

Table of Contents for the Soar Higher Google Drive					
Folder	Subfolder	Files			
<i>*These files are updated and added to regularly</i>					
1 - Sign up for Initial Eval					
		New Patient Checklist			
		Referral Coordinator Checklist			
	Intake Call Scrip				
		Referral Coordinator Script - Cash Only Practice			
		Referral Coordinator Script - if you take insurance			
		Predictive Questions and Easy Explanations			
	Thank you letters				
		Thank you card for Non-professional, patient, or friend referral			
		Thank you letter for doctor - once patient has scheduled			
		Thank you letter for doctor - unable to schedule			
	Welcome Letters				
		Welcome Letter - Adult			
		Welcome Letter - Adult - Spanish			
		Welcome Letter - Child			
		Welcome Letter - Child - Spanish			
2 - Initial Evaluation					
		Initial evaluation Testing Protocol			
		Patient Check Out Slip Template			
		Records Release Request Template			
		Records Transfer Request Template			
	Comprehensive Report from Initial Evaluation				
		Comprehensive Report - Template for Crystal			
		Comprehensive Report - Template for Revolution			
		Comprehensive Report - 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 designed to distribute			
Medical Records Template				
	Crystal PM Template file			
	E&M Record Template			
	History of 10 point symptom survey template			
	Medial Records Tests in Order Template			
	Refraction Record Template			
	Sensorimotor Record Template			
3 - Visual Perceptual Exam				
	Visual Perceptual Test Administration Instructions with Verbal Prompts			
	Visual Peceptual Testing Protocol			
	Visual Perceptual Testing Administration and Scoring Time Recording Template			
4 - Conference				
	Conference Exam Form			
	Financial Portion of Conference Script/Commonly Asked Questions - Cash			
	Financial Portion of Conference Script/Commonly Asked Questions - Insurance			
	Letter to Teachers for Accommodations			
Financial Agreements				
	Financial Agreement Template - Cash			
	Financial Agreement Template - Insurance			
Recurring Billing Forms				
	Recurrent Billing Form - Credit/Debit Card			
	Recurrent Billing Form - ACH Withdrawal			
	Recurrent Billing Merchant Services			
	Care Credit vs Self Funding Long Term Financing			
5 - Vision Therapy				

		3 strikes and you are out policy			
		4 Visit Tropic/Strab child curriculum			
		Master VT schedule Simple			
		Master VT schedule that calculates number of patients			
Graduation					
		Certificate of Graduation			
		Graduation Packet			
Orientation					
		Financial policy to be done at orientation - cash			
		Financial policy to be done at orientation - insurance			
		Orientation Procedure and Outline			
6 - Progress/Follow Up Evaluations					
		10 Point Symptom Survey for Progress/Follow Ups - 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 used by Valerie Lam			
7 - HR					
		Employee Review Master			
		Exit Protocol for Employees			
		New Employee Hire Checklist			
		Sample Policy on cost of Vision Therapy for Staff and Other Professionals			
Employee Discipline					
		Memo of Understanding Template			
Hiring and Training Protocol					
		Hiring and Training the Emergent Way Outline			
		Hiring Questions for Hiring Screening Course			
		Interview Questions for Patient Care Coordinator			
		Hiring and Training with Emergent Infographic			
Job Postings					

		Sample Patient Care Coordinator Job Posting		
		Sample Vision Therapist Job Posting		
		Sample Vision Therapy Administrator Job Posting		
	Organizational Charts/Roles and Responsibilities			
		Org Chart Template		
		Sample Roles and Responsibilities Outline		
		Sample Organizational Chart		
8 - Marketing				
		Hiring a Publicist for Making Newsletters Easy		
		Marketing Activities Spreadsheet		
		Patient Permission Form for Photo/Video for Marketing Purposes		
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 to give to Pediatrician Office		
Sample Newsletters				
		Sample Newsletters (19)		
Sample Referral Pads				
		Sample Referral Pad		
Workshops				
		Sample Workshop Fliers		
		Sample Presentation for Workshops		

9 - Miscellaneous						
		Conflict Resolution Script				
		Example Start Up Expenses				
		Leased Space Sample Drawing				
		Purchasing List for New VT 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				