

**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.

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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

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## **POLICIES & JOB DESCRIPTIONS**

(Clinic Name)

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## **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, 4<sup>th</sup> 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.

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***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. You will not be paid for hours in seminar.

***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.

***INTERNET/SOCIAL MEDIA***

You are expected to work during work hours. There will be no internet surfing, emailing, texting or any other forms of communication with friends or family during work hours.

***CLINIC PROMOTIONS***

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

***PAY PERIODS***

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You will be paid bi-monthly. Pay periods are from the 1<sup>st</sup> to the 15<sup>th</sup> and the 16<sup>th</sup> 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

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## **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.**

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## **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**

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## ***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”

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## Office & Patient Service

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## 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. Role play!
2. Role play!!
3. Role play!!!

**This is where you would put such things as:**

**How to answer phones**

**If the Call is For the Doctor**

**If the Phone Call is for Office Staff**

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

**If the call is a patient scheduling or rescheduling an appointment**

**New Patient Phone Script**

**New Patient Script FORM**

**New patient is shopping for price**

**Will I need X-rays?**

**Scheduling an appointment for an existing patient:**

**Greeting New Patient Script**

**Prior to Viewing Presentation**

**Report of Findings Script**

**You can find Rosen Coaching versions of these important scripts in the CA Foundational program**

<http://www.rosencoaching.com/store/newpackages/foundational-ca-program/>

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## **OFFICE HOURS**

List your office hours

Including exam time, ROF time,

Adjustments, etc.

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## 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.

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**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.**

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## **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***

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

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## **BILLINGS & COLLECTIONS**

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**List procedure & billing codes**

**Show correct example of health insurance claim form.**

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## ***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.**

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## 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*

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## **BANKING & BOOKKEEPING**

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## 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)

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## 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:*

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## 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:*

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(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)

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(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 to help you.

Yours in awesome health.

(Doctor's Name)

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(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)

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(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)

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(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)

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(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)

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(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)

Remember make sure everything including giving prizes, discounts etc is legal in your state

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