. Of the Republican Senators supported by the AAOPAC, 74 percent won their seats and of the Republican House Representatives there was a 93 percent win.

The AAOPAC contributed \$18,500 to seven leadership PACs and a combined \$75,000 to national party committees in 2019 and 2020 including the National Republican Congressional Committee, the Democratic Congressional Campaign Committee, and the National Republican Senatorial Committee.

The AAO's federal lobbyist team at Cozen O'Connor has assisted diligently in the process of staying alert to legislative issues that affect the AAO and our member's interests. The AAOPAC regularly reviews recommendations from Cozen O'Connor as we consider contributions to candidates whose views are consistent with our AAO goals. The AAOPAC also serves to reinforce the goals of the entire dental profession in general as we support candidates to whom other PACs have already contributed the maximum amount that is allowable by law.

During the COVID-19 shutdowns, many state and federal governmental bodies paused in their passage of regulations and legislation during March, April and May 2020. The AAO during and subsequent to the shutdown worked persistently to make sure that legislators knew before the fact when orthodontic issues would be coming to them from a state and/or federal level.

The AAO continues to foster excellent relationships with many key legislators on Capitol Hill and will be working hard to develop further relationships with our newly elected legislators who hold similar views and support of AAO legislative priorities. Without these relationships with our elected Senators and Representatives, the ability to make a demonstrable influence and difference in governmental happenings is seriously in jeopardy. Please consider supporting your AAOPAC by going to aaoinfo.org/advocacy/aao-pac.

Thank you for allowing me this amazing opportunity to serve the MSO as your AAOPAC Representative.

Deborah Lien
Rochester, Minnesota

AMERICAN BOARD OF ORTHODONTICS (ABO)

ABO Yearly Update:

- **Clinical Exam Update:** The ABO conducted Clinical Examinations in February and November 2020. A total of 706 examinees were certified or recertified between January 1, 2020 and February 1, 2021. A complete listing of names by constituency is located on the [ABO website](#). The ABO currently represents 49 percent of AAO membership.

The February 2020 Clinical Examination was held in St. Louis in the Scenario-based Oral Clinical Examination format. However, in response to safety requirements recommended by the CDC due to COVID-19, an alternative testing option for the Clinical Examination was identified and announced in July 2020. The July 2020 Clinical Examination was cancelled, with examinees having the opportunity to reschedule to a future examination.

Beginning with the November 2020 Clinical Examination and for 2021 Clinical Exams scheduled in February, July and November, the examinations now take place at Scantron testing centers worldwide. Travel to St. Louis will not be required. The examination will continue to be administered in a scenario-based format with the same exam components and testing criteria. The validity of the exam will be maintained with changes only made to accommodate how answers are submitted. Exams will continue to be scored by multiple ABO examiners to ensure accuracy and consistency for each exam section.

To-date, all future examinations are full with wait-lists, with the exception of the November 2021 date, which is currently open. Complete details regarding the Clinical Examination, study materials and how to prepare can be found on the [ABO website](#).

- **Certification Renewal:** Certification renewal is an important component of the board certification process, requiring ongoing proficiency in orthodontics and a commitment to life-long learning. In order to maintain an active board certification status, certification renewal is required every 10 years. Individuals may register for this exam up to two years prior to their expiration date. Please view this [Motion Graphic Video](#) created to outline the certification renewal process. Additional details and requirements for completing this examination are located on the [ABO website](#).

- **Written Examination Update:** The ABO Written Examination was administered to 409 examinees throughout the United States and Canada on June 5 and 6, 2020. The reliability of the exam was 87% with a 99% pass rate.

Due to COVID-19 restrictions, the original April 7, 2020 testing date was rescheduled and the exam format conducted through a live, online-proctored test, administered through Scantron/Examity. This change allowed examinees to complete the exam from their personal computer with strict security measures in place.

Registration for the next Written Examination closed on January 22, 2021. The exam is scheduled on April 6, 2021 at Scantron Testing Centers throughout the United States and Canada. Examination eligibility requirements and exam resources can be found on the [ABO website](#). An important reminder is that once the Written Examination is successfully completed, it never expires and does not need to be retaken.

- **The College:** Due to COVID-19, the College cancelled in-person prep courses for the ABO Scenario-based Clinical Exams. Virtual presentations are being considered with the next in-person prep course being offered during the 2021 AAO Annual Session in Boston, pending COVID-19 restrictions. The ABO and College continue to collaborate to ensure all CODA accredited orthodontic programs in the United States and Canada have at least one assigned volunteer advocate to promote board certification.
- **GORP:** GORP 2020 was cancelled due to COVID-19. Plans are underway for ABO's participation during the 2021 event.
- **WFO:** ABO directors were invited to present at the 9th International Orthodontic Congress 2020 meeting, originally scheduled in Yokohama, Japan, however, the physical meeting was cancelled and held virtually. In response, the ABO directors participated in the virtual meeting and presented information on board certification. Additionally, the ABO directors submitted an article for inclusion in the *Journal of the WFO*, titled *Introduction to the American Board of Orthodontics Scenario-based Clinical Examination*.

Educational Update:

The ABO continues to develop study materials to assist in preparing for the Scenario-based Clinical Examination, which include a study guide, sample cases, and videos. Additionally, the ABO is working closely with examiners and orthodontic program educators requesting their feedback and assistance with the new exam format and item writing process.

ABO advocates continue to be appointed for each orthodontic program as a resource to residents interested in additional information on board certification.

To add value to board certified orthodontists, the ABO is proud to introduce an orthodontic specialty video on the importance of using a specialist. This professionally created video was developed specifically for board certified orthodontists to feature in lobby or patient waiting areas, on websites and social channels and during patient consultations. The ABO continues to offer online educational materials to allow board certified orthodontists to speak in a unified voice to include an Educational Toolkit, Brand Standards Guide, sample website wording, press release, pathway graphic, window clings, and consumer brochure. Board certified orthodontists also have access to a personal, online dashboard, where enhanced software allows for improved functionality on the ABO website to include, an orthodontist locator with the ability to list multiple offices, user-specific dashboard notifications, print complimentary verification letter and track personal CE credit hours.

The ABO's April 2020 Educators Symposium, *The Change is Here – Are You on Board?*, honoring Dr. **Katherine Vig**, was cancelled due to COVID-19. In lieu of the physical meeting in St. Louis, a PowerPoint presentation with important examination information and updates was distributed to Department Chairs and Program Directors of CODA accredited orthodontic programs in the United States and Canada. The ABO will announce plans to reschedule the symposium in the fall of 2021.

Complimentary ABO measuring gauges were distributed to first-year residents at requesting CODA accredited orthodontic programs.

In preparation for the AAO's 2021 Annual Session, the ABO plans to again host an Educator/Advocate Workshop as well as an ABO Open House/Info Session to share updates, answer questions and provide educational information on the Written and Clinical Examinations. In addition, the ABO will have an informational booth located in the Convention Center to provide information on the board certification process.

ABO Award Recognition:

Due to the cancellation of the 2020 AAO Annual Session, the award ceremonies honoring the 2020 recipients could not take place. Therefore, these individuals will be recognized during the 2021 Annual Session in Boston during a newly established ABO Awards Night. No additional award recipients will be identified for 2021.

The following 2020 ABO award recipients who will be recognized in 2021 include:

- Albert H. Ketcham Memorial Award: Dr. **Rolf G. Behrents**
- Dale B. Wade Award of Excellence in Orthodontics: Dr. **Carla Evans**
- Earl E. and Wilma S. Shepard Distinguished Service Award: Dr. **Perry Opin**

O.B. Vaughan Special Recognition Award: Dr. **John Kanyusik**

Please visit the [ABO website](#) for information on all award honorees.

ABO Directors 2020-2021:

The [ABO Directors](#) for the 2020-2021 year are as follows:

Dr. **Valmy Kulbersh**, President, representing the Great Lakes Association of Orthodontists

Dr. **David Sabott**, President-Elect, representing the Rocky Mountain Society of Orthodontists

Dr. **Patrick Foley**, Secretary/Treasurer, representing the Midwestern Society of Orthodontists

Dr. **Timothy Trulove**, Director, representing the Southern Association of Orthodontists

Dr. **Jae H. Park**, Director, representing the Pacific Coast Society of Orthodontists

Dr. **Roberto Hernandez-Orsini**, Director, representing the Middle Atlantic Society of Orthodontists

Dr. **Stephen McCullough**, Director, representing the Southwestern Society of Orthodontists

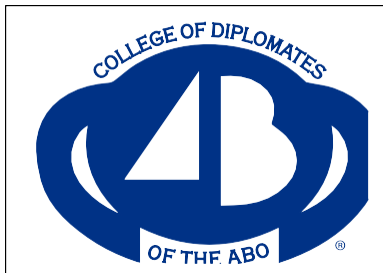
Dr. **Nicholas Barone**, Immediate Past President, representing the Northeastern Society of Orthodontists

The AAO House of Delegates confirmed [Dr. Emile Rossouw](#) as the new ABO Director, representing the Northeastern Society of Orthodontists.

Patrick Foley

St Louis, Missouri

COLLEGE OF DIPLOMATES OF THE AMERICAN BOARD OF ORTHODONTICS (CDABO)



College of Diplomates of the American Board of Orthodontics (CDABO)

Phone: 888-217-2988

Email: association.info@icloud.com

www.cdabo.org

Constituent 2021 Ad Interim Report

Annual Member Business Meeting to be at AAO Annual Session in Boston 2021 Meeting in Savannah Moved from March 2021 to 2024



Since College members will not be able to meet together as initially planned this March in Savannah, the required College Annual Member Business Meeting is currently slated to be held at **2:45 p.m. on Saturday, June 26** in room 104 of the Boston Convention & Exhibition Center at the 2021 AAO Annual Session in Boston. This brief meeting features the College's election, installation and presentation of the 2021 CDABO Case Report of the Year Award to **Drs. Min-Su Kim, Sung-Hoon Lim, Seo-Rin Jeong, and Jae Hyun Park** (case published *AJO-DO* June 2020). The 2021 College Annual Meeting planned for Savannah March 19 – 22 was cancelled due to the

continuing impact of COVID. The College is now scheduled to return to the Westin Savannah Harbor Golf Resort & Spa on March 8 - 11, 2024.

2021 Scheduled Prep Courses for ABO Scenario-based Oral Clinical Exam Go to our website for details and link to register directly with the College:

<http://www.cdabo.org/meetings-education>

June 27, 2021 in conjunction with the 2021 AAO Annual Session in Boston **October 9, 2021** in conjunction with the 2021 SAO Annual Session in Charlotte, NC.

Thank You College Leaders

The 2020 - 2021 College Council is comprised of President **Dr. Robert Vaught of SAO**, President-Elect **Dr. Dan Rejman of RMSO**, Secretary **Dr. Linda Rigali of NESO**, Treasurer **Dr. Ashok Kothari of MSO**, Councilor **Dr. Sandy Bigman of PCSO**, Councilor **Dr. Paul**

Sproul of SAO, Editor **Dr. Howard Fine of NESO**, Parliamentarian **Dr. Perry Opim of NESO** and Historian **Dr. John W. M. Carter of SWSO**. **Dr. Matthew Ng of SWSO** is the Mountain Councilor (SWSO/RMSO) nominee to fill the position when **Dr. Dan Rejman of RMSO** is installed as president June 26 in Boston.



Cheers to Being Together July 2022 in Sonoma 2022
College Annual Meeting attendees will have plenty of reasons to raise their glasses for a toast together at the Fairmont Sonoma Mission Inn & Spa in the heart of California wine country. The program “A Balance in Orthodontic Perspective...” features: Drs. Dwight Damon, Ambrosina Michelotti, Jose Nelson Mucha and Sandra Tai.

Ashok Kothari
Naperville, Illinois

COUNCIL ON COMMUNICATIONS (COC)

Name (*report preparer*): Brecht Mulvihill Date: 2/8/2021

Name of Council/Committee/Task Force: **Council on Communications MEETINGS**

Date: February 5, 2021

Conference Call In-person Location: Conference Call via Zoom Attendance:

Chair: Dellinger

Members: DeLeon (CONYM), Dellinger (Chair), Dunn, Durbin (BOT), Hughes, Jorgensen, Miller, Teng, Vitkus, Wang

Staff: Brothers, Mulvihill, Otero, Schult, Weishaupt

MEETING HIGHLIGHTS

| Topic | Discussion | Action/Follow-up |
|--------------------------------|---|-----------------------|
| Meeting | The bi-annual meeting of the Council on Communications (COC) was held virtually via Zoom on Friday, January 8, 2021. The meeting began at 8:00am Central Standard Time. COC Chair Dr. Aron Dellinger chaired the meeting. | N/A – for information |
| Approval of Agenda and Consent | The agenda and consent agenda were approved as presented. | N/A – for information |

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| <p>Board Liaison Report</p> | <p>COC Board Liaison Dr. Mike Durbin</p> <ul style="list-style-type: none"> • Durbin thanked members of the COC for their service among unprecedented circumstances and to the AAO team for keeping the momentum moving forward. All members of the Council will be returning in FY21-22, with the possible exception of DeLeon (CONYM). • Dr. Durbin communicated upcoming events and discussed actions of the AAO Board of Trustees (BOT) from the December 2020 meeting, including: <ul style="list-style-type: none"> • Upcoming Events: <ul style="list-style-type: none"> • Leadership Development Conference - This year's LDC keynotes are available to all members and posted on the AAO website. The remainder of the conference takes place on Feb and March 25th. • Winter Conference - WC is coming up on Feb. 12-14th, taking place virtually and covering clear aligners. • 2021 House of Delegates – The HOD will occur virtually April 23-25th. • Annual Session - AS has moved to June 25 – 27 and will take place in person and virtually this year. <p>Action from December 2020 BOT:</p> <ul style="list-style-type: none"> • At Large Trustee - The BOT decided to refrain from adding another At Large Trustee. | <p>n/a</p> |
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| | <ul style="list-style-type: none"> • Inclusion & Engagement Task Force - The BOT established a new Inclusion and Engagement Task Force to make sure that we are giving pathways to leadership to all members. • OSO/DSO Task Force – The BOT established the OSO/DSO Task Force to engage and inform resources needed for members in the practice modality. • AAO Facebook Groups - The BOT approved the use of member Facebook groups to connect across member peer groups, developed policies to address usage. CTECH has formed the first of these groups. | |
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| <p>Member Marketing Update</p> | <p>Mulvihill presented current plans and metrics for member marketing items. The AAO is currently experiencing great rates for email opens and clicks.</p> <p>COVID Resource links are showing high traffic for members including items on infection control, vaccine information and availability and items related to COVID relief and financial issues.</p> <p>Changes informed by Membership Sub-Committee including graphics and other eBulletin details have improved performance and helped direct members to find information faster.</p> <p>For this year’s membership renewals, discounted ACH fees and installment payments were offered to members as an incentive to renew. Reach rate of renewal emails continues to rise.</p> <p>New member website was unveiled Feb. 2, 2021. Information should be easier to find with fewer duplication and clicks for members. The idea of the new website to be AAO specific branding and structure of content.</p> <p>Upcoming outreach includes virtual and in-person meeting promotion, a renewed advocacy push, and potential upcoming changes to the strategic plan.</p> | <p>Win-back and resubscribe campaigns take place through the Spring, all other initiatives ongoing.</p> |
| <p>Creative Review</p> | <p>Happy Mouth Now premiered early in FY20-21 to very strong numbers. The Precocious Kid followed with importance of children seeing an ortho at an early age. Marketing publication Adweek recognized Happy Mouth Now for their underlying message and unique delivery.</p> <p>Future direction of creative campaigns was discussed to include focus on children and the benefits of seeing an orthodontist at an early age. As new campaigns are released, it remains important that we find members who want to share it as well. Social media becomes a very important piece of the strategy.</p> <p>The difference between dentists and orthodontists is still a problem in some areas, and the lack of understanding extends to patients as well. People like and trust their dentists, and we don’t want to be seen as being negative in this regard.</p> | <p>Future creative to be determined in line with AAO messaging, increased promotion to members needed.</p> |
| <p>Influencer Campaigns</p> | <p>Three key components to successful campaigns: influencers, messaging, and metrics. The previous campaign featuring a smaller</p> | <p>Messaging and timing on future campaigns TBD.</p> |

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| | <p>group of more high-profile influencers yielded better results. Engagement rate is very high compared to similar projects.</p> <p>What’s next: COC to consider diversifying the influencers including men, specialists, new categories, etc. Health and self-care also are a huge opportunity in this space. Future influencers will be selected based on their ability to create a connection with their followers. Notably, our analysis indicated that moms tend to make these decisions in the household, hence the current direction.</p> | |
| <p>CAP Discussion and Recommendation</p> | <p>Almira Schult presented to the BOT on CAP strategy and stats in December. In FY21, CAP has operated with a smaller budget of \$5 million. Goal for FY21 is to maximize CAP dollars through traffic to website and an organic presence.</p> <p>Our SEO content positions the AAO as the expert or go-to source of information for orthodontic queries.</p> <p>In 2021, CAP ads had a 40% decrease in spend, a 28% decrease in traffic, and a 74% increase in duration. Similarly, clicks to the “Find an ortho” locator have increased 38%, a 125% increase in clicks to doctor’s website, and a 56% increase in form submissions.</p> <p>Three blog items complemented The Precocious Kid campaign for wholistic approach. Comments and engagement on social media furthered this message well.</p> <p>We can still optimize what we’re doing with a five-million-dollar budget.</p> <p>Motion Passed: AAO COC was unanimous in their agreement to recommend a budget of \$5 million for the CAP to the House of Delegates for FY21-22.</p> <p>Dr. Durbin notes that last year, we cut the amount members were paying; however the same budget for 21-22 would mean an increase in the assessment from \$300 to \$600.</p> | <p>CAP Recommendation to be Shared with HOD.</p> |

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| <p>Anti-bullying Campaign</p> | <p>For October of 2020, office participation in anti-bullying month was promoted via eBulletins, the AAO member website, and on social media. Promotion began in July and was heaviest during the month of October.</p> <p>Ideas for 2021 include mailing a toolkit to every office, continued use of the #BullyingBites hash tag, poster for member practices, t shirt ideas from practices, and renewed focus on our partnership with Stand for the Silent.</p> <p>In the past, the suggestion for fundraising has received push back, but members of the COC feel that there needs to be a monetary component that is prepackaged for members.</p> <p>The “ready to roll” campaign is necessary for member participation to increase. It’s likely a staffer who would handle this</p> | <p>Additional brainstorming may be necessary, staff to report back on the ideas offered for a game plan.</p> |
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| | <p>project. A complete packet will allow members to hand the project off at one time.</p> | |
| <p>Four Things Discussion – Committee of the Whole</p> | <p>Mindi Brothers reports that the goal of the “Four Things” is to look at each of these different areas from the perspective of different committees and councils’ focus. Ideas below are the leads we identified in September. If there are other topics for consideration, let’s add to the list and get a working doc together.</p> <ol style="list-style-type: none"> 1. Aligners – Consumer Alert <ol style="list-style-type: none"> a. Simplify the current AAO Consumer Alert to be more consumer friendly. b. Web Content Subcommittee to review and revise content as appropriate. 2. Aligners – Aligner Education <ol style="list-style-type: none"> a. Create clear aligner education material for adult patients. b. Web Content Subcommittee has added to FY 20/21 content calendar. 3. Practice Management – Hiring Agencies/Freelancers: What to Look For 4. Practice Management – Consumer Education <ol style="list-style-type: none"> a. COC to focus on ensuring Market Your Practice stays up to date (patient education materials/videos) and increasing member awareness of these resources. b. Current patient education materials to be reviewed and approach to be discussed. <p>A Committee of the Whole discussion was conducted and staff took notes on suggested topics and ideas for further discussion</p> | <p>Identify new areas for discussion. Edits to be suggested for the AAO Consumer Alert.</p> |

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| Subcommittee Assignments | Web content: Dr. Miller, Dr. Vitkus & Dr. Hughes Creative: Dr. Hughes, Dr. DeLeon & Dr. Teng Membership: Dr. Dellinger, Dr. Teng & Dr. Wang Anti-Bullying/Special Projects: Dr. Jorgensen & Dr. Dunn | Staff to update COC with final engagement metrics via email. |
| Social Media (FB) Group Assignments | OrthoPreneur – Jesse Teng Women in Orthodontics – Courtney Dunn, The Digital Orthodontist – Greg Jorgensen Ortho Cosmos – Jesse Teng Aligner Insider – Herb Hughes Ortho Start-ups – Mary’s List – Jackie Miller Ortho Pearls – Greg Jorgensen | Social influencer campaigns to continue. Staff to provide upcoming campaign updates via email. |
| Council Chair Election | COC nominates Hughes and Dellinger to serve as the next Council Chair, COC members to email Durbin with their selections. | Durbin to tabulate results of the Chair election. |
| 2021 Remaining Meetings | FY21 remaining meeting dates: Friday, March 5: Conference call @ 7am CT via Zoom | Staff to coordinate meeting details and send invitation for virtual meeting. |

Jacqueline Miller
Washington, Missouri

COUNCIL OF EDUCATORS (COE)

Name (*report preparer*): Katherine Pinner

Date: 2/10/2021

Name of Council/Committee/Task Force: Council of Educators (COE)

MEETINGS

Date: 2/10/2021

Conference Call In-person Location: Conference Call Attendance:

Chair: Dr. Glenn Sameshima

Members: Drs. Sercan Akyalcin, Anil Ardeshta, Ki Beom Kim, Thomas Kluemper, Kelton Stewart, Patrick Foley, Edmund Khoo, Lauren Wiese, John Callahan (COE Board Liaison) Staff: Kay Pinner (COE Staff Liaison); Michelle Ritterskamp

Not Present: Wendy Chu

Guest(s):

BOT RECOMMENDATIONS

| Recommendation | Responsible Party | Completion Date | Budget Implication |
|---|-------------------|-----------------|--------------------|
| COE recommends Dr Anil Ardeshta to fill the position on the ADA Standards Committee on Dental Products as requested by the ADA for the term 2021- 2024. | STAFF | 2/28/21 | N/A |

DISCUSSION

| Topic | Discussion | Action/Follow-up |
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| CODA Update | <p>TOPIC COE representative to CODA reported on the January 15, 2021 CODA Ortho Review Committee meeting. • CODA Ortho Review Committee voted to accept and recommend changes in standards. Especially of note were the revisions that called for the program requirement to insure a) a ratio of 4 to 1 resident-to faculty for the entire program (clinical, didactic, administration and research components) and b) a ratio of 8 to 1 resident-to-faculty for clinical coverage. The Program Director shall be a <i>full-time position</i> as defined by the institution.</p> <ul style="list-style-type: none"> • Proposed changes, if accepted, to go into effect in 18 months (July 2022) | Revisit |
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| | <ul style="list-style-type: none"> • COE representative to CODA will report progress on Ortho Section Review Committee reports, surveys, and actions at the COE meeting, April 2021. <p>Update: CODA approved the Orthodontic Review Committee changes in standards during the Open Session of the Board of Commissioners' 2021 Winter Meeting on February 12, 2021. Changes will take effect July 2022 in order to give programs time to implement the new standards.</p> | |
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| ADEA Report | <p>TOPIC Dr. Khoo discussed moving the annual ADEA Ortho awards to earlier in the year.</p> <ul style="list-style-type: none"> • Recommended that the awards be announced after the Virtual ADEA Annual Session in 2021. With award submissions due by May, post submissions due in June and awards announced in October. • COE agree to the recommended change for 2021. • Revisit in October during Dr. Khoo's ADEA report to COE. | Dr. Khoo to proceed with planned date changes. |
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| <p>FFT Fellowship Program continuation</p> | <p>TOPIC Dr. Callahan reported that the FFT Fellowship program continuation motion is on the February BOT agenda. • If passed by the BOT for continued funding for FY2022- 2024 will move to the House for review/approval.</p> <p>PREVIOUSLY SUBMITTED BOT MOTION: That the AAO continue its support of the Full-time Faculty Teaching Fellowship Award Program (Attachment A), at its current level of support, for FY2022-2024 with three, two year funded Fellowships per year and an outcomes assessment to follow.</p> | <p>December motion is already on file for BOT review</p> |
| <p>Match Program Sanctions</p> | <p>TOPIC Dr. Kluemper reported on Program Match Sanctions subcommittee update.</p> <p>Discussion Points</p> <ul style="list-style-type: none"> • Reviewed sanctions document prepared by the BOT Match Program Sanctions Task Force • The BOT Match Program Sanctions Task Force is currently seeking approval from the AAOF in order to partner on suspending funding on programs who are found in violation of NMS Agreements. • Ratification of sanctions is needed to ensure that COE can review program violations as this is an outstanding task from programs reported in 2020 and 2021. • Ratification of sanctions is needed to ensure AAO compliance with the NMS and AAO agreement. | <p>BOT Match Program Sanctions Task Force to oversee</p> |

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| | <p>MOTION: COE ratified the proposed sanctions by the BOT's Program Match Sanctions Task Force. COE's Task Force member to vote in favor of sanctions.</p> | |
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| <p>Match Program Sanctions</p> | <p>TOPIC How to ensure that all programs abide by fair conduct regardless of whether they participate in NMS or not.</p> <p>Discussion Points</p> <ul style="list-style-type: none"> • Specific examples were cited of non-match programs playing outside behaviors that would create fairness and equity for all programs and residents. • Council stressed that sanctions only apply to programs who participate in the match. • Members discussed whether to and how to develop and enforce sanctions for non-match programs. • Council agreed that this is a very complex issue that has implications for the AAO, members, programs, and residents <p>COE moved that the Task Force representative to COE communicate a concern to the BOT Task Force Program Sanctions Chair. Outside of the Match Program Sanctions, they request that the BOT consider the larger issue of creating a “level playing field” between match and non match programs.</p> <p>The BOT is scheduled to review the Task Force proposed Match Program Sanctions at their April meeting.</p> | <p>BOT Match Program Sanctions Task Force to oversee</p> |
| <p>Partners in Research</p> | <p>TOPIC Discussion on process after the roll-out of new PIR review teams in January 2021.</p> <ul style="list-style-type: none"> • Discussion on quality of PIR submissions and what new review teams should be looking for during their review. • Recommended that members use Survey Rubric developed by Dr. Stewart and Dr. Khoo. • COE to review PIR application and implement edits including investigator to (1) write an extract or methodology for their survey including purpose; goals of their survey; and any references to support their proposed survey. • AAO staff to include a list of all PIR survey titles and dates (for at least a 6-month period) for COE reviewers to ensure that similar surveys are not being sent, as well as the new rubric. | <p>PIR Subcommittee to propose revisions to PIR application</p> |
| <p>COE Appointment to SOE</p> | <p>TOPIC During the October COE meeting, the COE Chair asked for a volunteer to serve on SOE leadership committee. • Chair of COE to appoint a member of the Council to serve on SOE no later than the end of February.</p> | <p>COE Chair to appoint member to serve on SOE</p> |

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| | <ul style="list-style-type: none"> • Greater consideration will go to those who are newer to the Council as this will increase continuity and improve outcomes. | |
| Speaker Clearing House | <p>TOPIC Recommendation to COE to set-up a clearing house for Ortho Programs</p> <ul style="list-style-type: none"> • COE to discuss at April meeting. | Revisit |
| 2021 April COE meeting | <p>TOPIC Next meeting to be virtual on April 14 at 6:00 pm CT.</p> | April Council Meeting |
| ADA SCDP Appointment | <p>TOPIC ADA Standards Committee on Dental Products appointment.</p> <p>The ADA requests an appointment to the ADA Standards Committee on Dental Products. The appointment will run from 2021-2024. A member of the Council on Orthodontic Education typically fills this appointment.</p> <p>The ADA Standards Committee on Dental Products meeting will be held June 19-21, just prior to the AADR Meeting. The ADA requests AAO representation at this vitally important meeting for both national and international dental standards development. Updates on whether the meeting will be in person or virtual will be forthcoming.</p> <p>MOTION: COE recommends Dr. Anil Ardeshta to fill the position on the ADA Standards Committee on Dental Products as requested by the ADA for the term 2021-2024.</p> | BOT Motion |

Future Reference or Archive

The council would like to retain these items for future reference or for archive.

Ki Beom Kim and Patrick Foley

St. Louis, Missouri

COUNCIL ON ORTHODONTIC HEALTH CARE (COHC)

Name (*report preparer*): Andrew Wiltsch

Date: 2/17/2021

Name of Council/Committee/Task Force: Council on Orthodontic Healthcare

MEETINGS

Date: 1/9/2021

Conference Call In-person

Location: Teleconference

Attendance:

Chair: Dr. John Metz

Members: Dr. Richa Dutta; Dr. Tasha Hall; Dr. Randall Markarian; Dr. Layne McCord; Dr. Sneha Oberoi; Dr. Marlin Salmon; Dr. Kyle Shannon; Dr. Greg Oppenhuizen, COHC Consultant; Dr. Myron Guymon, Board Liaison

Staff: Andrew
Wiltsch

Not Present: N/A

Guest(s): N/A

BOT RECOMMENDATIONS

| Recommendation | Responsible Party | Completion Date | Budget Implication |
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DISCUSSION

| Topic | Discussion | Action/Follow-up |
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| DBAS | Mr. Wiltch provided a Dental Benefits Advisory Service (DBAS) Helpdesk Update. There were 261 calls in 2020, a slight drop that may be the result of the COVID-19 pandemic and prolonged periods of office closures/operating at reduced capacity. DBAS will continue to track a wider variety of issues in 2021, will begin collecting more specific data including references to particular codes, and will no longer track information related to the identity of callers. | Actions 1. DBAS will continue to track a wider variety of issues in 2021, will begin collecting more specific data including references to particular codes, and will no longer track information related to the identity of callers. |
| COHC CHAIR REPORT | Dr. Metz thanked the Council for volunteering their time for the benefit of the profession. Discussed Council's 2020 accomplishments including the Coding Survey and ADA Change Request Submissions. Looking ahead, changes in Washington, D.C. could open opportunities related to increasing access to Medically Necessary Orthodontic Care. The AAO has requested its Councils focus on the 4 Things Initiative. | None |
| BOARD LIAISON REPORT | Dr. Guymon appraised the Council of the following: <ul style="list-style-type: none"> • Provided an overview of the 4 Things Initiative. | None |

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| | <ul style="list-style-type: none"> • Annual Session was rescheduled for June 25-27, 2021, and will have both in-person and virtual options. • The House of Delegates will meet virtually in April of 2021. • The annual Leadership Development Conference has gone virtual and will take place February 25th and March 25th. • Winter Conference 2021 has gone virtual and takes place February 12-14. | |
| CODING AND MEMBER EDUCATION | <p>NATIONAL ASSOCIATION OF DENTAL PLANS (NADP) MEETING</p> <p>Dr. Oppenhuizen, as the Code Consultant, provided his report with the assistance of Dr. Salmon, who was also in attendance. The 2020 meeting took place virtually in September of 2020 with replays available through December 31. For the second year in a row, the major topics included:</p> <ul style="list-style-type: none"> • Discussion of standalone dental plans dwindling or disappearing in the future. • The increasing use of Artificial Intelligence in adjudicating claims/monitoring fraud. <p>Other topics of interest generating Council discussion included:</p> <ul style="list-style-type: none"> • A growing trend of dentists hiring dental consultants to negotiate their network reimbursement rates • Plans’ strategy for optimizing their network (remove, replace, and recruit providers) • Apps to encourage children’s engagement in their oral hygiene <p><u>Dr. Markarian and Dr. Oppenhuizen will attend the 2021 NADP Converge meeting, details of which are not yet available.</u></p> <p>AMERICAN ASSOCIATION OF DENTAL CONSULTANTS (AADC) MEETING</p> <p>The 2021 AADC Annual Meeting and Spring Workshop has been changed to a virtual event, taking place May 5-7, 2021.</p> <p><u>Dr. Markarian and Dr. Oppenhuizen scheduled to attend.</u></p> | <p>Actions</p> <ol style="list-style-type: none"> 1. Dr. Markarian and Dr. Oppenhuizen will attend the 2021 NADP Converge meeting, details of which are not yet available. 2. Dr. Markarian will attend the upcoming virtual 2021 AADC Meeting, along with Dr. Oppenhuizen. 3. Dr. Dutta will attend the upcoming virtual 2021 ADA CMC Meeting, along with Dr. Oppenhuizen and Mr. Wiltsch. |

ADA CODE MAINTENANCE COMMITTEE (CMC) MEETING

Dr. Oppenhuizen provided his report on the upcoming ADA Code Maintenance Committee meeting and presented an analysis of the 2021 Action Request Inventory. The Council discussed fifteen groups of change requests, including three from AAO:

- Delete Interceptive Orthodontic Treatment subcategory nomenclature, descriptor, and codes D8050 and D8060
- Revise Limited Orthodontic Treatment descriptor
- Delete D8690 “orthodontic treatment (alternative billing to a contract fee)”

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| | <p>The need for code modifiers was discussed. Insurance industry will oppose initial implementation due to cost of updating their processes. The Dental Claim Form would also require modification.</p> <p><u>Dr. Oppenhuizen and Dr. Dutta will attend the virtual 2021 ADA CMC meeting. Dr. Oppenhuizen will represent the AAO, providing the Council's positions regarding the Code Action Requests.</u></p> <p>STANDARDS COMMITTEE ON DENTAL INFORMATICS Report of the AAO's Electronic Health Records Attachments Committee was shared with the Council. Alan Baum, Director of IT and Liaison to CTECH, is the new Staff Liaison.</p> <p>Dr. Markarian reported that a topic of interest to the Council, real time in-office benefit verification, was worked during the last ADA SCDI Meeting.</p> | |
| <p>MEDICALLY NECESSARY ORTHODONTIC CARE (MNOC)</p> | <p>Dr. Shannon shared that his practice has received an increase in requests to provide a narrative explaining patients' medical necessity. Dr. Oppenhuizen reported treating a patient whose claim was paid following submission of a narrative referencing the AAO's definition and autoqualifiers.</p> <p>ANNUAL DEFINITION REVIEW Council discussed the definition and determined there was no need for revisions at this time.</p> | <p>None</p> |

| NEW BUSINESS | MEMBER REQUEST – CBCT REIMBURSEMENT | Actions |
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| | <p>Council discussed an AAO Member’s request to consider issues pertaining to obtaining reimbursement for the use of CBCT scans for the diagnosis and treatment of conditions such as sleep apnea or TMD. Determined there are CDT and CPT codes for the Member’s particular use cases, but reimbursement is the issue.</p> <p>Request prompted discussion on importance of hearing Member Concerns. Current process relies on staff members relaying concerns that happen to be brought to their attention.</p> <p><u>Staff Liaison to explore creating a web form for Members to use to submit future coding and billing concerns to COHC for consideration.</u></p> <p>COHC MEMBER REQUEST – THIRD-PARTY PAYER ISSUE Dr. Salmon reports a recent issue with a third-party payer that requires a monthly visit in order for the patient to receive reimbursement.</p> <p>Council discussed options including utilization of teledentistry to facilitate patients’ appointments and</p> | <p>1. Mr. Wiltsch will discuss with the Marketing Team the creation of a web form for Members to use to submit considerations/requests regarding coding/billing.</p> |

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| | <p>speaking with the local dental association regarding this particular plan (a state program).</p> <p>“4 THINGS” INITIATIVE – AAO BOT REQUEST Mr. Wiltsch provided an update on the AAO’s “4 Things” Initiative. The Board of Trustees has tasked the Association’s Councils and Committees with considering four topics of interest and determining how the AAO can best serve its Members in these areas. The topics include:</p> <ul style="list-style-type: none"> • Clear Aligner Therapy • Financial Management • Practice Management • All Things Digital (Teledentistry, HIPAA, Cybersecurity, etc.) <p>The Council discussed the “4 Things” and determined much of its current work already focuses on these areas. One way the Council will continue addressing these going forward is through soliciting Member feedback on coding/billing issues via its new webform and using that information to propose code changes and create educational materials. The council also plans to continue advocating for better reimbursement for clear aligner therapy and Medically Necessary Orthodontic Care.</p> | |
| <p>FUTURE MEETINGS</p> | <p>SUMMER 2021 The 2021 Summer COHC meeting is currently scheduled to be held in St. Louis on Saturday, June 12, 2020.</p> <p>Dr. Guymon reports that, due to the ongoing pandemic, the Board of Trustees will discuss at its February Meeting the state of in-person meetings currently scheduled to take place at the AAO Headquarters.</p> <p><u>Council will decide whether to offer an in-person option for the Summer 2021 Meeting once the outcome of the Board discussion is determined.</u></p> <p>A separate conversation regarding the date of the meeting took place.</p> <p><u>Staff Liaison will poll the Council on preference for date of the Summer Meeting.</u></p> <p>WINTER 2022 The Council agreed to hold the 2022 winter COHC teleconference on Saturday, January 8, 2022, at 10:00 AM Eastern, 9:00 AM Central, 8:00 AM Mountain and 7:00 AM Pacific.</p> | <p>Actions</p> <p>1. Decision on in-person meetings to be made upon completion of poll and/or receipt of direction from the BOT</p> |

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| Annual Budget <i>(Feb.)</i> |
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| Nomination of Council Chair <i>(Annually, Nov. or Feb)</i> | Name | Constituent |
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Future Reference or Archive

The council would like to retain these items for future reference or for archive:

Click here to enter text.

Randall Markarian

Swansee, Illinois

COUNCIL ON MEMBERSHIP, ETHICS AND JUDICIAL CONCERNS (COMEJC)

Name (*report preparer*): Brandon Hackworth Date: 1/12/21

Name of Council/Committee/Task Force: Council on Membership, Ethics & Judicial Concerns

MEETINGS

Date: 1/8/2021

X Conference Call ___ In-person Location: Conference Call Attendance:

Chair: Dr. Stephen Belli

Members: Drs. Bret Mooso, Luis Toro, Scott Arbit, Jacqueline Bunce, Matthew Ng, Theresa Skelton, Chris Murphy, Daniel Keith (NYM Advisor), Michael Sherman (BOT Liaison)

Staff: Mr. Brandon Hackworth

Not Present:

Guest(s): Mr. Rob Kent

BOT RECOMMENDATIONS

| Recommendation | Responsible Party | Completion Date | Budget Implication |
|---|-------------------|-----------------|--------------------|
| <p>ACH Discount</p> <p>That on a permanent basis, the AAO offers a three percent reduction/discount on AAO dues and assessments for members who pay using the ACH payment method;</p> <p>And be it further,</p> <p>That AAO encourages constituents and components for which the AAO collects dues to provide the same discount for their members.</p> | BOT | February 2021 | TBD |
| <p>International Study Task Force Recommendations</p> <p>That the AAO Board of Trustees approves the recommendations from the International Study Task Force.</p> | BOT | February 2021 | TBD |

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| <p>Implications of Members Serving as DTC Case Reviewers</p> <p>That AAO suggests AAO Insurance Company to create a position statement with recommendations to members who may consult on cases from direct-to-consumer orthodontic companies.</p> | BOT | February 2021 | None |
| <p>Amendment to Principles of Ethics</p> <p>That, per the approval of AAO’s legal counsel, the AAO add a statement to the AAO Principles of Ethics and Code of Professional Conduct stating that members</p> | BOT | February 2021 | None |

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| <p>should physically practice in office locations that are listed on the AAO’s Find an Orthodontist locator.</p> | | | |
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DISCUSSION

| Topic | Discussion | Action/Follow-up |
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| Meeting | The annual meeting of the Council on Membership, Ethics & Judicial Concerns (COMEJC) was held virtually via Zoom on Friday, January 8, 2021. The meeting began at 8:00am Central Standard Time. COMEJC Chair Dr. Stephen Belli chaired the meeting. | N/A – for information |
| Approval of Agenda and Consent | The agenda and consent agenda were approved as presented. | N/A – for information |

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| <p>Board Liaison Report</p> | <p>COMEJC Board Liaison Dr. Michael Sherman provided an overview of the AAO governance structure, including general council responsibilities. Additionally, Dr. Sherman discussed actions of the AAO Board of Trustees (BOT) from the December 2020 meeting, including:</p> <ul style="list-style-type: none"> • Passing a motion to establish financial guidelines on transferring patients (originally recommended by COMEJC) • Establishing an Orthodontic Support Organization (OSO)/Dental Support Organization (DSO) Task Force • Passing a motion to create member Facebook groups • Reviewing AAO leaders who pay less than full AAO member dues (referred to COMEJC) • Passing a motion to move Orthodontic Staff Appreciation Week to a single day (first Wednesday in June) rather than a full week | <p>N/A – for information</p> |
| <p>Update on Member Renewals and Drops</p> | <p>COMEJC Staff Liaison Brandon Hackworth reported on membership renewals through December, which marked the end of the AAO renewal cycle. Renewals finished strong helping achieve goals established for Canadian Active members and new and younger Active members. Active members overall finished slightly behind goal but matched 2019 year-end renewals. International Members were the biggest concern, which finished 4.6% behind goal.</p> <p>Mr. Hackworth also reported on membership drops, which were completed on January 6th for members who had not renewed by that date. Noteworthy figures include:</p> <ul style="list-style-type: none"> • 18% of International Members were dropped, including 43.8% of those within five years of graduation. • 49.9% of International Students were dropped. | <p>N/A – for information</p> |

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| | <ul style="list-style-type: none"> • 2.6% of PCSO (Pacific Coast Society of Orthodontists) members were dropped, which was the lowest percentage of any constituent. • 5.0% of SAO (Southern Association of Orthodontists) members were dropped, which was the highest percentage of any constituent. • 10.2% of Active members within five years of graduation were dropped. • More female members were dropped than males. | |
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| U.S. Market Share Report | Mr. Hackworth gave a report on the AAO's market share of U.S. orthodontists, which is 86.0% as of May 2020. This number will be recalculated at the end of May each year. AAO staff will also be conducting research in early 2021 to identify retired orthodontists who should be removed from the market share calculation. | N/A – for information |
| Member Reinstatement Review | <p>COMEJC reviewed reinstatement data from the current and previous fiscal years, as well as the reinstatement policy that was amended in 2020.</p> <p>In light of the pandemic, Council discussed the possibility of offering a one-time exemption to the reinstatement policy for one year to help more lapsed members rejoin without penalty. Council did not move forward with a recommendation.</p> | N/A – for information |
| Dues Waiver Policy Review | <p>COMEJC reviewed dues waivers granted to members during the current and previous fiscal years, as well as the dues waiver policy that was amended in 2020.</p> <p>In light of the pandemic, Council discussed the possibility of adopting a new waiver condition for job loss to help members maintain their memberships while they are searching for employment. Council did not move forward with a recommendation.</p> | N/A – for information |
| Dues Proration for New Members | <p>COMEJC discussed whether to prorate dues for new members who join the AAO based on the time of the year they join. Council did not move forward with a recommendation.</p> <p>COMEJC also discussed whether to extend the memberships of those who join/rejoin after the Annual Session occurs but before the start of the next fiscal year, through May 31st of the following fiscal year. Council did not move forward with a recommendation but asked staff to track the number of inquiries received after the 2022 Annual Session occurs, but before the start of the 2022-23 fiscal year, to help COMEJC decide whether amending policy would be beneficial in the future.</p> | Staff to track join/rejoin inquiries following the 2022 Annual Session and before the start of the 2022-23 fiscal year. |
| Dues for AAO Leadership | In December 2020, the BOT requested for COMEJC to consider whether AAO leaders who pay less than full dues | COMEJC to submit resolution to HOD |

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| | <p>should be eligible to serve in their leadership positions. This may include dues reductions based on their membership categories or dues waivers for which they may apply. Council believes reduced dues based on membership category should not impact eligibility to serve within leadership. However, Council also believes recipients of the senior limited practice waiver, which carries a 50% dues reduction, should not be eligible to serve in elected positions.</p> <p>COMEJC motion: That AAO Bylaws be amended to state that senior limited practice waiver recipients are not eligible to serve in elected positions within AAO leadership.</p> <p>Motion passed.</p> <p>Council briefly discussed the possibility of creating a dues structure for AAO volunteer leaders, whereby dues may be reduced in exchange for their service. This topic will be considered during a later meeting.</p> | |
| Retired Member Policy | <p>COMEJC discussed retired member eligibility, per AAO Bylaws, which was amended in 2020 to require members to be members in good standing at the time of retirement in order to transition to retired status. The intent of the discussion was to determine whether Life Active members should be exempt from this policy, thereby allowing them to rejoin as retired regardless of whether they were members at the time of retirement. Council believes all members should be treated equally in this regard and should have to reinstate (pay dues) as the same member type as they were when they lapsed before transitioning to retired status.</p> <p>COMEJC motion: that COMEJC not pursue changes to the current AAO retirement policy.</p> <p>Motion passed.</p> | N/A – for information |

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| <p>Non-Orthodontist Faculty Category</p> | <p>COMEJC submitted a resolution in 2020 to adopt a new member category for non-orthodontist faculty. However, the resolution was not voted on by the HOD because of a condensed agenda and virtual nature of the HOD meeting.</p> <p>COMEJC motion: that COMEJC resubmit the non-orthodontist faculty resolutions as written for the 2021 HOD.</p> <p>Motion passed.</p> <p>COMEJC further discussed that the background of the original resolution should be amended to clarify the difference between honorary members and the new non-orthodontist faculty category.</p> | <p>COMEJC to resubmit HOD resolution</p> |
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| <p>Membership Renewal Cycle</p> | <p>COMEJC submitted a resolution in 2020 to change the membership renewal deadline from December 31st to October 31st. However, this resolution was withdrawn by the council in response to the pandemic prior to the HOD vote.</p> <p>COMEJC motion: that COMEJC resubmit the membership renewal deadline resolution as written for the 2021 HOD.</p> <p>Motion passed.</p> <p>In addition to the above resolution, COMEJC discussed a suggestion by PCSO to extend the membership drop date two weeks beyond the renewal deadline so volunteer leaders can conduct grassroots outreach after the deadline has occurred. Council did not move forward with a recommendation.</p> | <p>COMEJC to resubmit HOD resolution</p> |
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| <p>ACH Discount</p> | <p>The AAO offered a three percent discount on 2020-21 AAO dues and assessments for members who paid by ACH (automated clearing house/electronic bank account transfer). COMEJC discussed whether this should be offered beyond the current year.</p> <p>Motion to BOT: That on a permanent basis, the AAO offer a three percent reduction/discount on AAO dues and assessments for members who pay using the ACH payment method;</p> <p>And be it further,</p> <p>That AAO encourages constituents and components for which the AAO collects dues to provide the same discount for their members.</p> <p>Motion passed.</p> | <p>COMEJC to submit BOT motion</p> |
| <p>International Task Force Report</p> | <p>Dr. Matthew Ng, member of COMEJC and the International Study Task Force, reported on work completed by the International Study Task Force over the past year, which included a consulting engagement in fall 2020 and concluded with several recommendations for the AAO to consider. During a conference call in December 2020, the International Study Task Force voted in favor the following recommendations and to submit those recommendations to COMEJC for consideration:</p> <p><u>Tiered dues for developing countries</u> The task force recommended implementation of a tiered dues structure for International Members to accommodate current and prospective members from countries where economic conditions may be a barrier to membership. These countries are based on income classifications from the World Bank and would be separated into three tiers: low/lower middle income (20% of full dues); upper middle</p> | <p>COMEJC to submit BOT motion</p> |

income (35% of full dues); and high income (50% of full dues).

Discounted dues for new International Members The task force recommended implementation of a graduated dues scale for new International Members to mirror the structure available to new Active members (10% > 25% > 50% > 75% > 100%). The intent is to gradually increase dues to make entry more affordable, including for those transitioning from student to full international status. The task force also recommends making this structure available to all new International Members rather than only recent graduates.

Bulk membership dues for international orthodontic societies The task force recommended the AAO to negotiate group dues rates for societies that sign up 100% of their members to be AAO members. Additionally, the task force recommended starting negotiations with the Israeli Orthodontic Society, which purchased bulk registrations for the 2020 virtual Annual Session.

WFO partnership to explore membership opportunities and barriers

The task force recommended the AAO to request assistance from the WFO, through the North American representatives from the WFO Executive Committee, for the purpose of identifying WFO members who may be most likely to join the AAO. This may include conducting a survey among national orthodontic societies to identify membership opportunities and barriers.

Motion to BOT: That the AAO Board of Trustees approves the recommendations from the International Study Task Force.

Motion passed.

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| <p>International Faculty Dues</p> | <p>Following a situation in 2020 in which an International Member at a CODA (Commission on Dental Accreditation) accredited orthodontic program in Saudi Arabia requested a faculty dues discount, COMEJC discussed how to handle dues of members in this situation, as they are potentially eligible for either international membership or foreign-trained academic membership.</p> <p>A motion was presented to allow full-time faculty at international CODA-accredited programs to be eligible for academic faculty dues, but they can only fall under one member category. After further discussion, the motion was withdrawn without a vote.</p> <p>Council advises that members in the above situation should choose one AAO membership category from those which</p> | <p>N/A – for information</p> |
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| | <p>they are eligible in accordance with AAO Bylaws. Moreover, they should pay dues as their chosen member category in accordance with AAO financial policies.</p> | |
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| <p>Canadian Member Research</p> | <p>COMEJC discussed an outstanding resolution referred from the HOD in 2019, which in part directed COMEJC to assess Canadian AAO members' perspective on active versus international membership. A survey among Canadian members was conducted in fall 2020 to explore this issue.</p> <p>Dr. Sherman explained that the AAO enjoys a higher market share among Canadian orthodontists than does the Canadian Association of Orthodontists (CAO). The AAO has approximately 420 Canadian Active members compared to 300 within the CAO. Further, because of the fact that there are more organizations to which Canadians can belong, they are trying to determine which are most valuable and relevant to them.</p> <p>A question was raised whether the AAO should consider revising the dues percentage paid by Canadian members, as it has not changed in many years despite changes with AAO programs and services to Canadians, as well as the currency exchange rate. No recommendation was made.</p> <p>Consensus among the council is that the AAO should continue improving the value provided to Canadians. However, it does not recommend making any changes to their membership status (i.e., making them International Members). This will be reflected in a report to the 2021 HOD.</p> | <p>COMEJC to submit a report to the HOD</p> |
| <p>Lunch Break</p> | <p>The council broke for lunch at 1:45pm reconvened at 2:30pm.</p> | <p>N/A</p> |

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| <p>Four Areas of Focus</p> | <p>COMEJC discussed the “four areas of focus” that were previously identified by the BOT as high priorities for the AAO to support its members this year.</p> <p><u>Clear Aligners</u></p> <p>Council agreed that clear aligners are not as big of an issue as they were a few years ago, as by now orthodontists have decided whether to adopt them or not within their practices.</p> <p>However, there are concerns that general dentists are practicing clear aligner treatment, including some individuals practicing dentistry without a license.</p> <p>Additionally, the point was raised that some AAO members serve as case reviewers for direct-to-consumer orthodontic companies. As such, the council questioned the ethical and/or legal implications for these doctors who approve these cases, which are often based on limited records and without seeing the patients in person.</p> | <p>COMEJC to submit BOT motion regarding request for AAOIC.</p> |
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Motion to BOT: That AAO suggests AAO Insurance Company to create a position statement with recommendations to members who may consult on cases from direct-to-consumer orthodontic companies.

Motion passed.

Based on the statement created, COMEJC suggests for the AAO to create a resource for members similar to the existing consumer resource with “questions to ask when considering direct-to-consumer orthodontic treatment”.

Financial Management

The council discussed how to get the AAO’s Financial Management for Residents content into more programs. No formal recommendation was made, although there was a suggestion to leverage an influential orthodontic program chair/director, such as Dr. Brent Larson, to encourage greater participation by programs.

All Things Digital

COMEJC also discussed whether the AAO needs to advise members on the ethical implications of virtual consults and teledentistry. However, the existing teledentistry parameters were deemed sufficient.

It was stated that there is a double standard between “big business and small business”, meaning AAO members and their practices are held to one standard by not being allowed to practice teledentistry in some states. However, direct-to consumer companies can advertise in those same states and even if their doctors are not licensed to practice in those states.

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| <p>Orthodontic Residency Presentations</p> | <p>Brandon Hackworth reported on the results of AAO presentations delivered at orthodontic residency programs. For the 2020-21 academic year and through December 2020, the AAO has hosted or scheduled 30 Resident Vitals presentations (compared to 47 in 2019-20) and 16 Financial Management for Residents presentations (compared to 30 in 2019-20). This number is expected to grow throughout the spring semester and staff is working on scheduling a Resident Vitals presentation for the spring that any programs and residents can attend.</p> <p>Staff will also continue sharing the list of programs that participate in these programs with COMEJC. Council members were encouraged to review the programs in their constituent regions and discuss at their ad interim meetings to identify opportunities for the AAO to present at the programs that have not participated.</p> | <p>Staff to share list of programs that have and have not hosted AAO presentations.</p> <p>COMEJC to review the list and discuss at ad interim meetings.</p> |
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| <p>OSO/DSO Education in AAO Presentations</p> | <p>COMEJC discussed a directive from the BOT to identify opportunities to incorporate education on dental support organizations (DSOs) and orthodontic support organizations (OSOs) into AAO presentation materials. After a discussion on the purpose of each presentation – Resident Vitals and Financial Management for Residents – COMEJC agreed that incorporating DSO/OSO content into the financial presentation was most appropriate.</p> <p>Brandon Hackworth provided a proposed outline of the revised financial presentation with this information included:</p> <p><u>Part 1: Financial management for individuals</u></p> <ul style="list-style-type: none"> • Personal money management (e.g., career options, income, personal and family expenses, saving and budgeting strategies, debt management) – the career options piece would include DSO/OSO content • Personal insurance needs (e.g., medical, disability, life, automobile, homeowner, excess liability, professional liability) • Retirement planning (e.g., social security, private savings and assets, retirement savings and pensions) • Personal tax strategies • Estate planning <p><u>Part 2: Financial management for orthodontic practices</u></p> <ul style="list-style-type: none"> • Financial decisions for practice ownership (e.g., practice financing, expenses, value, legal entities, advisors, start-up vs. purchase, becoming a DSO/OSO, selling to a DSO/OSO, etc.) • Business finance basics (e.g., overview of financial terms and statements) • Financial analysis and control (e.g., financial planning and reporting, measuring performance, success factors) • Business tax strategies • Financial risk management (e.g., office risks and liabilities, insurances, employee benefits, etc.) <p>COMEJC agreed with the outline in general but will review more thoroughly and provide feedback following the meeting. COMEJC will report to the BOT for its February meeting.</p> | <p>COMEJC to submit report to BOT</p> |
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| Member Loyalty Program | Following expressed interest by COMEJC in exploring a member loyalty program during its 2020 meeting, staff researched capabilities, including vendors and possible implementation through the AAO's association management system (AMS). Brandon Hackworth reported that there is functionality through the new AMS to support this type of | N/A – for information |
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| | program, although more exploration would be needed once the AMS launches in March 2020. However, COMEJC no longer believes a program of this nature is warranted and requested staff not to move forward with additional research. | |
| "Find an Orthodontist" Locator Policy | <p>COMEJC discussed a recent member complaint regarding a competing orthodontist in their area who has a listing on the AAO's Find an Orthodontist Locator but does not practice physically out of that location and only via teledentistry. The purpose of this discussion was to determine whether the AAO should allow such members to appear on the locator.</p> <p>Council agreed this is a concern and should be stated as an ethical violation via the AAO's Principles of Ethics and Code of Professional Conduct. The council also requested the opinion of the AAO Legal Department before any amendments are made out of concern that it could make the AAO liable in states where practicing teledentistry is legal.</p> <p>Motion to BOT: That, per the approval of AAO's legal counsel, the AAO add a statement to the AAO Principles of Ethics and Code of Professional Conduct stating that members should physically practice in office locations that are listed on the AAO's Find an Orthodontist locator.</p> <p>Motion passed.</p> | COMEJC to submit motion to BOT |
| Supplier Membership Category | COMEJC discussed whether the AAO should consider implementing a supplier membership category as a means to enhance engagement with orthodontic suppliers and increase revenue opportunities. Council believes this topic warrants further discussion but would like to invite Libby Dischert, AAO Director of Meetings, to a future conference call to discuss. | For future consideration |

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| Ethics Review | Mr. Rob Kent, AAO Vice President of Advocacy and General Counsel, joined the meeting for discussions regarding the council's ethics review process and Principles of Ethics. No recommendations were made. | N/A – for information |
| 2021-22 Council Budget | COMEJC motion: That the 2021-22 COMEJC budget be approved as proposed. Motion passed. | Staff to submit budget as approved. |
| Council Chair Election | Drs. Stephen Belli and Chris Murphy were nominated for council chair for the 2021-22 council year. COMEJC members were asked to send their votes via email to Dr. Sherman. | Dr. Sherman to report on outcomes of the vote to the February BOT. |
| 2022 COMEJC Meeting | COMEJC will hold its annual meeting on Saturday, January 8, 2022 at AAO headquarters in St. Louis. | N/A – for information |

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| New Business | Dr. Sherman noted that members may not be able to see how many views their listing on the Find an Orthodontist Locator has received. This information was previously available through the member profile page of the AAO member website. Staff was asked to investigate and report back. [UPDATE: Staff confirmed that this issue was previously reported and has since been resolved.] | Staff to investigate and report back. |
| Adjournment | Having no other business, the meeting adjourned at 4:15pm. | N/A – for information |

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| Annual Budget (Feb.) | |
| The 2021-22 COMEJC budget as proposed: Council Meetings \$15,600 Chairman Expense <u>300</u> \$15,900 | |

| Nomination of Council Chair <i>(Annually, Nov. or Feb)</i> | Name | Constituent |
|---|-------------------|-------------|
| February | Dr. Stephen Belli | GLAO |
| | Dr. Chris Murphy | NESO |

Future Reference or Archive

The council would like to retain these items for future reference or for archive:

N/A

Scott Arbit

Mequon, Wisconsin

COUNCIL ON NEW AND YOUNGER MEMBERS (CONYM)

Name (*report preparer*): Lauren Carr

Date: 2/8/2021

Name of Council/Committee/Task Force: Council on New and Younger Members

MEETINGS

Date: 2/6/2021

Conference Call In-person

Location: Online

Attendance:

Chair: Dr. David White

Members: Drs. Mary Lanier Berne, Adam Donnell, Mary Hoffman, Daniel Keith, Brandon Shoukri, Lauren Wiese, Todd Wright, James Gordon, Steven Siegel (BOT Liaison)

Staff: Brandon Hackworth, Lauren Carr

Not Present: Dr. Lisa Kwarteng

Guest(s): [Click here to enter text.](#)

DISCUSSION

| Topic | Discussion | Action/Follow - up |
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| Meeting | The annual meeting of the Council on New and Younger Members (CONYM) was held on Saturday, February 6, 2021 via conference call. | N/A |
| Agenda Approval | The meeting agenda was approved as submitted. | N/A |
| Minutes Approval | The minutes from CONYM's 2020 meeting were approved by consent. | N/A |

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| <p>Board Liaison Report</p> | <p>Dr. Steven Siegel, Board Liaison to CONYM, provided an overview of AAO governance (as it relates to the council) as well as recent AAO activities, which included the following discussion points:</p> <ul style="list-style-type: none"> • A private practice accelerator program will be developed, in conjunction with the Wharton Business School, to provide training, motivation, and support to help participants increase practice profitability • An Inclusion and Engagement task force will be formed to inspire diverse groups within the AAO by developing pathways to leadership and identifying unique needs and issues • The BOT will hold off on selecting a third At-Large Trustee for the 21-22 fiscal year to review the strategic plan, conduct a futurist study, and gather feedback from the Inclusion and Engagement Task Force to identify attributes needed for the next At-Large Trustee • An Orthodontic Service Organization (OSO)/Dental Service Organization (DSO) Task Force will be established to inform AAO on matters important to OSO/DSO ownership and help shape solutions the AAO can provide to address them • Member Facebook groups will be formed, starting with the Committee on Technology, to provide avenues for creating connections and facilitating the communication of ideas across AAO member peer groups | <p>N/A</p> |
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| | <ul style="list-style-type: none"> • The annual House of Delegates meeting will be held online during the third week of April • The Winter Conference will be held online from February 12-14, 2021, focusing on clear aligner treatment • Annual Session will be held in-person in Boston and online from June 25-27, 2021 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|---|--|----------------------------|---------------------------|----------------------------|-----------------------|-------|-----|-----|-----|-------|---------|------|-----|----|-------|---------|------|-----|-----|-------|-------|-----|----|----|-------|---------|------|----|----|-------|-------|------|----|----|-------|-------|------|----|----|-------|--------|------|----|----|-------|--|---------------|------------|------------|--------------|---|
| <p>NYM Trends & Market Share Report</p> | <p>Brandon Hackworth, Membership Director and CONYM staff liaison, presented the AAO’s membership trends for new and younger members (NYMs) as well as U.S. market share data with breakouts by demographics and constituents.</p> <p>Brandon also announced the newly designed AAO member website, including persona pages, which can be found here: https://www2.aaoinfo.org/</p> <p>Brandon also shared the following results for CONYM’s outreach to new and younger members who hadn’t renewed their AAO memberships by November.</p> <table border="1" data-bbox="375 863 1294 1205"> <thead> <tr> <th>CONYM Rep</th> <th>Constituent</th> <th># Started With (10/20/20)</th> <th># Members Renewed (1/6/21)</th> <th>% Renewed (by 1/6/21)</th> </tr> </thead> <tbody> <tr> <td>Berne</td> <td>SAO</td> <td>160</td> <td>102</td> <td>63.8%</td> </tr> <tr> <td>Donnell</td> <td>NESO</td> <td>105</td> <td>79</td> <td>75.2%</td> </tr> <tr> <td>Hoffman</td> <td>PCSO</td> <td>162</td> <td>122</td> <td>75.3%</td> </tr> <tr> <td>Keith</td> <td>MSO</td> <td>60</td> <td>40</td> <td>66.7%</td> </tr> <tr> <td>Shoukri</td> <td>GLAO</td> <td>66</td> <td>44</td> <td>66.7%</td> </tr> <tr> <td>White</td> <td>SWSO</td> <td>79</td> <td>57</td> <td>72.2%</td> </tr> <tr> <td>Wiese</td> <td>MASO</td> <td>68</td> <td>47</td> <td>69.1%</td> </tr> <tr> <td>Wright</td> <td>RMSO</td> <td>33</td> <td>23</td> <td>69.7%</td> </tr> <tr> <td></td> <td>Totals</td> <td>733</td> <td>514</td> <td>70.1%</td> </tr> </tbody> </table> | CONYM Rep | Constituent | # Started With (10/20/20) | # Members Renewed (1/6/21) | % Renewed (by 1/6/21) | Berne | SAO | 160 | 102 | 63.8% | Donnell | NESO | 105 | 79 | 75.2% | Hoffman | PCSO | 162 | 122 | 75.3% | Keith | MSO | 60 | 40 | 66.7% | Shoukri | GLAO | 66 | 44 | 66.7% | White | SWSO | 79 | 57 | 72.2% | Wiese | MASO | 68 | 47 | 69.1% | Wright | RMSO | 33 | 23 | 69.7% | | Totals | 733 | 514 | 70.1% | <p>CONYM to continue non-renewal outreach efforts annually.</p> |
| CONYM Rep | Constituent | # Started With (10/20/20) | # Members Renewed (1/6/21) | % Renewed (by 1/6/21) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Berne | SAO | 160 | 102 | 63.8% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Donnell | NESO | 105 | 79 | 75.2% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Hoffman | PCSO | 162 | 122 | 75.3% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Keith | MSO | 60 | 40 | 66.7% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Shoukri | GLAO | 66 | 44 | 66.7% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| White | SWSO | 79 | 57 | 72.2% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Wiese | MASO | 68 | 47 | 69.1% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Wright | RMSO | 33 | 23 | 69.7% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Totals | 733 | 514 | 70.1% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>Membership Resolutions Impacting NYMs</p> | <p>CONYM member Dr. Daniel Keith provided an overview of membership resolutions from Council on Membership, Ethics & Judicial Concerns (COMEJC) that will impact NYMs:</p> <ol style="list-style-type: none"> 1. Shorten the membership renewal deadline from December 31st to October 31st 2. Offer the 3% ACH discount permanently 3. Implement a graduated dues scale for new International Members (to mirror the one offered for domestic members) | <p>N/A</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>“Four Areas of Focus” Initiatives</p> | <p>CONYM members provided an update on initiatives related to the “four areas of focus” identified by the Board of Trustees: clear aligners, financial management, practice management, and all things digital. CONYM is primarily focusing on the areas of practice and financial management for new and younger members.</p> <p>Initiative #1: Practice Management – Consider a practice owner toolkit to provide comprehensive guidance for running a practice as either a solo practitioner or partner in a group.</p> | <p>Subcommittees to continue working on initiatives.</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

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| | shared his involvement on a joint COOP/CONYM subcommittee to | |
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| | <p>develop an online lecture series for orthodontic office design and business planning. Additional content relative to new practice owners will also be considered.</p> <p>Initiative #2: Practice Management – Develop resources for women preparing for and transitioning back from maternity leave (possibly in collaboration with COOP and Special Committee on Women Orthodontists).</p> <p>Update: CONYM members Drs. Mary Lanier Berne and Mary Hoffman will be collaborating on a subcommittee with Drs. Valerie Martone and Marie Lathrop from the Special Committee on Women Orthodontists to identify content needs.</p> <p>Initiative #3: Financial Management – Focus CONYM presentation at GORP around financial management, possibly as a synopsis of the Financial Management for Residents program.</p> <p>Update: Drs. David White and Mary Hoffman are identifying and preparing content inspired by the book, <i>The White Coat Investor: A Doctor's Guide to Personal Finance and Investing</i>. The presentation will focus on tips around student loan refinancing, initial investment decisions, and saving goals.</p> <p>Other initiatives: Practice and financial management content will also be incorporated into the New Orthodontist and Resident Conference. An update is provided below.</p> | |
| <p>AAO Mentoring Program</p> | <p>AAO staff member Lauren Carr discussed a strategy for the AAO Mentoring Program moving forward, including a new platform (InstaViser) and ideas for grassroots promotion and recruitment.</p> <p>The new platform will feature a more short-term and streamlined approach, allowing mentees to book individual sessions with mentors on a given topic and meet through the platform via one-on-one video or phone conversations.</p> <p>The council will assist in developing conversation topics for participants to choose from and consider a new name for the program, including the elimination of “mentor” and “mentee” labels. Ideas include “AAO Advisor Network” or “AAO Support Network”. The emphasis will be on peer-to-peer mentoring and information sharing.</p> | <p>Staff to implement changes and report back to the council.</p> |

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| New Orthodontist & Resident Conference at AAO Annual Session | <p>The 2021 New Orthodontist and Resident Conference at Annual Session is scheduled on Saturday, June 26, 10:30am-1:00pm in Boston, MA.</p> <ul style="list-style-type: none"> • The event will feature two TED-style presentations given by LeeAnn Peniche and Wesley Lyon (about 20-25 minutes long using a storytelling approach) • The overall theme is clinical and business strategies for new orthodontists with topics covering new patient consultations (LeeAnn Peniche) and managing overhead costs for practice | Staff and planning committee to identify volunteer moderators and continue marketing event. |
| | <p>owners (Wesley Lyon)</p> <ul style="list-style-type: none"> • The event will continue with a roundtable format to encourage direct conversation with subject-matter experts, experienced orthodontists, and members of the Board of Trustees and CONYM (1-2 moderators at each table) • Presenters will stay for the roundtable portion and serve as roundtable hosts to discuss their topics with attendees who have additional questions • Simple lunch options will be provided for attendees <p>All CONYM members planning to attend the 2021 Annual Session are requested to attend and assist with this program. All CONYM members are planning to attend, except Dr. Hoffman.</p> <p>Planning committee members for the 2022 program will be determined during a future conference call.</p> | Committee members to be identified and begin planning following 2021 Annual Session |
| Annual Session Programming for NYMs | The council will be asked to review the 2021 Annual Session program schedule when available and provide input on which lectures are most pertinent to NYMs. These will be marked with a special NYM logo/icon in the on-site program. | Staff to provide program schedule once available and request feedback from the council. |
| New and Younger Member Articles | <p>Lauren Carr reported on published and pending articles for new and younger members. These are distributed via general eBulletins targeted to the new and younger member segment as well as news items on the AAO member homepage.</p> <p>The 2019-20 contribution schedule is as follows:</p> | Staff to send guidelines to article contributors. |

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| | <ul style="list-style-type: none"> • Summer 2019 (August): Dr. Brandon Shoukri • Fall 2019 (November): Dr. Todd Wright • Winter 2020 (February): Dr. Lauren Wiese • Spring 2020 (May): Dr. Mary Lanier Berne | |
| CONYM Brainstorm | <p>The council discussed potential challenges and concerns of NYMs that AAO can address:</p> <ul style="list-style-type: none"> • Increasing class size at Georgia School of Orthodontics – the AAO has representation on CODA to provide input on accreditation standards and ensure they are being met, including a robust visitation process • Some DSOs may be offering less compensation and benefits than previous years – The AAO can potentially offer: <ul style="list-style-type: none"> ○ Advice from an attorney on negotiation strategies ○ Detailed compensation data by area/role/modality ○ An overview of the differences between contract and employee status | <p>CONYM to consider possible article contributions.</p> <p>Staff to explore the possibility of publishing salary and income data collected through the Economics of Orthodontics survey</p> |

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| Representation on Councils & Committees | <p>The following NYM council advisor appointments were identified for 2021-22:</p> <p>COE – Dr. Lauren Wiese COGA – Dr. Mary Hoffman COMEJC – Dr. Mary Lanier Berne COOP – Dr. David White CTECH – Dr. Brandon Shoukri</p> <p>Appointments still need to be identified for COC and COHC.</p> | <p>Staff to reach out to incoming council members regarding open appointments.</p> |
| GORP (Graduate Orthodontic Residents Program) | <p>Dr. Mary Hoffman will tentatively represent CONYM at the 2021 GORP meeting in St. Louis, MO (July 29-August 1).</p> | <p>CONYM representative to participate as planned.</p> |

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| American Student Dental Association (ASDA) Annual Session | The 2021 ASDA Annual Session is cancelled due to the COVID-19 pandemic. A volunteer will need to be identified for the 2022 ASDA Annual Session, though the date and location has not been confirmed. Staff will send information to CONYM once available. | Staff to update CONYM on date/location of ASDA Annual Session and confirm CONYM representative or Resident Champion. |
| ADEA (American Dental Education Association) Virtual Fair | Volunteers will not be needed for the ADEA virtual fair this year, which will focus on international dental graduates interested in advanced standing programs in the United States. Volunteers may be needed in 2022 once more information is available. | Staff to update CONYM on date, time, and focus of future ADEA virtual fairs. |
| Council Chair Election | The following individuals were nominated for council chair for 2021-22: <ul style="list-style-type: none"> • Dr. Brandon Shoukri (GLAO) • Dr. Lauren Wiese (MASO) | TBA |
| Next Meeting | The next meeting will take place at the 2022 Winter conference in Orlando, Florida. The meeting is scheduled for Thursday, January 27, 2022. | N/A |
| Adjournment | Having no other business, the meeting adjourned at 11:50am. | N/A |

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| Annual Budget (Feb.) | |
| Previously approved via email ballot on January 20, 2021, the 2020-21 CONYM budget as proposed: | |
| Council Meeting | \$20,935 |
| Annual Session Stipend – Chair | 300 |
| Annual Session Stipend – Residents | 1,000 |
| | |
| GORP Travel (1 representative) | 1,300 |
| Mentoring Program Software | 15,000 |
| TOTAL \$38,535 | |

| Nomination of Council Chair (Annually, Nov. or Feb) | Name | Constituent |
|--|---------------------|-------------|
| February | Dr. Brandon Shoukri | GLAO |
| February | Dr. Lauren Wiese | MASO |

Future Reference or Archive

The council would like to retain these items for future reference or for archive:

Daniel Keith

Bismarck, North Dakota

COUNCIL ON ORTHODONTIC PRACTICE (COOP)

The Committee on COOP last met on October 31, 2020 in St. Louis. Due to the Covid pandemic it was a combination of in person and virtual attendance. At this meeting COOP was able to review several topics they have been working on. I will hit on some of the highlights of these topics.

- COOP has just completed a review of the CE lectures available to our members. There are over 500 hours of CE on our recorded lecture site. Lectures are divided into clinical, practice management, and staff topics. The ADA CERP requires a three-year review. COOP is now trying to figure out a way to streamline this process before the next ADA deadline for review in 2024.
- COOP has completed a review the ADA Submittal for Specialty. There were four questions that need to be answered in order to submit for recognition as a dental specialty organization to the ADA National Commission on Recognition of Dental Specialties and Certifying Boards.
- COOP has also completed a review of the educational bundles available to its members to determine if we are meeting needs and requests of our members.
- COOP has reviewed the informed consent video in the AAO library along with creating new informed consent articles pertaining to transfer patients, tele-dentistry, and orthognathic surgery issues that may arise in the orthodontic office. These have been submitted to the BOT for review.
- COOP also reviewed and made recommendations for staff appreciation week and improvements to our Annual Session to honor staff members. COOP recommended the creation of three areas of awards for staff; Staff Lifetime Achievement Award, Staff Rising Star Award and an Orthodontic Team Achievement Award. Application criteria and guidelines for the awards were given. The estimated cost of these awards/travel was estimated to be \$3750.00 starting in 2023. This was submitted to the BOT. The BOT decided not to proceed with this recommendation due to past poor attendance/involvement and did not feel added expense could be justified at this time. COOP will start to identify new ways to celebrate orthodontic staff at the Annual Session apart from the awards luncheon. One suggestion has been a Staff Pavilion at the Annual Session.
- COOP has completed their annual review of the AAO strategic plan, council budget and annual session reception. The Governance Committee will be making final decision on Annual Session reception.

- COOP has begun the process of re-working the office design manual on the AAO website. They are currently putting together a committee in conjunction with CONYM to review the current information and make recommendations to improve this resource for our members. Based on the AAO's current webpage resource for Office Design and the ADA's printed Office Design Manual, COOP feels the best use of resources for this topic would be to develop 30-minute Business of Orthodontic webinars with downloadable handouts and guides for members to access when needed. Experts in each topic would be invited to give a 30-minute presentation that could be taped and downloaded by our members. Each presentation would include visual aids as well as handouts for any member viewing their presentation.

COOP's next in person meeting is scheduled for October 2021 in St. Louis, however sub-committees of COOP will still be holding conference calls on specific topics currently being reviewed. If you have any questions please don't hesitate to reach out to me.

Ryan VanLaecken

Watertown, South Dakota

COUNCIL ON SCIENTIFIC AFFAIRS (COSA)

Name (*report preparer*): Jackie Hittner Date: 2/1/2021

Name of Council/Committee/Task Force: COSA

MEETINGS

Date: 1/8/2021

Conference Call In-person Location: Click here to enter text.

Attendance:

Chair: Onur Kadioglu

Members: Michael Duryea; James Mah; Steven Marshall; J. Martin Palomo; Emile Rossouw, Dina Stappert Sanchez; Eser Tufekci; Greg Huang; Kelton Stewart; Rolf Behrents, Trustee Liaison

Staff: Jackie Hittner

Not Present: Click here to enter text.

Guest(s): Sylvia Frazier-Bowers

BOT RECOMMENDATIONS

| Recommendation | Responsible Party | Completion Date | Budget Implication |
|--|-------------------------|---------------------------|--------------------|
| That Drs. Greg Huang and Eugene Roberts be nominated by the AAO for the ADA’s Norton M. Ross Award for Excellence in Clinical Research | COSA and Jackie Hittner | February 2021 BOT meeting | \$0 |
| That the definition of the orthodontics specialty be reconsidered | COSA and Jackie Hittner | February 2021 BOT meeting | \$0 |

DISCUSSION

| Topic | Discussion | Action/Follow-up |
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| <p>PBRN Update</p> | <p>Dr. Frazier-Bowers updated COSA on the activities of the PBRN Committee which is a subcommittee of COSA. She mentioned the following:</p> <ul style="list-style-type: none"> • Network funding of studies • Dr. Huang’s completed study • COVID-19 study proposals • Aligner study proposal and the NDPBRN quick poll on aligners • Reinvestigate AAO having its own PBRN – this was brought up at the December 2020 PBRN Committee meeting <p>Questions from COSA:</p> <ul style="list-style-type: none"> • How do we recruit members to become participants in Network studies? • If PBRN asks for support from AAO, why not ask AAOF? | <p>None</p> |
| <p>Approval of Consent Agenda</p> | <p>No items were moved from the consent agenda. The consent agenda was approved.</p> | <p>None</p> |
| <p>Call for New Business</p> | <p>No new business was raised from council members.</p> | <p>None</p> |
| <p>Review of AAO Strategy Map and Governance</p> | <p>Dr. Behrents reviewed the AAO Strategy Map with the council members.</p> | <p>None</p> |

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| <p>Hellman, Sicher, Graber Awards Selection</p> | <p>30 applications were received for consideration for the Hellman, Sicher, Graber Awards. All entries were scored by each council member. Entries were discussed, and the council agreed on the selection of award recipients.</p> <p>Milo Hellman Research Award Epigenome-wide analysis of DNA methylation in monozygotic twins discordant for orofacial clefts Aline Petrin University of Iowa</p> <p>Harry Sicher Research Award Validity and reliability of HLD treatment need indices currently used in the United States Timothee Cousin University of Washington</p> <p>Thomas M. Graber Awards of Special Merit (next 4 titles)</p> <p>The effects of periodontal distraction on tooth vitality and bone quality/quantity: a split-mouth experimental design Parul Sangwan Texas A&M University</p> <p>The efficacy of fluoride varnish versus a filled resin sealant for preventing white spot lesions among orthodontic patients Lauren Flynn Texas A&M University</p> <p>Gsalpha deficiency in osteocytes alters craniofacial growth and enamel mineralization Khalid A. Alamoud Boston University</p> <p>Effect of osteocyte apoptosis on orthodontic tooth movement, periodontal ligament, and alveolar bone: a pilot study in mice Michele Kaplan Columbia University</p> | <p>Ms. Hittner will follow-up with the award winners.</p> |
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| <p>COSA Programs at the 2021 Annual Session</p> | <p>Discussion occurred regarding COSA programs at the 2021 Annual Session. COSA was made aware of the following:</p> <ul style="list-style-type: none">• Ms. Hittner will not be attending the 2021 Annual Session• COSA programs can be done virtually or in person but not a combination for each program• All 2020 and 2021 participants must be cleared as of the 2021 Annual Session; no hold overs for the 2022 Annual Session• The schedule for the Resident Scholar Award, Oral Research, Hellman, Sicher, Graber lectures and Table Clinics if held in-person | <p>Dr. Kadioglu informed Dr. Roberts that COSA programs at Annual Session will be held virtually on 1.8.2021.</p> <p>Ms. Hittner informed AAO Senior Management that COSA programs at Annual Session will be held virtually on 1.11.2021.</p> |
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Following a thorough discussion on the uncertainty of the pandemic and the related travel restrictions of academic institutions, COSA has decided to do the following:

All programs will be held virtually.

Red dates are tentative as of 1.11.2021

Hellman, Sicher, Graber Lectures

- Award winners from 2020 and 2021 will be asked to record their 15-minute lecture and submit to Ms. Hittner via a shared OneDrive folder.
- Pre-recorded lectures must be in the shared OneDrive folder by **Friday, April 16, 2021**.
- Marketing would need to create a webpage for the Hellman, Sicher, Graber lectures.
- Marketing would need to edit lectures to make sure the lecture is no longer than 15 minutes.
- Lectures would need to be posted on the Hellman, Sicher, Graber webpage.
- Recognition of award winners: article in e Bulletin/Bulletin; award information on Annual Session website; if award winner is attending the 2022 Annual Session recognition at Excellence in Orthodontics Luncheon.
- QUESTION FOR MARKETING: COSA would like the ability of AAO members who listen to the lectures to be able to submit questions to the award winner on the Annual Session webpage. These questions would go to Ms. Hittner. Ms. Hittner would send the questions along with the contact information of the member asking the question to the appropriate presenter. Question option would be available from **date** to June 27, 2021.
- QUESTION FOR MEETINGS: Do we want the lectures to have AAO branding? Do we want them on the Digitell site or the AAO Annual Session webpage?
- SET-UP OF HELLMAN, SICHER, GRABER WEBPAGE:
 - 2020 AWARD WINNERS
 - Hellman Award Winner
 - Lecture title linked to the lecture
 - Name of award winner and photo
 - Bio of award winner
 - Link to form for questions to award winner

Sicher Award Winner

Ms. Hittner contacted the AAO IT Department regarding break out rooms for the Resident Scholar Program on 1.11.2021.

Ms. Hittner will email the AAO Annual Session Planning Committee COSA's plans

Ms. Hittner will work with the Meetings Department, the Marketing Department and the AAO IT Department to administer COSA programs for Annual Session.

Ms. Hittner will contact all participants with details of the how the programs will operate in the virtual environment.

2021 Award Winners

Hellman Award Winner

Lecture title linked to the lecture

Name of award winner and photo

Bio of award winner

Link to form for questions to award winner

Sicher Award Winner

Lecture title linked to lecture

Name of award winner and photo

Bio of award winner

Link to form for questions to award winner

Graber Award Winner (there will be four winners) Lecture title linked to lecture

Name of award winner

Bio of award winner

Link to form for questions to award winner

Resident Scholar Award

- COSA will hold the judging portion of this program. Will need 1 zoom channel with up 6 breakout rooms; AAO IT support.
- Possible date for judging: **Saturday, May 22, 2021** starting at 9:00am Central Time.
- All COSA members will need to be available for judging and possibly other judges will be needed.
- Pre-recorded message from Dr. Rossouw regarding how the program will be run and introduction of judges (use photos of judges for this). This will need to be posted on the AAO Annual Session webpage.
- For 2021 program only awarding 3 Basic Science winners; 3 Clinical winners; possibly 2 other winners from either category.
- Recognition of award winners: article in e Bulletin/Bulletin; award information on website; if award winner is attending the 2022 Annual Session recognition at Excellence in Orthodontics

Luncheon. Oral Research

- Participants will be asked to record their 10-minute presentation and submit to Ms. Hittner via a shared OneDrive folder.
- Pre-recorded lectures must be in the shared OneDrive folder by **Friday April 16 2021**

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| | <ul style="list-style-type: none"> • QUESTION FOR MEETINGS: Do we want the lectures to have AAO branding? Do we want them on the Digitell site or the AAO Annual Session webpage? • SET-UP OF ORAL RESEARCH WEBPAGE: Category of presentation (to be determined by COSA) Presentation title linked to the presentation Bio of presenter <p>Table Clinics</p> <ul style="list-style-type: none"> • Participants will be asked to convert their Table Clinic into an EPoster and to upload their EPoster to the EPoster platform. The deadline to do this is April 2, 2021. • COSA will judge the 22 Table Clinics in their EPoster format sometime in May 2021. • Three winners will be announced for Table Clinic awards. • Award money and plaques will be sent in June 2021. • Winners are announced in the Bulletin. <p>EPosters</p> <ul style="list-style-type: none"> • No change to the EPoster program. • There will be an EPoster lounge in the exhibit hall at the 2021 Annual Session. • EPosters will be available for viewing from date to July 31, 2021. | |
| <p>Annual Session Calendar Needs</p> | <p>COSA will need to determine who will judge the Table Clinic program. All COSA members will need to be available to judge the Resident Scholar Award.</p> | <p>Ms. Hittner will contact COSA members once details are firm regarding the Resident Scholar Award and Table Clinic programs.</p> |

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| <p>4 Things</p> | <p>Ms. Hittner explained the 4 Things project and the possible projects that might work given the topics. Possible projects: • Practice based aligner study – the PBRN Committee is working on a study proposal.</p> <ul style="list-style-type: none"> • Create an Aligner Resource Center – after discussion, COSA does not support creating this resource center given the amount of information already available on aligners. • Update the CBCT Resource Center – given the annual usage of this resource center, COSA recommended to state on the resource center that article citations are no longer being added to the resource center. <p>While discussing the CBCT Resource Center, the Bisphosphonate Resource Center was mentioned. COSA recommended to state on this resource center that article citations are no longer being added to the resource center.</p> | <p>Ms. Hittner will add the notice to the CBCT Resource Center that article citations are no longer being added to the resource center.</p> <p>Ms. Hittner will add the notice to the Bisphosphonate Resource Center that article citations are no longer being added to the resource center.</p> |
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| <p>ADA Norton Ross Award Nominees</p> | <p>Prior to the meeting, Ms. Hittner emailed COSA members asking for possible nominees for the Norton Ross Award. COSA surfaced the names of Drs. Greg Huang and Eugene Roberts.</p> | <p>Ms. Hittner will contact Drs. Huang and Roberts to determine if they would like to be a possible nominee from the AAO for the award.</p> <p>Ms. Hittner will submit a recommendation with COSA’s nominees for the Norton Ross Award.</p> |
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| <p>Committee of the Whole</p> | <p>Dr. Mah questioned the name of the specialty: orthodontics and dentofacial orthopedics. He questioned if we are correct and the rest of the world wrong regarding the name of the specialty. He asked if the name of the specialty should be orthodontics and facial esthetics since this is what orthodontists are concerned about.</p> <p>Dr. Behrents gave a short history of the specialty name. He also told the council that others have questioned the name of the specialty.</p> <p>The council will recommend to the BOT that the definition of the specialty should be reconsidered.</p> | <p>Ms. Hittner will submit a recommendation regarding reconsidering the name of the specialty.</p> |
| <p>Future Meetings</p> | <p>The council's next video meeting is Friday January 7, 2022 at Noon Central Time.</p> | <p>Ms. Hittner will post this information on the AAO calendar.</p> |
| <p>Nomination of Council Chair</p> | <p>Drs. Marshall (MSO) and Palomo (GLAO)</p> | <p>Ms. Hittner will email a ballot to COSA members.</p> |
| <p>Annual Budget</p> | <p>The proposed budget for the 2021-2022 fiscal year was presented. The budget will need to be revised given decisions that were made at the meeting. The council gave Ms. Hittner permission to revise and submit the budget to accounting. Ms. Hittner must email the council the revised budget.</p> | <p>Ms. Hittner will submit the revised budget to the Accounting department.</p> |
| <p>Adjournment</p> | <p>Prior to adjourning the meeting several council members were thanked:</p> <ul style="list-style-type: none"> • Dr. Marshall for taking the lead on the article written by COSA: Marshall S, Duryea M, Huang G, Kadioglu O, Mah J, Palomo JM, Rossouw E, Stappert D, Stewart K, Tufekci E. COVID-19: What do we know? AJODO 2020 Nov; 158(5):e53-e62. • COSA members who are serving on the AAO COVID-19 Task Force (Drs. Huang, Kadioglu, Mah, Stewart, Behrents). • Drs. Kadioglu and Behrents for their leadership as council chair and BOT liaison. | <p>None</p> |

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| | <p>Consent Agenda Items</p> <p>The following items on the consent agenda were approved by COSA at the beginning of the meeting.</p> | |
| <p>Hellman, Sicher, Graber Lectures at Annual Session</p> | <p>The Hellman, Sicher, Graber Award lectures will be presented at the 2021 Annual Session virtually.</p> | <p>Ms. Hittner will send information regarding the lectures to the AAO Marketing Department for promotion purposes.</p> |
| <p>Marketing of Hellman, Sicher, Graber Award Application</p> | <p>ADA and CDA orthodontic program chairs were emailed about the application deadline on June 11, August 3, September 1 and September 21, 2020. Reminders of the application deadline appeared in the AAO e-Bulletin September 10 and September 24, 2020.</p> | <p>None</p> |
| <p>2022 Hellman, Sicher, Graber Application</p> | <p>The 2022 Hellman, Sicher, Graber application will be an online application. The 2022 online application will be available on March 15, 2021. The deadline will be October 1, 2021.</p> | <p>Ms. Hittner will update and post the application online.</p> |
| <p>Oral Research, EPoster, Table Clinic Applications</p> | <p>268 applications were received: 39 Oral Research; 22 Table Clinics; 207 EPosters.</p> <p>Oral Research:</p> <ul style="list-style-type: none"> • 39 Oral Research applications received and judged • 11 accepted • 28 rejected Oral Research accepted for an EPoster <p>EPoster:</p> <ul style="list-style-type: none"> • 207 EPoster applications received and judged • 205 EPosters accepted • 2 EPosters rejected <p>Table Clinics:</p> <ul style="list-style-type: none"> • 22 Table Clinics applications received and judged • 22 Table Clinics accepted • 0 rejected Table Clinic were accepted as an EPoster • 0 rejected Table Clinic were rejected for an EPoster | <p>Ms. Hittner will follow up with all accepted applicants with information about their participation at the 2021 Annual Session.</p> |

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| Marketing of Oral Research, EPoster and Table Clinic Applications | The online application went live on the AAO website August 3, 2020 and was made inactive October 15, 2020. ADA and CDA orthodontic program chairs were emailed about application deadlines on August 20 and October 5, 2020. | None |
| EPoster Viewing Statistics for 2020 EPosters | <p>The 2020 EPoster viewing statistics along with past Annual Session statistics:</p> <p style="text-align: right;"><u>2020 2019 2018</u></p> <p><u>EPoster Viewing</u> <u>Prior to Annual Session 43 0 1</u> <u>During Annual Session 7482 1248 1574</u> End of AS through April (enter information if AS is in <p style="text-align: right;">NA NA NA</p> <u>April)</u> <u>End of AS through May 1388 767 426</u> <u>June 444</u> <u>657 1026</u> <u>July 65 152 207</u></p> <p>An announcement about the 2020 EPosters being available For viewing until July 31, 2020 was published in the AAO e Bulletin dated: June 19, 2020.</p> | None |
| Marketing of Dr. William R. Proffit Resident Scholar Award | The Dr. William R. Proffit Resident Scholar Award online application and Invitation to Participate went live December 1, 2020. An email was sent to all ADA and CDA orthodontic program chairs informing them that the application was available on December 2, 2020 and January 4, 2021. Application deadline is February 1, 2021. | Ms. Hittner will do the necessary follow-up with the applicants for this program. |
| Dr. William R. Proffit Resident Scholar Award Program | Contact Person for the 2021 Dr. William R. Proffit Resident Scholar Award: Dr. Rossouw. | Ms. Hittner will work with Dr. Rossouw regarding the 2021 Resident Scholar Award program. |
| Evidence Based Orthodontic Research (EBOR) Resource Center | 616 articles were requested from the EBOR Resource Center in 2020. | None |

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| Bisphosphonate Resource Center | 69 articles were requested from the Bisphosphonate Resource Center in 2020. | None |
| CBCT Resource Center | 9 articles were requested from the CBCT Resource Center in 2020. | None |

Future Reference or Archive

The council would like to retain these items for future reference or for archive: None

Steven Marshall

Chicago, Illinois