

Emergent Practice Management

Accelerant Program Shared Drive

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If you haven't purchased the shared drive yet, feel free to reach out to Dr. Winters. It's a valuable optional add-on, and many Toolkit videos refer directly to the materials inside.

These files are updated and expanded regularly.

1 – Sign Up for Initial Evaluation

New Patient Onboarding

- New Patient Checklist
- Referral Coordinator Checklist

Intake Call Scripts

- Referral Coordinator Script – Cash Only Practice
- Referral Coordinator Script – Insurance Practice
- Predictive Questions and Easy Explanations

Thank You Letters

- Thank You Card for Non-professional, Patient, or Friend Referral

- Thank You Letter to Doctor – Once Patient Has Scheduled
- Thank You Letter to Doctor – Unable to Schedule

Welcome Letters

- Welcome Letter – Adult
 - Welcome Letter – Adult (Spanish)
 - Welcome Letter – Child
 - Welcome Letter – Child (Spanish)
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2 – Initial Evaluation

Core Templates

- Initial Evaluation Testing Protocol
- Patient Check-Out Slip Template
- Records Release Request Template
- Records Transfer Request Template

Comprehensive Report Templates

- Comprehensive Report – Template for Crystal
- Comprehensive Report – Template for Revolution
- Sample Completed Report

History Forms

- 10-Point Symptom Survey
- Adult History Forms Packet
- Child History Forms Packet
- Child History Forms Packet – Spanish
- Convergence Insufficiency Symptom Survey (For Distribution)

Medical Records Templates

- Crystal PM Template File
 - E&M Record Template
 - History of 10-Point Symptom Survey Template
 - Medical Records Tests in Order Template
 - Refraction Record Template
 - Sensorimotor Record Template
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3 – Visual Perceptual Exam

- Visual Perceptual Test Administration Instructions with Verbal Prompts
 - Visual Perceptual Testing Protocol
 - Visual Perceptual Testing Administration & Scoring Time Recording Template
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4 – Conference

Conference Materials

- Conference Exam Form
- Financial Portion of Conference Script / Common Questions – Cash
- Financial Portion of Conference Script / Common Questions – Insurance
- Letter to Teachers for Accommodations

Financial Agreements

- Financial Agreement Template – Cash
- Financial Agreement Template – Insurance

Recurring Billing Forms

- Recurring Billing Form – Credit/Debit Card
 - Recurring Billing Form – ACH Withdrawal
 - Recurring Billing – Merchant Services Instructions
 - CareCredit vs. Self-Funding Long-Term Financing Comparison
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5 – Vision Therapy

- 3 Strikes and You Are Out Policy
- 4-Visit Tropic/Strab Child Curriculum

- Master VT Schedule – Simple
- Master VT Schedule (with automatic patient count calculation)

Graduation

- Certificate of Graduation
- Graduation Packet

Orientation

- Financial Policy for Orientation – Cash Practice
 - Financial Policy for Orientation – Insurance Practice
 - Orientation Procedure and Outline
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6 – Progress / Follow-Up Evaluations

- 10-Point Symptom Survey for Progress/Follow-Up (Before and After)
- Pre-Progress Report Template

Progress Report Templates

- Progress Evaluation Report Template – Crystal PM
 - Progress Evaluation Report Template – Simple
 - Progress Evaluation Report Template – Easy-to-Understand (Valerie Lam Version)
-

7 – Human Resources (HR)

- Employee Review Master
- Exit Protocol for Employees
- New Employee Hire Checklist
- Sample Policy: Cost of Vision Therapy for Staff & Other Professionals

Employee Discipline

- Memo of Understanding Template

Hiring & Training Protocol

- Hiring and Training the Emergent Way – Outline
- Hiring Questions for Hiring Screening Course
- Interview Questions for Patient Care Coordinator
- Hiring & Training with Emergent – Infographic

Job Postings

- Sample Job Posting – Patient Care Coordinator
- Sample Job Posting – Vision Therapist
- Sample Job Posting – Vision Therapy Administrator

Organizational Charts & Responsibilities

- Organizational Chart Template

- Sample Roles & Responsibilities Outline
 - Sample Organizational Chart
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8 – Marketing

- Hiring a Publicist for Making Newsletters Easy
- Marketing Activities Spreadsheet
- Patient Permission Form for Photo/Video for Marketing Use

Incentive Program

- How to Earn Prizes
- Ticket Values
- Incentive Program Examples

Parent Magazine Ads

- Sample Ads (5)

Personalized Professional Letters

- Letter to Personal Injury Attorneys
- Letter to Optometrists
- Letter to Pediatric OTs/PTs

Sample Brochures

- Sample Brochure for VT Office (2)
- Sample Brochure for Pediatrician Office

Sample Newsletters

- Sample Newsletters (19)

Sample Referral Pads

- Sample Referral Pad

Workshops

- Sample Workshop Fliers
- Sample Workshop Presentation

9 – Miscellaneous

- Conflict Resolution Script
- Example Start-Up Expenses
- Leased Space Sample Drawing
- Purchasing List for New Vision Therapy Clinic
- RightEye Substitute

Scholarship Program

- Scholarship Paper Form

10 – Billing

- Form for Calling Insurance Companies About Vision Therapy
- Letter of Medical Necessity – Example
- New Attendance Policy and Automatic Billing
- Patient's Guide to Filing a Claim