

Financial Coordinator Training and Manual Content

This Financial Coordinator Manual and Training videos are designed for your Financial Coordinator to have the full suite of documents, letter templates, scripting and training videos at your fingertips.

You will be able to use the materials to work on the training based on the schedule that *Shimmin Consulting* and your consultant develop together. This material will also be useful for training a new Financial Coordinator to receive the same proven results that the *Shimmin Consulting* team has been providing clients for years.

Documents Included:

Job Description
Segregation of Responsibilities
Status Instruction
End of Month Executive Summary
End of Year Summary Worksheet
Financial Coordinator Reports to Run
Financial Instructions
Recurring Credit Card Authorization Agreement
Transfer Ortho Fee Adjustment
Financial Agreement for Orthodontic Treatment –
Contract Sample

Scripting Included:

Delinquent Accounts – Asking for Payment
Front Office – Early Finish of Treatment
Delinquent Accounts

Letter Templates Included:

Financial Letters (7 Letter process for collecting
Delinquent Accounts)
Writing off Insurance Balances
HIPPA
TIL Disclosure

Videos Included:

Financial Coordinator Manual Training