

WC Routine Activities

Opening:

1. Turn on computer and tablets.
2. Sign onto computer using the clinic number; Mooresville's is 12041.
3. Open Google "The Joint"
4. Open a new tab for each of the following:
 - a. **Daily Log**
 - b. **Axis** – sign in with your user name and password, choose clinic (Mooresville).
 - c. **Clinic email** – sign in with clinic email and password (look in binder)
 - d. **Carbon** – sign in with user name and password prompted then chose the appropriate clinic.
 - e. **Clinic Calendar**.
5. Daily Log Completion begins first thing in the morning after turning on the lights, computer and completing #'s 1-4 above.
 - a. **Open Daily log** and right click on the "Daily Stats" then choose duplicate.
 - b. Right click on the copy of daily states and rename it using the current date.
 - c. **Today's Date** = the date you are completing the log.
 - d. **Chiropractor on duty** = the Doctor who is working in the clinic on that day.
 - e. **Total Patients Treated** = this is for the end of the day and can be found on the axis dashboard under "Clinic Performance". Click on the arrows in the center of the box to see the total patients treated.
 - f. **Beginning Sale Amount** = the Total Revenue, which can be found on the axis dashboard under "Clinic Performance (click on arrows)." This must be done and recorded before the first patient is scanned in.
 - g. **Cash at open** = the amount of petty cash on hand.
 - h. **Mooresville (Clinic) Patients Treated** = total patients treated less the number of visiting patients seen that day.
 - i. **Ending Sales Amount** = Total Revenue, this is for the end of day and can be found on the Axis dashboard under "Clinic Performance."
 - j. **Cash at Close** = petty cash on hand at the end of the day.
 - k. **New Patients (NP)** = All patients who come in that have NEVER been to a Joint Chiropractic Clinic before. It's good to add their name to the daily log while they are completing the intake forms and then go back to check off the option they choose to sign up with.
 - l. **Returning Patients (RP)** = all patients who have visited any Joint Clinic but do not have a plan or package. It is good to add their name to the daily log after the sign in and then go back and check off the option they choose to sign up with.

- m. **Visiting Members** = all patients who have another clinic as their “Home Clinic.” These can be found by going to the dashboard, Axis dropdown menu and choosing “Inter-Clinic Activity.”
- n. **Number of Declined cards** = # of ARB’s that are NOT STARTED. These can be found on the clinic dashboard (ARB Column). Click on the actual column to see all of the ARB’s and count the number that are not started and record that number.
- o. **Number of Patients that left** = patients who come into the clinic but leave due to wait time or because we cannot see them due to the time of day.
- p. **Members Cancelled Out Today** = these can be found by going to the clinic dashboard then the dropdown Reports menu. Click on the drop down arrow.
 - i. View advanced reports
 - ii. More advanced reports
 - iii. Scroll to pending cancellations
 - iv. Click on requested cancellation date to sort
 - v. Find the date you are on and record the number of patients and their names in the space provided on the log.
- q. **Daily Sales Goal** = Monthly Revenue less Net Sales (this number can be found under on the dashboard axis dropdown menu. Choose the sales reconciliation report and put in the beginning of the month to the day before the current day, then say download). Then divide that number by the number of working days you have left in the month. Be sure to know if your clinic is open on Sundays. Mooresville is not.
- r. **AM/PM Duties** – should be self-explanatory
- s. **Notes** = anything noteworthy that happens throughout the day. It could be a reporting an issue, a patient praise or a patient complaint.
- t. **Wellness Review** = a form that should be in each clinic and given to a patient to complete according to the doctor’s timeframe but at least once a year.
- u. **Referrals** = how many referrals (\$29 blue cards) you hand out and to whom you hand them out to. This number would include new patients that receive a folder in their gift bag or new patients who receive a folder at all.
- v. **Thank You Cards** = should be sent to all new patients and returning patients who sign up with a plan or a package.
- w. **Discard Status** = check all that apply. This is asking if you have emptied the paper shredder, thrown away any recyclables and emptied the vacuum.
- x. **Challenges Today** = any challenges you faced throughout the day.
- y. **Best Part of the Day!** It’s up to YOU to make it what it is.