



Visit Summary for VST4033

| | |
|------------------------------------|-------------------------------------|
| Franchise ID | : 08022 |
| Schedule Date | : 08/15/2021 |
| Visit Start Date | : 08/17/2021 |
| Visit Completion Date | : 08/17/2021 |
| Action Plan Completion Date | : |
| Consultant | : Donna Smith |
| Status | : Completed |
| Visit Form | : Patient Experience Assessment 2.0 |
| Consultant Score | : 91.00 / 100.00 |
| Consultant Time Taken | : 01 HRS: 39 MIN: 07 SEC |
| Comments | : |

| |
|--------------------|
| Compliance (43) |
| Non-compliance (4) |
| Not Attempted (0) |

VISITS / ASSESSMENT

New Patient

1. Based off the PEA Report does the clinic's New Patient count fall within the allotted threshold?

Consultant Response :

Yes

Consultant Comments :

North Myrtle Beach. The average NP count for the 3 months ending in July was 95, compared to 109 for clinics +/- 6 months in operation. That is within 85% of the benchmark and receives full points.

2. Ad spend is reported and meets required minimum spend.

Consultant Response :

No

Consultant Comments :

Q2 ad spend was reported as \$6,759, below the \$7,500 minimum required by the franchise agreement. Let's get with Marketing and see what additional activities we can add.

3. Do the clinic's hours and staffing align with company policies and meet the patient flow demands?

Consultant Response :

Yes

Consultant Comments :

Clinic is open M-F 10-7 and Saturday 10-4. Clinic has not reached 1200 visits so Sunday hours are not yet called for and there are not excessively busy hours calling for double staffing.

4. WC utilizes Advantages Incoming Call Notifier to track and help convert new prospects.

Consultant Response :

Yes

Consultant Comments :

It appears that the staff occasionally uses the ICN; however, in the 3 random calls that I listened to, the prospects were not asked their name, email address, phone number or when they would be able to visit the clinic. WC mentioned that the ICN (which is usually automatically on) had turned off and he has caught it now.

5. WC and DC know the daily referral card distribution goal and have a plan for achieving it.

Consultant Response :

Yes

Consultant Comments :

Try to give away 5 a day to new and existing patients.

6. Clinic responds to negative reviews on social media sites like Google, Yelp and Facebook.

Consultant Response :

Yes

Consultant Comments :

OTT responds to negative reviews. It's recommended that the clinic team respond to positive reviews, as well, to add valuable keywords and improve SEO.

7. Clinic Microsite is fully optimized

Consultant Response :

Yes

Consultant Comments :

North Myrtle has a good directional, 2 DC bios and images on the site. Unfortunately, there

are only 3 microsite reviews on the site. Please work to add additional reviews asap since these improve Search Engine Optimization. Jonathan is going to be handing out more of the forms.

Conversion

8. Based off the PEA Report does the clinics Conversion Rate fall within the allotted threshold?

Consultant Response :

Yes

Consultant Comments :

The clinic conversion averages 61% versus 57% for clinics of a comparable age.

9. Do the WC and DC know the daily sales goal and have an action plan to achieve?

Consultant Response :

Yes

Consultant Comments :

Goal of \$1450 per day, achieved through selling to new patients, collecting outstanding ARBs.

10. Does the WC greet and provide an orientation during the intake process to build rapport and educate patients on key differentiators?

Consultant Response :

No

Consultant Comments :

Be sure to ask for the patient's name and mention differentiators. Although it's okay to mention that we are a wellness clinic, that should not take the place of the differentiators. We are introducing the patient to the factors that set The Joint apart from our competition--walk-in, open evenings and weekends, focus on wellness, affordable rates.

11. Does the DC and WC mention the patient's name during the visit to reinforce the personalized nature of care?

Consultant Response :

Yes

Consultant Comments :

Mentioned names at the beginning, during adjustment and when the DC departed from the front.

12. Does the DC utilize the Patient Activity Assessment (pg. 7 of intake forms) during the consultation, exam, and adjustment?

Consultant Response :

Yes

Consultant Comments :

Discussed how the patient's baseball activities were creating part of the issues with lower back. Lifting weights Would like to hear this tied together during the final wellness discussion, as well, by mentioning how the patient's baseball and lifting activities will work against the adjustment thus requiring the ongoing care.

13. Does the DC explain the treatment plan including the 3 Stages of Care scripts and wellness discussion?

Consultant Response :

Yes

Consultant Comments :

Mentioned how areas of pain were interconnected with issues in the body. Discussed relief, recovery and wellness and the need for extra visits at the start.

14. Does the DC restate the treatment plan and the committed follow-up visit during the handoff?

Consultant Response :

Yes

Consultant Comments :

Recommended that patient come back in 24-48 hours. Received confirmation from patient that he could do that.

15. Does the WC follow the sales scripts during the plan presentation?

Consultant Response :

Yes

Consultant Comments :

The WP was sold primarily in the back. Jonathan discussed the primary points of the plan and the patient verified that he wanted to sign up.

2nd Month Return Rate

16. Based off the PEA Report does the clinic's 2nd Month Return Rate fall within the allotted threshold?

Consultant Response :

Yes

Consultant Comments :

2nd month return rate is 50% versus the average of 58%, within the 85% allowance for full points.

17. Does the DC provide the patient a personalized explanation of the treatment plan, obtaining patient buy-in?

Consultant Response :

Yes

Consultant Comments :

Discussed how the multiple visits early on would clear up the patient's condition quicker and how ongoing care would keep him out of pain.

18. Does the DC work with the patient to establish the follow up visit, confirming commitment in back and during handoff?

Consultant Response :

Yes

Consultant Comments :

Patient coming back in tomorrow.

19. Does the DC continue the discussion of wellness care beyond the initial visit?

Consultant Response :

Yes

Consultant Comments :

Discussed improvement in legs, need for care more frequently, provided talking adjustment and suggested the wellness plan.

20. Do the DCs complete 3-Day Thank You Calls?

Consultant Response :

Yes

Consultant Comments :

It appears that 92 DC calls have taken place since June 1.

21. Does the WC complete actionable phone calls?

Consultant Response :

Yes

Consultant Comments :

It appears that these were being completed to some extent; however, the Member Education call queue contained 74 names, 14 of which were over 100 days.

22. Does the DC provide the patient with effective home care instructions?

Consultant Response :

Yes

Consultant Comments :

Recommended ice following the visit.

23. Does the staff effectively explain and promote the benefits of Care Cards?

Consultant Response :

No

Consultant Comments :

WC mentioned that not providing physical cards make it more difficult to remember to go through the program, which I agree is true!

24. Does the staff provide the patients with extra service touches to exceed expectations?

Consultant Response :

Yes

Consultant Comments :

Sends thank you notes to new patients.

Attrition

25. Based off the PEA Report does the clinic's Attrition Rate fall within the allotted threshold?

Consultant Response :

Yes

Consultant Comments :

Clinic attrition average of 8% is awesome! Well below the 13% average for clinics +/- 6 months in operation.

26. Does the clinic staff greet all patients by name, re-engaging and building rapport?

Consultant Response :

Yes

Consultant Comments :

Clinic staff knows all patients by name and is familiar with what's going on in their lives.

27. Does the WC celebrate and encourage usage by updating patients of their remaining visits during check in?

Consultant Response :

Yes

Consultant Comments :

WC reminds patients when they depart. I would recommend that this change to check-in to assure that the WC does not forget or get too busy when patient is departing.

28. Is the clinic following the patient flow process?

Consultant Response :

Yes

Consultant Comments :

Patients are sent straight to the back.

29. Does the DC provide a talking adjustment and discuss areas of focus for the next visit?

Consultant Response :

Yes

Consultant Comments :

DC does a great job of talking through the adjustment and discussing why he is doing what he is doing.

30. Does the DC continue chiropractic education during every visit?

Consultant Response :

Yes

Consultant Comments :

Dr. Jon did a good job of continuing education and imparting that knowledge during the adjustment so it didn't add to the time needed for the adjustment.

31. Does the DC gain commitment for the existing patient's next visit?

Consultant Response :

No

Consultant Comments :

DC mentioned that he does this sometimes but he did not get commitment for the existing patient's next visit while I was listening in. By getting commitment for the next visit, the DC can help assure that the patient utilizes all of their visits and gets full value from their wellness plan.

32. Does the WC refrain from stating "2-month minimum" at any point in the Wellness Plan sales process?

Consultant Response :

Yes

Consultant Comments :

--/--

33. Does the clinic use the 30-day Wellness Review for patient re-evaluations and plan changes?

Consultant Response :

No

Consultant Comments :

I did not see the 30 day Wellness Reviews in any of the random patient files that were pulled.

34. Is the WC following the plan change procedure correctly?

Consultant Response :

Yes

Consultant Comments :

Offers a freeze, flex plan.

Brand Standards

35. Have the WC and DC both completed their respective Learning Paths in The Learning Center (e-logic)?

Consultant Response :

Yes

Consultant Comments :

All staff have completed the Learning Path except Joseph. Can you please have him finish as well?

36. Only approved signage and artwork displayed throughout clinic and exterior windows.

Consultant Response :

Yes

Consultant Comments :

--/--

37. All furniture, surfaces and fixtures operational, clean, and without damage.

Consultant Response :

Yes

Consultant Comments :

Clinic opened in November and still looks fantastic!

38. All staff in accordance with uniform policy.

Consultant Response :

Yes

Consultant Comments :

--/--

39. Correct hours of operation professionally displayed on front door decal.

Consultant Response :

Yes

Consultant Comments :

--/--

Critical Violations

40. Do only associates that are currently employed with The Joint appear on the clinics Atlas User List (Atlas Reporting_Staff Management_Atlas User List)?

Consultant Response :

Yes

Consultant Comments :

--/--

41. Are the DC and clinic business licenses available and current?

Consultant Response :

Yes

Consultant Comments :

Both Dr. Holt and Dr. Buffkin's chiropractic licenses expire in 2022.

42. Is the clinic PC compliant (if applicable)?

Consultant Response :

--/--

Consultant Comments :

--/--

43. Does the clinic follow all protocols to protect Patient Privacy?

Consultant Response :

Yes

Consultant Comments :

Clear out scan files every evening. Protect patient files in the clinic.

44. Does the clinic use, save, and correctly transcribe using the current and correct forms?

Consultant Response :

Yes

Consultant Comments :

Overall, it appears that forms are being appropriately used; although there were a couple of issues with signatures (Alissa Wiley) and a missing Wellness Plan Agreement (Carollee Woodward). Intake forms appear to be updated when they get > 1 year old.

45. Does the clinic follow correct Medicare compliance procedures?

Consultant Response :

Yes

Consultant Comments :

WC knows that MEP patients can only be charged \$29 per visit. When patient checks that they are MEP, gives them the ABN form. Upload separately.

46. The clinics pricing, discounts, and promotions are consistent with current approved company standards?

Consultant Response :

Yes

Consultant Comments :

Overall, pricing appears to be good. There were two patients though (Robert Speedling and Carollee Lockwood) who did not appear to have been charged their Initial Visit? Per policy, all patients should pay the IV charge unless a special promotion on a BER is taking place.

47. The clinic has no additional unapproved retail, services, or equipment displayed, mentioned, or in use?

Consultant Response :

Yes

Consultant Comments :

--/--

48. Does the DC review and initial the informed consent page with new patients (where applicable based on state law) and advise of possible risks associated with Chiropractic care?

Consultant Response :

--/--

Consultant Comments :

--/--

49. If the clinic has any Critical Violations select Yes. If the clinic did not receive any Critical Violations select N/A.

Consultant Response :

--/--

Consultant Comments :

--/--

Seasonal Brand Focus

50. Do Atlas and eLogic Learning users match?

Consultant Response :

Yes

Consultant Comments :

--/--

51. Does the clinic meet the minimum Axis software and hardware requirements?

Consultant Response :

Yes

Consultant Comments :

--/--

52. Are clinics utilizing a review solicitation to maximize Google reviews? (i.e.; carbon, opinion, etc...)

Consultant Response :

Yes

Consultant Comments :

--/--

Signature

Date