
BECOMING
A STELLAR
CHIROPRACTIC
ASSISTANT

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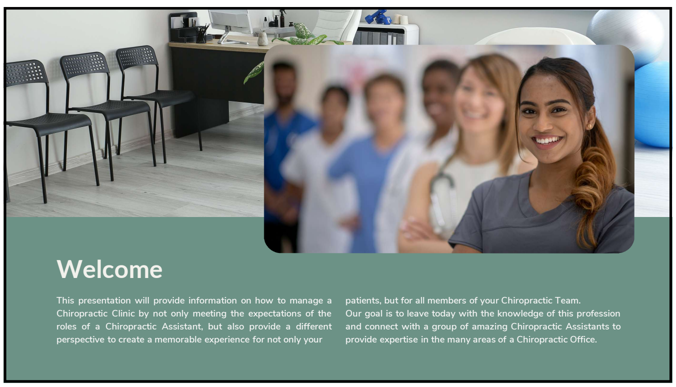
Welcome
This presentation will provide information on how to manage a Chiropractic Clinic by not only meeting the expectations of the roles of a Chiropractic Assistant, but also provide a different perspective to create a memorable experience for not only your patients, but for all members of your Chiropractic Team.
Our goal is to leave today with the knowledge of this profession and connect with a group of amazing Chiropractic Assistants to provide expertise in the many areas of a Chiropractic Office.

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Disclaimer
This presentation is intended for educational purposes only and do not replace independent professional judgement. This presentation is not meant to offer medical, legal, accounting, regulatory compliance or reimbursement advise and is not intended to establish a standard of care.
Please consult professionals in these areas if you have related concerns.
James R. Nieland, DC & Elizabeth Nieland do not have any financial conflicts to disclose and we are not promoting any service or product.

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What Does a Chiropractic Assistant (CA) Do?

Patient Communication
- Collect Patient Data (Demographics)
- Insurance Verification
- Patient Scheduling
- Answer Phones & Patient Questions
- Collect Patient Payments

Patient Care
- Administer Patient Education & Materials
- Administer Clinic Therapies
- Assist in Patient Exams
- Certified X-Ray Technician

Accounts Receivables
- Insurance Billing & Payment Posting
- Patient Statements
- Patient & Payer Accounts Receivables Follow-up
- Collections

Office Management
- Order Office Supplies, Supplements, DME
- Medical Records Management
- Managing of Office Supplies, Equipment, etc.
- Certified Chiropractic Assistant

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Is That All?

Far From It!

Depending on the clinic, will depend on your involvement of the practice.

- Babysitter during a patient visit
- Travel Agent
- Human Resources
- Bookkeeper
- Complaint Specialist
- IT Specialist
- Janitor
- Patient Care (or Insurance) Detective
- And Many More!!!

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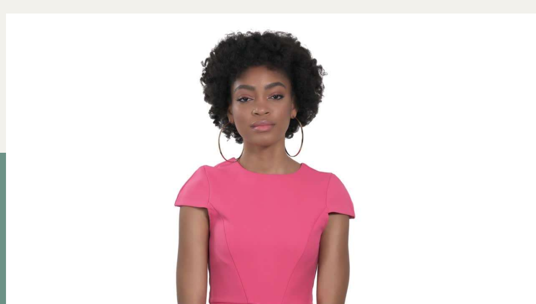
But Hey... Don't forget to SMILE!



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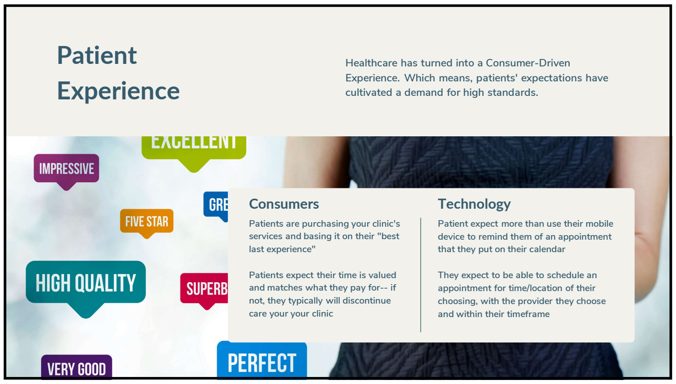
Patient Experience
Healthcare has turned into a Consumer-Driven Experience. Which means, patients' expectations have cultivated a demand for high standards.
EXCELLENT
IMPRESSIVE
FIVE STAR
HIGH QUALITY
SUPERB
VERY GOOD
PERFECT
Consumers
Patients are purchasing your clinic's services and basing it on their "best last experience"
Patients expect their time is valued and matches what they pay for-- if not, they typically will discontinue care your your clinic
Technology
Patient expect more than use their mobile device to remind them of an appointment that they put on their calendar
They expect to be able to schedule an appointment for time/location of their choosing, with the provider they choose and within their timeframe

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Advantages of Improving Patient Experience
Improves Patient Retention
Organizations with high patient loyalty can command a higher price
Good patient satisfaction avoids the risk of malpractice claims
Increased staff morale by avoiding employee turnover
Get a complete understanding of critical factors
Feeling heard helps patients develop loyalty to your services

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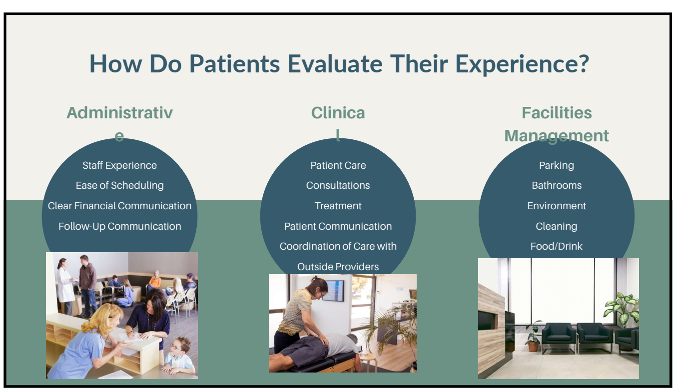
How Do Patients Evaluate Their Experience?
Administrativ
e
Staff Experience
Ease of Scheduling
Clear Financial Communication
Follow-Up Communication
Clinica
l
Patient Care
Consultations
Treatment
Patient Communication
Coordination of Care with Outside Providers
Facilities Management
Parking
Bathrooms
Environment
Cleaning
Food/Drink

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How Can A CA Help Improve The Patient Experience?

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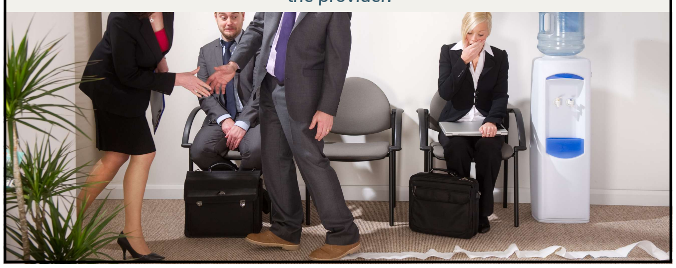
First Impressions

First Impressions are often the lasting impressions. It takes patients 7 seconds to determine if they like you, if they like the office, if they like the provider.



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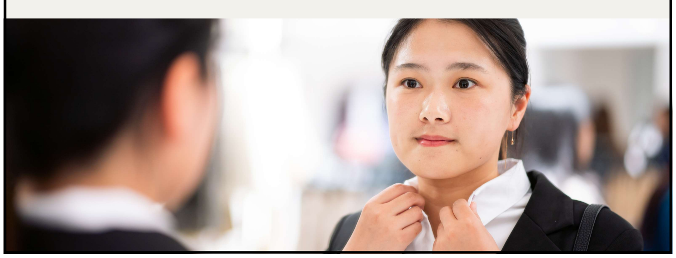
Lets Be First Date Ready

Clean and Tidy Scrubs, Clean Shoes, Hair Neatly Styled, Subtle Perfume & Make-up, Nametag Worn



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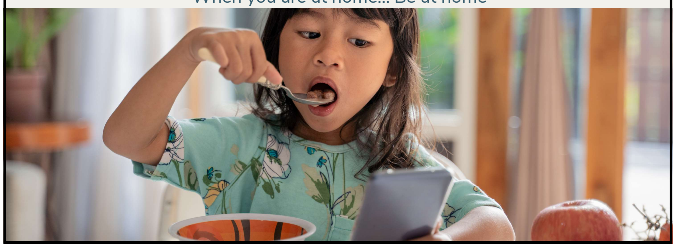
Be Where Your Feet Are

When you are at work… Be at work
When you are with a patient… Be with that patient
When you are at lunch… Be at lunch
When you are at home… Be at home



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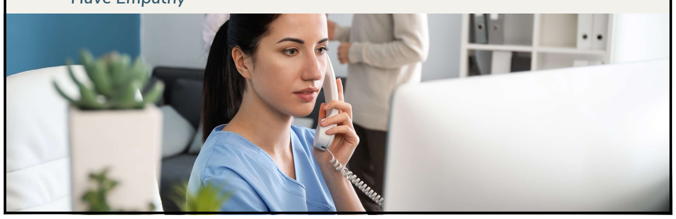
Good Phone Etiquette

- *SMILE*
- *Know your Clinic's Phone Scripts*
- *Have a Telephone Message Pad &/or Notepad to jot down the caller's name*
- *Know what is urgent and not urgent*
- *Have Empathy*



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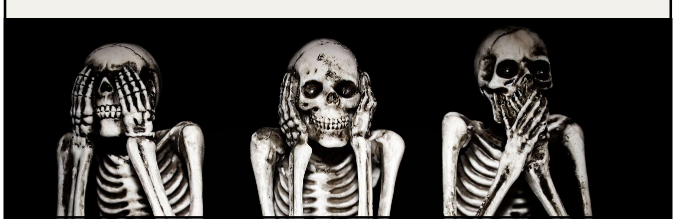
How Important Is Communication?

<u>Face-to-Face</u>
55% Body Language
38% Tone of Voice
7% Written Word



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Communication via Telephone or Email

Telephone

82% Tone of Voice

18% Written Word

Email

100% Written Word

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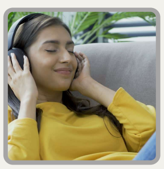

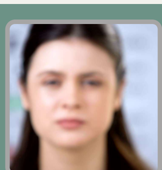
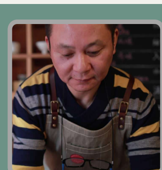

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Patient Visit Flow

Front Desk

- Scheduling
- Reception Area
- Intake Forms
- Financial Communication
- Inputting Information in EHR

Exams & X-Rays

- Patient Intake of Information
- Assisting in Evaluation/Examination
- Administer X-Rays
- Inputting Information in EHR

Treatment Room & Therapies

- Adjusting Room/Bay
- Therapy Room
- Massage
- Acupuncture
- Physical Therapy
- Inputting Information in EHR

CA Office Space

- Submitting Medical Records Request & Follow-Up
- Ordering Outside Diagnostic Testing (CT/MRI/Labs)
- Coordinating Care with Outside Provider(s)
- Inputting Information in EHR

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Using the Five (5) Senses with Patients

Touch

- Reception area furniture feels comfortable, clean and aesthetically complementary to the décor of your waiting room
- Review the floor plan of the office-- patients find it uncomfortable sitting in a formation where they are forced to stare at each other
- Make sure the flow throughout the office doesn't limit the patient's movement, especially patients with wheelchairs, canes or walkers
- Having toys for children in the reception area, exam/x-ray room, therapy room, etc. are on hand and aren't worn out
- Utilizing a online scheduling platform (SKED, ReviewWave) and allowing patients to use mobile apps engages patients with your practice

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Using the Five (5) Senses with Patients

Hearing

- Silence is awkward. Gentle background music is great to break tension and set a more comfortable environment
- Don't play the radio-- no one wants to hear about "Krazy Kevin Powell" Motor Sports having a sale
- If you are using a TV, ensure the volume is set at a level that is respectful of other patients who may choose not to engage with it
- Make sure staff and provider conversations are keep in a calm and reassuring tone when speaking with new patients-- the first visit may be very nervous for patients
- Speak clear, concise and in a steady tone with the patient in person or on the phone
- Patients love hearing their name-- call them by their first name
- Make note of any milestones that patients tell you-- birthdays, anniversaries, new job, death in family
- Be present in your conversation with patients, whether on the phone or in person

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Using the Five (5) Senses with Patients

Smell

- Often overlooked, smell can either be inviting or offensive-- we want to leave a good first impression of your practice
- Fresh, soothing scents within the practice will help make patients feel more relaxed and comfortable while they wait during their appointment
- Essential oil diffusers work great! Eucalyptus and Rosemary, Peppermint and Lavender, Grapefruit and Lemongrass are some great smells
- Use cleaning products that are not overpowerful-- strong chemicals smells are contribute to headaches, etc.
- Perfume should not be overpowering

Sight

- Is the Parking Area clear of debris? Is the front entrance visible? Are their cobwebs anywhere in the office?
- Lighting is important to help with the mood/feel of the practice. Make sure that there aren't any "burnt" bulbs or lightbulbs that are flickering
- Patient Paperwork should never be "A copy of a copy"
- Office Clutter should be kept at a minimum
- Patients that wear glasses-- while they are on the table, take disposable eyeglass wipes and clean their glasses for them
- Disposable Eye Masks are great for patients who are on therapy tables for an extended period of time

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Using the Five (5) Senses with New Patients

Taste

- Coffee Machine-- Keurig/Nespresso with K-Cups/Pods, sugar packets (NO SPLENDA!), creamers & stirring sticks
- Water Dispenser-- Utilize a water cooler or if you are using a countertop water dispenser, maybe put in frozen fruit blends (strawberries/blueberries & mint) or lemon slices to give it an extra "Splash" and keeps the patients cool, calm and hydrated
- Mints-- bowl of complimentary mints at the Front Desk and the Exam Room

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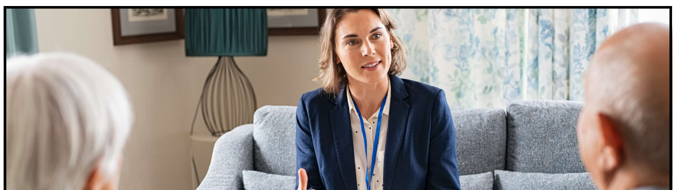

How Can A CA Provide Exceptional Patient Experience?

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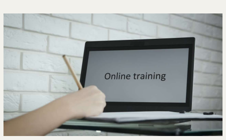
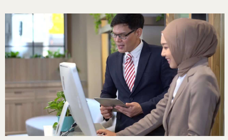
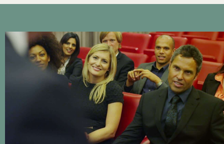
Clinic Policies & SOPs







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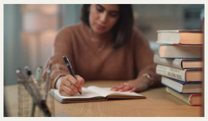

Prep Time vs. Show Time vs. Polish Time

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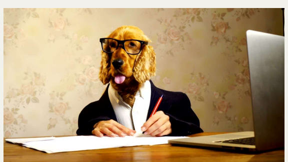
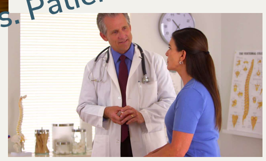


Paper Time vs. Patient Time



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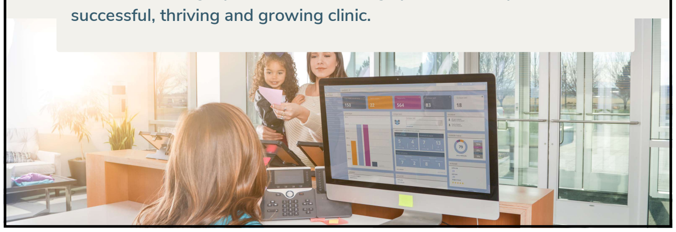
Patient Scheduling

Patient Scheduling is the lifeline of any Chiropractic Clinic. Clinics that focus on creating a proficient scheduling system can help run a successful, thriving and growing clinic.



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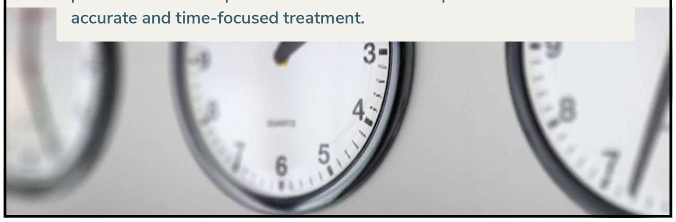
Patient Scheduling

Have a methodology on how your clinic schedules New Patients, Re-Exams, Therapies, etc. Ensuring an SOP on the Patient Scheduling process will ensure patient treatment allots the provider to ensure accurate and time-focused treatment.



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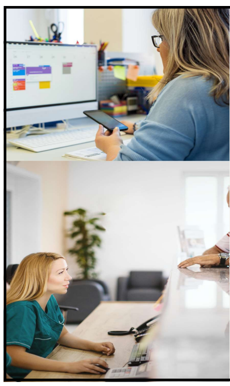

How Does Your Clinic Schedule?

The Doctor & Patient Time is Valueable!

Regardless if your clinic is a low-volume, walk-in clinic or a high-volume clinic, **Scheduling is Key**!

Take time and evaluate your clinic's current set-up . Make sure that your schedule allows appropriate time for intake process, insurance verification, pre-authorization requests, data entry & chart prep.

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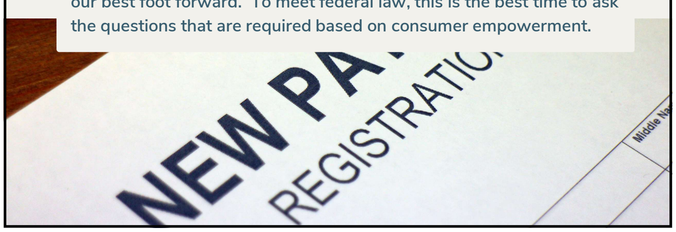
New Patient Intake Process

Patient Intake Process is often given a low priority. We want to provide the best experience as possible, so we want to proceed with our best foot forward. To meet federal law, this is the best time to ask the questions that are required based on consumer empowerment.



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Prioritize Patient Intake

- Email/Fax New Patient Intake Forms
- Utilize EHR Integration Features
- Downloadable pdfs of New Patient Intake Forms from Clinic website
- Provide a Good Faith Estimate to patients at their request within the timeline outlined by the No Surprises Act

Ensure that your New Patient Intake Forms allow patients to provide a complete health history that can be completed by the patient.

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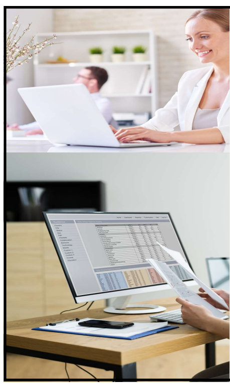

What is Important Data to Collect?

Need to Know

- Patient Legal Name, Mailing Address, DOB, Home/Cell Phone, Email Address, Insurance or Self-Pay (Good Faith Estimate) & Insurance Details (Medicare/PI), Health History

Would Like to Know

- Referral to Office

Great to Know

- Patient Knows their insurance benefits/coverage

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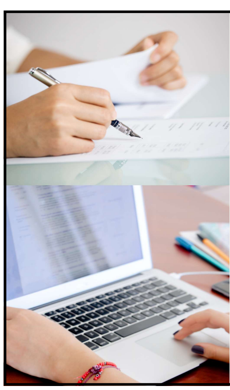

Review Your Patient Intake Process

- Patient Legal Name, Mailing Address, DOB, Home/Cell Phone, Email Address
- Health Insurance Information
- Reason for Visit & Date of Injury (DOI)
- Complete Health History including Review of Systems
- Previous Medical Health Issues/Surgeries/Radiology
- Current Medications
- Primary Care Physician

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Review Your Patient Intake Process

- Are your Patient Intake Forms available as a pdf?
- How many pages is your Patient Intake Form?
- Can you email these to your patients before they come in?
- Do you use an online web portal to collect the data for the clinic?

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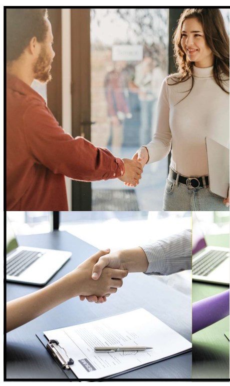

Good Faith Estimate

If your office is using the Good Faith Estimate (GFE), these are the Delivery Requirements that must be done to be within compliance with the Federal Laws. If an appointment is made:

- **10 business days** in advance, the GFE must be provided within **3 business days**
- **3-9 business days** in advance, the GFE must be provided **within 1 business day**
- **<3 days** in advance, you **ARE NOT** required to provide a GFE in writing

Notify orally upon scheduling (provide estimate of initial evaluation)

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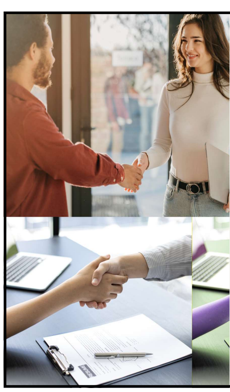

Good Faith Estimate

Note: If the patient requests a GFE on their own, while at the clinic or just shopping for care, then you need to provide one within three (3) days of date of request.

Keep all copies of GFEs as part of the medical record and provide a hard copy or electronic to the patient or prospective patient.

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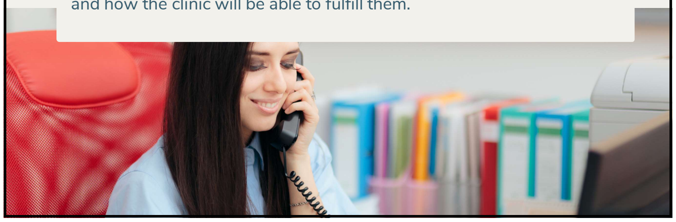
Incoming Patient Phone Call

Identifying the incoming patient phone calls are key to patient scheduling. Those calls are the first step in triaging the patient's needs and how the clinic will be able to fulfill them.



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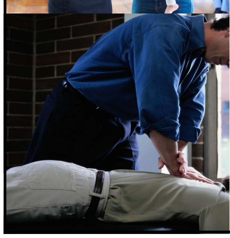

Is it a New Patient or Established Patient?

New Patients are Patients who have never been seen at the clinic -or- the patient hasn't been seen in the clinic 3+ years from the scheduled appointment date.

Established Patients as patients who either have one of the following:

- Active Treatment Care Plan
- Scheduled Maintenance (Wellness) Care Plan
- Patient is "As Needed Basis" (PRN)

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Train, Train, Train

Repetition Is the Mother of All Skills

- Phone Scripts
- Team Role-Playing
  - New Patient Phone Calls
  - Existing Patient Phone Calls
  - Upset Patients
- Training Schedule
  - Paper Time
  - Prep Time

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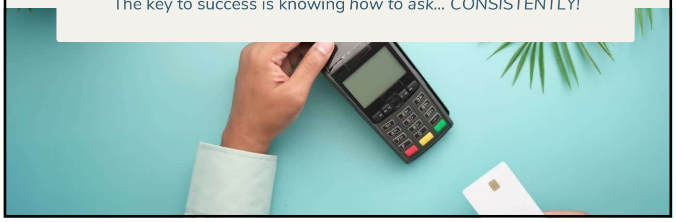
Patient Collections

Financial Relationships are very difficult for many offices.

The key to success is knowing *how* to ask… *CONSISTENTLY!*



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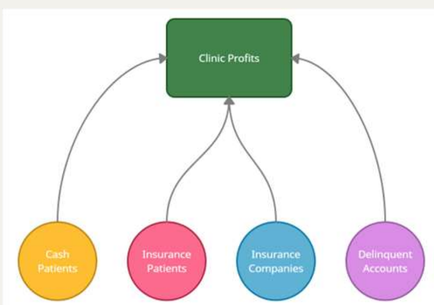
Strong Collections = Strong Practice



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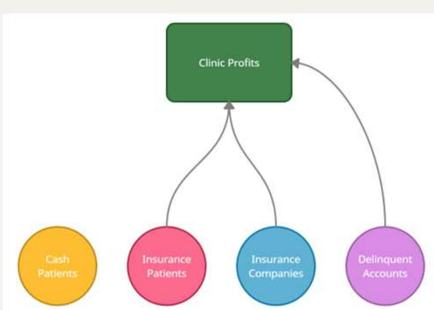
No Collection From Cash Patients



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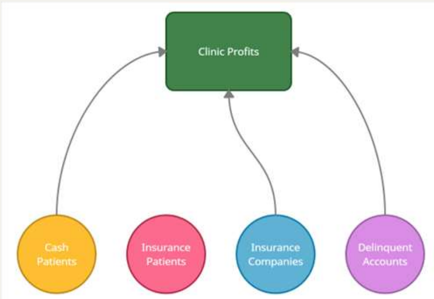
No Collections From Insurance Patients



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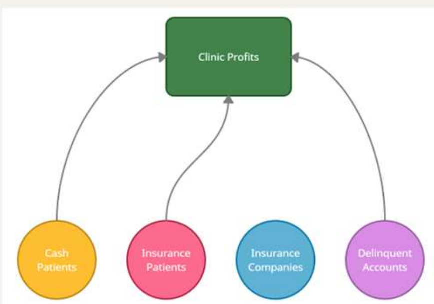
No Collections From Insurance Companies



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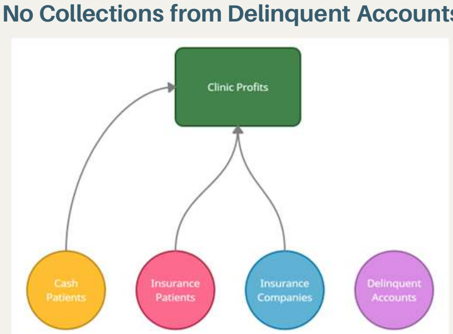
No Collections from Delinquent Accounts



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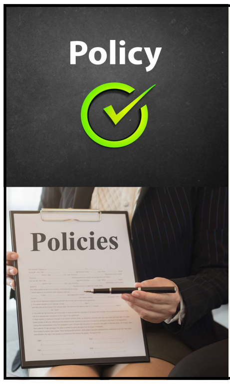

Office Financial Policy

Whether your clinic has a current Office Financial Policy or need to create one, it should be a written statement that is given to all patients and is posted (at least in a brief format) at your check-out counter.

A solid financial policy that is followed can set up a clinic to be financially successful.

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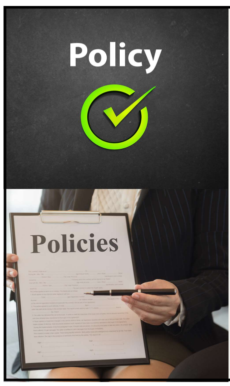

Office Financial Policy

Make sure your current Office Financial Policy has the following:

- Level of Participation with Insurance Carriers & Medicare
- Your Clinic's Financial Hardship Policy
- Options for Payment Plans
- How Your Clinic handles Overdue Statements
- Charges for Missed Appointmnts
- Does Your Clinic charge Interst on Unpaid Balances

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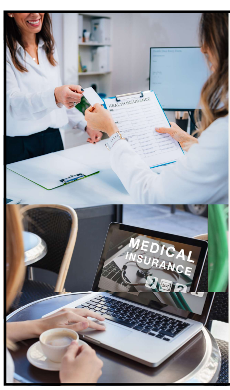

Imposed vs. Elective Discounted Fees

Imposed Discounts

- **Regulated Discounts**
  - Fees which must be accepted because they are regulated by a governing body
  - i.e.- Medicare, Worker's Comp, Medicaid, No-Fault, Personal Injury (PIP)
- **Contacted Discounts**
  - Fees that are discounted by the payer agreed upon by the contract for members of the plan
  - i.e.- Insurance Carriers (HNS, UHC, etc.)

Neither of these discounts are usually negotiable

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Imposed vs. Discounted Fees

- **Elective Discounts**
  - Discounts at the discretion of the owner/provider and are not mandatory
  - Discount options are possible by setting policies and procedures and must meet compliance guidelines.

  - i.e.- **ChiroHealthUSA**, DMPO Membership, Professional Courtesy, Financial Hardship, etc.

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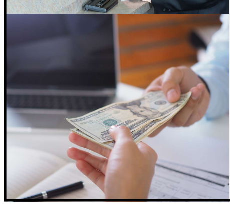

You Are Not The Patient's Banker

Understand Fees

Patients lose trust in a clinic if the clinic is unsure on the proper way their finances are handled within the office

- Understanding the clinic's fee schedule vs. in-network payers fee schedule
- Collect at Time of Service… CONSISTENTLY
- Don't Rely on Insurance to Pay before collecting from the Patient
- Create Patient & Payer AR Follow-Up Schedule
- Send Monthly Patient Statements… CONSISTENTLY

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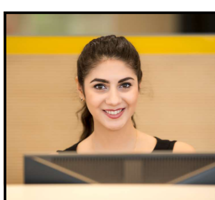


3 Cs

- **Communicate**
  - Greet the Patient/Feel Comfortable
  - Inform the Patient of the Clinic's Financial Policy
  - Build Trust

- **Collect**
  - Collect Funds that the Patient is responsible for

- **Close**
  - Close the Conversation.. Don't leave them hanging

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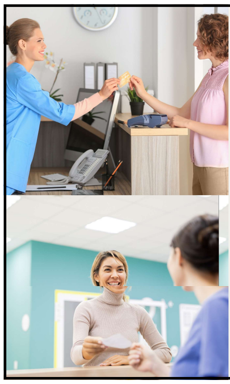

Tips on Setting the Standard on Collections

Collections should be your strongest areas of any clinic

Start with the New Patients
- Collect at the First Visit

Know your clinic's fee schedule & payer fee schedules
- You cannot collect what you don't know

Don't let patients walk out without paying
- If they do, address immediately on their next visit

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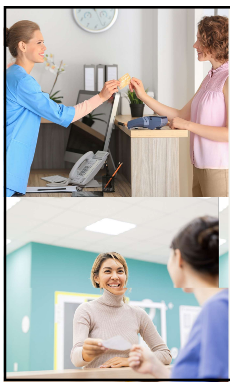

Tips on Setting the Standard on Collections

Keep it Simple
- Don't complex asking for the payment-- know what & why you are collecting

Know how to read your EHR Ledger
- Know why the patient owes and provide the patient with accurate patient responsibility

Cross-Train Your Team
- Sometimes your front desk CA has to go to the bathroom

Be Direct but Polite
- Make eye contact and state what they owe (but not a staring contest!)

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Excuses... Excuses... Excuses...

- Know how to handle those comments
- Offer Different Options (Monthly Payment Plans, Self-Address/Self-Stamp Envelopes)
- Offer DMPO (or ChiroHealthUSA) Program
- Tag in your Provider if the Patient is Inconsistent in Paying

54

Train, Train, Train

Repetition Is the Mother of All Skills

- Be Polite, Positive & Confident but Firm
- Team Role-Playing
  - How to Discuss Financial (Cash v. Ins)
  - Upset Patient
  - Patient Calls In
  - Financial Disputes with your Billing Manager, Billing Co., &/or Provider

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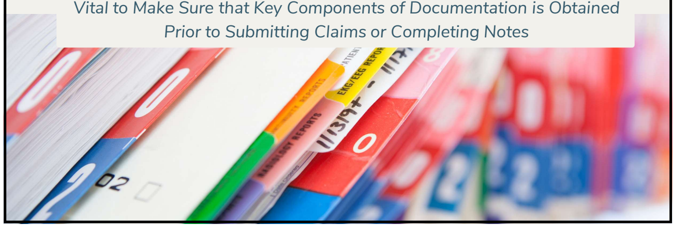
Case Management

Most Chiropractic Clinics will have their CAs assist in the Case Management of Patient Care

Vital to Make Sure that Key Components of Documentation is Obtained Prior to Submitting Claims or Completing Notes



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Compliant Medical Records

Documentation of the encounter between the provider and the patient is vital as part of their health records.

The patient's record is the final and legal documentation that describes the conditions and treatment of the patient.

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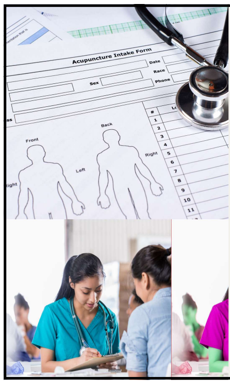

Roles of Health Records

- Establishes Chronological Record of the Patient's Conditions & Treatments
- Demonstrates Medical Necessity of the Patient's Care to Third-Party Payers
  - This will help justify the bill and provide the services that is appropriate for the patient's condition
- Serves as a "Real-Time" record of everything that has or had happened wit the patient which would be vital in the case of a malpractice claim

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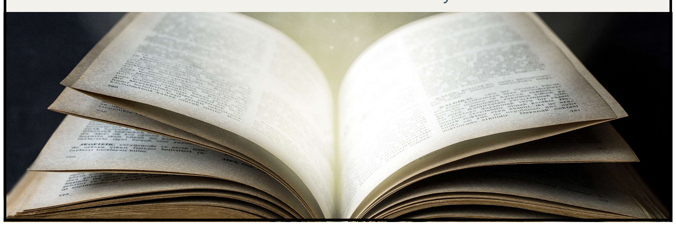
Case Management

Documentation are the Chapters within the Patient's Storybook

More detail on the information, the more clarity it provides the provider, outside providers, third party payers &/or malpractice insurance on why the patient came into the office and what services they received



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Medical Records are Business Records

- Medical Records must be made in the regular course of the business
- Medical Records must be kept by a person who has personal knowledge of the act, event, or condition being recorded
- Medical Records must be made at or near the time that the recorded act, event or condition occurred or reasonably soon after
- Medical Records must be kept in a consistent manner, according to a set procedure

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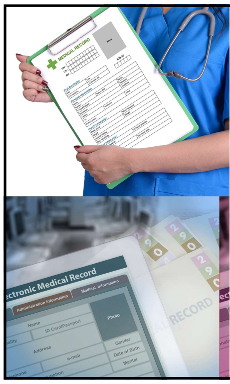

Medical Records Contents

Medical Records should contain enough information for the provider, unfamiliar with the patient, to provide appropriate care

- Patient full & legal name (not nickname)
- For minors, name of parents or legal guardians should be in the chart and prominent notation as to who is legally able to consent to the child's care
  - Any Legal Constraints (i.e.-- parent who is not allowed to consent to care, who can or cannot pick up a child from the clinic, who does or doesn't have access to a child's medical information

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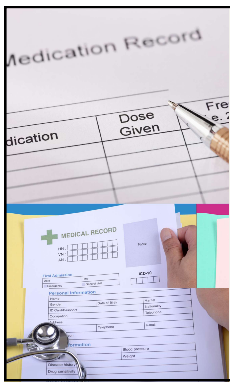

Medical Records Contents

- Create New Patient Packets
  - Patient Intake Form w/ Health History
  - Patient Consent Authorization
  - Records Release Authorization
  - HIPAA Notification of Information Practices
  - Office Financial Policy
  - Authorization to Treat a Minor (if applicable)
  - Initial Exam Form
  - X-Ray Report Form (Radiology Report)
  - Routing/Fee Slip for First Visit
  - Diagnosis Code Sheet
  - Treatment Plan Form
  - SOAP Note Sheet

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Additional Information

- Copies of Insurance Card(s) (Front/Back)
- Copy of Driver's License
- Patient Ledger (Records of Fees/Charges)
- Initial Evaluations or Re-Evaluations
- Insurance Billing & Remittance Data (if applicable)

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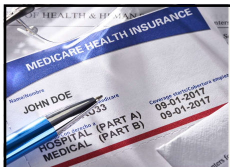

Medical Records Contents

Major Medical Insurance
- Assignment of Benefits
- Verification of Insurance Form

Medicare
- Medicare Insurance Verification Form
- Medicare ABN Form (as needed)

Personal Injury
- Personal Injury Questionnaire
- Personal Injury Insurance Verification Form
- Doctor's Lien
- Power of Attorney

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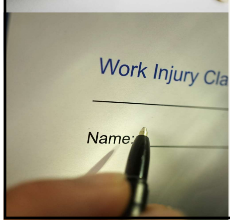

Medical Records Contents

Cash
- Good Faith Estimate (if applicable)
- DMPO Form

Workers Compensation
- Workers Compensation Questionnaire
- Workers Compensation Verification Form
- Workers Compensation Authorization to Release Information

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Medical Records Contents

Make Sure…
- Patient Name is included on all documents
- Writing is legible
  - This saves time and reduces liability
- All Forms are Complete
  - No Incomplete Sections
  - Make Sure to check the front **AND** back of all forms!
- All notes are signed by the Provider-- DC must always authenticate the notes

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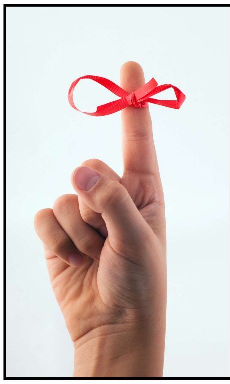


REMINDER…

Documentation is considered a LEGAL document!

67

Medical Records Request

Every Chiropractic Office will either request medical records or have medical records requested from them

Timeliness & Presentation are important factors because it matters for the involvement of patient care

Not done in this manner can not only delay patient care, but can also affect possible reimbursement

68

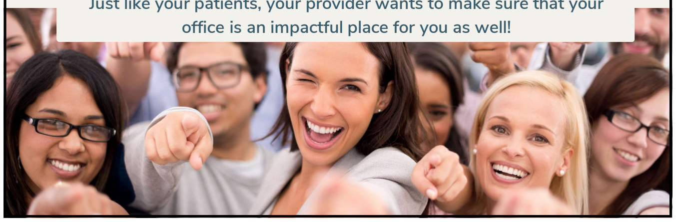
How Can A CA Provide A Stellar Patient Experience?

69

Great Patient Experience Starts with Great Team Experience

You joined your office because you wanted to create an impact in patient lives.

Just like your patients, your provider wants to make sure that your office is an impactful place for you as well!



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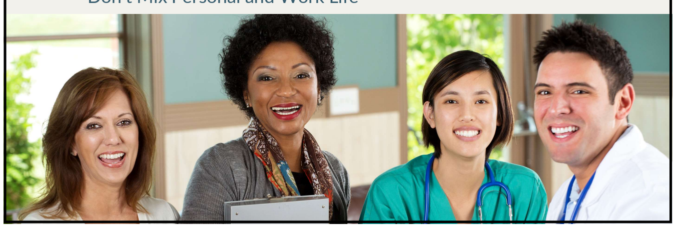
Create a Inclusive Team Environment

Focus on What You Can Control

- Eliminate Negativity
- Control Stress
- Respect... Don't Gossip or Cause Chaos
- Don't Mix Personal and Work Life



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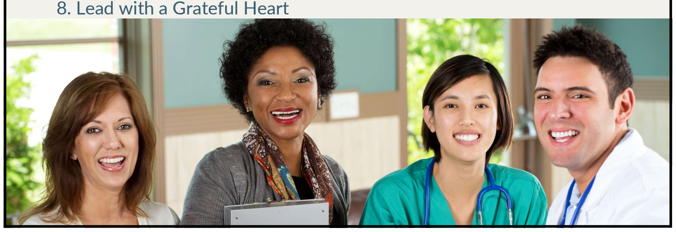
Create a Inclusive Team Environment

Focus on What You Can Control

5. Start with Positivity & Choose to Be Positive
6. Smile
7. Make Problems into Opportunity
8. Lead with a Grateful Heart



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People Go Where People Go

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Make a Patient's Visit The Best Part of Their Day

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Create An Exceptional Visit for All Patients

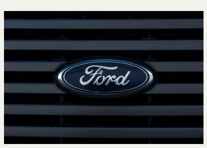
Get a **FORD**

F- Family

O- Occupation (Work/School)

R- Recreation

D- Dreams



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Create An Exceptional Visit- For Kids

Have basket of toys for kids in areas that kids may be spending a good amount of time in
- Reception Area
- Exam Rooms
- Therapy Rooms

Make sure that the toys are not worn out or broken

Have toys that are not a choking hazard

Do not have plush toys or toys made of fabric

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Create An Exceptional Visit- For Kids

Have Basket or Baskets of Giveaway Items for Kids:
- Bubbles or Bubble Wants
- Fidget Pop Keychains
- Stickers
- Lollipops
- Race Cars
- Little Animal Finger Puppets

Always ask parents for permission first!

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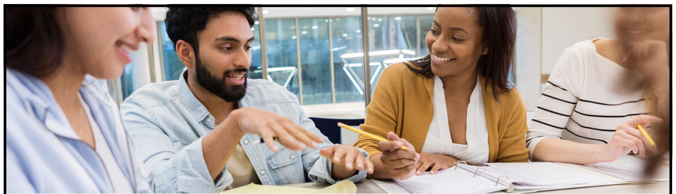

CA RoundTable

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Rules

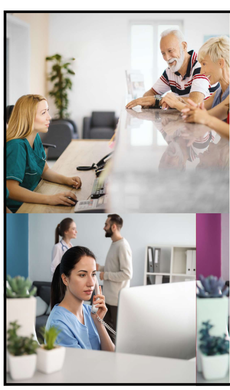
- No Question is a Dumb Question
- We are going to be open to ideas, suggestions, conversations
- We are going to remember that we all started at the beginning
- Have Fun!

79

Scheduling Question?

Who is more important… The patient in front of you or the patient on the phone?

80



Scheduling Answer

Whomever is first!

One doesn't outweigh the other but it is important that when you are talking to the patient in front of you or on the phone, that you are aware of the other patient, without taking from the patient that you are working with.

Make sure the conversation is not a personal one!

81

Reception Area Question?

Patients are waiting in the reception area and it is that awkward silence & patients are "glaring" or obviously "sighing" because their wait is too long. What do you do?

82

Reception Area Answer

Engage with your patients in the waiting room. Communication is key-- Patients don't like feeling ignored!

Offer water, coffee, any reception area snacks

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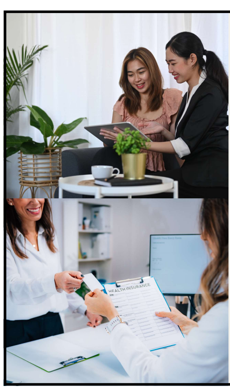
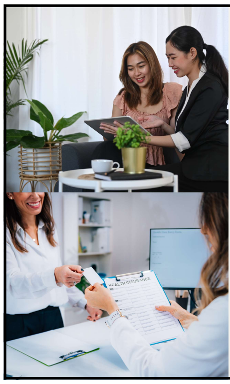


Financial Question?

When should insurance verification be performed? How do I explain to the patient what they owe?

84



Financial Answer

Transparency is Key!

Insurance Verification should be completed by the first visit to determine insurance responsibility and patient responsibility.

Review benefit information with the patient prior to services rendered to ensure that communication is established and patient agrees to the financial responsibility before services rendered.

Also... Know your Payers Allowed Fees

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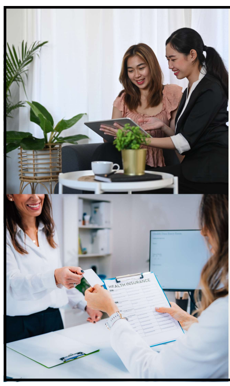

Financial Question?

Patient gives you an insurance card and you cannot verify benefits over the phone because it is a Federal Holiday or the Insurance Company is closed. What do you do?

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Financial Answer

Transparency is Key!

- Have access to online web portals to payers to verify benefits
- Inform the patient that insurance verification cannot be performed at that visit and when they should expect the clinic to complete the insurance verification process
- Collect a clinic approved amount for the visit to stay in "Fair Exchange" with the patient
- Once insurance is verified, review insurance coverage with the patient before future services are rendered.

Also... Know your Payers Allowed Fees

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Open Discussion

Who's Got A Question?
Who Has A Suggestion?

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