

New Franchise Clinic Operations

2019 Facilitator Guide





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A Note to the Facilitator

Dear Facilitator,

Congratulations on being chosen to be a certified trainer for our New Franchisee Clinic Operations Training! You were chosen for your skills and expertise, and because of your track record of delivering an excellent patient experience.

Use this guide to help you in each training. You will find tips, answers to the activities, notes on facilitation, topics to cover and direction of where to find additional information. This guide includes the participant sections for a visual on what they see for each activity.

Find helpful facilitation tips in the back of the guide. These are suggested best practices in facilitation.

Thank you for your outstanding work effort! You are a big part of providing initial support and guidance for New Franchisees!

The Joint Corporate Office Training Team



Training Pre-work and Preparation

Instructions

The graphic below shows the New Franchisee Training Flow and should be used to keep track of each stage of training. Pre-work, Clinic Operations Training, and Business Operations at the Corporate office are all included.

This section is for the participant to complete on their own time. It is meant to help them keep track of the various phases of training.







Pre-work

- ☐ Complete the D.C. (Doctor of Chiropractic) Learning Path assigned to you in the Learning Center.
- ☐ Complete the W.C. (Wellness Coordinator) Learning Path Assigned to you in the Learning Center.
- Complete the prep call with a Regional Training Specialist. Your assigned Regional Training Specialist will set up this call.

Certified Training Clinic

Training on the day to day operations of running a clinic.

Travel Schedule

Monday of the week of training is a travel day. Tues-Thursday are full training days. Friday is a half day of training.

Clinic Support Center Training

Training in the operations of setting up and running a clinic from the business side. Your workbook for this training will be provided at the Corporate office.

Facilitator Notes

DO: Have the participant read the Welcome Letter and answer any questions about this week's training. Provide the participant with the clinic phone number and address in the event they need to contact you.

SAY: "The goal of this week is to cover the various operations activities at the clinic. I am your facilitator and while I will be guiding you through the week, there are also multiple structured activities you will complete on your own to help you with your learning."

IMPORTANT: The agenda may be flexible from day to day depending on the activity in the clinic. However, keep the topics of discussion within the day instead of jumping ahead, for training consistency and retention.

Welcome!

This participant workbook will act as your guide as you learn about Clinic Operations. The learning for a New Franchisee is designed to be participant centered. In this type of learning, many instructional methods are shifted from the facilitator to the participant. Activities are a mix of instructor-led and self-guided; designed for auditory, visual and hands-on learning styles.

Workbook Sections

Learning objectives: Objectives can be found before the plan for the day. At the end of the day, the facilitator will recap the objectives with you.

Plan: The plan consists of guidance for each activity. It is recommended that topics are covered in the order outlined in the plan as content builds throughout training.

Additional guidance: Find <u>The Joint Glossary</u>, and helpful information about resources.

Icon Glossary



Hands-on



Self-guided



Facilitator-led



Notes



Training tip



Role-play



Knowledge Check



Case study



Clinic Name:	 	 	
Clinic Phone:			
Clinic Address			
Participant Name:			
Facilitator Name;			





Facilitator Notes

DO: Explain the
Checkpoint Challenge
to the participant and
encourage them to
complete all five. When
each challenge is
completed, award the
participant a star. The
stars can be signed by
you once the activity is
complete if you do not
get stamps or stars.

Checkpoint Challenge

Instructions

Play the checkpoint challenge! There are five check point activities throughout the training. When you have an opportunity to collect a star see your facilitator.



Facilitator Notes

DO: On the next few pages, cover the week at-a-glance and day one objectives and agenda. Explain that day one starts with the foundation of The Joint and the role of the W.C.

ASK: "What questions do you have for me?"

Week at a Glance

DAY ONE

Welcome, Meet the Joint, Introduction to the Wellness Coordinator Role

- Welcome and Training Housekeeping
- Clinic Tour
- Introduction to The Joint
- · Clinic Roles
- Basic Terminology and Policies
- Shadow the WC Patient Flow
- ATLAS Basic Functionality
- Pricing
- Sales Focus

DAY TWO

Wellness Coordinator Role

- · ATLAS Basic Billing
- ATLAS Learner Demonstration
- Existing Patient Membership Scenarios
- Document Handling- Scan, Upload, Delete, Shred
- Patient Case Studies
- · Metrics and Blue Book



Week at a Glance

DAY THREE

Be the Wellness Coordinator & Doctor of Chiropractic Observation & Interview

- Opening Checklist
- Admin Functions
- · Be the Wellness Coordinator
- Observe the Doctor or Chiropractic
- Closing Checklist

DAY FOUR

Skills Assessment and Training Recap

- · Be the Wellness Coordinator Skills Assessment
- New Patient Experience
- Wellness Coordinator Objectives Skills Review
- Training Week Recap



Day One Objectives

Meet the Joint Objectives

- Describe The Joint's Mission "To improve the quality of life through routine and affordable chiropractic care and core values Integrity, accountability, trust, excellence, respect"
- Explain the benefits of routine chiropractic care
- Understand what makes The Joint different than traditional chiropractic offices
- Understand both the D.C. and W.C. roles and responsibilities

Patient Flow Objectives

· Discuss the key components of efficient patient flow

Greeting Patients and Taking Intake Forms Objectives

- Illustrate welcoming new patients to The Joint
- Differentiate the welcome script between Medicare patients and non-Medicare patients
- · Assemble clipboards with patient intake forms and key tags and understand the benefits of key cards
- Distinguish the difference between a patient's first visit and all subsequent visits
- Review completed intake forms (check for signatures, sign as witness, etc.)
- · Indicate how to adhere to patient privacy
- Identify which intake forms to give to the doctor

Day One Objectives

Plans and Packages Objectives

- Understand The Joint's products plans and packages
- Match the patient's treatment plan to a plan or package
- Explain policy on splitting/sharing packages and plans
- · Understand zone pricing
- Summarize how inter-clinic visits & fees work
- Define Medicare limiting charges
- · Assemble wellness plan welcome kits

Sales and Close Objectives

• Understand the entire sales process from start to finish and demonstrate the W.C. actions in the sales process

ATLAS Objectives

· Recall and demonstrate basic ATLAS functionality



Day One Agenda

Facilitator Notes

DO: Discuss where the bathroom is located and water. Give the participant some ideas of what is in the area for lunch. Discuss training times each day.

This is a great time to let the learner know that they should always put the patient first. So, at times they may abruptly stop to address the patient first and swiftly.

ASK: "What questions do you have for me about training week?"

Activity Detail					
Time	Туре	Activity	Method	Page/Resource	Completed
.25		Welcome and Housekeeping	Facilitator Led	p. 15	
.5		Clinic Tour	Facilitator Led	p. 16	
.5		Understanding Clinic Roles	Facilitator Led	p. 18	
.5		Introduction to The Joint	Self-guided	p. 21	
.5		Basic Terminology	Self-guided	p. 25	
1 hour		Overview of Forms	Facilitator Led	p. 27	
.5		Five Step Sales Process	Self-guided	p. 28	
2 hours		Shadow the W.C Welcome, Build Rapport, Patient Intake, Patient Flow	Facilitator Led	p. 31	
1 hour		ATLAS Basic Functionality	Facilitator Led	p. 33	



Day One Agenda

Facilitator Notes

DO: Discuss where the bathroom is located and water. Give the participant some ideas of what is in the area for lunch. Discuss training times each day.

This is a great time to let the learner know that they should always put the patient first. So, at times they may abruptly stop to address the patient first and swiftly.

ASK: "What questions do you have for me about training week?"

Activity Detail					
.5		Pricing Structure	Facilitator Led	p. 34	
.5		Sales Focus	Shadow the Facilitator	p. 35	
.5		Sales	Role-play	p.37	
.25		Closing Activity	Facilitator Led	p. 38	

Day One

- Welcome and Housekeeping
- Meet The Joint
- Introduction to Wellness Coordinator Role

Welcome and Housekeeping (.25)



Facilitator Notes

This section is for the participant to take notes as you discuss the activities for the week and for day one.

Instructions

As your facilitator discusses the week at a glance, take notes in the space provided below.



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Day One

- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

Clinic Tour (.5)



Facilitator Notes

DO: Discuss how the front office is set up—at the counter and behind the counter. Provide the participant with best practices for organizing forms and the front office. Discuss the kit marketing sends to the clinic with various promotions and anything else that may be useful in clinic set up.

SHOW:

- Outside of the building & marketing materials (window decals, a-frames, etc.
- Front waiting area and set up

Instructions

During the tour with your facilitator, use the sections below to capture helpful information about marketing, clinic and office setup. Additionally, notice the current marketing materials and inquire about the frequency of promotions and marketing kits sent to the clinic.

L	Outside of the building

- 4
_//
K/I

Marketing

Day One

- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

Clinic Tour (.5) (con't)



Facilitator Notes (con't)

- At the front desk set up
- Behind the front desk set up
- Adjustment Bay and Doctor set-up
- Back office set-up
- Bathroom (If not already shown)

Instructions

During the tour with your facilitator, use the sections below to capture helpful information about marketing, clinic and office setup. Additionally, notice the current marketing materials and inquire about the frequency of promotions and marketing kits sent to the clinic.

Back o	ffice			



Training Tip

Ask your facilitator about best practices for front desk setup, and back office organization.

Front office			

Day One

- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

Understanding Clinic Roles (.5)



Facilitator Notes

DO: Review the answers with the participant and answer any questions.

Instructions

There are two roles at The Joint Clinic: Wellness Coordinator (W.C.) and Doctor of Chiropractic (D.C.) Take time to learn more about each role. Read about the role on pages 7 and 8 in the *Wellness Coordinator Manual*.

1. What are the responsibilities of the Wellness Coordinator? Answer:

- Assisting patients with the completion of required paperwork
- Assisting patients by pairing their treatment plan with their most affordable and convenient payment option to align with the doctor's treatment plan and fit their needs
- Managing daily clinic operations, including cleaning, ordering/stocking supplies and maintaining organized patient records in Atlas, our patient database

2. Describe the educational background of The Joint's Doctor of Chiropractic. Answer:

All of the doctors at The Joint Chiropractic are licensed Doctors of Chiropractic who have completed a doctor of chiropractic degree program from a CCE-accredited college.

The Council on Chiropractic Education (CCE) is the agency certified by the U.S. Department of Education to accredit chiropractic colleges in the United States.

3. How is chiropractic work regulated?

Answer:

Chiropractic is regulated individually by each state, the District of Columbia, and some federal agencies.

Day One

- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

Understanding Clinic Roles (.5) (con't)



Facilitator Notes

DO: Prepare answers ahead of time for the interview. Advise the D.C. of the questions as well so that they can prepare for the interview.

ASK: "What other questions do you have for me about the Wellness Coordinator role?"

RESOURCE: Answers can be found on pages 7 & 8 in the Wellness Coordinator Manual.

Instructions - Part 2

Spend time with both a W.C. and a D.C. to understand more about their role. Here are some interview questions to get you started.

W.C. Interview

Questions	W.C.'s Answer
To be successful in their role, what advice would you give to other Wellness Coordinators?	
How do you balance patient care and the day to day clinic operations?	
What are some of your best practices for working efficiently?	

Day One

- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

Understanding Clinic Roles (.5) (con't)



Facilitator Notes

DO: Prepare answers ahead of time for the interview. Advise the D.C. of the questions as well so that they can prepare for the interview.

ASK: What other questions do you have for me about the Wellness Coordinator role?

RESOURCE: Answers can be found on pages 7 & 8 in the Wellness Coordinator Manual.

D.C. Interview

Questions	D.C.'s Answer
Why did you want to become a Chiropractor?	
When you first started, how did you adopt to The Joint model?	
How many adjustments do you complete in one day and how do you keep up with the demand?	

Day One

- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

Introduction to The Joint (.5)



Self-guided

Facilitator Notes

DO: Review the answers with the participant and answer any questions.

RESOURCE: Answers can be found on The Joint website (www. thejoint.com) and on pages 4-6 in the Wellness Coordinator Manual.

Instructions

Get to know more about The Joint through a fun Scavenger Hunt activity! Use the following resources to find answers to each question in the activity. Complete the full Scavenger Hunt to collect a star!

Questions	Answers
What is our Mission Statement?	(To improve quality of life through routine and affordable chiropractic care.)
Where is the Mission Statement shown to patients in our clinics?	(On the back wall in the bay area.)
What type of provider is The Joint striving to be in chiropractic care?	(The premier provider of chiropractic care.)
What are The Joint	Trust: We believe in the reliability, truth and ability of others. Integrity: We adhere to moral and ethical principles. Excellence: We drive a continuous pursuit of optimal
Chiropractic's Core Values?	Excellence: We drive a continuous pursuit of optimal levels of performance. Respect: We appreciate the intrinsic value of each individual.
	Accountability: We hold ourselves and others responsible.

Day One

- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

Introduction to The Joint (.5) (con't)



Self-guided

Questions	Answers
Why do we do what we do?	(Routine activities regularly cause misalignments of the spine. These misalignments create interference with the transmission of proper neuro-electrical impulses through the spine and paravertebral structures. These misalignments can result in decreased motion, pain and discomfort. A spinal misalignment may also contribute to a lessening of the body's overall health.)
True or False: We treat severe injuries using x-rays and diagnostic equipment.	(False)
What insurance carriers do we accept for payment?	(We do not accept insurance.)
What is the popping noise when an adjustment is delivered?	(The popping sounds you hear are your joints releasing tiny pockets of gases. A chiropractic adjustment does not affect the bones of either side of the joint, but rather the connective tissue that holds the joint together.)



Day One

- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

Introduction to The Joint (.5) (con't)



Self-guided

Questions	Answers
Is chiropractic care safe?	(Chiropractic is the largest, non-invasive, drugless and safest forms of health care available.)
Will I be sore following a chiropractic adjustment?.	(Any reported soreness after an initial adjustment has been described as similar to that associated with starting a new exercise program. Drinking plenty of water, using an ice pack, and engaging in light stretching after your first visit can help ease any discomfort to promote healing.)
What is the lifetime prevalence of low back pain being reported?	(As high as 84%)
True or False: Chiropractic Care can help with headaches, migraines, arthritis and fibromyalgia?	(True)

Day One

- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

Introduction to The Joint (.5) (con't)



Self-guided

Questions	Answers		
Can chiropractic care benefit someone during pregnancy?	Yes, benefits of chiropractic care during pregnancy could include: Relief from back, neck or joint pain Controlling symptoms of nausea Reduction in time of labor and delivery Prevention of a potential cesarean delivery		



Congratulations!

You completed a <u>Scavenger Hunt Checkpoint Challenge!</u> See your facilitator to collect your first star!

Day One

- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

Basic Terminology (.5)



Self-guided

Facilitator Notes

DO: Review the answers with the participant and answer any questions.

RESOURCE: Answers can be found throughout the Wellness Coordinator Manual. **Tip**: Press CTRL + F to find the term and definition in the Manual.

Instructions

This activity will help you learn the most common terms and definitions. For each definition, find the term from the key. Use the W.C. Manual to help you find the answers. Write the answer in the space provided below.

Key Words	☐ ATLAS	☐ Home Clinic	□ Packages
☐ Treatment Plan	☐ Super-bill	☐ Table Loading	☐ Walk-in
☐ Inter-Clinic Fee	☐ Flex Plan	☐ Additional Plan Visit	☐ Wellness Plan
			☐ Blue Book

Questions	Answers
A monthly recurring membership plan that includes four visits per month, that can be used at any clinic with a two-month minimum commitment	Wellness Plan
The clinic where the patient completes their intake forms and their membership fees are processed (although patients may visit any clinic)	Home Clinic
Patients on Wellness Plan pay only \$10 per visit after their 4th visit in the monthly billing cycle	Additional Plan Visit



Day One

- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

Basic Terminology (.5) (con't)



Self-guided

Questions	Answers
A membership plan that should be presented to existing members only who have requested cancellation of their existing membership - \$19 per month membership fee with a \$15 per visit charge	Flex Plan
When there is an open table for an existing patient, W.C.s will send patients back to the adjustment bay where they can relax until the DC is ready for their adjustment	Table Loading
The doctors specific plan to how they will get the patient better to achieve their goals	Treatment Plan
When a patient visits a clinic that is not their Home Clinic, that clinic gets paid \$9.50 by the home clinic	Inter-Clinic Fee
A detailed receipt of the services provided to the patient over a period of time	Super-bill
A quarterly tracking tool that breaks down daily tasks, goals, and items to be completed	Blue Book
The patient and billing management system utilized by all The Joint clinics	ATLAS

Day One

- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

Overview of Forms (1 hour)



Facilitator Notes

po: Cover each form with the participant and summarize the sections. Provide examples of dialogue that can be used to explain the sections to the patient. Stress important points and show the sections to highlight for the patient. Have the participant take notes for best practices in summarizing and explaining each section to the patient.

HANDOUT: Provide the forms to the franchisee if they would like to take an example of each form.

Instructions

Depending on the visit, a form may be required for the patient to complete. Your facilitator will review the purpose of each form with you along with the highlighted areas that are completed by the patient. As you learn more about the various patient scenarios, the trainer will provide a more in-depth guidance. Take notes in the space provided.

Questions	Answers
Where can you find and print forms?	Dokshop
Patient Intake Forms	(Participant notes)
Wellness Plan Form	(Participant notes)
Membership Freeze Form	(Participant notes)
Membership Cancellation Form	(Participant notes)
Package Plan Form	(Participant notes)



Training Tip

Forms are free to download and should be downloaded every time new forms are needed to ensure the clinic is using the correct forms.



Day One

- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

Five Step Sales Process (.5)



Facilitator Notes

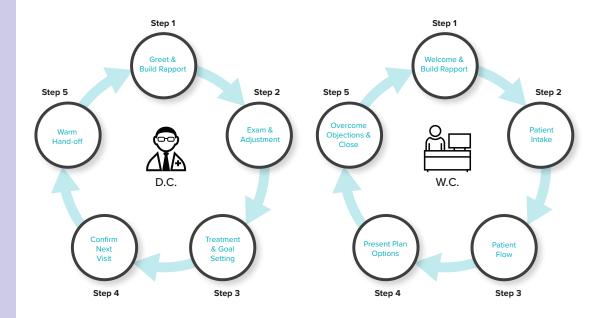
po: Discuss the sales process with the participant. Refer to the W.C. Manual for helpful dialogue and information about each step in the process. Review the summary of each step with the participant.

ASK: "What are some sales techniques you have seen work well (in general)?"

(Discuss the techniques and how they relate to The Joint's).

Instructions

The five-step sales process guides the Wellness Coordinator and Doctor of Chiropractic through each step of a patient visit where there is an opportunity to help patients begin a wellness plan. Read pages 9-19 in the W.C. Manual to learn about the five-step sales process and complete the questions below.





Day One

- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

Five Step Sales Process (.5) (con't)



Self-guided

Summarize each step in the sales process.

Questions	Answers
Step One	(See Wellness Coordinator Manual to compare summary. Refer to facilitator notes for pages.)
Step Two	(See Wellness Coordinator Manual to compare summary. Refer to facilitator notes for pages.)

Day One

- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

Five Step Sales Process (.5) (con't)



Self-guided

Summarize each step in the sales process. (con't)

Questions	Answers
Step Three	(See Wellness Coordinator Manual to compare summary. Refer to facilitator notes for pages.)
Step Four	(See Wellness Coordinator Manual to compare summary. Refer to facilitator notes for pages.)
Step Five	(See Wellness Coordinator Manual to compare summary. Refer to facilitator notes for pages.)



Best practice:

Patients should only wait in the reception area if all tables and chairs in the bay are already taken.

Day One

- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

Shadow the W.C. (Welcome and Build Rapport, Patient Intake)

(2 hours)



Facilitator Notes

Ask: "What are some of your take-aways from the observation? Was anything confusing?"

(Help the participant with questions but don't overwhelm with too much information. If there is a topic they will learn more about later, let them know. Keep the answer short.)

IMPORTANT NOTE:

During this time, the participant observes all steps in the sales process, yet the facilitator led discussion should be focused on the first three steps:

Welcome & Build

Rapport, Patient Intake,

& Patient Flow.

Instructions

Observe the W.C. as they interact with patients. During this time, focus on the first three steps in the sales process. Record your observations in the section below.

Questions	Answers
How did the W.C. greet patients?	(Participant notes)
How did the W.C. build rapport with the patient?	(Participant notes)
What questions did the W.C. ask when new patients arrived for an adjustment?	(Participant notes)
What are some best practices when new patients arrive?	(Participant notes)



Day One

- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

Shadow the W.C. (Welcome and Build Rapport, Patient Intake)

(2 hours) (con't)



Questions	Answers
Discuss the patient intake form with the facilitator. What dialogue is used in each section when explaining the form to the patient?	 Intro: Be sure to tell the new patient your name and ask theirs. Refer to the patient by his/her name throughout the length of his/her visit. Two Questions: Have you been involved in any recent car accidents or work related injuries(workers' compensation)? If answer is yes to either, please provide the new patient with information for referral out. Are you Medicare Eligible (age 65+ or on disability) for any reason? If the new patient is Medicare eligible (or has Medicare), please wait for a doctor to become available and have him/her consult with the new patient. It is at the discretion of the doctor whether the patient will be able to be seen or not. If the patient is accepted, please have him/her fill out the forms for Medicare eligible patients otherwise known as ABN. Remember, a patient cannot be charged more than \$29/adjustment. Paperwork & ID: Provide brief description of The Joint (no appointments, no insurance, open 7 days a week, etc) Present the paperwork to the patient in exchange for their ID. Show the patient the adjustment area, point out the location of the bathroom and water cooler.

Day One

- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

ATLAS Basic Functionality (1 hour)





Facilitator Led

Hands-on

Facilitator Notes

DO: Cover Basic ATLAS
Functionality with the
participant. Allow the
participant to complete
basic functions throughout
the day. Provide guidance
and coaching along the
way.

RESOURCE: ATLAS Basic Functionality pages in the W.C. Manual.

TOPICS:

Login

- Multi-Clinic
- Tab columns in each view
- Patient queue
- Pending notes
- · Today's visits
- Patient list

Front Office Bar

- · Patient search
- Patient list
- · Quick create
- Clinic performance snapshot
- Basic real time reports
- Actionable phone calls

Patient Details

TIP: The ATLAS eLesson is a great refresher to advise the participant to review again before clinic opening.

ASK: "What questions do you have about basic ATLAS Functionality?"

Instructions

Read pages 30-36 in the W.C. Manual to learn about part one of front office functionality. After you are done reading, report what you have learned to your facilitator. The facilitator will already be logged into ATLAS and will be guiding you along the way with more context. Spend about 30 minutes performing the functions you learned as the trainer observes and helps guide you in the steps.



Notes		

Day One

- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

Pricing Structure (.5)



Facilitator Notes

DO: Discuss pricing structure. Show the pricing guide at the front desk to the participant to discuss pricing.

RESOURCE: Information about pricing structure to discuss can be found on pages 22-29 in the W.C. Manual.

TOPICS:

- Wellness Plan
- Zone Pricing
- Packages
- Flex Plan
- Medicare
- Inter-Clinic Fee

Instructions

Take notes as your facilitator discusses the pricing structure and plan options for patients. Read pages 22-29 of the W.C. Manual for additional information about plans and packages, and zone pricing. Additional information on how to present the plan to the patient can also be found in this section.

19		
Notes		
Notes		

Day One

- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

Sales Focus (.5)



Facilitator Notes

DO: Discuss the observations of the participant in how the D.C. talked to patients, the D.C. hand-off, and the W.C. role in the sales process. During this section, the participant observes the D.C. steps in the sales process and the last two W.C. steps in the sales process, Presenting Plan Options and Overcoming Objections and Close.

ASK: "What stood out to you in the observation?"

Instructions

Shadow the W.C. and observe the how the W.C. presents plan options to the patient and overcomes objections. Observe the D.C. in the back of the office as well and take note on the D.C. involvement in the sales process as a trusted advisor. Take notes in the space provided.

Questions	Answers
How did the W.C. present the plan options to the patient?	(Participant notes)
How did the W.C. ask for the sale?	(Participant notes)
How did the W.C. overcome objections?	(Participant notes)
What did you observe about the D.C.'s involvement in the sales process?	(Participant notes)



Day One

- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

Sales Focus (.5) (con't)



Facilitator Notes

DO: Role-Play with the participant- how to offer the plan and overcome objections. Demonstrate first a sales scenario, then have the participant practice.

RESOURCE: Pages 18-19 and 41-23 in the W.C. Manual for dialogue.

Ask first if the participant wants any feedback before providing it. Provide positive feedback and any areas of opportunity.

Instructions

In this activity, use the following objections to role-play with your facilitator. The facilitator will act as the patient and the Franchisee will act as the W.C. After each role-play, your trainer will provide feedback. The role-play begins with the Franchisee (W.C.) presenting the plan options. The Trainer will begin the activity with Role-Play 1-Facilitator demonstration. How did the W.C. present the plan options to the patient?

Role-play #1

Susan, this is how the plan works...

I'll have to think about this...

Day One

- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

Sales Focus (.5) (con't)



Franchisee (as W.C.)	Facilitator (as patient)	
Role-play #2	Objection: "I don't know if I can afford this."	
Role-play #3	Objection: "I don't have a credit card."	
Role-play #4	Objection: "I don't know if I can commit to this wellness plan."	



Congratulations!

You completed the <u>Sales Role-play Checkpoint Challenge!</u> See your facilitator to collect your second star!

Day One

- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

Closing Activity (.25)



Self-guided

Facilitator Notes

This section is for the participant to complete on their own after training. Unless the participant wants to share, you do not have to cover it with them.

Instructions

The facilitator will review the learning objectives (next page). During this time, any questions can be answered in addition to taking notes on topics you would like to explore in further detail. Use the space provided to also reflect on the day.

ı	

My key take-aways:

|--|

Best practices I learned:



Questions I still have:

Day One Learning Objectives Recap

Meet the Joint Objectives

- Describe The Joint's Mission "To improve the quality of life through routine and affordable chiropractic care and core values - Integrity, accountability, trust, excellence, respect"
- ☐ Explain the benefits of routine chiropractic care
- ☐ Understand what makes The Joint different than traditional chiropractic offices
- ☐ Understand both the D.C. and W.C. roles and responsibilities

the day. Ask if the participant has any questions and take note of anything they would like to cover more in depth if time permits.

DO: Review the objectives from

Patient Flow Objectives

☐ Discuss the key components of efficient patient flow

Greeting Patients and Taking Intake Forms Objectives

- ☐ Illustrate welcoming new patients to The Joint
- ☐ Differentiate the welcome script between Medicare patients and non-Medicare patients
- ☐ Assemble clipboards with patient intake forms and key tags and understand the benefits of key cards
- ☐ Distinguish the difference between a patient's first visit and all subsequent visits
- Review completed intake forms (check for signatures, sign as witness, etc.)
- ☐ Indicate how to adhere to patient privacy
- ☐ Identify which intake forms to give to the doctor

Day One Learning Objectives Recap

Plans and Packages Objectives
☐ Understand The Joint's products - plans and packages
☐ Match the patient's treatment plan to a plan or package
☐ Explain policy on splitting/sharing packages and plans
☐ Summarize how inter-clinic visits & fees work
☐ Define Medicare limiting charges
☐ Assemble wellness plan welcome kits
Sales and Close Objectives
☐ Understand the entire sales process from start to finish and demonstrate the W.C. actions in the sales
process
ATLAS Objectives
☐ Recall and demonstrate basic ATLAS functionality

Facilitato Note

Day Two Objectives

ATLAS Objectives

- Understand patient status
- Explain how to process payments and refunds
- Demonstrate how to process past due automatic recurring billing
- Demonstrate how to process membership freeze requests
- Demonstrate how to process membership cancellation requests
- Demonstrate how to process membership renewals
- Interpret real time metrics and clinic snapshot statistics

Patient Question Objectives

• Understand how to answer common patient questions

Metrics and Blue Book

• Explain how to use the Blue Book

DO: Review the day two learning objectives and day two agenda.



Day Two Agenda

Activity Detail					
Time	Туре	Activity	Activity Method Pag		Completed
.5	\bigcirc	Opening Activity	Knowledge Check	p. 43	
.5		ATLAS Billing	Facilitator Led	p. 45	
3.5 hours		Demonstration	Hands-on	p. 45	
1 hour		Common Patient Questions	Facilitator Led	p. 46	
.5		Handling Patient Forms	Facilitator Led	p. 47	
1 hour		Case Studies	Self-guided	p. 48	
1.25 hour		Metrics and Blue Book	Facilitator Led	p. 55	
.25		Closing Activity	Self-guided	p. 56	



• Wellness Coordinator Role

Opening Activity (.5)



Facilitator Notes

DO: Review the answers to the Knowledge Check.

Instructions

Review from the previous day and complete the questions below.

Questions	Answers				
What is our Mission, Vision and Core Values at The Joint?	(To improve quality of life through routine and affordable chiropractic care.)				
What two main roles will you find in The Joint Chiropractic clinics?	(Wellness Coordinator and Doctor of Chiropractic.)				
		Zone 1	Zone 2	Zone 3	The cost per visit in my clinic's zone equals:
	Introductory Offer	\$29	\$29	\$29	\$29
M/b at we are b a valaire	Wellness Plan (Adult)	\$59	\$69	\$79	\$14.75 \$17.25 \$19.75
What membership plans do we offer at The Joint and how are they priced?	Wellness Plan (Youth)	\$39	\$39	\$39	\$9.75
	Additional Plan Visits	\$10	\$10	\$10	\$10
	20 Pack	\$399	\$429	\$469	\$19.95 \$21.45 \$23.45
	10 Pack	\$259	\$269	\$289	\$25.90 \$26.90 \$28.90
	6 Pack	\$179	\$189	\$199	\$29.83 \$ 31.50 \$33.17
	Pay Per Visit	\$39	\$39	\$39	\$39
	Flex Plan	\$19	\$19	\$19	\$15.00

Day Two

• Wellness Coordinator Role

Opening Activity (.5) (con't)



Facilitator Notes

DO: Review the answers to the Knowledge Check.

Questions	Answers
What type of sales process do we use at The Joint to be successful?	(5 step sales process)
What are 3 examples of basic functions for ATLAS? Examples include:	 Adding a new patient Using the search field Adding a patient to the queue, logging in Adding patient details, quick create, viewing a patient's history

• Wellness Coordinator Role

ATLAS Billing and Demonstration (3.5 hours)



Facilitator Notes

DO: Review ATLAS billing and demonstrate each function. For handson: have the participant complete billing functions throughout the day. They can also practice what they've learned from day one, along with practicing billing for three hours.

RESOURCE: ATLAS Billing pages in W.C. Manual.

TOPICS:

- Taking payments
- Paying with cash
- · Paying with CC
- Existing billing info
- Patient status/billing
- ARBs
- Membership freeze requests
- Cancellations
- Utilizing Flex Plan

Instructions

Read pages 39-40 in the W.C. Manual to learn about ATLAS' billing and other functionality. Afterwards, report what you have learned to your trainer, who will guide you through the billing sections in ATLAS and provide more context.

Spend three hours practicing ATLAS' basic functionality and billing. Your facilitator will help you along the way.





Congratulations!

You completed the <u>ATLAS Demo Checkpoint Challenge!</u> See your facilitator to collect your star!

• Wellness Coordinator Role

Common Patient Questions (1 hour)



Facilitator Notes

DO: Discuss common patient questions and the best answers to provide. Below is a list of examples. Provide other common questions you have heard as well.

TOPICS:

How many visits do I have left?

Which Doctor did I see last?

Can I see the same Doctor again?

Can I cancel my plan?

Can I freeze my plan?

Can I change my bill date?

Can I get a new key tag?

Is there a location

Instructions

Use the space below to take notes as your facilitator discusses common patient questions.

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• Wellness Coordinator Role

Handling Patient Forms (.5)



Facilitator Notes

DO: Show the participant the complete process to handling forms.
Stress the importance of shredding patient information after scanning and uploading it.

Instructions

Use the space below to take notes as your facilitator discusses handling patient forms.

Action	Questions	Questions Answers	
Scan	What do you do?	(Scan all forms on the scanner using the scan functions.)	
Upload	To where?	(Upload the forms to a location on the computer where it can be saved, then upload the form to the patient's profile under 'Documents.')	
Delete	From where?	(Delete the forms from the file in the computer.)	
Shred	What is shredded?	(The paper forms.)	



Wellness Coordinator Role

Case Studies (1 hour)



Facilitator Notes

DO: Review the answers to each question in the case study of how you would handle the case studies. Suggested answers are also included.

Instructions

Use the space below to take notes as your facilitator discusses handling patient forms.

Patient Case Study #1

Scenario: A patient comes into the clinic, uses their key tag and heads to the treatment bay for their adjustment. After their adjustment, the patient comes to the front desk and tells you they would like to cancel their membership because they are feeling great now and won't need to use it anymore.

Questions	Answers
What steps would you take with this patient?	(Tell the patient that you're glad that they are feeling great. Explain that this is the best outcome of consistent wellness care at The Joint. Ask if there is any other reason for canceling.)



• Wellness Coordinator Role

Case Studies (1 hour) (con't)



Facilitator Notes

DO: Review the answers to each question in the case study of how you would handle the case studies. Suggested answers are also included.

Questions	Answers	
What product should be offered to a patient wanting to cancel (depending on reason)?	(Offer the Flex Plan to the patient Explain to the patient that chiropractic care is like going to the gym, and does require maintenance. Offer the packages or the Flex Plan. Say: "(Patient), I understand you want to change your plan because (restate patient reason). We have a good option for patients who want more flexibility. It has a discounted membership for savings and a pay as you go set up so you II only pay for what you use. Lets get you switched to that option today.")	
If the patient wants to cancel, how do you complete those actions?	(Provide the patient with a cancellation form and proceed to cancel their membership.)	



• Wellness Coordinator Role

Case Studies (1 hour) (con't)



Facilitator Notes

DO: Review the answers to each question in the case study of how you would handle the case studies. Suggested answers are also included.

Patient Case Study #2

Scenario: A wellness plan patient informs you that they will be traveling to visit family, so they won't be in town and they don't want to be charged until they return.

Questions	Answers
What questions should you ask to better understand and accommodate the patient's needs? Why?	When will you be leaving? What town will you be visiting? (It is possible to research the area to see if there are any Joint Chiropractic locations in the area)



• Wellness Coordinator Role

Case Studies (1 hour) (con't)



Facilitator Notes

DO: Review the answers to each question in the case study of how you would handle the case studies. Suggested answers are also included.

Questions	Answers	
What form do you use to complete next steps and what actions are taken in ATLAS?	(Membership Freeze Form Complete the Membership Freeze Spreadsheet and freeze the membership. A patient's account may be frozen for up to 3 months at a time, and up to 4 months in a year. The patient will sign a freeze form (the form may be emailed to the patient if they are unable to come in to the clinic. Please be sure to fill out ALL dates on the form BEFORE sending/giving the form for signature) stating the beginning and end of the freeze. The WC must sign the freeze form in addition to the patient signing. The freeze will begin on their billing date (so they will be charged the day the freeze goes into effect), and will NOT be charged on the day their account unfreezes (which is also the billing date). Please call the patient on the day his/her account unfreezes and remind him/her that they have 4 visits awaiting them.)	



• Wellness Coordinator Role

Case Studies (1 hour) (con't)



Facilitator Notes

DO: Review the answers to each question in the case study of how you would handle the case studies. Suggested answers are also included.

Patient Case Study #3

Scenario: A potential patient, new to The Joint, walks in and appears to be in pain. You find out that they were recently in a car accident and a friend recommended The Joint to receive great care.

Questions	Answers	
What dialogue would you have with the patient and why?	("Sorry to hear about your accident. We definitely would like to see you feel better. Though, since you have recently been in a car accident, here is an appropriate provider. The Joint provides a service to patients with routine and maintenance care. This healthcare provider does see patients after a serious car accident. Give them a try. We hope you feel better soon.")	
What are your next steps with this patient given the information?	(Refer the patient out.)	
What is the D.C.'s role with this individual?	(The patient may ask to speak to the Doctor further. If this is the case, the Doctor may talk to the patient, but ultimately, the patient will be referred to an appropriate provider.)	



• Wellness Coordinator Role

Case Studies (1 hour) (con't)



Facilitator Notes

DO: Review the answers to each question in the case study of how you would handle the case studies. Suggested answers are also included.

Patient Case Study #4

Scenario: A patient walks in that is new to The Joint. In asking your fact-finding questions you discover that they are Medicare eligible.

Questions	Answers
What dialogue would you have with the patient and why?	("OK, (Patient's name), since your are Medicare eligible, I am going to notify the Doctor, please have a seat, he/she will be with you soon for a consult.")
What steps does the D.C. take with this patient?	(If the new patient is Medicare eligible (or has Medicare), please wait for a doctor to become available and have him/her consult with the new patient. It is at the discretion of the doctor whether the patient will be able to be seen or not.)
If the D.C. is going to treat the patient, what actions need to be taken to process the MEP?	(If the patient is accepted, please have him/her fill out the forms for Medicare eligible patients otherwise known as ABN. Remember, a patient cannot be charged more than \$29/adjustment.)



• Wellness Coordinator Role

Case Studies (1 hour) (con't)



Facilitator Notes

DO: Review the answers to each question in the case study of how you would handle the case studies. Suggested answers are also included.

Patient Case Study #5

Scenario: A patient calls complaining that they have canceled their Wellness Plan but are still being charged.

Questions	Answers	
What is the response to the patient?	(Empathize with the patient. Ex., "Thank you for bringing this to our attention. That sounds frustrating. Let me see do some further research for you.")	
Depending on whether the cancel form is present, what are the next steps?	(Cancel the patient's account. Typical procedure is that W.C.s are authorized to refund up to three months. (This may vary from clinic to clinic.))	
At what point would this be escalated to a supervisor or Franchisee?	(If the patient asks for a refund for over three months, speak to a supervisor or Franchise owner. It will be up to the Franchise owner to decide on escalating procedures.)	



Congratulations!

You completed the <u>Case Studies Checkpoint Challenge!</u> See your facilitator to collect your star!

• Wellness Coordinator Role

Metrics and Blue Book (1.25 hour)



Facilitator Notes

DO: Show the participant how to complete the Blue Book daily. Show the formula used to find out the numbers needed each day for each metric.

TOPICS:

- Opening and Closing Activities
- Sales
- · Current month ARBs
- Conversion %
- New Patients
- Walk-In
- Packages
- Plans
- Attrition
- Patient Visits
- ARBs Collected
- Referral cards given
- Referral %

Instructions

Use the space below to take notes as your facilitator discusses handling patient forms.



Notes

Daily Goal Formula

Daily Goals should be discussed in your morning huddles. There is a mathematical way to get to the daily goal for sales, plans, packages, new patients, and patient visits:

Month Goal - MTD Actual - ARB's Remaining = X = X / Number of Days Left in the Month (top of Blue Book) = Daily Goal

Example: Month Goal = \$35,066, MTD Actual = \$8,238, Current Month ARBs Left = \$24,567, Days Left in Month = 27

\$35,066 - \$8,238 - \$24,567 = \$2,261 / 27 = \$83.74

So, \$83.74 should be the goal for additional revenue in addition to today's starting sales.

Day Two

• Wellness Coordinator Role

Closing Activity (.25)



Self-guided

Facilitator Notes

This section is for the participant to complete on their own after training. Unless the participant wants to share, you do not have to cover it with them.

Instructions

The facilitator will review the learning objectives (next page). During this time, any questions can be answered in addition to taking notes on topics you would like to explore in further detail. Use the space provided to also reflect on the day.

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My key take-aways:

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Best practices I learned:



Questions I still have:

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Day Two Objectives Recap

ATLAS Objectives

- Understand patient status
- ☐ Explain how to process payments and refunds
- ☐ Demonstrate how to process past due automatic recurring billing
- ☐ Demonstrate how to process membership freeze requests
- Demonstrate how to process membership cancellation requests
- ☐ Demonstrate how to process membership renewals
- Interpret real time metrics and clinic snapshot statistics

DO: Review the objectives from the day. Ask if the participant has any questions and take note of anything they would like to cover more in depth if time permits.

Patient Question Objectives

☐ Understand how to answer common patient questions

Metrics and Blue Book

☐ Explain how to use the Blue Book

Day Three Objectives & Agenda

Learning Objectives

- Understand the opening checklist
- Demonstrate the role of a W.C.
- Understand the role of a D.C.
- Understand the closing activities in the closing checklist.

DO: Review the day three learning objectives and day three agenda.

Activity Detail					
Time	Туре	Activity	Method	Page/Resource	Completed
1 hour		Opening Checklist	Hands-on	p. 59	
.25	\bigcirc	Opening Activity	Knowledge Check	p. 60	
3 hours		Be the W.C.	Hands-on	p. 61	
2 hours		Observe the D.C.	Self-guided	p. 63	
.5		New Patient Experience (Optional)	Self-guided	p. 64	
.5		Closing Activities Checklist	Hands-on	p. 65	
.25		Closing Activity	Self-guided	p. 66	

Day Three

- Be the W.C.
- Observe the D.C.

Opening Checklist (1 hour)





Facilitator Led

Hands-on

Facilitator Notes

DO: Start the day by covering the checklist with the participant. Ask if the participant wants to help with any of the activities as you cover them.

Instructions

Take notes in the section below as your facilitator discusses the opening checklist. Help your facilitator complete the checklist including the Blue Book section for metrics.



Notes

Day Three

- Be the W.C.
- Observe the D.C.

Opening Activity (.25)



Facilitator Notes

DO: Discuss the answers to the Knowledge Check.

Instructions

Review from the previous day and complete the questions below.

Questions	Answers
What does ARB mean and what is it used for?	(Automatic Recurring Billing. Patients with Wellness Plans are set up for automatic recurring billing. This means that each month on their billing date, the credit card they have on file in Atlas will be automatically charged their monthly membership fee. From time to time, it is possible that ARBs due will not process correctly. Atlas will keep track of ARBs that are past due. W.C.s should contact patients with ARB past due issues immediately to update the card information on file and avoid the disruption in a patient's care.)
What process do we follow to ensure our patient records are kept safe?	 Scan forms Upload forms to the patient's profile Delete forms from the computer Shred the forms

Day Three

- Be the W.C.
- Observe the D.C.

Opening Activity (.25) (con't)



Facilitator Notes

DO: Review the answers to each question in the case study of how you would handle the case studies. Suggested answers are also included.

Questions	Answers	
How do we use the Blue Book to communicate goals to the team?	(During daily huddles, daily goals are communicated with the team. With the goals for the day, both the W.C and D.C. know the focus areas and the numbers they should be aiming at for the day while working as a team.)	
What are the metrics that we track daily and monthly in the Blue Book?	(Sales, Current month ARBs, Conversion %, New Patients, Walk-Ins, Packages, Plans, Attrition, Patient Visits, ARBs Collected, Referral cards given, Referral %)	
What are the two types of scenarios where we cannot treat a patient at The Joint?	(Work-related injury, serious car accident)	

Day Three

- Be the W.C.
- Observe the D.C.

Be the W.C. (3 hours)



Facilitator Notes

participant to completely be the role of the W.C. for three hours. Let the participant know that you are there to help at any time. Ask the participant is they would like feedback then provide both positive feedback and areas for improvement.

Instructions

Spend three hours in hands-on practice acting as the W.C. Your facilitator will help you along the way. After the activity, reflect on your experience and record your strengths and opportunities for improvement.

Questions	Answers
My strengths:	(Participant notes)
Opportunities for improvement:	(Participant notes)



Congratulations!

You completed the <u>Be the W.C. Checkpoint Challenge!</u> See your facilitator to collect your star!

Day Three

- Be the W.C.
- Observe the D.C.

Observe the D.C. (2 hours)



Facilitator Notes

ASK: "How did your observation go? What were some key takeaways?"

DO: Listen to the participant and answer any questions. Recognize their takeaways.

Instructions

Spend two hours observing the D.C. Additionally, read pages 21-29 about the Back of Office functionality. While observing, answer the questions below.

Questions	Answers
How did the D.C. build rapport with the patient?	(Participant notes)
What questions did the D.C. ask during the patient exam?	(Participant notes)
What differences did you notice about new and existing patients?	(Participant notes)
How did the D.C. talk to the patient about both the treatment plan and wellness plan?	(Participant notes)
What did you find helpful to know about Back of Office functionality?	(Participant notes)

Day Three

- Be the W.C.
- Observe the D.C.

New Patient Experience (Optional Activity) (.5)



Facilitator Notes

This section is encouraged but not required to complete. It does give the participant a perspective of what a new patient experiences. If they decide to do it, review the questions with them.

Instructions

Now that you have learned many operations of The Joint, experience it yourself. First, read page 8 in the W.C. Manual. Next, complete a patient intake form and get an adjustment if you desire to do so. Record your reaction below.

Questions	Answers
What did you think of the process?	(Participant notes)
How do you feel after the adjustment?	(Participant notes)
How do you think new patients would feel going through the process?	(Participant notes)

Day Three

- Be the W.C.
- Observe the D.C.

Closing Activities in the Checklist (.5)





Facilitator Led

Hands-on

Facilitator Notes

DO: Discuss the closing checklist. Ask the participant if they want to help as you complete it.

Instructions

Use the space below to take notes as your facilitator discusses the closing checklist. Help your facilitator complete the checklist using the Blue Book section for metrics.



Notes

Day Three

- Be the W.C.
- Observe the D.C.

Closing Activity (.25)



Self-guided

Facilitator Notes

This section is for the participant to complete on their own after training. Unless the participant wants to share, you do not have to cover it with them.

Instructions

The facilitator will review the learning objectives discussed at the beginning of the day for a training recap. During this time, any questions can be answered in addition to taking note topics you would like to explore in further detail. Use the space provided to also reflect on the day.



My key take-aways:

Best practices I learned:



Questions I still have:

Facilitato Note

Day Three Objectives Recap

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Learning Objectives

- ☐ Understand the opening checklist
- ☐ Demonstrate the role of a W.C.
- ☐ Understand the role of a D.C.
- ☐ Understand the closing activities in the closing checklist.

DO: Review the objectives with the participant. Ask if they have any questions and take note of any topics to cover again if time permits.



Day Four Objectives & Agenda

Learning Objectives

- Demonstrate the role of a W.C.
- Understand the Admin functions

DO: Review the objectives and agenda for day four.

Facilitator Note

Activity Detail							
Time	Туре	Activity	Method	Page/Resource	Completed		
.25	\bigcirc	Opening Activity	Knowledge Check	p. 69			
.5		Admin Functions	Facilitator Led	p. 71			
2 hours		Be the W.C. Skills Assessment	Hands-on	p. 75			
.5		Skills Objectives Overview	Facilitator Led	p. 76			



Day Four

• Skills Assessment and Training Recap

Opening Activity (.25)



Facilitator Notes

DO: Discuss the answers to the Knowledge Check.

Instructions

Review from the previous day and complete the questions below.

Questions	Answers
How many tasks are there in the Opening Checklist in the Blue Book?	(20)
What is the name of the incoming call log system we use to track incoming calls?	(Over the Top (O.T.T.) Advantage)
What is the process of sending patients to the adjustment bay called?	(Table loading)



Day Four

• Skills Assessment and Training Recap

Opening Activity (.25) (con't)



Facilitator Notes

DO: Discuss the answers to the Knowledge Check.

Questions	Answers		
Why is table loading an important process in The Joint business model?	(Keeping an effective patient flow will benefit all parties; the DC, you, and more importantly, the patients in your clinic. Good patient flow will help keep positive energy in the clinic, make adjustments easier, decrease DC down time, and decrease patient wait times. Table loading allows patients to relax and prepare for their adjustment.)		
What is the process for handling preferred doctor requests?	(If the preferred Doctor is available, the patient may see him/her. If the preferred Doctor is not available, use the dialogue, "Dr is seeing patients today. He/She gets great reviews. I know you will like them.")		

Day Four

• Skills Assessment and Training Recap

Admin Functions (.5)



Facilitator Notes

DO: Discuss the various Admin functions of a Wellness Coordinator. Use the job aids on the next couple pages to practice taking calls. Have the participant help you make calls and write thank you cards.

TOPICS:

- Referral cards
- Thank you cards
- · Cash deposit
- Daily actionable calls
- Social media reviews
- When to submit a helpdesk ticket and how

Instructions

Use the space below to take notes as your facilitator discusses Admin functions. See the job aid on the next two pages for help in role-playing incoming calls after you discuss Over the Top (O.T.T) with your facilitator.

Notes	



Job Aid

Incoming Calls - Suggested Phone Script

GREETING

Positive, Enthusiastic, Professional "Thank you calling The Joint (CLINIC NAME). This is (WC NAME) speaking. How may I help you?"

ACKNOWLEDGE

Commit to Assist

"Certainly, I'm happy to help. May I get your name?"
"Hi (CALLER'S NAME). Thank you for calling. If we get cut
off, what is the best number to reach you? Great, how can
I help you today?"

COMPLETE COMMITMENT

Aim for same day or within 24hrs max "Have I answered all your questions? We are located at _____." Are you familiar with the area? May I have your email, please? I'd like to send you directions, some paperwork, and confirmation of your preferred time? Great, I look forward to meeting you!"

CONFIRM COMMITMENT

- Log the caller's info on the Incoming Call Sheet
- Enter required information on O.T.T./Advantage
- Send (email or text) directions to your location, along with intake paperwork or intro offer.





Job Aid

Incoming Calls - Frequently Asked Questions

Q: Can I make an appointment?

A: "When would you like to come in today?

(RESTATE PREFERRED TIME) on (DATE) sounds great. Dr. (NAME) will be here to see you on (RESTATE DATE). We recommend that you plan on 30 - 45 minutes for your first visit which will include a consultation, exam and adjustment. How does that sound to you?"

Q: What is the Joint Chiropractic?

A: "Here at The Joint, we believe in improving your quality of life through routine and affordable chiropractic care. We take walk-ins Monday – Friday from 10 –7, (State Saturday and Sunday hours depending on your location. Most visits will take less than 15 minutes, and there is no insurance necessary. When would you like to come in today?"

Q: What type of insurance do you take?

A: "The Joint offers affordable rates that let you focus on getting the relief you are seeking. No insurance is needed. When would you like to come in today?"

Q: What can you tell me about your Doctor?

A: "Dr. (NAME) is a graduate of (SCHOOL NAME) University with (#) years of experience. S/he specializes in (SPECIALTIES/TECHNIQUES) and our patients always talk about (EXAMPLES; how much they love his/her adjustments)"

Q: How much will this cost?

A: "Your initial visit is just \$29. This includes your consultation, exam, and adjustment. We have a variety of affordable options for continued treatment which we can review after the D.C. completes his/her visit. When would you like to come in today?"



Incoming Call/Lead Tracking Log

The following is an example of how incoming calls and leads can be tracked. If you like this idea, it can be used for your clinic as well. **Tip**: Make a new table in a spreadsheet program like Excel or Google Sheets.

Incoming Calls							
Date	Caller Name	Phone #	Lead Source (Optional)	Email	Preferred date/time to come in	WC Initials	
3/19/19	Newt O'Chiro	543-123-4567	Val Pak	Newtochiro@gmail.com	Wed. @ 2pm	MJM	
3/19/19	Ima Pain	543-234-5678	Google	imapain@hotmail.com	Wed. @ 3pm	MJM	
3/19/19	Mel Oman	543-235-6789	Google	mellow@gmail.com	Thurs. @ 10am	MJM	
3/19/19	Walt Runner	543-356-7890	Referral	Walt.runner@hotmail.com	Fri. @ 11am	MJM	

Instructions

All incoming calls should be answered by the third ring and the Phone Script should be used to book prospects the same day.

Track all leads for follow-up:

- If the prospect arrives and purchases, highlight the name in green.
- If the prospect arrives but does not purchase, highlight the name in yellow.
- If the prospect arrives but does not purchase and we should not pursue for any reason, highlight in pink.

Add prospect to Advantage New Tracking System immediately following initial call.

Send prospect to one/all of the following: Directions to the clinic, intro offer, intake paperwork by either email or text (must be subscribed).

^{*} If the prospect does not arrive at preferred date/time, call back within one hour and attempt to reschedule.



Day Four

• Skills Assessment and Training Recap

Be the W.C. Skills Assessment (2 hours)



Facilitator Notes

DO: Encourage the participant to act as the W.C. Ask the participant if they would like feedback. Provide them with both positive notes and areas of opportunity if applicable.

Instructions

Spend two hours acting as the W.C. Your facilitator will help you along the way. After the activity, reflect on your experience and record your strengths and opportunities for improvement.

Questions	Answers
My strengths:	(Participant notes)
Opportunities for improvement:	(Participant notes)

Day Four

Skills Assessment and Training Recap

Skills Objectives Review (.5)



Facilitator Notes

DO: Encourage the participant to act as the W.C. Ask the participant if they would like feedback. Provide them with both positive notes and areas of opportunity if applicable.

Instructions

With your facilitator, review all the objectives below, and on the next two pages, to check for understanding. Mark them as complete after all your final questions have been answered.

Meet the Joint Objectives

- Describe The Joint's Mission "To improve the quality of life through routine and affordable chiropractic care and core values - Integrity, accountability, trust, excellence, respect"
- ☐ Explain the benefits of routine chiropractic care
- ☐ Understand what makes The Joint different than traditional chiropractic offices
- ☐ Understand both the D.C. and W.C. roles and responsibilities

Patient Flow Objectives

☐ Discuss the key components of efficient patient flow

Greeting Patients and Taking Intake Forms Objectives

- ☐ Illustrate welcoming new patients to The Joint
- ☐ Differentiate the welcome script between Medicare patients and non-Medicare patients
- Assemble clipboards with patient intake forms and key tags and understand the benefits of key cards

Day Four

• Skills Assessment and Training Recap

Skills Objectives Review (.5) (con't)



Facilitator Notes

DO: Encourage the participant to act as the W.C. Ask the participant if they would like feedback. Provide them with both positive notes and areas of opportunity if applicable.

Objectives (con't)

- □ Distinguish the difference between a patient's first visit and all subsequent visits
- ☐ Review completed intake forms (check for signatures, sign as witness, etc.)
- ☐ Indicate how to adhere to patient privacy
- ☐ Identify which intake forms to give to the doctor

Plans and Packages Objectives

- ☐ Understand The Joint's products plans and packages
- ☐ Match the patient's treatment plan to a plan or package
- ☐ Explain policy on splitting/sharing packages and plans
- Understand zone pricing
- ☐ Summarize how inter-clinic visits & fees work
- ☐ Define Medicare limiting charges
- ☐ Assemble wellness plan welcome kits

Sales and Close Objectives

☐ Understand the entire sales process from start to finish and demonstrate the W.C. actions in the sales process

ATLAS Objectives

- ☐ Recall and demonstrate basic ATLAS functionality
- ☐ Explain how to process payments and refunds

New Franchisee Clinic Operations Facilitator Guide

Day Four

• Skills Assessment and Training Recap

Skills Objectives Review (.5) (con't)



Facilitator Notes

DO: Encourage the participant to act as the W.C. Ask the participant if they would like feedback. Provide them with both positive notes and areas of opportunity if applicable.

Objectives (con't)

- ☐ Demonstrate how to process past due automatic recurring billing
- ☐ Demonstrate how to process membership freeze requests
- ☐ Demonstrate how to process membership cancellation requests
- ☐ Demonstrate how to process membership renewals

Patient Questions Objectives

☐ Understand how to answer common patient questions

Metrics and Blue Book Objectives

☐ Explain how to use the Blue Book

Learning Objectives

- ☐ Understand the opening checklist
- Demonstrate the role of a W.C.
- ☐ Understand the role of a D.C.
- ☐ Understand the closing activities in the closing checklist.
- Demonstrate the role of a W.C.
- ☐ Understand the Admin functions



A

Acute - Refers to one of the measures of the time scale for an ailment. The onset of acute pain may be caused by a single injury or repetitive micro-trauma to neuromusculoskeletal tissues. Acute contrasts with 'subacute' and 'chronic' and denotes rapid onset of pain and the initiation of the normal healing process. Acute pain is generally considered as pain that is present for the duration of the normal healing process and may last as long as 90-120 days. Pain theorists have suggested that acute pain may be present for as long as 1 year in some cases. Acute pain may be experienced as aching, burning, stabbing, sharp or dull, well defined, or vaque. The intensity may range from mild to severe and may fluctuate. The focus of treatment in the acute phase is directed toward stabilization/elimination of symptomatology."

Adjustment or Manipulation - The gentle application of a targeted movement directed to the spine and extremities where and when indicated to improve joint and neurological dysfunction.

AM (active members) - Patients with a current plan of any membership and their status is active. (Excludes ARBs past due and inactive).

A (attrition) - Percent of members who canceled during the time period (monthly). Formula: membership cancellations divided by the number of active members at the beginning of the period.

Automatic Recurring Billing (ARB) - An account set up with a valid credit card or other accepted payment method that bills automatically on a monthly basis.

C

Central Nervous System (CNS) - The CNS is that part of the nervous system that consists of the brain and spinal cord. The CNS is one of the two major divisions of the nervous system.

Cervical - The anatomical term for the neck area of the spine. The cervical spine is comprised of seven\ vertebral bodies (C1-C7) and extends from the base of the skull to the first segment of the thoracic spine (T1).

Change of plan or Plan Change (Not referred to as "Cancellation") - Used to define a member opting out of a wellness plan. Not referred to this as "canceling" because we still allow and encourage patients to return for visits under a different plant type, such as a package or walk-in.

Chronic - Refers to one of the measures of the time scale for an ailment. Chronic pain has no arbitrarily fixed duration and is generally considered to be "pain that extends beyond the expected period of healing". Like acute pain, chronic pain may be experienced as aching, burning, stabbing, sharp or dull, well defined, or vague. The intensity may also range from mild to severe and may fluctuate. In addition to the biological sources seen in acute pain, chronic pain also includes varying degrees of psychological and social factors. The biological factors of chronic pain may be divided into two general categories, "nociceptive" (caused by inflamed or damaged tissue activating specialized pain sensors called nociceptors), and "neuropathic" (caused by damage to or malfunction of the nervous system).



The psychological factors associated with chronic pain are those related to ongoing stress and anxiety. Prevailing social conditions may serve as a complicating factor to associated psychological factors. The focus of treatment in the chronic phase is directed towards reduction of pain, restoration of bodily function and patient life-style education.

Clinic Support Center (CSC) - The department at the corporate office that supports the outside clinic network.

Coccyx - The anatomical term for the area located just below the sacrum frequently referred to as the "tail-bone." The coccyx is a small bone that articulates with the sacrum and that usually consists of four fused vertebrae, which form the terminal segments of the spinal column in the human spine.

Cognitive - The set of all mental abilities and processes related to knowledge: attention, memory and working memory, judgment and evaluation, reasoning and "computation", problem solving and decision making, comprehension and production of language, etc. Human cognition is conscious and unconscious, concrete or abstract, as well as intuitive (like knowledge of a language) and conceptual (like a model of a language). Cognitive processes use existing knowledge and generate new knowledge.

Comparison to Historical Average (EOY) Goal — Relative sales performance compared to the historical averages for that specific month in operation. Also referred to as the End of the Year Goal.

Conversions - Number of prospects that have

acquired a package of ongoing care or membership.

CR (Conversion Rate) - Percent of prospects who converted to a package or membership. Formula: (conversions / prospects)

Doctor of Chiropractic (D.C.) - A D.C. is a licensed primary portal of entry health care provider that focuses on the biomechanics of the spine, related extremities and their relation to the human nervous system. The D.C. administers manual manipulation or adjustments to the joints resulting in improved joint motion, neurological function and health of the patient.

E

Empathy - The capacity to understand what another person is experiencing from within the other person's frame of reference. (i.e., the capacity to place oneself in another's shoes.) Empathy is known to increase positive social (helping) behaviors.

EP (Existing Patients) - Number of unique patients who visited during the time period who were not new patients.

EPV (Existing Patient Visits) - Number of visits generated from preexisting patients

Evidenced Based Care - Applying the best available research results (evidence) when making decisions about health care. Health care professionals who perform evidence-based practice use research evidence along with clinical expertise and patient preferences.

Existing Patient - An established patient of The Joint.



Patients that haven't received care more than six months should complete another history form before being seen by the doctor.

Extremity (Paravertebral Structure) - In clinical terms, an extremity is often used to describe the portions of the 126 individual bones that combine to form the appendicular skeleton (shoulder girdle, arms, hands, pelvic girdle, legs and feet).

J

Joint Dysfunction (Subluxation/Misalignment)

- The terms spinal misalignment, subluxation or joint dysfunction are often used interchangeably. Regardless of the term used, when a joint in the spine or extremities is restricted a lack of motion and dysfunction of the joint is created. This joint dysfunction can adversely affect the nervous system and impairs the ability to perform normal daily activities.

L

LMS (Learning Management System) - A system created to teach and educate the network on the proper protocol and procedures necessary to operate a successful franchise business.

Lumbar - The anatomical term for lower back area. The lumbar spine is comprised of five vertebral bodies (L1-L5) that extend from the lower thoracic spine (chest) to the sacrum (bottom of the spine).

M

Membership or Wellness Plan – A plan committed to by an investment by the patient in themselves for continued wellness and prevention.

MIO (Months in Operation) - Number of full calendar months the clinic has been in operation.

Musculoskeletal Memory - The body's memory of how spinal joint structures are positioned at the present time. Musculoskeletal memory may be changed over time through proper physical procedures such as exercise, postural habits and chiropractic adjustments.

N

Nerve Communication (Impulses) - Communication of the nervous system from the brain through the spine out to the organs, muscles, tissues and cells of the body.

New Patient - (Not customer) A patient seeking the services of The Joint for the first time.

NP (New Patients) - Number of unique patients. The date of the new patient is the date of either their first visit date or their first sales (payment transaction date) whichever came first.

NPV (New Patient Visits) - Number of visits generated from new patients during the reporting period.

0

Occiput - The anatomical term for a bone of the skull situated at the lower, posterior (back) portion of the skull. The occiput connects to the atlas vertebra (C1) of the cervical spine forming the junction between the



skull and cervical spine (neck).

Peripheral Nervous System (PNS) - The peripheral nervous system (PNS) connects the central nervous system (CNS) to sensory organs (such as the eye and ear), other organs of the body, muscles, blood vessels and glands. The peripheral nerves include the 12 cranial nerves, the spinal nerves and roots, and what are called the autonomic nerves that are concerned specifically with the regulation of the heart muscle, the muscles in blood vessel walls, and glands.

Portal of Entry Provider (POE) - A POE provider is any physician to whom a patient had direct access, not referral access. A POE is also referred to as a primary portal of entry health care provider. D.C.s have always been portal of entry physicians.

P

Prospects - Includes any patients that were converted (covers package re-purchases) + any visits at the clinic where the patient was not on a package or membership.

S

Sacrum - The sacrum is a triangular shaped bone consisting of five segments (S1-5) and lies between the last lumbar segment and the coccyx (tail-bone). The sacrum begins as five unfused vertebrae, which begin to fuse between the ages of 16–18 years and have usually completely fused into a single bone by the age of 34 years.

Т

Thoracic - The anatomical term for the mid back area. The thoracic vertebrae are the twelve vertebral segments (T1-12) that make up the thoracic spine. These structures have very little individual motion because they are firmly attached to the ribs and sternum (breastbone).

Treatment Plan or Care Plan - A plan given by the doctor outlining the details (approximate number of visits, etc.) associated with receiving the most benefit from the prescribed health care services. Care plans are derived from the patient's presenting symptoms, conditions and health care goals accompanied with the doctor's findings and professional opinion.

W

Wellness - A state of complete mental, physical and social well-being and not merely the absence of a disease, an infirmity.

Resources

The Learning Center

https://thejoint.elogiclearning.com

Provides eLearning lesson for the Wellness Coordinator and Doctor of Chiropractic roles at The Joint.

FranConnect

https://thejoint.franconnect.net/fc/

Provides an easy way to link to other sites, access documents via The Hub Library, and discuss topics via a franchisee forum called The Buzz.

AXIS Help Desk

https://axis.thejoint.com

Submit help desk tickets to The Joint's IT team via the Help Desk portal.

DokShop

https://www.dokshop.com/thejoint/login.asp

Access to order all The Joint branded marketing supplies, apparel and clinic patient forms.

ATLAS

https://atlas.thejoint.com

The Joint's inter-clinic operating system for patient records, billing, and reporting.

Over the Top (O.T.T.) - Advantage

https://advantage.overthetop.com

Incoming Call Notifier for clinics to track incoming calls, send patients clinic directions and intake forms as well as track leads for potential new patients.

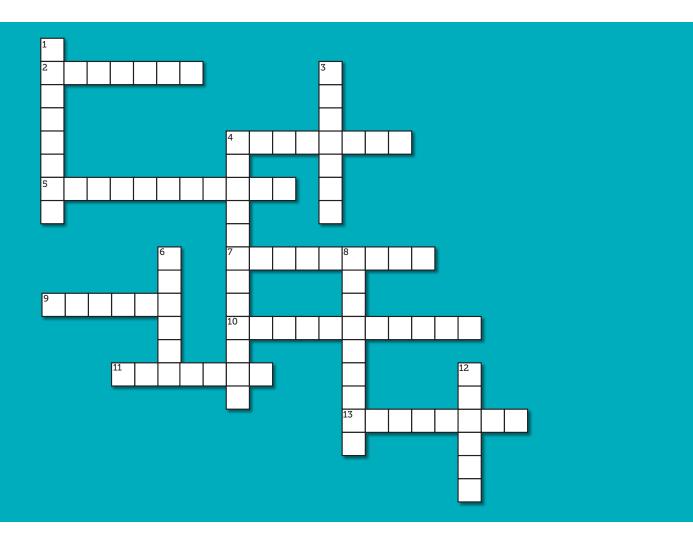
The Joint Website

https://www.thejoint.com

The Joint's public facing website with company information, doctor bios, clinic locations and directions as well as articles on chiropractic care.



Terminology Crossword



Across

- 2. The capacity to understand what another person is experiencing from within the other person's frame of reference.
- 4 The anatomical term of the neck area of the spine.
- 5. A slight misalignment of the vertebrae.
- 7. Includes any patients that were converted
- 9. A triangular shaped bone consisting of five segments.
- 10. Number of prospects that have acquired a package of ongoing care of membership.
- 11. Refers to one of the measures of the time scale for an ailment
- 13. The anatomical term for the mid-back area.

Down

- 1. A state of complete mental, physical and social well-being and not merely the absence of disease, an infirmity.
- 3. The anatomical term for a bone of the skull situated at the lower, posterior (back) portion of the skull.
- 4. A healthcare profession that focuses on conditions stemming from restricted join motion of the spine and extremities.
- 6. The anatomical term for lower-back area.
- 8. Often used to describe the portions of the 126 individual bones.
- 12. The anatomical term for the area located just below the sacrum frequently referred to as the "tail-bone."



Facilitation Tips

Instructions

These are different learning techniques used in training. Give each of these techniques a try throughout training New Franchisees.

