

All PEA Questions

1. Based off the PEA Report does the clinic's New Patient count fall in the allotted threshold
2. Ad spend is reported and meets required minimum spend
3. Do the clinic's hours and staffing align with the company policies and meet the patient flow demands
4. Clinic is utilizing Carbon by OTT to maximize Google reviews
5. WC utilizes Advantage's Incoming Call Notifier to track and help convert new prospects
6. WC and DC know the daily referral card distribution goal and have a plan for achieving it
7. Clinic responds to negative reviews on social media sites like Google, Yelp and Facebook
8. Clinic Microsite is fully optimized
9. Based off the PEA Report does the clinics Conversion Rate fall within the allotted threshold
10. Does the WC and DC know the daily sales goal and have an action plan to achieve it
11. Does the WC greet and provide an orientation during the intake process to build rapport and educate patients on key differentiators
12. Does the DC and WC mention the patients name during the visit to reinforce the personalized nature of care
13. Does the DC utilize the Patient Activity Assessment (pg. 7 of intake forms) during the consultation, exam, and adjustment
14. Does the DC explain the treatment plan including the 3 stages of care scripts and wellness discussion
15. Does the DC restate the treatment plan and the committed follow up visit during the handoff
16. Does the WC follow the sales scripts during the plan presentation
17. Based off the PEA Report does the clinic's 2nd months return rate fall within the allotted threshold
18. Does the DC provide the patient a personalized explanation of the treatment plan, obtaining patient buy-in
19. Does the DC work with the patient to establish the follow up visit, confirming commitment in back and during handoff
20. Does the DC continue the discussion of wellness care beyond the initial visit
21. Do the DC complete 3-day Thank You Calls
22. Does the WC complete the actionable phone call
23. Does the DC provide the patient with effective home care instructions
24. Does the staff effectively explain and promote the benefits of Care Cards
25. Does the staff provide the patients with extra service touches to exceed expectations
26. Based off the PEA Report does the clinics Attrition Rate fall within the allotted threshold
27. Does the clinic staff greet all patients by name reengaging and building rapport
28. Does the WC celebrate and encourage usage by updating patients of their remaining visits during check in
29. Is the clinic following the patient flow process
30. Does the DC provide a "talking adjustment" and discuss areas of focus for the next visit
31. Does the DC continue chiropractic education during every visit
32. Does the DC gain commitment for the existing patient's next visit
33. Does the WC refrain from the stating "2 month minimum" at any point in the wellness plan sales process
34. Does the clinic use the 30-day Wellness Review for the patient re-evaluations and plan changes
35. Is the WC following the plan change procedure correctly
36. Have the WC and DC both completed their respective Learning Paths In The Learning Center

37. Only approved signage and artwork displayed throughout the clinic and exterior windows
38. All furniture, surface, and fixtures operational, clean, and without damage
39. All staff in accordance with uniform policy
40. Correct hours of operation professionally displayed on the front door decal
41. Do only associates that are currently employed with The Joint appear on the clinics Atlas User List
42. Are the DC and clinic business licenses available and current
43. Is the clinic PC compliant (if applicable)
44. Does the clinic follow all protocols to protect Patient Privacy
45. Does the clinic use, save, and correctly transcribe using the current and correct forms
46. Does the clinic follow correct Medicare compliance procedures
47. The clinic's pricing, discounts, and promotions are consistent with current approved company standards
48. The clinic has no additional unapproved retail, services or equipment displayed, mentioned or in use
49. Does the DC review and initial the informed consent page with new patients (where applicable based on state law) and advise of possible risk associated with Chiropractic care
50. If the clinic has any critical violations select Yes. If the clinic did not receive any critical violations select N/A
51. Does the clinic follow all protocols to protect Patient Privacy
52. Have the DCs completed the new Treatment Protocol Training
53. Does the clinic meet the minimum Axis software and hardware requirements

Wellness Coordinator Specific PEA Questions

- WC utilizes Advantage's Incoming Call Notifier to track and help convert new prospects
 - Make sure it is turned on at the beginning of the day and take good notes. Don't forget to ask for a name when they call in as it is the only way we can save it in the system
- WC and DC know the daily referral card distribution goal and have a plan for achieving it
 - Passing out 8-10 referral cards daily, including existing customers as they are our most loyal customers, they already know the advantages of chiro care
- Does the WC and DC know the daily sales goal and have an action plan to achieve it
 - Goal is to sell 3 WP a day and break down the monthly sales goal into daily increments
- Does the WC greet and provide an orientation during the intake process to build rapport and educate patients on key differentiators
 - Our differentiators are Open evenings/ weekends, walk-in convenience, and no insurance needed
- Does the DC and WC mention the patients name during the visit to reinforce the personalized nature of care
 - Whenever possible call the client by their name check- in , back for adjustment and leaving
- Does the WC follow the sales scripts during the plan presentation
- Does the WC complete the actionable phone call
 - Don't exclude the member education calls as they help improve attrition
- Does the staff effectively explain and promote the benefits of Care Cards
 - Stress that it is only good at our location and only can be used in the 1st month
- Does the staff provide the patients with extra service touches to exceed expectations
- Does the clinic staff greet all patients by name reengaging and building rapport
 - Key word here being ALL... use their name whenever possible
- Does the WC celebrate and encourage usage by updating patients of their remaining visits during check in
 - Ideally you will have updated that them on their RPV's before they are asking you.
- Does the WC refrain from the stating "2 month minimum" at any point in the wellness plan sales process
 - It is okay to say... "month to month plan that can be changed after the second billing date"
- Is the WC following the plan change procedure correctly
 - Make sure that WP Reviews and you also want to mention the FLEX
- Have the WC and DC both completed their respective Learning Paths in The Learning Center
 - All can be found at thejoint.myasorb.com

Doctor Specific PEA Questions

- **WC and DC know the daily referral card distribution goal and have a plan for achieving it**
 - Passing out 8-10 referral cards daily, including existing customers as they are our most loyal customers, they already know the advantages of chiro care
- **Does the WC and DC know the daily sales goal and have an action plan to achieve it**
 - Goal is to sell 3 WP a day and break down the monthly sales goal into daily increments
- **Does the DC and WC mention the patients name during the visit to reinforce the personalized nature of care**
 - Whenever possible call the client by their name check- in , back for adjustment and leaving
- **Does the DC utilize the Patient Activity Assessment (pg. 7 of intake forms) during the consultation, exam, and adjustment**
 - Are you incorporating that their job might work against the adjustment which stresses the need for continued care. Talk about the activities on that page that may contribute to their visit and pain in general
- **Does the DC explain the treatment plan including the 3 stages of care scripts and wellness discussion**
 - 3 Stages of care is Relief, Recovery and Wellness – Talk with the patient about the difference in the stages. Use those 3 words specifically to explain
- **Does the DC restate the treatment plan and the committed follow up visit during the handoff**
 - Breakdown the treatment plan in front of the WC so all on same page, give the written treatment plan to the patient to take home as a reminder
- **Does the DC provide the patient a personalized explanation of the treatment plan, obtaining patient buy-in**
 - Written treatment plan should not look the same for every patient, customize and explain to them. Also verify that the treatment plan is something that they can follow
- **Does the DC work with the patient to establish the follow up visit, confirming commitment in back and during handoff**
 - Give the patient a specific day of the week, be as precise as possible versus “see you back in soon”
- **Does the DC continue the discussion of wellness care beyond the initial visit**
 - Follow up with how they are executing the treatment plan. Discuss the stretches, are they drinking water, normalize that pain may get worse before it gets better.
- **Do the DC complete 3-day Thank You Calls**
 - During down time it is important to make these calls because a patient is more likely to follow the given treatment plan when a doc is checking in on them
- **Does the DC provide the patient with effective home care instructions**
 - Are they doing stretches, drinking water, changing habits to help aid the adjustment
- **Does the staff effectively explain and promote the benefits of Care Cards**
 - Giving it to the patient to reduce cost to meet plan, it is only good at our location and only can be used in the 1st month
- **Does the DC provide a “talking adjustment” and discuss areas of focus for the next visit**
 - Explain why you are adjusting certain areas, tell patient what you are going to do next before going into it

- **Does the DC continue chiropractic education during every visit**
 - Explain how their home care is helping with what you are adjusting when then come in
- **Does the DC gain commitment for the existing patient's next visit**
 - Always give a specific day of the week. Try to avoid thing like " Okay, you are good to go" and " Okay I'll see you next time"
- **Have the WC and DC both completed their respective Learning Paths In The Learning Center**
 - All paths can be found at thejoint.myasorb.com
- **Are the DC and clinic business licenses available and current**
 - On display should be the most recent version of your liscence
- **Does the DC review and initial the informed consent page with new patients (where applicable based on state law) and advise of possible risk associated with Chiropractic care**
 - Get the signature PRIOR to starting you adjustment and explain what they are signing
- **Have the DCs completed the new Treatment Protocol Training**

Admin/Front Desk Specific PEA Questions

- **Clinic is utilizing Carbon by OTT to maximize Google reviews**
 - Talk with patients about leaving a review, use carbon to send request to new patients after their initial visit with us
- **Clinic responds to negative reviews on social media sites like Google, Yelp and Facebook**
 - Respond with 48 hours. Making sure the patient feels heard and trying to come to solution that brings them back in
- **Clinic Microsite is fully optimized**
 - Make sure to have client testimonial on the microsite, they can be entered through OTT
- **Does the staff provide the patients with extra service touches to exceed expectations**
 - Write out Thank You notes and/or use the postcard to invite them back in
- **Is the clinic following the patient flow process**
 - Attract (phone conversation, what's bringing them in), Convert (what plan or package are they interested in), and Retain (follow up call, continue education with adjustments)
- **Does the clinic use the 30-day Wellness Review for the patient re-evaluations and plan changes**
 - Should be used as a follow up tool to show how chiro care is helping.
- **Only approved signage and artwork displayed throughout the clinic and exterior windows**
 - NO outside business advertisement should be in the windows nor on counter
- **All furniture, surface and fixtures operational, clean, and without damage**
 - Clean the surfaces and floors a couple times of day per Covid guidelines and to keep the clinic looking good.
- **All staff in accordance with uniform policy**
 - Only Joint branded and business professional clothing is to be worn, should always look neat and clean.
- **Correct hours of operation professionally displayed on the front door decal**
 - Is the correct PC listed and hours are correct
- **Does the clinic follow all protocols to protect Patient Privacy**
 - Be organized and discreet with documents, making sure to shred and delete forms
- **Does the clinic use, save, and correctly transcribe using the current and correct forms**
 - Make sure all the forms are most recent version, filled out in full by guest and then entered accurately in the system
- **Does the clinic follow correct Medicare compliance procedures**
 - Make sure all who are applicable fill out pages, be mindful that this is an annual acknowledgment so people will sign more than once
- **The clinic's pricing, discounts, and promotions are consistent with current approved company standards**
 - Offering only approved promotions to the patients, up to date with pricing for your zone
- **The clinic has no additional unapproved retail, services or equipment displayed, mentioned or in use**
 - NO outside business products should be on counter, no unapproved massage tools in the back and only doing that manual adjustment