



AMERICAN ACADEMY  
OF OPHTHALMOLOGY®

American Academy of Ophthalmic Executives®

## Practice Management Consultant Listing Application

### Consultant benefits:

- Your company listing in the online Consultant Directory on the Academy's website ([aao.org/consultant](http://aao.org/consultant)).
- Free registration to our annual meeting, **AAO 2019**, which will be held in San Francisco from October 11 to 15. We expect 13,000 ophthalmologists and 2,000 health professionals to attend. It's the largest convention of ophthalmic professionals in the country.
- Eligible to participate in the popular **Conversations with the Experts** during the annual meeting. Conversations with the Experts are free 20-minute one-on-one consultations with Academy and AAOE members held in the Academy Resource Center.

### Other benefits include:

- Priority housing for **AAO 2019** in San Francisco
- Discount on products from the Academy Store
- Subscription to weekly e-newsletters *Practice Management Express*, *Academy Express* and *Washington Report Express*
- Subscription to *EyeNet® Magazine* (12 issues per year)
- Access to E-Talk listserv

(Please note: Benefits are offered only to the principal contact listed in the Consultant Directory.)

Join today by returning the enclosed forms and your remittance of \$599. For further information, please contact Janine Barth at 415.447.0335 or [jbarth@aao.org](mailto:jbarth@aao.org).

#### Notice of Terms and Conditions for Consultants in the Directory

Consultants agree to the following:

- That they will abide by all relevant Academy and AAOE policies including the **listserv guidelines**.
- That they will promptly notify the Academy and AAOE of any dispute with a member over services provided or litigation arising from their work for a member. Notification can be sent to [aaoe@aao.org](mailto:aaoe@aao.org).
- That participation in the directory is at the sole discretion of the Academy and can be revoked at any time with or without cause. The sole remedy for removal from the Directory is a pro rata refund of the fee. Upon removal from the Directory, all other benefits will cease as well.
- Consultants should have at least three years of providing services to ophthalmic practices.
- The consultant directory is meant as a resource of people or businesses that provide project based or consulting services to ophthalmic practices. It is not intended as a marketing platform to sell products.



AMERICAN ACADEMY  
OF OPHTHALMOLOGY®

American Academy of Ophthalmic Executives®

## General Consultant Listing Information

Name of firm \_\_\_\_\_

Principal contact \_\_\_\_\_ Title \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_

Additional listings per firm/name(s) and title(s) \_\_\_\_\_

Check below if you would like to be linked from the Academy website **aao.org**

Email address \_\_\_\_\_ Link my email address Yes ☐ No ☐

Website address \_\_\_\_\_ Link my website address Yes ☐ No ☐

Year business established \_\_\_\_\_

Initial consultation rate \$ \_\_\_\_\_

Daily rate \$ \_\_\_\_\_

Hourly rate \$ \_\_\_\_\_

AAOE's **Consultant Directory** indicates those consultants who are willing to offer a discount to AAO & AAOE members.

Enter the percentage discount that you would like to offer? \_\_\_\_\_ %

List states in which your firm can provide services: (Check all or list below) All ☐

List the professional organizations to which you belong that relate to your areas of expertise:

Description of your services in 90 words or less: (Attach an additional page if needed)



## Key Competencies Profile

Check the topics of expertise to be listed in your listing. Please add any additional topics you would like included in the "Other" box. The additional topics will be reviewed and may be included in the key competencies profile.

<b>ASC</b>	<input type="checkbox"/> Ambulatory Surgery Centers <input type="checkbox"/> ASC Accreditation, Licensure and Medicare certification	<input type="checkbox"/> ASC Corporate Partnering Programs <input type="checkbox"/> Laser Vision Correction Centers
<b>BUSINESS DEVELOPMENT</b>	<input type="checkbox"/> Accountable Care Organizations (ACO) Development <input type="checkbox"/> Business Development <input type="checkbox"/> Good Clinical Practice Training	<input type="checkbox"/> New Business Management <input type="checkbox"/> Planning Retreats <input type="checkbox"/> Productivity Analysis <input type="checkbox"/> Research Center Development
<b>BUSINESS OPERATIONS</b>	<input type="checkbox"/> Aesthetic Medicine Practice Development and Management <input type="checkbox"/> Business and Strategic Planning <input type="checkbox"/> Business Efficiency <input type="checkbox"/> Facility Design <input type="checkbox"/> Managed Care Contracting <input type="checkbox"/> Managed Care Negotiations <input type="checkbox"/> Operational Reviews	<input type="checkbox"/> Operational Surveys <input type="checkbox"/> Operations Enhancement <input type="checkbox"/> Patient Flow <input type="checkbox"/> Prescription Prior Authorization <input type="checkbox"/> Scripting <input type="checkbox"/> Space Planning <input type="checkbox"/> Succession Planning <input type="checkbox"/> Transcription
<b>BILLING &amp; INSURANCE</b>	<input type="checkbox"/> Chart Auditing <input type="checkbox"/> Fee Analysis	<input type="checkbox"/> Medical Billing
<b>COMPLIANCE &amp; RISK MANAGEMENT</b>	<input type="checkbox"/> Clinical Trial's Compliance <input type="checkbox"/> Co-Management <input type="checkbox"/> Credentialing <input type="checkbox"/> EHR Documentation Compliance <input type="checkbox"/> FDA Audits <input type="checkbox"/> Fraud & Abuse	<input type="checkbox"/> HIPAA <input type="checkbox"/> Liability Insurance <input type="checkbox"/> Loss Prevention <input type="checkbox"/> OSHA <input type="checkbox"/> Safe Harbor <input type="checkbox"/> Stark
<b>FINANCE</b>	<input type="checkbox"/> Accounts Receivable Financing <input type="checkbox"/> Accounts Receivable Management <input type="checkbox"/> Appraisal/Valuation <input type="checkbox"/> Asset Protection <input type="checkbox"/> Benchmarking Tools and Analysis <input type="checkbox"/> Brokerage <input type="checkbox"/> Budget Management and Analysis <input type="checkbox"/> Capitation Analysis <input type="checkbox"/> Charitable Gifting and Equity <input type="checkbox"/> Construction Administration and Building Development <input type="checkbox"/> Cost Containment <input type="checkbox"/> Equipment Financing	<input type="checkbox"/> Equipment Sales <input type="checkbox"/> Estate Planning <input type="checkbox"/> Financial Performance <input type="checkbox"/> Group Purchasing <input type="checkbox"/> Income Division <input type="checkbox"/> Investment Advising <input type="checkbox"/> Non Recourse Debt <input type="checkbox"/> Outsourced Medical Billing <input type="checkbox"/> Practice Acquisitions <input type="checkbox"/> Practice Sales, Mergers, Buy-Ins and Closure <input type="checkbox"/> Practice Start-Up and Evaluation <input type="checkbox"/> Tax Planning



<b>HUMAN RESOURCES</b>	<input type="checkbox"/> Career Counseling <input type="checkbox"/> Interviewing and Hiring <input type="checkbox"/> Locum Tenens <input type="checkbox"/> Personnel Policies <input type="checkbox"/> Physician and Staff Retention <input type="checkbox"/> Physician Employment	<input type="checkbox"/> Provider Career Counseling <input type="checkbox"/> Recruitment/Placement <input type="checkbox"/> Salary and Benefits Administration <input type="checkbox"/> Staff Training <input type="checkbox"/> Technical Training for Technicians
<b>INFORMATION TECHNOLOGY</b>	<input type="checkbox"/> Apps <input type="checkbox"/> Augmented Reality <input type="checkbox"/> Cyber Security <input type="checkbox"/> Developing an Request for Proposal (RFP) <input type="checkbox"/> Digital Magazine <input type="checkbox"/> Electronic Health Records (EHR) <input type="checkbox"/> EHR Contracting <input type="checkbox"/> EHR Project Management <input type="checkbox"/> EHR System Selection <input type="checkbox"/> Glassware (for Google Glass)	<input type="checkbox"/> HD Video Production <input type="checkbox"/> High Tech Presentations <input type="checkbox"/> Practice Management Software <input type="checkbox"/> Search Engine Optimization <input type="checkbox"/> Social Media Management <input type="checkbox"/> Systems (inventory, scheduling, etc.) <input type="checkbox"/> Systems Implementation and Training <input type="checkbox"/> Web Page Design and Management/ Maintenance <input type="checkbox"/> Web Page Optimization
<b>LITIGATION</b>	<input type="checkbox"/> Contracts <input type="checkbox"/> Dispute Mediation	<input type="checkbox"/> Employment Law <input type="checkbox"/> Litigation Support
<b>MARKETING</b>	<input type="checkbox"/> Brand Differentiation Strategies <input type="checkbox"/> Internal and External Marketing <input type="checkbox"/> Marketing Research <input type="checkbox"/> Patient Surveys	<input type="checkbox"/> Practice Surveys <input type="checkbox"/> Refractive Surgery Marketing <input type="checkbox"/> Survey Techniques
<b>OPTICAL</b>	<input type="checkbox"/> Optical Benchmarking <input type="checkbox"/> Optical Dispensing Management	<input type="checkbox"/> Optometric Networking <input type="checkbox"/> Sales Training for Opticians
<b>PROFESSIONAL GROWTH</b>	<input type="checkbox"/> Executive Performance Coaching for Providers, Administrators, Mid-Level Managers <input type="checkbox"/> Executive Staff Development and Management Mentoring <input type="checkbox"/> Management Team Coaching and Development	<input type="checkbox"/> Matching Leadership Models with Practice Scale <input type="checkbox"/> Professional and Leadership Skills/ Development <input type="checkbox"/> Retirement Planning
<b>OTHER</b>		



AMERICAN ACADEMY  
OF OPHTHALMOLOGY®

American Academy of Ophthalmic Executives®

## Payment Information

☐ **Yes**, please sign me up for a listing in the Consultant Directory for an annual fee of \$599

Company \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State & zip \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

☐ Billing information (same as above)

Check ☐ American Express ☐ Visa ☐ MasterCard ☐ Discover  
(Attached)

Credit card # \_\_\_\_\_

Expiration date \_\_\_\_\_

Name of CC holder \_\_\_\_\_

Signature \_\_\_\_\_

☐ Add billing information if different from above:

Company \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State & zip \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

**Mail, email or fax payment and the completed forms to:**

**American Academy of Ophthalmic Executives**

Janine Barth, Programs Administrator

P.O. Box 7424, San Francisco, CA 94120-9892

Phone: 415.447.0335

jbarth@aao.org

Fax: 415.561.8595

**For Accounting Use Only—Consultant Directory (4400-1015000-00)**  
**Payment Received**

\_\_\_\_\_  
Date

\_\_\_\_\_  
By

\_\_\_\_\_  
\$ Amount



AMERICAN ACADEMY  
OF OPHTHALMOLOGY®

American Academy of Ophthalmic Executives®

## **AAOE LISTSERVS: Guidelines & Standards**

The American Academy of Ophthalmic Executives (AAOE) LISTSERVS are governed by the following set of standards that will apply to all of those who participate on an AAOE LISTSERV. We reserve the right to remove any material that does not (in our judgment) comply with these standards and to revoke posting privileges at our sole discretion and without warning or explanation. Our decisions are considered final.

- Listservs access is non-transferable.
- Only the person listed as the principal contact can participate.
- You may not solicit your services in e-mail replies or postings.
- You may not invite readers to contact your firm for further information.
- If a reader voluntarily contacts your firm, you may engage in a professional relationship only after you convey—and they agree—that your services are separate from AAOE's general listserv activities.
- Content submitted to an AAOE LISTSERV is not reviewed or checked by AAOE staff before it is posted. If you believe there is a problem with content you see on an AAOE LISTSERV, notify AAOE staff.
- You must be respectful and civil to other members, consultants, AAOE and AAO staff even if you disagree with them.
- You may not post subject lines or comments containing profanity, sexually graphic or offensive language.
- Harassing, threatening, libelous, racist, abusive, hateful, violent or obscene language or behavior is not allowed. Likewise posts that discriminate or denigrate on the basis of race, national origin, ethnicity, age, sex, gender-preference, religion or disability are not allowed.
- Participation in, suggesting or encouraging any illegal or unethical activity is cause for immediate deletion and may be reported to the appropriate authorities.
- You may not post any articles, news reports or other copyrighted material included in the posts without the prior permission of the relevant copyright owners. Providing a link to copyrighted material is acceptable.
- You may not flood or spam, post chain letters, pyramid schemes, junk mail or URLs for outside sites that violate any of these Guidelines.
- No commercial solicitation or advertising is allowed.
- Personal support for or opposition to political candidates and parties can be discussed, but political solicitation or advertising is not allowed.
- The discussions on AAOE LISTSERVS are open and viewable by any AAOE members or consultants. Do not post personal or any other information that you do not want seen by other members.
- Anyone who you share your login information with can post content under your name. You are responsible for the security of your login information.