

### CASH FLOW-OUTFLOW

- Budget
- Supplies
- Inventory Control
- ACT Profit Reward System

### INFLOW

- Written Financial Agreements
- Collections
- Insurance Processing

### RESERVES

- Freedom Account

### PRACTICE MANAGEMENT

- Doctor Production Goals
- Hygiene Production Goals
- Fee Setting
- Patient ID (A, B, C)
- Scheduling
- Patient Cancellations
- Commitment to Appointment
- Comfort Care Appointment
- Statistical Tracking
- P.I.T. Stop
- Developing New Systems

### MARKETING

- Development of Referral Sources
- Internal Marketing
- External Marketing
- Do's / Don't of Office Technology

### QUALITY CONTROL OF PATIENT EXPERIENCE

- Morning Huddle
- Phone Control and Customer Service
- New Patient Process / Pt. Interview COE
- Exam Forms / Charting / Records
- Treatment Planning
- Case Presentation
- Comprehensive Exams for Pts of Record
- Recare System
- Re-Appointment System
- Hygiene Philosophy (Mix of Services etc.)
- Reactivation & Purging System
- Perio Protocols

### NOTES

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