



General Guidelines and Duties

Contents:

1. General Policies and Procedures..... page 3
2. Operations guidelines for Doctors of Chiropractic.....page 4
3. Operations guidelines for Wellness Coordinators
 - a) General duties.....page 6
 - b) Weekly report.....page 7
 - c) Placing orders.....page 9
 - d) Escalations.....page 11
 - e) ARB's.....page 12
 - f) Mail.....page 13
 - g) WC daily routine.....page 14
 - h) Carbon and Calls.....page 18
 - i) Overview of the WC role.....page 16
4. The PEA.....page 20
5. Evaluations.....page 21
6. Timecards.....page 26

General Policies and Procedures

1. **Please arrive to work on time each morning. Wellness coordinators should arrive 15 minutes before opening and Doctors of Chiropractic should arrive at least 5 minutes prior. Do not clock in more than 15 minutes before time to open the clinic.**
2. **Attire: Please dress in business casual attire, which includes slacks, skirts and a button down, polo style shirt or blouse. Athletic wear, low cut clothing, mid-drifts, sweatpants, and flip flop shoes are not appropriate.**
3. **Branded attire: It is preferred that the brand is represented in clothing by either company provided branded attire, or your nametag with the logo and business name.**
4. **Vacation Time: Please give at least a 30 day notice for extended vacation time requests, you can record those requests in the website, and please also text management to let them know personally.**
5. **Call outs and Last minute requests off: Please try to avoid excessive call outs, and if possible try to locate a replacement for you shift prior to letting us know. You can access employee telephone numbers and schedules via the website should you need them.**
6. **Communication: Working with the public can be understandably challenging at times, but we should always strive to maintain a professional demeanor with a problem solving approach. “Warm and Professional” is your go to mantra to help you maintain composure during tough communications.
And remember: If a situation feels beyond your control, or pushes you beyond your ability to solve the problem...warmly and professionally offer to put them in touch with management.**

Guidelines for Chiropractors

We ask that you support the mission and goals that are congruent to the business model.

Understanding that The Joint Chiropractic is built around a membership model, and seeks to educate and engage patients to become long term wellness care patients should inform your communications with them.

Key aspects we look for in the Doctor/Patient interaction include:

1. Weaving a wellness message into your interactions. Take every opportunity to educate the patient about the benefits of regular and consistent care so they understand the value in continuing care even when pain has diminished.
2. Perform a “talking adjustment” by explaining your findings, and what you are doing throughout the time you spend with the patient. This connects patient education with that person’s own real world experience and is the best time to connect and inform.
3. Use the Patient’s name because there is no better way to make them feel at ease and welcome in our place of business.
4. State to them the next best action always saying to them when they should return. “give it a couple of days and lets see you back on Friday...” etc. They are looking to you as the expert to keep them on track.

These are elements that corporate reviewers might look for, so getting in the habit of doing them consistently is a best practice.

For new patients:

When performing your history it is sometimes helpful to write down relevant information to serve as a reminder to you for putting in your notes. Many of us use the back of the informed consent form.

Your history and exam can be brief or expanded, depending on the patient presentation, so use your best clinical judgement.

Remember: North Carolina Board of Chiropractic examiners prefers vital signs be a part of examination procedures, so many of us perform those after the informed consent is obtained, Just remember that if you record them on the back of your informed consent form, notify the WC to give you that form back after it has been scanned, or it may get shredded, and you are left with no vitals to transfer to your notes.

Informed Consent: The NC board also requires us to obtain and verbal and written informed consent prior to initiating care. This should include at least a brief description of the form, notifying them that it presents the risks and benefits of chiropractic care, and the purpose of the form.

Notes: Should be completed before business opens the next day. Use your best clinical judgement in completing notes. Put any red flags/general patient info in the comments section to make them visible.

The hand off: When you escort the patient up front, you should have already presented them with your treatment plan and recommendations in the back. Wait for the patient to arrive at the desk, and then **REPEAT THE ENTIRE TREATMENT PLAN TO THE WC IN FRONT OF THE PATIENT.** This serves to transfer the your authority and the information you have provided to the front desk...**WHICH BEST ENABLES THEM TO DO THEIR JOB.** Failing to do this is also failing your co-worker.

Notes and Documentation

Although we are not submitting notes to a payer for reimbursement and thus scrutiny, we should still make an effort to have complete and well-constructed notes.

Best Practices for notes include:

1. Put a general description of the patient situation as well as any red flags that may exist in the general notes section as a courtesy to the doctor(s) who follow you and to make that information easily accessible.
2. Try to match findings with areas of adjustment. On the left section of the adjustment page, clicking on the squares by each segment (the ones that turn yellow, orange and red,) insert language regarding objective findings. The square that turns blue when clicked simply states that a subluxation is present at that level, and these should, ideally, match where adjustments are given in the panel to the right.
3. Click the informed consent button (bottom right) for all new patients and if it was again obtained.
4. Don't forget to fill out the prognosis section on the vital signs page.
5. Keep in mind that NC requires vital signs be taken for exams, and if you are recording this separately on one of the forms or on the back of one, please make sure the WC knows to give them to you prior to shredding, or you will have no record of the vital signs to put into the system. This can happen, and if they are not available, you will have to leave them blank.

You can log in and finish notes at home should you need or choose to do so, but please have them completed prior to the location opening for the next shift to avoid any confusion.

If there is a person that you did not see, avoid clicking on their name, or the system will assign that person to you and the doctor who needs to create a note will be unable to open them.

Should this happen, or for any other reason, a note is completed under the name of a doctor other than the person who saw the patient, please include a line that states who actually saw the patient somewhere in the daily note.

Three day calls:

It is the responsibility of the chiropractors to make follow up calls to new patients who were seen the previous day.

You can access these through the front office portal by clicking on the appropriate bar in the bottom left of the screen.

This is our opportunity to “head off” problems before they arise, since we can explain to the patient that soreness is often a normal response to a first adjustment etc. and answer any questions that may arise.

WC's can assist us in making these calls on particularly busy days, but corporate would like to see a majority of these calls made by doctors.

Although they are called “three day calls” ideally we would like to see each new patient called the next day.

General WC Duties

Business cash vs Petty Cash: You should have two separate reserves of cash that are kept separate. Business cash is used to make change and hold the cash collected from transactions, and the petty cash is used to what should be relatively rare last minute purchase needs.

Each morning, you should, at the start of the day, count both the business cash and the petty cash, and record the amount on the daily log in the appropriate place.

Should the amount not balance with what was recorded for the end of the previous day, notify management immediately.

Through the day, you will recording any cash in: sales, or cash out: deposits in the appropriate area of the daily log.

The petty cash is funded by the business cash.

Business Cash: is cash on hand from business transactions, such as a patient (pt) paying cash for a walk-in, overage wellness plan visit, their initial visit, etc.

Business cash should be at \$300 but may go over at which time a deposit will be made.

Deposits: Deposits should be made close the end of every month if your business cash is in excess of 300 dollars so that as much of that month's revenue as is possible is reported and in the bank by the end of the month. A deposit should also be made anytime business cash gets much above \$500 so that we are not keeping excess cash in the clinics. When you are ready to make a deposit and go to the nearest "truist bank" notify the operations manager, who will send you a temporary image that contains the information you need to give the bank to make a deposit.

After the deposit is made, go to the appropriate page on the website, scan, upload, and report that the deposit was made.

Replenishing petty cash from business cash: When petty cash gets low, it will be replenished with business cash and all receipts will be sent to Sonia the bookkeeper through the website. The business cash log is on the Clinic Daily Report and is part of your daily reconciliation duty. The amount of money on the Clinic Daily Report should always equal the amount of business cash on hand in your clinic.

To replenish from business cash, go to that page on the website, and record each receipt that has been saved from purchases made with petty cash. The total of these receipts plus the remaining cash in the envelope should balance to 200\$.

Scan and total all receipts and upload them to the website. This go directly to the operations manager and the book keeper.

By uploading those receipts, you are requesting to take the equivalent amount out of business cash and replenish petty cash. The first time you do this please reach out for guidance to help you with the process.

Petty Cash daily use: is used to purchase something for the clinic, with permission. Petty cash on hand should never be more than \$200 and will be replenished with the business cash when it gets low as previously discussed. There is a petty cash log on your desktop that you will record all money received into petty cash and all money spent from petty cash. This log should be on your computer dashboard and must be completed anytime there is a change in petty cash.

Petty Cash Log: When money is used or replenished from/to petty cash, report it on the petty cash log. The Petty Cash log should always equal the amount of petty cash you have on hand in your clinic, and the amount of cash plus receipts for purchases should always equal \$200.

Date: the date of the transaction, whether money was deposited or withdrawn.

WC on Duty: should be your name

Description: what was the money used for

Amount Deposited: money replenished into Petty Cash

Amount Withdrawn: money spent

Paid into by: where the money deposited into the petty cash came from ie. Business cash

Disbursed to: who the money spent was paid to ie Sam's club, dollar store etc.

Approved by: who approved the transaction

Be sure to keep all receipts. Mark on the receipt what the purchase was for. When the petty cash account gets low, scan all the receipts, and send them to Sonia then replenish the petty cash from your business cash.

Weekly Report: the weekly report is a summary of each day of the week. This report will be found on your clinic desktop and is to be completed at the end of each day.

There will be a tab for each month on the bottom of the page. To make a new month, right click on the "blank report," then right click on the "copy of blank report" and rename it to the current month.

The report is already formatted and all you need to do is make sure the date is correct and complete the information asked for. Most of it can be found right on the Clinic Daily Report.

Weekly Report Details:

New Patients: the number of new patients seen that day.

Returning Patients: the number of returning patients seen that day.

Number of Member Conversions: the number of new and returning patients that signed up for a Wellness Plan or Flex Plan that day.

Number of Package Conversions: the number of new and returning patients that signed up for a package that day.

Total Visits: the total number of patients seen that day. This can be found on the clinic dashboard, under "Clinic Performance." Click on the arrows and it will generate the statistics.

Cancellations: the number of members that cancelled out that day. This can be found on your Clinic Daily Report under "Goals, Activity." This is not the people who came in and filled out a cancellation form, but those whose plans actually cancelled out that day.

Calls in Log: This is the number of calls that came in to your clinic today. This can be found by scrolling through the calls on the actual phone, being mindful of the date. After you count the calls at the end of the day, delete them from the phone.

WC %: this is your conversion % for the day. You will find this by going to the clinic dashboard and clicking on the arrow next to the Axis icon. This will open a dropdown menu, click on "Staff Conversions." This will generate a report that will show you lots of helpful information that you should get acquainted with! Find your name and follow it across the report to "Conversion Rate %" and that is the number that goes on the report. This number represents the % of new and returning patients that signed up for a plan or package.

Total Sales: This is the ending sales amount. This number can be found on the clinic dashboard, under "Clinic Performance." Click on the arrows in the center and it will generate the statistics. The number under "Total Revenue" is your Total Sales number.

Inventory Form: this form can be found on the computer desktop. It is an inventory of supplies used in the clinic. An inventory should be done weekly.

Print this out and keep it posted in your supply room along with an "inventory sign-out sheet."

Each time you take an item out of your supplies, sign it out on the inventory sign-out sheet.

Update the Inventory Form weekly by taking the old sheet posted in your supply room and counting the current actual items on hand. Once the form is updated, print it and hang it in the stockroom. This is helpful for a quick review of what you have on hand, and can be accessed by management to approve or deny ordering requests.

Ordering:

An update to your inventory form is **required prior to placing any order.**

Placing orders:

Moving forward, we will be allowing each clinic lead to order supplies for each clinic for delivery to free up time for other functions. Below you will find an outline of the procedures and the necessary information to complete the process.

Clinic leads and/or those people most consistently scheduled in each clinic should complete the inventories and place all orders unless there is an urgent, communicated need.

1. General clinic supplies will be ordered from SAMS CLUB.**General rules around ordering from SAMS:**

- A) Please try to order from the saved/frequently used items as those have been “shopped” already to be a good deal. IT WILL BE EASIEST TO GO TO THE “REORDER” TAB AT THE TOP. You aren’t restricted to these items if you need something else, but here you will find those items we have been using.
- B) Only order items that are eligible for free delivery.
- C) If a minimum order is required for delivery, please ensure that you hold off on ordering until you have enough items to qualify for free delivery.
- D) Please do not order an extremely large amount of any item just to “stock up”, the goal is to spread the cost out month to month, not concentrate it in one month.
- E) You should try to get on a regular ordering schedule.
- F) This is for general supplies, bulk items, coffee etc. If you order something like a case of paper, feel free to coordinate bringing some to other clinics as necessary.
- G) You can also order printer ink from SAMS.

Procedure: since there is only one cart available to us in the SAMS website, please notify your fellow WC’s that you are placing an order in the group text thread. When you have completed your order in the cart, please text me so that I can review it, match it by your inventory, and pay for it with the company card.

2. DOK shop materials**General rules around ordering from DOK SHOP:**

- A) Order the supplies for your clinic as needed.
- B) Create the order and save the cart, name the cart “clinic name and date”
- C) Please only order those things we currently stock without prior permission.
- D) Please check with me to see if there are additional items that need to be ordered, including shirts or nametags for new hires etc prior to creating the order.

- E) Please verify that every address that is input for each item is the correct address for your clinic and that they all match. If any variation in addresses exists, they will split the order and charge us twice for shipping.
- F) If you can collaborate and work together to consolidate orders for multiple clinics into a single order and then coordinate transferring the items to your coworkers or dropping off at another clinic when you work there, please do that. You can coordinate amongst yourselves.
- G) When you order cardstock and items that allow multiple addresses be printed on the item, please include all our charlotte area addresses to facilitate a transfer of supplies between clinics should that become necessary and to support the growth of all clinics.
- H) Please consolidate the orders for shipping if it will allow you to do so.

(please place orders M-Th and when I am not working in an office to facilitate completion)

General procedure each time an order is placed: Before you place an order, please ensure that you have:

- 1. Updated your inventory and verify that no other suitable items can be used for that purpose. I will check your new inventory as part of my process of evaluating the order.**
- 2. Notify your fellow WC's that you will be placing items in the cart (for SAMS club only) in the group chat.**
- 3. After you have notified me that you are finished and I can pay for the order, and I have logged on to pay, I will respond in the group chat that the cart has been cleared out so you know it is available if someone else needs to place an order.**
- 4. I will be verifying that items need to be ordered prior to paying so please do not create an order in a cart without first performing an inventory.**

If you have any questions or need clarification, please contact me.

LOG IN CREDENTIALS TO ORDER:

SAMS

drkenneththomas@chirowellnessassociates.com

Lander1975!

DOK SHOP—in clinic passwords

[The Joint Chiropractic Dokshop Login](#)

Escalations:

Should you require assistance in dealing with a patient complaint, please record the details of this on the website under the escalations button. **(please enter EVERY escalation into this area BEFORE you contact management so that a written record is in place and is easily accessible and trackable.)**

Doing so will create a record of the situation and will help management keep them organized and in one place until they are resolved.

Please provide as much detail as possible and complete all the fields.

Common reasons for an escalation to management include: requests for large refunds, angry or very dissatisfied patients, Patients who get loud, aggressive, and/or abusive, patients with a unique clinical concern, and complaints about the care received.

Take a defensive stance:

Remember that people complain about health care for many reasons. Sometimes such complaints are true and valid, and sometimes they are not, or they are seeking a different outcome.

It is important that we protect the health care professionals working with us so keep in mind that you should:

- a. **Never agree with a complaint or apologize for the actions of a health care provider. Doing so can be used as confirmation that an error occurred in a court of law because you are an agent of the health care provider.**

Use language such as “I’m sorry you feel that way,” and “Let me refer you to management so we can get to the bottom of this...” NOT “oh im so sorry you got hurt!” or whatever the complaint includes.

- b. **Always notify the health care provider that is the subject of the complaint. It is unprofessional to keep a healthcare provider uninformed about anything that may impact his or her career, and doing so may subject them, and thus, the business to increasing liability. Additionally, informing them of any and all issues is the only way they can employ their knowledge and education to help mitigate and correct the situation.**
- c. **Always notify management of the situation in detail using the escalations page of the website.**

You will receive updates on the progress of escalations from management as needed, and so you can help to facilitate any actions that may help resolve the issue.

ARB's:

Staying on top of ARB's is important and should be done on a daily basis.

When an account appears in the ARB list to call, that means we were unable to collect the regular recurring charge for that account.

This membership will not count in your clinic's total number of members until the account is reconciled.

Common reasons accounts appear on your ARB list include:

1. The patient got a new or has an expired debit or credit card and needs to update it.
2. The patient had insufficient funds for the charge to process at the time of billing.

One way to reconcile ARB's is to click through your list, and click the "reconcile ARB" tab at the top of the screen.

This is especially effective if done on Fridays after many people get paid.

If this fails, you will need to reach out to the patient, usually by telephone, to encourage them to place a new card on file with us.

Make sure to mark "in process" or "completed" in the far right column of the ARB to reflect what you have done or are doing.

A push to reconcile as many ARB's as possible each month will really reflect positively in your number of members for your location.

Mail:

You should regularly check your mailbox.

Mail received should be handled in the following ways.

Advertisements can be discarded.

Things received that say “chargeback, retrieval, or collaboration debt advice” are notifications that someone has disputed a charge and should be scanned and sent to Dr. Thomas at dr.kenneth.thomas@thejoint.com

Bills: anything that looks like a bill should be scanned and set to bookkeeping at:

bookkeepinghq@gmail.com, and please CC Dr. Thomas as well at the above email address.

Please do not just stack up bills and let them sit in the clinic until someone comes by.

WC Daily Routine

Following this guide will help you make it through your day without missing key responsibilities.

Opening:

1. Turn on computer and tablets.
2. Sign onto computer using the clinic number (this can be found on a post-it note near the computer, in a folder on the desktop called "Clinic Login" or in the clinic binder. (Each clinic has a binder with clinic specific information as well as general information)
3. Make sure that the key fab scanner is "on." There should be a folder on the desktop that you can just double click on to turn it on.
4. Open Google "The Joint"
5. Open a new tab for each of the following:
 - a. **Chirowellnessassociates.com (Clock in and sign into Axis from here or open a new tab to sign in to Axis – your choice)**
 - b. **Daily Report**
 - c. **Axis** – sign in with your user name and password, choose clinic you are in.
 - d. **Clinic email** – sign in with clinic email and password (look in binder for password)
 - e. **Carbon** – sign in with user name and password prompted then chose the appropriate clinic.
 - f. **Clinic Calendar.**
6. Daily Report Completion begins first thing in the morning after turning on the lights, computer and completing #'s 1-4 above.
 - a. **Open Daily Report** and right click on the "Blank Daily Report" tab at the bottom of the page, then choose duplicate. That will create a Copy of Blank Daily Report.
 - b. **Rename a copy** - Right click on the copy of blank daily report and rename it using the current date.

On the Daily Report under "TODAY"

- c. **Date** = the date you are completing the log.
- d. **Wellness Coordinator** = your name
- e. **Chiropractor on duty** = the Doctor who is working in the clinic on that day.
- f. **Total Patients Treated** = this is for the end of the day and can be found on the axis (clinic) dashboard under "Clinic Performance." Click on the arrows in the center of the box to see the total patients treated.
- g. **New Patients** = this is for the end of the day and equals the total number of new patients that were treated that day. (New patients will be added to the Daily Report as they come in.)
- h. **Returning Patients** = this is for the end of the day and equals the total number of returning patients that were treated that day. (Returning Patients will be added to the Returning Report
- i. **# Switching to Flex** = this should be updated throughout the day when a patient switched from a plan or package to a Flex Plan. You may also include returning patient that is not on a plan or package decides to sign on to the Flex Plan.

- j. **#Patients Visiting** = this is completed at the end of the day. This is the number of patients who visited the clinic but have another home clinic. This number can be found by clicking on the Axis dropdown arrow on the main dashboard then click on “Inter-clinic Activity.”
- k. **# of our members out** = this is completed at the end of the day and is the number of your patients who visited other clinics. This can also be found on the “Inter-Clinic” Report. (see step j)
- l. **Net Gain/Loss** = subtract the Members out from the Patients Visiting to obtain this number.

On the Daily Report Under “SALES”

- m. **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.
- n. **Ending Sales Amount** = Total Revenue, this is for the end of day and can be found on the Axis dashboard under “Clinic Performance.”
- o. **Amount Over/Under Daily Goal** = deduct the ending sales amount from the daily sales goal.
- p. **New Patients (NP)** = All patients who come in that have NEVER been to a Joint Chiropractic Clinic before. It is 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.
- q. **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 they sign in and then go back and check off the option they choose to sign up with.

On the Daily Report Under “Goals”

- r. **Revenue** = Monthly Sales Goal, this will be given to you.
- s. **Conversion** = 65% unless told otherwise.
- t. **Attrition** = 10% unless told otherwise
- u. **New Patients** = this is the monthly goal and will change depending on previous months. Ask for help.
- v. **Patient Visits** = this is the monthly goal for patient visits and will change depending on previous months. Ask for help.
- w. **Daily Sales Goal** = Monthly Revenue less Net Sales (this number can be found on the axis dropdown menu on the clinic dashboard. Choose the sales reconciliation report and put in the beginning of the month to the day before the current day, then say download). Next, 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 and check for holiday days off.
- x. **Patients That Left** = the number of patients that came in for a visit and left without being seen. Generally, these are patients that leave because the wait time is too long.
- y. **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 the ARB’s and count the number that are not started and record that number.
- z. **Axis Transaction PBLMS** = any problems that arise with Axis, the computer system.

- aa. **Cancellations** = 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.

On the Daily Report Under Business Cash:

- bb. **Cash/Open** = the amount of cash you have on hand. This is monies that patients pay with and that you make change with.
- cc. **Cash/Close** = the business cash you have on hand at the end of the day. This should equal the opening cash + any cash received – any cash spent.
- dd. **Amount** = the dollar amount paid to you.
- ee. **In from** = name of person or source of the money.
- ff. **Product** = what the payment was for.
- gg. **Deductions From Cash:** money taken out of the business cash.
- hh. **Amount** = the dollar amount of money taken out of business cash.
- ii. **Out To** = Who or what the money was used for.
- jj. **Notes** = anything extra you want to explain.

On the Daily Report Under Tasks:

- kk. **ARB** = found on the clinic dashboard under “Task Types.” Hold the cursor over the bar graph to get the total number of ARBs at the beginning of the day and then again at the end of the day.
- ll. **Carbon Leads** = Number of leads when you log into Carbon first thing in the morning.
- mm. **Patient Education Calls** = these can be found on the clinic dashboard. Hold the cursor over the bar graphs that are labeled “member education” and “non-member education.” Add the two together and record the number under patient education calls.
- nn. **New Patient Follow Up** = these can be found on the clinic dashboard. Hold the cursor over the bar graph labeled “3 Day Follow-up.”

On the Daily Report Under Progress (From Snapshot Report)

- oo. **Snapshot Report** = on the Axis clinic dashboard, click on the dropdown arrow to the right of “reports” and click on advanced reports. Scroll until you find Snapshot Report and click on it. Choose your clinic and run report. Record the information from this report onto the daily log. You can copy and paste “Yesterday’s” information from yesterday’s Daily Log.

On the Daily Log Under Variance from Last Month:

pp. New Patient Variance, Active Member Variance, Conversion Variance and Revenue Variance can all be found on the Snapshot report. See above for how to find snapshot report.

On the Daily Report Under WC Checklist:

- qq. **AM/PM Duties** = these are self-explanatory. Check them off **AFTER you complete** each task. These tasks are to be completed throughout the day and before you leave for the day. If for some reason a task cannot be completed, make a note under “notes” in this section of the daily log. Also, to be included under notes is anything noteworthy whether good or not. For example: the clinic’s tablets were not working. Or A patient was so happy with his adjustment that he did a happy dance!
- rr. **Wellness Review** = each clinic has Wellness Review Forms for pts to complete. Have patients complete these after their first two months treatments and then once every 6 months or as the doctors in your clinic advise. Once they are completed, record the patients name on the daily log, scan the form, and attached to the patient’s files under documents.
- ss. **Referral Cards** = each clinic has referral cards to be distributed to patients. Every new patient gets a folder that has a referral card in it so their name should be recorded here. Also, each clinic should have a goal of distributing at least 5 referral cards a day. Record the names of the patients you hand the card to, here.
- tt. **Challenges Today** = any challenges you faced throughout the day.
- uu. **Best Part of the Day!** It is up to YOU to make it what it is.

On the Daily Report Under Discard Status:

- vv. Mark off yes or no IF you have emptied the shredder, taken out the recycling, emptied the vacuum.
- ww. Mark off yes or no IF you have met the referral goal of handing out 5 referral cards, if you have met the WP (Wellness Plan) sales goal of selling 5 WPs, IF you have met your Daily Sales Goal, which you calculated in the morning.

Ask for help if you have any questions!

Referral Cards:

Each clinic has a goal of handing out 5 referral cards to patients to give to others each day.

A best practice is to place a stack of five next to your keyboard and make sure they are gone by the end of each day.

This becomes an important source of new patients to the business.

Please do not check that you have handed out 5 to meet that goal on the daily log if you have not done it.

Member education calls:

These calls are placed to members who have not used the visits they have on hand, in order to remind them to come in and be seen by the chiropractor(s).

You should stay on top of these calls and say something like,

“We noticed you haven’t been in to get adjusted and the doctors wanted me to call and remind you that it’s important to stay engaged with your treatment to get the best results...”

You can make that your own and put it in words you are comfortable with, but clinics where these calls are missed see lower patient volume and more cancellations due to non use that locations that stay on top of these calls daily.

Three day follow up calls:

Ideally, the doctor working should make a call to each new patient seen the previous day to follow up on that new patient interaction and answer any questions that the patient may have.

The WC should remind the DC’s that these calls need to be made.

Should your doctor(s) be too busy to do so, the WC should complete those calls.

A majority of the calls should be made by doctors.

A note about calls:

You should be aware that all calls in and out are recorded, and will be reviewed during evaluations to determine if appropriate calls are being made.

Carbon:

Carbon a system that consolidates all of the leads we collect from across platforms and from all our paid advertising, and as such, following up on carbon leads is ONE OF THE MOST IMPORTANT tasks a WC must stay on top of throughout the day.

To open it visit carbon.biz. It should come up with the appropriate login information prefilled.

Select the correct location of your work.

Leads are populated when someone expresses an interest in coming into The Joint for care, by responding to ads, or filling out a form to take advantage of our low intro offer.

They are expecting someone to reach out and “schedule” them to come in for an initial visit.

We can communicate with them via Text message, directly through the carbon system, or by phone call.

Please be aware that all calls are recorded and are available for review.

Best practice is to

1. Call them on the phone. If they answer, and you are able to schedule them mark that lead appropriately in carbon.
2. If they do not answer, immediately follow up with a text message. They can reply by text and you can carry on a conversation with them.
3. Keep in mind that although we are a walk in business, and you should make them aware of that prior to their visit, many people are “used to” making an appointment. You can “tentatively schedule” a time for them to come in for an exam and adjustment, but make sure they know they may be waiting behind people who are already in the que.

An example of a good script to follow when making calls is:

“Hi! This is bonnie with the Joint chiropractic in concord...I understand you responded and are interested in coming in to the clinic for your initial exam and adjustment and I was just calling to see if I could help set that up for you ?!”

Key Points about Carbon:

1. **Consistency is key.** Call leads as quickly as possible after they come into your system. Many people, if expressing interest, are likely to want to come same day, so we should try to facilitate that every time.
2. **The percentage of leads that convert to visits is tracked.** We should shoot for a **minimum of 50** percent of those creating a lead actually coming in as a patient.
3. **Not following up is literally wasting the money we budget for advertising.**

Overview of the WC Role:

As the WC you are the face of the office, its communication hub, and its facilitator.

Bring the right spirit to the WC role.

You set the tone.

You create the rhythm and the flow.

Coming to work as the best version of yourself and really investing in creating a warm, professional, and positive environment will go miles towards creating amazing beautiful days that positively impact lives...and in doing so...days that are pleasant productive and fun for everyone who enters your space.

If you were selected for the role, it’s likely because someone saw in you a personality that shines, an ease of communication, and an attitude that fits well with the job requirements...so let that person shine 😊

PEAs

About quarterly, a representative of The Joint Corp. will visit each clinic to ensure that standards are being met.

You will receive exhaustive communication regarding these visits prior to them happening, and guidance in preparing for them.

Numerous resources to help with this preparation are available in the documents section of the website for you to download or print.

Here I will list just key Items to keep in mind so that we can “live in a place” where we are always prepared for the review when it happens.

1. Clinic should display correct hours and doctor names on the door
2. Clinic website should be updated with correct doctor bios and new photos
3. Correct doctor licenses should be displayed
4. Correct and up to date forms should be printed and in folders for use in the clinics
5. Clinic should be clean and sanitary
6. Clinic should have no other non branded signs or materials
7. WC and DC should be calling patients by first name
8. WC should be focusing on key differentiators that make the joint different and communicating that with people. These include, no insurance, affordable, accessible, convenient hours, no appointments necessary.
9. WC should know that ABN forms are required for medicare patients and be able to explain why, (we will go over this with you.)
10. WC should be able to explain plans and packages.
11. All informed consent forms must be signed by doctor and patient and dated (make them do it if they forget!)
12. All proper documents, contracts and forms must be filled and uploaded to Axis.

There are more! But this is a good start for what to keep in mind.

Evaluations:

Periodically, each clinic location, and by extension, those people working in the location will receive an evaluation of performance by management. This is separate from the PEAs conducted by corporate, and are meant to help us deliver the best experience and optimize performance.

These evaluations may be conducted in person or by camera.

These evaluations are not meant to be punitive or scary, they are meant support the success of each clinic location and to help guide employees towards the provision of a quality, positive experience.

They will focus on things like:

Communication

Clinic preparation

Normal business practices

Reviews

Inventory

New patient experience and handoff

Conversion rates

Carbon

Phone Calls

On the following pages are an example of the evaluation form that could be used. (This is subject to change as needs arise.)

Clinic Periodic Evaluation Form

Name of \ Clinic: _____ Date of Evaluation: _____

WC on duty: _____

DC on duty: _____

Please rate the following areas of performance on a scale of :**1 to 5, with 1 = needs improvement and 5 = excellent.****1. Telephone Skills:**

- Proper phone etiquette
- Friendly and welcoming tone (Warm and Professional)
- Ability to answer common questions confidently
- Ability to handle customer complaints and concerns

Rating: _____

More Feedback: _____

2. Carbon Follow Up:

- Timely and efficient follow up with customers
- Providing the right information and addressing concerns
- Following up with leads and increasing conversion rates

Rating: _____

More Feedback: _____

3. Lead Conversion:

- The ability to convert phone calls into appointments

- The ability to turn prospects into customers

Rating: _____

More Feedback: _____

4. Cleanliness:

- Maintaining a clean and organized workplace
- Making sure the clinic is cleaned after every patient

Rating: _____

More Feedback: _____

5. Inventory Management:

- Monitoring and tracking inventory using approved tools
- Keeping inventory stocked
- Placing orders in a timely manner
- Helping with keeping inventory levels optimal

Rating: _____

More Feedback: _____

6. Reviews:

- Encourage clients to leave reviews through various channels
- Responding promptly to reviews
- Addressing any concerns or complaints in reviews

Rating: _____

More Feedback: _____

7. Customer Satisfaction:

- Ensuring clients' satisfaction with each visit
- Following up with clients after their visit
- Addressing any issues that may arise with clients

Rating: _____

More Feedback: _____

8. New Patient Hand Off:

- Effectively explaining the new patient process
- Ensuring the new patient feels comfortable and cared for
- Performance of the key tasks required for the hand off

Rating: _____

More Feedback: _____

Specific Feedback for (name of employee):

Overall Rating: _____

9. Branded Attire Being Worn? DC Y/N WC Y/N

Additional Comments:

Evaluator Signature: _____ Date: _____

tal Hours		Total WP	flex	twnypk	sixpk	tenpk		Total Bonus
8:25	8.42	2						190
0:00	0.00	2						Total Pay
0:00	0.00				5	1		\$440.00
0:00	0.00	1		1				
0:00	0.00	1						
0:00	0.00							
0:00	0.00							
8:25	8.42	12	0	2	7	2		
<i>amount \$ per</i>		7	5	15	8	10		
<i>Bonus totals</i>		84	0	30	56	20		
16:40	16.67							
\$15.00								
\$250.00								
\$440.00								

- Please complete these from a desktop or laptop. The use of a phone to complete them generally leads to errors and difficulties.
- Please try not to delete fields that have calculations in them and if you do reach out and I can fix it for you.

For any issues, please contact Dr. Thomas by text at 704-512-9370.

I am happy to provide you guys with guidance or technical assistance.

We hope this serves as a guide and a ready resource for you as you strive towards excellence in your role.

Of course, this is not exhaustive, and is subject to change at any time to meet business needs, and should you require further assistance or explanation at any time, do not hesitate to reach out to a member of management.