

New Franchise Clinic Operations

2019 Participant Guide





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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.



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.

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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. 3



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.

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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.

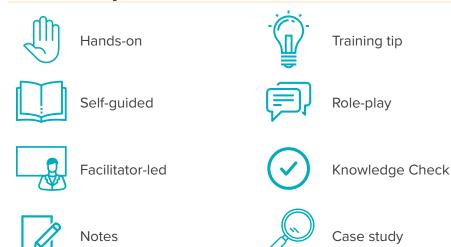
Workbook Sections

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.

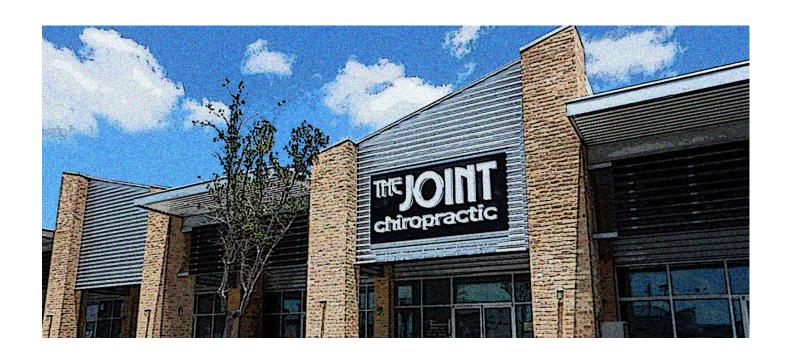
Additional guidance: Find The Joint Glossary, and helpful information about resources.

Icon Glossary





Clinic Name:	 		
Clinic Phone:			
Clinic Address			
Deuticia aut Manage			
Participant Name:			
Facilitator Name;			



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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.



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

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 Dagio Functionality	Facilitator Led	n 22	
THOU		ATLAS Basic Functionality	raciiitatoi Led	p. 33	
.5		Pricing Structure	Facilitator Led	p. 34	
.5		Sales Focus	Shadow the Facilitator	p. 35	



Day One Agenda

Activity Detail					
Time	Туре	Activity	Method	Page/Resource	Completed
.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)



Instructions	
As your facilitator disc	cusses the week at a glance, take notes in the space provided below.
Notes	

Day One

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

Clinic Tour (.5)



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.

Marketing Marketing

Day One

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

Clinic Tour (.5) (con't)



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 office	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)



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)



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)



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

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?	
Where is the Mission Statement shown to patients in our clinics?	
What type of provider is The Joint striving to be in chiropractic care?	
What are The Joint Chiropractic's Core Values?	



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?	
True or False: We treat severe injuries using x-rays and diagnostic equipment.	
What insurance carriers do we accept for payment?	
What is the popping noise when an adjustment is delivered?	



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?	
Will I be sore following a chiropractic adjustment?.	
What is the lifetime prevalence of low back pain being reported?	
True or False: Chiropractic Care can help with headaches, migraines, arthritis and fibromyalgia?	

Day One

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

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



Self-guided

Answers



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)

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	
The clinic where the patient completes their intake forms and their membership fees are processed (although patients may visit any clinic)	
Patients on Wellness Plan pay only \$10 per visit after their 4th visit in the monthly billing cycle	



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	
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	
The doctors specific plan to how they will get the patient better to achieve their goals	
When a patient visits a clinic that is not their Home Clinic, that clinic gets paid \$9.50 by the home clinic	
A detailed receipt of the services provided to the patient over a period of time	
A quarterly tracking tool that breaks down daily tasks, goals, and items to be completed	
The patient and billing management system utilized by all The Joint clinics	

Day One

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

Overview of Forms (1 hour)



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?	
Patient Intake Forms	
Wellness Plan Form	
Membership Freeze Form	
Membership Cancellation Form	
Package Plan Form	



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

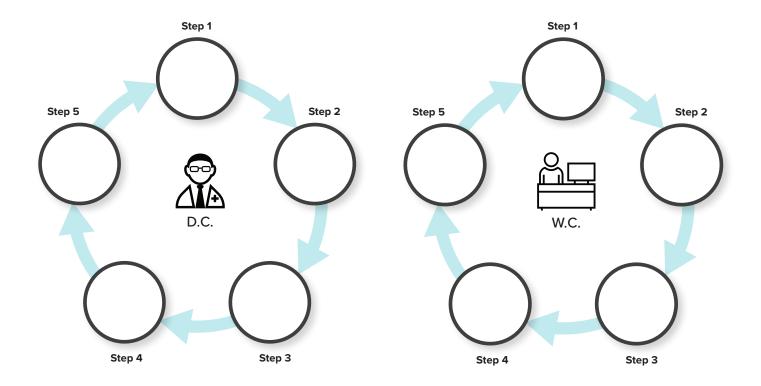
- Welcome
- Meet The Joint
- Introduction to Wellness Coordinator Role

Five Step Sales Process (.5)



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	
Step Two	

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	
Step Four	
Step Five	



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)



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?	
How did the W.C. build rapport with the patient?	
What questions did the W.C. ask when new patients arrived for an adjustment?	
What are some best practices when new patients arrive?	



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 noticet	
Discuss the patient intake form with the facilitator.	
What dialogue is used	
in each section when explaining the form to	
the patient?	

Day One

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

ATLAS Basic Functionality (1 hour)



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			
Hotes			

Day One

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

Pricing Structure (.5)



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.

Notes	



Day One

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

Sales Focus (.5)



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?	
How did the W.C. ask for the sale?	
How did the W.C. overcome objections?	
What did you observe about the D.C.'s involvement in the sales process?	

Day One

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

Sales Focus (.5) (con't)



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





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

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.

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
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
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

Day One Learning Objectives Recap

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 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

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Day Two Agenda

Activity Detail					
Time	Туре	Activity	Method	Page/Resource	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)



Instructions

Review from the previous day and complete the questions below.

Questions	Answers
What is our Mission, Vision and Core Values at The Joint?	
What two main roles will you find in The Joint Chiropractic clinics?	
What membership plans do we offer at The Joint and how are they priced?	

• Wellness Coordinator Role

Opening Activity (.5) (con't)



Questions	Answers
What type of sales process do we use at The Joint to be successful?	
What are 3 examples of basic functions for ATLAS? Examples include:	

Day Two

• Wellness Coordinator Role

ATLAS Billing and Demonstration (3.5 hours)



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.

Notes				
notes				



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)



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

Notes			

• Wellness Coordinator Role

Handling Patient Forms (.5)



Instructions

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

Action	Questions	Answers
Scan	What do you do?	
Upload	To where?	
Delete	From where?	
Shred	What is shredded?	

• Wellness Coordinator Role

Case Studies (1 hour)



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?	

• Wellness Coordinator Role

Case Studies (1 hour) (con't)



Questions	Answers
What product should be offered to a patient wanting to cancel (depending on reason)?	
If the patient wants to cancel, how do you complete those actions?	

• Wellness Coordinator Role

Case Studies (1 hour) (con't)



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?	

• Wellness Coordinator Role

Case Studies (1 hour) (con't)



Questions	Answers
What form do you use to complete next steps and what actions are taken in ATLAS?	

Day Two

• Wellness Coordinator Role

Case Studies (1 hour) (con't)



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?	
What are your next steps with this patient given the information?	
What is the D.C.'s role with this individual?	

• Wellness Coordinator Role

Case Studies (1 hour) (con't)



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?	
What steps does the D.C. take with this patient?	
If the D.C. is going to treat the patient, what actions need to be taken to process the MEP?	

• Wellness Coordinator Role

Case Studies (1 hour) (con't)



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?	
Depending on whether the cancel form is present, what are the next steps?	
At what point would this be escalated to a supervisor or Franchisee?	



Congratulations!

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

Day Two

• Wellness Coordinator Role

Metrics and Blue Book (1.25 hour)



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

Day Two

• Wellness Coordinator Role

Closing Activity (.25)



Self-guided

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.

My key take-aways:		
Best practices I learned:		
Questions I still have:		

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

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.

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)



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)



Instructions

Review from the previous day and complete the questions below.

Questions	Answers
What does ARB mean and what is it used for?	
What process do we follow to ensure our patient records are kept safe?	

Day Three

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

Opening Activity (.25) (con't)



Questions	Answers
How do we use the Blue Book to communicate goals to the team?	
What are the metrics that we track daily and monthly in the Blue Book?	
What are the two types of scenarios where we cannot treat a patient at The Joint?	

Day Three

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

Be the W.C. (3 hours)



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:	
Opportunities for improvement:	



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)



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?	
What questions did the D.C. ask during the patient exam?	
What differences did you notice about new and existing patients?	
How did the D.C. talk to the patient about both the treatment plan and wellness plan?	
What did you find helpful to know about Back of Office functionality?	

Day Three

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

New Patient Experience (Optional Activity) (.5)



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?	
How do you feel after the adjustment?	
How do you think new patients would feel going through the process?	

Day Three

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

Closing Activities in the Checklist (.5)



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

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:		

Day Three Objectives Recap

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.



Day Four Objectives & Agenda

Learning Objectives

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

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)



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?	
What is the name of the incoming call log system we use to track incoming calls?	
What is the process of sending patients to the adjustment bay called?	

Day Four

• Skills Assessment and Training Recap

Opening Activity (.25) (con't)



Questions	Answers
Why is table loading an important process in The Joint business model?	
What is the process for handling preferred doctor requests?	

Day Four

• Skills Assessment and Training Recap

Admin Functions (.5)



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)



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:	
Opportunities for improvement:	

75

New Franchisee Clinic Operations Participant Guide

Day Four

Skills Assessment and Training Recap

Skills Objectives Review (.5)



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
- 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

New Franchisee Clinic Operations Participant Guide

Day Four

• Skills Assessment and Training Recap

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



Objectives (con't)
☐ 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
☐ Demonstrate how to process past due automatic recurring billing
☐ Demonstrate how to process membership freeze requests

Day Four

• Skills Assessment and Training Recap

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



Objectives (con't)

- ☐ 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.

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.

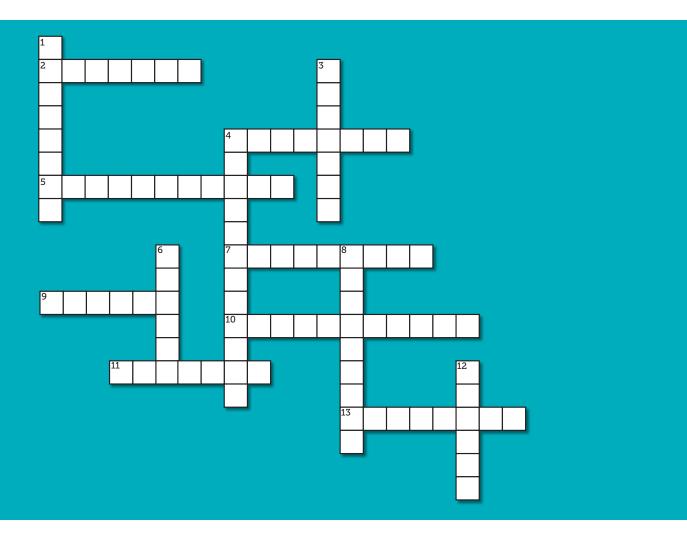
The Joint Website

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."