

CHIROPRACTIC CENTER *OFFICE MANUAL*

This is a good template to use as you put together your office manual. Please be aware that there are many legal issues when it comes to Policies, hiring, firing etc. and I would recommend you check out a legal firm, “Bent Ericksen” at (800)679-2760 or bentericksen.com. They are a wealth of knowledge.

Rosen Coaching

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- I. Employee Policy & Job Descriptions
- II. Office Operations, Scripts & Practice Member Service
- III. Computer Instructions & File Management
- IV. Billing & Collections
- V. Banking & Bookkeeping
- VI. Letters & Correspondence
- VII. Archives

POLICIES & JOB DESCRIPTIONS

(Clinic Name)

Chiropractic Center

Office Policy

APPEARANCE

You are expected to dress neatly and professionally.

PUNCTUALITY

You are expected to be ready and at your work station on time. We are a service oriented business, therefore lunch time and the end of the day may vary. Compensation, however, will be made for all time worked. Dr. _____ must give consent to leave before lunch and at the end of the day.

VACATIONS

List specifics. Example: You are eligible for one week vacation after one year of employment; two weeks after two years; and three weeks after five years. Vacation time must be approved by Dr. _____ at least 6 months in advance, and all work must be up to date prior to leaving. No vacation time will be given prior to completion of one year.

Paid holidays are New Year's Day, Memorial Day, 4th of July, Labor Day, Thanksgiving Day and Christmas Day.

When Dr. _____ goes on vacation, you may consult with him prior to leaving whether you will be able to work while he is away. If you choose to take the time off, you will not be paid unless you want to use your accumulated vacation time.

SICK PAY

You are expected to contact Dr. _____ at home prior to your scheduled arrival if you are not coming in. There is no sick pay. Excessive sick days (more than 2 in a six month period) may result in termination.

SEVERANCE PAY

It is Dr. _____'s decision whether or not to supply severance pay to any staff member that is terminated.

PROBATION

Full time employment is based on a ninety day probation period.

OVERTIME

If overtime occurs (over 40 hours a week), time and a half will be paid only if you received Dr. _____'s approval in advance. Otherwise, regular time will be paid.

ALCOHOL AND DRUG USE

Immediate termination will occur if you are under the influence of drugs or alcohol during working hours.

SMOKING

There is no smoking allowed inside the office building, nor may you or your clothes smell from smoke.

PERFUMES

Because of "environmentally sensitive people" and people with respiratory problems, no perfumes, after shaves, or strong smelling hair care, etc. may be used.

SEMINARS

You may occasionally be expected to attend an office-related seminar. All travel expenses and lodging will be fully compensated.

MOONLIGHTING

If your job performance suffers due to moonlighting, termination may occur.

THEFT

If theft of money, supplies, postage, records, copies, or equipment occurs, immediate termination and/or prosecution may occur.

RESIGNATION

If resignation is necessary, a two week written notice is expected.

CROSSOVER TRAINING

You are expected to learn procedures in other office departments. If the need arises, assisting in other departments may be necessary.

PROPER TITLES

When referring to the doctor, you will always use the prefix of "Doctor" in the office.

UNNECESSARY TALKING

No unnecessary talking will be tolerated.

PERSONAL CALLS

Unless during break or in an emergency, no personal calls will be made or accepted.

CLINIC PROMOTIONS

Any promotions given will be effective the first working day of the next pay period.

PAY PERIODS

You will be paid bi-monthly. Pay periods are from the 1st to the 15th and the 16th to the end of the month.

TIME CLOCK

Immediate termination may occur if you write down any extra/false hours on your time card. Be accurate.

AWARENESS

Doctor and staff will treat each other and our practice members with respect, love, and compassion. We understand that while going through the healing process, we often times must be aware of our communications and boundaries.

CONFLICT WITH PATIENTS

There is never a reason to fight with a patient. If there is potential for conflict and a patient is not agreeing with you, simply let them know that you will let the doctor know. Make sure the doctor knows what transpired and now it is the doctor's responsibility.

TRUST AND HONESTY

We base our doctor employee relationship on trust and honesty. If an employee is found lying to the doctor it will break our trust and immediate termination may occur.

DATING

Interstaff dating or sexual relations with practice members is strongly discouraged and may be cause for termination.

CONFIDENTIALITY

While working in the office, you will be privileged to personal information about practice members and their health as well as that of other staff members and the doctor. No personal information including health, private issues, and financial matters may be discussed with anyone outside of the doctor or staff and may be cause for termination.

I have read and fully understand the above office policy for (Clinic Name) Chiropractic Center and agree to adhere to it at all times.

Signature

Date

BACK OFFICE DUTIES

Tasks

- 1. Enter TC payments into computer.**
- 2. Reconcile Day Sheet Logs with Daily Computer Report.**
- 3. Write up Deposits.**
- 4. Enter stats in book, get monthly totals.**
- 5. Take Deposits to bank.**
- 6. Cover phones, pick up after second ring.**
- 7. Create templates for PM for insurance co.**
- 8. Copy records for medical records releases, mail.**
- 9. Follow up for payment for record releases.**
- 10. Sort mail, pay bills.**
- 11. Reconcile office credit card, enter in computer.**
- 12. Calculate and pay monthly GET.**
- 13. Monthly birthday letters.**
- 14. Cover front desk when Kat doing exams, re-evaluations.**
- 15. Welcome letters, referral letter.**
- 16. Create, maintain, modify forms and log sheets.**
- 17. Keep back office supplies stocked. Copy paper, fax paper, ACG cards/tapes, EMG buttons, cleaning supplies.**

Billing/Collections

- 1. Print Monthly Billing, HCFA forms. Check for errors, signature stamp each form, enter in log book.**
- 2. Enter insurance payments in computer.**
- 3. Enter insurance payments in log book**
- 4. Write reimbursement checks.**
- 5. Enter reimbursement checks in log book.**
- 6. Print monthly Aging report.**
- 7. Check it for overdue payments.**
- 8. Run Month End reports, rebuild indexes.**

FRONT DESK DUTIES

- 1. Greet people, follow procedure.**
- 2. Answer phone, follow procedure.**
- 3. Collect money, follow procedure.**
- 4. Work book, follow procedure.**

* * *

Order Product – price/invoices

Order Front Desk Supplies – appointment book/toner

Keep Trade & Overdue Cash – Account, Collections updated

**Do NP EXAMS, Revaluations, ACGs
Calculate ROF paperwork**

General Rules

1. Never promise results or a cure.

You can say “I know we’ve had many people come in here with similar problems that have gotten great results.”

2. “That’s a great question for the doctor!”
3. Never discuss finances.
4. Edify the doctor – speak from the heart, usually people come in after they’ve heard about Dr. _____ from many friends that they trust – we need to create that bond and that trust – they are putting their health in our hands.
5. Look them in the eye, be up-beat and compassionate, treat them with love, concern, and respect.
6. See “OFFIECE POLICIES”

Office & Patient Service

PHONE CORRESPONDENCE PROCEDURE

Phones

There are ____ phone lines into the office.

Line 1 - #(give number and list specifics, i.e., fax, cc mach, roll-over numbers, etc.)

Line 2 - #

Line 3 - #

Phone Scripts

When it comes to scripts please realize that scripts only work as long as the other person is reading from the same scripts you are. The important thing is to get the *why* behind the *how*. In other words why am I saying what I am saying? Then when a patient does not respond exactly as the script says they should you are not stumped and you know how to respond. NO One likes to hear a canned script.

With that said, you want to nail these scripts! You want to know re-word them so they feel comfortable for you, you want to make sure you always tell the whole truth and are congruent with everything you say. You will want to revamp these scripts and tailor-make them for your personality etc. and then get them approved by your doctor. After that you need to know them cold!

Then you need to do three things.

1. Roll play!
2. Roll play!!
3. Roll play!!!

How to answer phones:

Answer the phone within 1-2 rings, always with a smile on your face and enthusiasm in your voice. “(Give Name) Chiropractic, this is _____!”

If the Call is For the Doctor

If the call is for Dr. _____, advise that the Doctor is working with patients at this time, ask if you can help in any way or take a message. Give it to Dr. _____ and he will return the call at his earliest convenience.

If the Phone Call is for Office Staff

If the phone call is for office staff, take the name of person and place them on hold. Advise staff member of call, and if they are busy, return to the caller and advise, “(Name) is busy at the moment, may I please get your number and a message. I’ll give (Name) the message and he/she will return your call.”

All messages should be recorded in the Phone Message Book and include the following:

- *Who the message is for
- *Name of caller
- *Company affiliated with
- *Phone number
- *What call is in regard to
- *The date and time of call
- *Initials of who took message

If the call is a patient scheduling or rescheduling an appointment, handle the call as fast as possible. If you’re not at the schedule book, be sure to write the name, day and time on a note pad and enter in the schedule book ASAP.

NEW PATIENT PHONE SLIP/SCRIPT

New Telephone Call (average patient procedure)

I would recommend you make several copies of these and have them right in front of you for when a new patient calls.

As soon as you realize you are speaking with a new patient, use the following questions as a guide for your conversation. Remember that this is an important step for the new patient. Make sure that your voice reflects the warmth and caring attitude of the office. ALWAYS smile when you are answering the phone. Remember YOU are the first impression to your office. Make them feel that they are enrolled and activities have been set in motion, which will reduce “no shows.”

Who am I speaking with? _____
(Ask for spelling)

“Would you like to see the Doctor today or tomorrow? _____

“Do you prefer morning or afternoon?” _____
(Specify appointment time and date)

“May I have your home and work phone numbers, please?”
Home _____ Work _____

“Who referred you to our office?” _____
(Great, he/she is a wonderful person)

“Is your appointment concerning an auto or work related injury?” Yes [] No []

NOTE: If yes, get the following information:

Employer: _____

Supervisor: _____

Company Name: _____

“Do you have insurance that covers chiropractic care? Yes [] No []

Ask your doctor if they want you to discuss fees at this time. If they do you can say something like, “The fees for the first visit will be \$X and will be paid at time of service or and your insurance will cover it, or what ever.” Or, “The fees will be anywhere from \$X to \$Y depending on the severity of your case and what the doctor needs to do...”

“By the way, if you have insurance coverage, be sure to bring your information and form so we can submit your claim for you, if necessary.

“Do you know where out office is located?” Yes [] No []

“You will be at our office between 45 minutes to 1 hour. It will consist of a consultation with the Doctor and a chiropractic exam, possibly x-rays. We look forward to seeing you on

DAY _____ at TIME _____”

Patient _____ comments _____ or _____ additional _____ information:

New Patient Asks How Much it will Cost

If a patient calls and asks how much the visit will be:

Who am I speaking with? _____

How did you hear about our office? _____

(We want to start to bond and connect and the best way is to get them to talk)

Is this insurance or cash? _____

(How else can we tell them what it will cost?)

Gather appropriate insurance information NOTE: If yes, get the following information:

Employer: _____

Supervisor: _____
Company Name: _____

“Do you have insurance that covers chiropractic care? Yes [] No []

“By the way, if you have insurance coverage, be sure to bring your information and form so we can submit your claim for you, if necessary.

Some doctors do not want their CA’s discussing fees over the phone for any reason. You will need to discuss this with your doctor.

If that is the case you would just say, “I am sorry we don’t discuss fees over the phone, you are welcome to come in for a free consultation. By the end of that consultation you will have a better idea if you want to continue with the rest of the visit and the doctor will be able to tell you exactly how much the visit will be. Would you like to set a time to see the doctor?”

If you do discuss fees you might say something like, “The fees for the first visit range from \$100-\$150 depending on the severity of your case and what the doctor needs to do. If you would like I could schedule you to meet with the doctor for a free consultation. By the end of that consultation you will have a better idea if you want to continue with the rest of the visit and the doctor will be able to tell you exactly how much the visit will be. Would you like to set a time to see the doctor?”

Now this is all assuming there are different fees, of course if there is only one fee you would just tell them and then give the free consultation offer.

New patient is shopping for price

CA’s will want to discuss how the doctor wants to handle this.

Some doctors do not want their CA’s discussing fees over the phone for any reason. If that is the case you would just say, “I am sorry we don’t discuss fees over the phone, you are welcome to come in for a free consultation. By the end of that consultation you will have a better idea if you want to continue with the rest of the visit and the doctor will be able to tell you exactly how much the visit will be. Would you like to set a time to see the doctor?”

If you do discuss fees first see the above script for how to deal with the first visit. If the patient wants to know how much it is per visit after that you may want to say something like, “Our fees vary depending on the program you choose. They can run anywhere from \$30-\$40 per visit.” The real question is not what it costs per visit but what it ends up costing to correct the underlying problem. Dr. _____ is a tremendous doctor and in the long run it ends up costing much less than with many other approaches to regaining your health.”

Obviously there are many ways to deal with this, you always want to tell the truth, have your doctor discuss with you how they would want this question answered and I will be happy to help tailor-make it to your office.

Will I need X-rays?

There are so many options here. In many offices they never take x-rays, in other offices they always take x-rays, in others they sometimes take x-rays. Work with your doctor on this one and I will be happy to help you tailor make it to your particular needs.

Scheduling an appointment for an existing patient:

“When was the last time you saw Dr. _____?”

“May I have your name please?”

“Would you like to see the doctor today or tomorrow?”

“Morning or afternoon?” Get specifics.

“Great, then, (Name), we’ll schedule you for (day) the (date) at (time). If for some reason you are unable to make this appointment, please give us as much notice as possible. Dr. _____ has a very full schedule. We’ll be happy to reschedule another date or time with no problem.”

Scheduling for patients that haven’t been in for over _____ months:

“Dr. _____ would like to re-examine you and has added some high tech/state of the art spinal analysis equipment to his practice that he is very excited about.

“Our re-evaluation is _____dollars; would you like to schedule that today or tomorrow?” Follow procedure for scheduling.

This one can be tricky... If there is any resistance, just get the patient in to the office, I will teach your doctor how to help the patient realize it would be in their best interest to do a full re-exam.

Greeting New Patient Script

When NP walks in the door, CA gets up, walks around to the patient, shakes their hand and says:

“Hello, you must be _____. (Make sure you know their name and are waiting to greet them. Look in their eyes, smile, double hand shake.) Pleased to meet you, I’m _____, welcome to _____ Chiropractic.”

“Go ahead and have a seat right here, I’ve got a history form for you to fill out, if you have any questions please feel free to ask. Please just bring it right back up here when you finish.”

(They finish)

“Thank you. Dr _____ would like you to take a few minutes and listen to this 6 minute tape before he meets with you. (give them the paper) This follows along with the tape. This is great information about the spine and nervous system, and how we see health and healing here at _____ Chiropractic. It will give you a better understanding of how we may be able to help you.”

They’re done (take patient to exam room)

NP Exam Script

“Come on in and have a seat. Dr _____ will be in shortly, but first he’s asked me to briefly go over what we’ll be doing today. Dr. _____ will be going over your history with you and talk with you about your health concerns. He will then do a complete physical examination of your spine. Dr. _____ has asked me to briefly go over your history with you and take a few notes. (Go over their history and make sure it is all filled out, go over and ask anything they missed, or forgot. Make sure they sign the back of the form. Train your C.A. to go into more detail on some of the important questions. This is a great time for the patients to get that need of “talking and needing to be heard”, without taking a lot of the doctor’s time.) **PLEASE HAVE YOUR STAFF TRAIN WITH ME ON HOW TO DO AN OUTRAGEOUS PRE-CONSULTATION!**

Thank you, (patient’s name) Dr. _____ will be right in.

Report of Findings Script

When patient returns for ROF:

Welcome back _____, it is great to see you. So that we may best serve you the doctor would like you to listen to this 5 minute tape. It will give you a deeper understanding when the doctor relates his findings with you. The more you know about what's going on with you and your health the better chance you have of getting well. Just go ahead and read along with this, (hand them the paper) the doctor will ask you to make a few comments on the paper right over here, (show them on the form).

Please bring the paper up to me as soon as you are done.

Any questions?

When patient is finished with tape:

“ Thank you. Please come with me (take them to ROF room). You can have a seat right over here, the doctor will be with you in just a few moments.”

No Show Script

Please see section on color codes and abbreviations and read my reactivation/recall program. If you are a client of mine contact me and I will send it to you.

Realize when someone no shows we do not want to make them feel bad or wrong. It is a huge problem with many staff members and doctors.

I recommend the CA calls 10 minutes after the patients appointment time and say something like, “Hello Jill this is name at Rosen Chiropractic how are you? Great, we had you down for your appointment for about 10 minutes ago, did you have that time also?”

More often than not they will say that they forgot and they are sorry etc. “Easy enough we can get you in at ____ can you make it then?” Make sure to reschedule them at that time.

If they don't agree that they had an appointment at that time DO NOT MAKE THEM WRONG! Simply say something like, “Well I am so glad I called, obviously we had a miscommunication, let's go ahead and straighten that out right now.” And straighten it out.

If it is an answer machine, “Hello Jill this is name at Rosen Chiropractic, we had you down for your appointment about 10 minutes ago. Something unforeseen must have happened please call us at your earliest convenience so we can so we can get you in later today (if time permits,) or so we can reschedule your appointment.” If they have another appointment scheduled say something like, “If I don’t hear back from you today I will see you on your next scheduled appointment at _____.” If for some reason you will not be able to make it in at that time please call to let us know ASAP.”

If for some reason they are not scheduled for another appointment always give yourself an option to call them back so you don’t feel like you are hounding them i.e., “If for some reason I don’t hear back from you today I will check back with you tomorrow.”

OFFICE HOURS

List your office hours

Including exam time, ROF time,

Adjustments, etc.

COLOR CODES & ABBREVIATIONS

Travel Cards and Files:

(List the specifics of your office)

Cash Acct = Green Dot (Place on PM file and T-Card)
Ins Acct = Orange Dot (Place on PM file and T-Card)
Trade = Yellow Dot (Place on T-Card)

*Small dot goes on the top right-hand corner of T-Card

*Large dot goes below the year sticker on the PM file

*Note in red pen on T-Card if PM is a no-show

Put a notation on T-Card: *Note \$ amount paid in far right column directly across from the date payment was made. If a balance exists, note it under pmt.

*Highlight each line in the series of visits that the pmt. Covers. (If \$280 payment for 10 visits, you would highlight 10 TX lines.)

*Use the same color pen to highlight the notation of payment and the number of treatments covered by the payment.

*Use a different color pen for each payment series to distinguish between paid and unpaid series.

Schedule Book (appointment book) Coding:

Green pencil mark – Mark with green pencil when PM arrives for appointment.

Blue pencil mark – Mark with blue when a PM reschedules to a different day, or cancels appointment. To the right of the PM's name, note the date of next appointment in blue pen.

Red pen mark – Only if PM did not show or call to cancel.

Erase – Only if PM moves his appointment time on the same day.

In red pen after PM name enter:

- I- Ins. (PM is covered by private insurance)**
- P- Prepaid cash (PM has prepaid for TX series)**
- C- Cash (PM pays per visit)**
- T- Trade (PM has trade agreement)**
- W- Write Off (Employee or Comp. Visit)**

A highlighted pen is used to designate time slots in the Schedule Book for “Special Appointments”. I.e. Red for New Patient, Blue for R.O.F., yellow for re-exam and green for Re-Reports. If a special circumstance time is requested, it should be discussed with the doctor first.

COMPUTERS & FILES

TO TURN ON – list specifically “how” to turn on computer.

TO SHUT DOWN – list specifically “how” to turn off computer.

TO OPERATE IN WORD

To print

To save

To work in (patient Accounting Program) – (Your software)

TO CREATE A NEW PATIENT FILE - List specific steps

ACCOUNTING SCREEN - List specific steps.

TO EDIT – List specific steps

TO POST CHARGES AND PAYMENTS

TO USE BAR CODE SCANNER

TO POST MANUALLY

TO RUN BILLING

PRINTERS

List your specific printers, where they are, information about maintenance, etc.

BILLINGS & COLLECTIONS

List procedure & billing codes

Show correct example of health insurance claim form.

TO RUN BILLING

***Billing should be done twice a month, for the 1-15 period, and the 16-31.**

FINANCES

“Dr. _____ has recommended 3 x per week for 12 weeks. Our standard office rate is \$ _____. Our series rate, if you pay for the recommended series, is \$ _____ per TX. There is no time limit on how long you have to use your prepaid TX.” This is where you would put your financial plans and worksheets etc. See LAASR class for more details.

COLLECTIONS

At the beginning of each month, print an *Aging Report*. Go through the report and highlight all patients who have not made a payment within 60 days.

INSURANCE COLLECTIONS

Every two weeks, check Insurance Log Book to make sure that all PM Insurance payments are current. Any outstanding balances past 60 days need to be followed up on. A call to the insurance company should be made and any communication should be recorded in the communication log sheet in the Insurance Log book. Get the name of the person you talk to, and try to talk to the same representative who is familiar with your files each time. If you leave a message, follow up within a week. If no response is received after 3 attempts, talk to a supervisor. On a normal basis, insurance companies take 30 to 45 working days, which usually means 60 days.

CASH COLLECTIONS

The first attempt is to send a letter for whatever the amount, large or small. Save these letters in the *Acct.patient* file. Log in the Communication Log when the letter was mailed. If no response is received within 10 days, call the PM and make payment arrangements. If a message is left, log it and follow up. If payment arrangements were made and no payment is made, let the doctor know and call again. Let the PM know that we understand finances are difficult and we can work with them on an affordable payment plan.

MONTH END PROCEDURES

(Your software)

You must do a back-up before doing any of the following Month-End Procedures.

Run the billing for the previous month, then do a full back up.

Month End Processing Report

Make sure backup was done first!

Patient Aging Report

Practice Analysis

BANKING & BOOKKEEPING

DEPOSITS

After you have posted all payments, print out a *Payment Day Sheet* for that day's payment.

***To print a Payment Day Sheet* (give specifics)**

***To Prepare Deposits* (List your procedures)**

LOG BOOK PROCEDURES

The Log Books are used to keep updated financial statistics, and to track new patient, referral, drop out, and special letters.

Patient Account Log Books:

Office Statistic Log Book:

LETTERS & CORRESPONDENCE

***We send out personalized letters to patients for many different reasons such as birthdays, referrals, welcoming, etc.**

***These letters are signed by Dr. _____ personally, and some are written individually by him, which just need to be typed.**

***All formatted letters can be found in:**

***All letters are put on office stationary.**

1. *Birthday letters:*
2. *Welcome letters:*
3. *Special letters:*
4. *Sorry letters:*

(Your Letterhead)

Date

Patient's Name
Patient's Address

Aloha (Patient),

This greeting goes out to you with wishes for the Happiest, Healthiest, and the most Prosperous of Birthdays. May this New Year of your life be one of clarity and inner wisdom so that your path may unfold skillfully and gracefully.

It is the practice members like you that make our practice so fun, enjoyable, and perfect.

Yours in health,

(Doctor's Name)

(Your Letterhead)

Date

Patient's Name
Patient's Address

Dear (Patient),

It was a pleasure meeting you. I'm sorry that we will not be working together at this time.

I believe there are definite spinal problems that I can help you with.

I realize this is not the time for us to work together. It may feel more appropriate to work with me some time in the future and I want you to know that my staff and I stand ready t

Yours in awesome health.

(Doctor's Name)

(Your Letterhead)

Date

Patient's Name
Patient's Address

Aloha (Patient),

My staff and I were recently discussing the kind of practice members we especially like having in our practice. In general, we realize these practice members share similar values with us.

Because of the similar value systems, people like you are very likely going to be the kind of people we would like too. Since we would like to build an entire practice of people like you, if the opportunity should arise for you to send someone to us, we would be especially grateful.

We want you to know how much we appreciate having you in our practice and we want to remind you that when you do send someone to us, we will make sure to take good care of them. And, of course, you always receive a complimentary visit each time you refer someone as one way we can express our gratitude for your confidence and concern.

Yours in Health,

(Doctor's Name)

(Your Letterhead)

Date

Patient's Name
Patient's Address

Dear (Patient),

I realize it is difficult to get in at this time. I am looking forward to the time when your schedule clears up and you can make it in to your appointments.

Please remember:

1. There is nerve interference.
2. The nervous system controls and coordinates every function and system in your body.
3. We can help you clear up your nervous system interference.
4. You can then heal and remain healthy.

I look forward to working with you to correct your nerve interference ASAP.

Sincerely,

(Doctor's Name)

(Your Letterhead)

Date

Patient's Name
Patient's Address

Dear (Patient),

We've missed you! I'm sorry your schedule has been so full that you can't make it in for your appointments. Especially with the severity of your spine, the only way to make the types of changes we both want for you is for you to come in with much more regularity.

Please remember:

1. There is nerve interference.
2. The nervous system controls and coordinates every function and system in your body.
3. We can help you clear up your nervous system interference.
4. You can heal and remain healthy.

We have left messages with no reply and we certainly don't want to "hound" you to get your spinal problems taken care of. Therefore, at this time I will return your unused monies totaling \$____ and discharge you from my care.

If your situation changes and you can make it in for care, I would absolutely love working with you again. I do feel confident if you commit to the full program with me, your health will improve radically now and in the future. Stay well!

Love and light,

(Doctor's Name)

(Your Letterhead)

Date

Patient's Name
Patient's Address

Aloha (Patient),

It was great working with you on the path towards Optimum Health and Wholeness.

You have made a tremendous investment in your health – *time, energy, money, a conscious commitment to Wellness*. To continue to reap the benefits of your investment; to maintain a flexible spine and nervous system, **COMING IN ONCE OR TWICE A MONTH IS VITAL** in monitoring your progress, checking your spine, and keeping the level of tension in your nervous system more manageable.

Attitude, diet, lifestyle, including chiropractic care, are the crucial ingredients on the path to abundance and total health. (Your Company Name) offers the state of the art healing techniques and is an awesome form of health maintenance.

You are part of our ohana; it is always a pleasure to see you. Whenever you're ready to play, we're ready to serve you with love, awareness, and awesome chiropractic adjustments.

Sincerely,

(Doctor's Name)

(Your Letterhead)

Date

Patient's Name

Patient's Address

Dear (Patient),

Thank you for your confidence and for selecting me as your family doctor of chiropractic. We all welcome you to our family of fine practice members who have found their lives transformed through natural chiropractic health methods.

Our goal is to locate, analyze and remove your spinal "subluxations", allowing your life force to flow to every cell of your body, unimpeded, thereby allowing you to regain normal function and heal yourself on all levels. With this in mind, you and I will restore optimal spinal health in as many visits as we feel are necessary to get you to the level of spinal clarity you desire. As time goes on and you experience the wonderful transformations that occur in your life, you will most likely redefine your goals and what you hope to receive from (your Company Name) and this healing process.

Essentially, my work is to correct your subluxations. It is your job to "care" for your health. Most likely as you become "clearer" and more life force flows through you, you will start to get messages as to which foods, exercises, spiritual, mental, and emotional practices do and do not work for you at this point in the evolution of your healing process. Obviously, doing what is most appropriate for yourself will help you on your road to health.

I believe that chiropractic and turning your life force on can help you greatly and I hope you appreciate our "care" approach. Please read all of our flyers and handouts, attend all health care talks, bring your family and friends, and take an active role in your healing process. Remember, healing is an inside job!

If at any time you have questions, I will be glad to give them my attention.

Yours in health,

(Doctor's Name)

NEW PATIENT PHONE SLIP

New Telephone Call (average patient procedure)

As soon as you realize you are speaking with a new patient, use the following questions as a guide for your conversation. Remember that this is an important step for the new patient. Make sure that your voice reflects the warmth and caring attitude of the office. ALWAYS smile when you are answering the phone. Remember YOU are the first impression to your office. Make them feel that they are enrolled and activities have been set in motion, which will reduce "no shows."

"When was the last time you saw the Doctor?"

"May I ask your name please?"

(Ask for spelling)

"Would you like to see the Doctor today or tomorrow?"

"Do you prefer morning or afternoon?"

(Specify appointment time and date)

"May I have your home and work phone numbers, please?"

Home _____ Work _____

"Who referred you to our office?"

(Great, he/she is a wonderful person)

"Is your appointment concerning an auto or work related injury?" Yes [] No []

NOTE: If yes, get the following information:

Employer: _____

Supervisor: _____

Company Name: _____

"Do you have insurance that covers chiropractic care? Yes [] No []

"By the way, if you have insurance coverage, be sure to bring your information and form so we can submit your claim for you, if necessary.

"Do you know where our office is located?" Yes [] No []

“The exam will take between 45 minutes to 1 hour. It will consist of a consultation with the Doctor and a chiropractic exam, possibly x-rays. We look forward to seeing you on

DAY _____ at **TIME** _____”

Patient comments or additional information: _____