**AASL ORG BOARD EXPLAINED**

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**ALL ABOUT SPEECH & LANGUAGE ORGANIZING BOARD**

**AKA ORG BOARD EXPLAINED**

**Executive Director: oversees entire company**

**Operations Director: oversees Divisions 1, 2, 3 of the ORG BOARD**

**Clinical Director: oversees Divisions 4, 5 of ORG BOARD**

**Marketing Director: oversees Division 6 of ORG BOARD**

**Executive Council: Division 7 of ORG BOARD**

Key—Other terms:

*HFA=Held From Above,* which means that a person higher up in the company like an owner, director, or manager will hold a position until an appropriate team member is trained for the position and/or a new team member is hired for the position.

*VFP=Valuable Final Product*, which is the ideal scene or the goal of each division. If everyone is doing their part in their respective division, this VFP should be achieved.

**Human Resources Division 1:**

Human Resources Manager:

-Oversees this entire division, so the components of the division either report up to this person and/or work alongside this person.

Hiring:

-This includes getting candidates to join the AASL team across all divisions. The team will be involved as necessary; however, we constantly interview given the company needs are continually changing. Operations Director (OD) oversees candidates for Divisions 1, 2, and 3. Executive and Clinical Directors oversee candidates for Division 4, 5, and 6.

Position Training:

-This includes general onboarding for employees to the company as well as division specific training. Operations Director will get with team members for onboarding as it concerns Dominion, W2, training schedules, email set up, Raintree set up. She will also train specific to Divisions 1,2 and 3. Clinic Division onboarding/specific training will be handled by Clinic Managers and Quality Assurance Managers.

HR Files:

-All employees have files that contain HR related information tied to their interviews, signed agreements, personal information, as well as Performance Improvement Plans, etc. This is kept in a locked cabinet and is accessed by Executive Council, as warranted.

Communications:

***A. Email issues:***

A1. Resetting Password: Email Operations Director to reset. If you want a particular password, let her know. Otherwise, OD automatically reset to @Welcome2AASL default password.

A2. Cannot Access Outlook or MacMail, utilize the web-based email until such time you have access:

To use webmail/Roundcube, you simply go to: <http://aaspeech.com/webmail>

Username: your full email address

Password: whatever you set it to

Once you log in, you will be presented with 3 webmail interfaces.
You can use any of them, but we recommend Roundcube as it is the easiest and most modern interface.

A3. Getting a bounced back email: DO NOT RESEND, sending repeatedly when emails are bouncing back will end up with your domain being put into sending “time out”. If emails are not being delivered, read the bounce message to find out why.  Resending isn’t the answer unless you correct the issue.  If you need assistance, reach out to the Operations Director.

A4. If you are going over your email quota too quickly, change your email to POP, not IMAP. To set up your email properly take the following steps:

Username: full email address

PW: whatever you set in cPanel

Both mail servers: [lion.lionheart.net](http://lion.lionheart.net)

SSL: on

SMTP: authenticated

SMTP cannot be port 25.  If it comes up as such, change it to 587

If this protocol is followed, you shouldn’t have any troubles with setting up new accounts.

Note that you can use either POP or IMAP.  POP pulls the email into that computer and removes it from the server (when set up properly, anyway).  IMAP mirrors the email on the server and requires closer management of storage, particularly SENT and TRASH folders, which tend to build up and take up server space.  Emptying TRASH and doing local archiving or deleting SENT folders is required to prevent going over your quota.

***B. Raintree:***

-Operations Director will help with general set up of the EMR system and oversees all Admin/Finance related functions of Raintree.

-Clinic Division functions tied to notes (daily, conversion, discharge, progress), evals etc. contact Operations Director first, who can then direct you to Quality Assurance if warranted.

***C. Printer/tech issues:***

-Valrico: communicate to Front Desk Receptionist who will communicate with Executive Council

-S. Tampa: communicate to Front Desk Receptionist who will communicate with Executive Council

- In the event Front Desk Receptionist is out or position is not filled, please communicate with Clinic Manager who will communicate with the Executive Council

-Repair Your Tech oversees handling company computer and printer set-up and internet related issues. Client Services will communicate directly with them, please notify Front Desk Receptionist via email and she will take the necessary steps.

***D. Dominion PTO/PRETO Handling:***

- Executive Director approves/rejects once it has been submitted by team member

-Operations Director makes changes relative to payroll or dates once been approved/rejected

***E. Benefits/Insurance:***

-Operations Director will oversee communication with AASL Team

***F. Electricity, Internet, Maintenance:***

*-At Valrico:* Front Desk Receptionist is the first person to notify around items such as the alarm, electricity, internet, AC, plumbing issues, and bug issues (anything related to the office). If there is a concern, communicate with Front Desk Receptionist via email and she will take the necessary steps. There is also a list kept by Employee Entrance that can be filled out for non-emergent maintenance issues as well.

*-S. Tampa:*Electricity, AC, plumbing, building issues (i.e. bugs, elevator, common area bathroom etc.) communicated to either Front Desk (should be contacted first) or Clinic Manager and/or Clinic Director for general notification purposes, then handled by team members contacting Landlord accordingly. The landlord’s name is David Silber and the best way to contact him is on his cell: 352-870-2024. His email is: david@linearcapitalmtg.com.

Inspections and Reports:

-All inspections and reports for the entire company from day-to-day matters as well as financial and other are overseen by the Operations Director. Inspections and Reports are shared with Executive Council.

Safety:

-This concerns any matters of safety from day-to-day office relations, emergencies, and the long-term longevity of AASL. This is overseen by Executive Council.

-In line with the Communication Program, Team Member Report forms are filled out for things such as: breakages of larger office equipment (i.e. OT equipment, copy machines, office furniture etc.), loss, blatant policy violations, injuries, safety matters, security matters, and anything harmful to our group or group members.

-If clients have an incident in your session that is not typical to your day-to-day, like attempting to self-injure or harm themselves, acting out toward you/others in a violent manner, or an actual injury, an Incident Report Form should get filled out as well as communication to your senior.

-If there are immediate safety issues like client emergencies, please inform your senior who will communicate to their manager directly and things will escalate up to Executive Council as warranted. Please use the Incident Report Form located on the Employee website.

-If clients are exhibiting typical behaviors in your day-to-day sessions, secondary to their diagnoses etc. this does NOT need to go into a report form, you can merely document it in the client’s daily note.

-If there is an emergency tied to fire, intruder, or any other urgent matters, call 911 and report to your CM or Senior as soon as you are able to.

-If there is inclement weather, Executive Council will communicate with team members directly.

-Worker’s Comp issues should be reported to HR Manager, documentation is required and directions available at both offices.

-Any circumstances not listed here, please contact Operations Director for direction and/or contact 911 if the circumstance is considered an imminent danger.

Staff Morale:

-Overseen by Executive Council via Managers of each division

-This includes overseeing the wellbeing of the team, keeping in mind that complaining and natter are two things that will not be tolerated without productive solutions, as well as using Team Member Enhancement or Report Forms to train/retrain team members given impact of policy and procedure on performance as it concerns morale.

-Morale at the level of the group includes things like coordinated events at and outside work, theme days, dress up days, collaboration and team work, clear communication around company policy/procedure, expectations, responsibilities, and problem-solving to ensure understanding across each position, division, and company as whole.

-Morale at the level of the individual includes open communication and dialogue around any such matters impacting the employee and/or ability to fulfill Skills, Abilities, Duties, and Responsibilities as outlined by Position Hats and contribution to division and company as a whole.

## **Client Services Division 2:**

Client Services Manager:

-Oversees entire division and reports to the Operations Director

Front Desk Receptionist:

-Is responsible for answering phones, helping clients check-in, patient charts, collecting payments in-office or over the phone.

-Clinic Division will work with Receptionist to contact families for reschedules, no shows, and cancelled appointments.

-Clinic Division will work with Receptionist when out of the office following company procedures.

-Responsible for replenishing cleaning supplies throughout the office, including the ones that therapists use daily.

-Responsible for daily trash removal and spot cleaning any areas that need additional attention prior to the cleaning company’s cleaning over the weekend.

-Responsible for the daily operations of the business, making sure all equipment is working, office supplies are maintained. Front Desk Receptionist is the first line of contact regarding any kinks in the inner workings of the business day to day.

-Responsible for entering Medical History updates and maintaining client charts/medical records, which included uploading all documentation received for the client.

-Responsible for coordinating paperwork updates, whether Medical History Updates for re-evaluations, policy updates for existing clients, surveys for existing clients per the PR & Marketing Division, etc.

-Responsible for release of information needs, i.e. medical requests from external sources and managing any requests we have on behalf of patients from other entities for our clinic’s needs.

Patient Scheduling:

-Oversees all current client schedules from scheduling new patient evaluations, scheduling treatment appointments, schedule change requests for current clients, block delete, block scheduling changes, managing scheduling priority lists, and maintenance of employee schedules (including rescheduling clients from PTO days >2 days and/or holiday weeks).

-Responsible for New Client Entry into Raintree. Once the client fills out the new client intake forms, they will be added to Raintree by Patient Scheduling, which included uploading the New Client Intake Form to the chart. The exception to this is entering an insurance client in based on our access to the patient portal information.

-Responsible for entering the client’s insurance information and diagnosis information and updating accordingly.

-Please follow company procedures for adding and/or updating diagnosis codesif additional and/or new diagnosis codes need to be added for your client.

-Clinic Division is to communicate with Patient Scheduling for all needs as outlined above, again, noting difference between what Patient Scheduling Handles vs Front Desk Receptionist as it concerns scheduling matters.

New Patient Establishment:

-Oversees new client acquisition once authorizations have been received, online form has been filled out and/or client calls are received. Background information is collected relative to concerns, intake process and next steps are addressed as well as coordination of intake and medical history paperwork. This information is then forwarded to the patient scheduler for all initial evaluation and subsequent treatment recommendation scheduling as received from the therapist.

-Responsible for surveying new clients per the PR & Marketing Division.

Charts:

-Medical records maintenance is a critical component of providing therapy services. AASL implemented effective January 2020 that all records will be scanned into the Electronic Medical Records system by Front Desk Receptionist. Records December 31, 2019, and prior are filed by Front Desk Receptionist as paper files in file cabinets located at the respective offices. These files can be shredded 7 years after the last visit. This responsibility is twofold; it is the therapist’s responsibility to properly identify the documents and provide to Front Desk Receptionist via the “To Be Scanned” Folder, and then it is Front Desk Receptionist’s responsibility to properly scan, upload, and label into the correct patient’s chart.

Insurance Authorization:

-Client Services Division has access to the Provider Portals of the insurance companies AASL has credentialed as a provider. Through the Provider Portal, any employee in Client Services, i.e. Front Desk Receptionist, Patient Scheduler, New Client Acquisition, can access client records on insurance coverage. It is important when establishing a new client that we verify current coverage and get the necessary documentation to support delivery of services, i.e. authorization or referral.

-Responsible for maintaining accurate authorizations and referrals for insurance companies for each client. This includes, for one-year authorizations, requesting extension in dates of service and requesting additional units.

-Responsible for notifying parents, treating therapists, and front desk receptionist when authorizations are expiring so proper steps are taking to prepare for re-evaluations and continuity of services.

-Responsible for working with Referral Management with the insurance companies to provide them with any documentation requested to make sure we maintain continuity of care.

# **Finance Division: Division 3:**

Finance Manager:

-Oversees entire division and reports to the Operations Director

Billing:

-Responsible for End of Day that is posted correctly and timely, execution of monthly eStatements, managing client ledgers, correcting billing errors, analyzing aging report, and communicating with clients regarding billing discrepancies or questions.

-Responsible for managing insurance remittances and all electronic interfaces responsible for billing charges and posting payments to ensure gross income is constantly growing.

-Responsible for the management of State of Florida funded programs, submitting invoices and posting payments (includes Gardiner/PLSA, VocRehab, VPK-SIS, etc).

Collections:

-Responsible for managing the collections of all monies due to the Company. This includes eStatement oversight, coordinating with Front Desk Receptionist for onsite collections, and communicating to Finance Manager if additional efforts need to be made to ensure full compensation.

-Responsible for analyzing aging reports and collection reports, communicating with clients regarding aging charges, organizing payment plans, and working with collections company to ensure every possible dollar is recouped from services rendered.

Payment Reconciliation:

-Responsible for maintaining software, i.e. Quickbooks to ensure payments posted in Raintree are in fact deposited into the Company’s respective banking accounts.

-Responsible for any other payment received by the company and reconciling such in Quickbooks when Raintree is not relevant to these “other” income sources.

Purchasing and Supplies:

-Responsible for managing and executing purchases on behalf of the company for goods such as office supplies, janitorial supplies, therapy supplies, equipment, goods and services that are in place to support the business.

-Utilizes Client Services Division’s Front Desk Receptionist to help monitor inventory of office and janitorial supplies.

-Utilizes Supply Wish Lists located at the employee calendar at each office where therapists and/or employees communicate therapy, cleaning, or office supplies needed to execute their hat.

-CSW requests should be sent to the Clinic Director and Executive Director, copying CM’s.

Payroll:

-Processes payroll for pay periods on the 5th and 20th every month, including review of hours paid, any PTO/unpaid PTO, incentive pay, bonus pay, and benefit deductions.

-Entry of PRN hours for payroll and validates timecards for hourly workers.

-Fixes any errors in timecard entries.

-Notifies benefits company of any payroll discrepancies on behalf of employees.

-Coordinates end of year payroll, including W2 dispersion.

-PTO management throughout the year, including fixing any errors, communicating/confirming balances, and entry to any adjustments and new year balances (including seniority additions).

-Oversees Short Term Disability (STD) implications on employee payrolls, i.e. reimbursement of benefits to AASL upon return from STD.

-Liaison for AASL with the payroll company.

Records, Assets, and Material:

-Responsible for all files, books, records, and contracts for AASL.

-Responsible for working with AASL’s accountants to ensure accurate records of all assets.

-Entry and management of all accounting records for the company.

## **Clinic Division: Division 4:**

Clinic Manager:

-Oversees assigned team members at respective office locations. Available to answer everyday client questions and help the therapists problem solve for clinical solutions; can also answer policy/procedure related questions or direct a therapist to Quality Division for retrain if needed.

-Clinic Managers also ~~track~~ review their juniors’ weekly statistics, review compliance with documentation/dashboard review, and help~~s~~ juniors create “battle plans” for the week ahead to ensure uptrending statistics and efficiency.

-Clinic Manager reports up to Clinical Director and has weekly meetings about clinic~~al~~ matters and clinic division statistics

-Clinic Managers help with the smooth operation of the “clinic” and therapy team on a day-to-day basis including morale, incidents, accountability, and communication with clients about attendance or care plans as warranted.

SLP Department:

-Comprises therapists on the team who work at either the S. Tampa or Valrico offices

OT Department:

-Comprises therapists on the team who work at either the S. Tampa or Valrico offices

Overall Clinic Division Statistics:

-Statistics pertaining to the clinic division are critically important as they directly relate to the “service” that the entire company exists upon (i.e. delivery of therapy)

~~-~~Daily/Weekly statistics inputted by therapists and overseen by respective Clinic Managers for each office and Clinic Director

-Works with Finance Division (Payroll) for calculation of any incentive-type bonuses

-Each division has a unique statistic to keep track of that objectively reveals how the company divisions are functioning together in any given snapshot of time; these statistics are overseen by the Clinic Director and the Executive Council.

## **Quality Division: Division 5:**

Quality Assurance Manager:

Oversees all aspects of this division, and reports up to Clinic Director(s), which include the following:

Chart Reviewing:

-Auditing employee charts to make sure they are following policy and procedure. New employees receive more frequent chart review at they undergo the “onboarding” process in preparation for increased independence with company expectations.

Clinical Excellence:

-Ensuring that all employees hold their full licensure (state and national) and meet their educational requirements each interval. Also keeps track of specialty trainings to add to each therapist’s clinical folders. Finally, ensuring that each employee is well versed in various skill sets under their scope of practice; an employee may electively or as suggested by the company, work on training up in ~~a~~ particular skills like feeding, voice, AAC, reading/writing, etc. Quality Division will help support in this new skill acquisition. Finally, the Quality Excellence manager will collaborate with respective team members across the clinic division, especially if not in the same scope of practice (i.e. ST/OT departments), to ensure the best provided care to our patients.

Administrative Excellence:

Ensures all administrative employees have also been apprised and knowledgeable of company policies and procedures. Provides retrain when needed and ensures all members have reviewed/signed acknowledging understanding and application.

Policy Log:

Updates all Company Policies, tracks team members, and trains new members and retrains current team members on policies when needed. Communicates with team members when new policies are added to the website for review.

Library:

Manages, updates, and maintains the library housing all company-wide Trainings and Resources. Advises team members when a new personal or professional training may be available. Keeps the library tidy, orderly, and up to date.

Conflict Resolution:

Will work alongside Executive Council for following up with team members on retraining and/or meeting given any conflicts, disciplinary action, etc. that takes place. Also manages conflict resolution with clients when problems are presented within the company for handling. Will assist with Quality Assurance checks with clients (surveys) and follow-up accordingly with the feedback provided to ensure the Clinic Department maintains the highest level of quality and excellence.

# **PR & Marketing Division: Division 6**

PR and Marketing Manager:

-Oversees entire division and reports up to Executive Director

Patient Care Coordination:

-Is handled by the Patient Care Coordinator (PCC) to help build relationships with referral sources out in the community and grow the clinic division through new referrals to the company

-The PCC sets up meetings independently with referral sources and/or coordinates meetings with the Division Manager.

Surveys & Promotion Liaison:

-PCC will work alongside Division Manager to help with client surveys, promoting campaigns within the company to clients, referral sources, and the community.

Community Events Coordination:

-PCC will work alongside Division Manager to help plan, organize, execute community events hosted by AASL and/or other community partners for the sake of educating and helping others, and in turn growing AASL.

Website Upkeep Liaison:

-PCC will work alongside Manager to help with upkeep related to AASL website.

Social Media Liaison:

-PCC will work alongside Manager to help with planning, organizing, executing social media efforts for the company for the sake of educating and helping others, and in turn growing AASL.

Newsletter/Blog Liaison:

-PCC will work alongside Manager to help with planning, organizing, executing newsletters and blogs for the company to use to communicate/share with clients, referral sources, social media endeavors for the sake of educating and helping others, and in turn growing AASL.