

# TOC for CD-Rom Files

## **ORGANIZATIONAL Programs:**

- ☺ 2007 to 2009 Vertical Calendar
- ☺ Evaluation Control Calendar
- ☺ Handling Adjustments
- ☺ Marketing Programs
- ☺ Missed Appointment Control
- ☺ OBS Recall & Log Control
- ☺ Ph-II Starts Control
- ☺ Pt. Training Programs & Letters
- ☺ Referral Control
- ☺ Run-On Patients Control (3 files)
- ☺ Team Member Evaluation Form
- ☺ Team Member Evaluation System
- ☺ Team Member Benefits & Policies Manual
- ☺ Team Position Organization
- ☺ OSHA Personalized Practice Checklists
- ☺ OSHA Programs Update

## **Reporting System:**

- ☺ Daily AR Posting Summary, Form/Spreadsheets
- ☺ Daily Visit Statistics Form/Spreadsheet
- ☺ Procedures for Super Report STATISTICS
- ☺ TC Monthly Statistics
- ☺ Budget Report
- ☺ Budget Expense Categories
- ☺ Last Year Super Report Data
- ☺ This Year's SUPER Report

## **Financial Control:**

- ☺ Credit Card Financial Agreement
- ☺ Daily Cash & Charge Control System
- ☺ Daily Cash Control Log
- ☺ Fee Schedule Design.xls
- ☺ Invisalign Fee Schedule Design
- ☺ Past Due Control
- ☺ Payment Card
- ☺ Practice Evaluation.xls

## **HIPAA:**

- ☺ All HIPAA forms, Letters & Procedures

## **Scheduling System Design:**

- ☺ Appointment Code Listing
- ☺ Appointment Availability Form
- ☺ Appointment Availability Procedure
- ☺ Composite Appointment Design
- ☺ Rotation Schedule Design
- ☺ Schedule Layout, Designing
- ☺ Schedule Time Calculations
- ☺ Treatment Appointment Procedures

## **Tx Forms & Programs:**

- ☺ DR Raps at Exam & Consult
- ☺ Exam, Consult, Etc., Cards (OUTSIDE)
- ☺ Exam, Pre-Orth, Etc., Cards (INSIDE)
- ☺ Extended Payment Plan FORM
- ☺ Financial Agreement
- ☺ Health History Questionnaire
- ☺ Informed Consent
- ☺ Making Acceptable Financial Arrangements
- ☺ New Pt Call Sheet
- ☺ PCD Post CONSULT Form Letter
- ☺ PCD Post EXAM Form Letter
- ☺ Phone Follow-up Log
- ☺ Patient-Centered Services Manual
- ☺ Selling Orthodontics
- ☺ TC Interview Form
- ☺ Wise-Shopper Comparison

## **Other Forms and Files:**

- ☺ 6-Month Review Questionnaire
- ☺ 6-Month Patient Review Parent & PCD Report
- ☺ Associate Analysis System
- ☺ No-No Food List
- ☺ PCD End of Active Tx Form Letter
- ☺ PCD End of Retention Form Letter
- ☺ PCD Surgical Orthodontics Form Letter
- ☺ Retirement Income Calculator
- ☺ Treatment Request Form