



Corvane Ashmoor & Co.

CONSULTING · PROFESSIONAL SERVICES



Professional & Medical Offices

Administrative support and records management for busy offices.

What we deliver

- Document scanning and digitizing
- Records management and file systems
- Data entry, reports and spreadsheets
- Correspondence drafting and formatting
- Scheduling and calendaring systems

What we hear

"The file room is full."

Paper records take space, and finding one takes too long.

"Data entry is eating the front desk."

Staff time goes to typing instead of the people in front of them.

"Every letter looks different."

Without templates, correspondence is inconsistent and slow.

How the work runs

- ASSESS** Inventory: Records, workflows and systems reviewed and listed.
- ORGANIZE** Structure: A file naming and folder structure designed for how the office works.
- CONVERT** Digitize: Paper records scanned, named and filed into the new structure.
- ONGOING** Support: Data entry, reports and correspondence handled on a set schedule.

Who we work with

Medical and dental offices

Insurance agencies

Accounting offices

Law offices

Real estate offices

Agencies and studios

Documents we keep in order

- Scanned record archives
- File naming conventions
- Correspondence templates
- Data entry logs
- Weekly reports
- Scheduling templates

Capabilities engaged

Consulting & Strategy

Operations & Back Office

Records & Research

Document Services

Connections & Vetting

Technology Setup

Clear lines

We handle

Scan and organize records
Enter data and prepare reports
Draft and format correspondence
Build scheduling systems

Licensed professional

Clinical or professional judgment (licensed staff)
Privacy compliance decisions (the practice and its counsel)
Billing and coding decisions (certified staff)
Legal advice (attorney)

Corvane Ashmoor & Co. is not a law firm, CPA firm, freight broker, licensed contractor, real estate broker or property manager, and does not provide legal, tax or investment advice. Every engagement is scoped and priced in writing before work begins.