



**Saltash
Chiropractic
Clinic**

CA TRAINING
MANUAL

CA Training Manual

Clinic Procedures

CA Working hours:

AM shift: to
PM shift: to
Saturday: to

Clinic Opening Hours:

Monday: to
Tuesday: to
Wednesday: to
Thursday: to
Friday: to
Saturday: to

CA Uniform and Appearance:

1. _____
2. _____
3. _____
4. _____
5. _____

Basic Clinic Set-up:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____

Our Clinic Address and Contact:

Address:

Tel:

Email:

Open Plan:

Closed Plan:

Who is the regulatory body for Chiropractic?

What Associations are there in the UK?

1. _____
2. _____
3. _____
4. _____

<u>Appointment Type</u>	<u>Forms Needed</u>
Wellness Induction	Wellness Induction
New Patient Experience (Examination Visit)	History Examination
New Patient Experience (Care Plan)	History Report of Findings (ROF) Folder 5 x inserts Office Policy Informed Consent Chiropractic Acknowledgement Data Protection Satisfaction & Complaints Get The Best Out Of Your Adjustment Posture Screen Escan
Progress Report (PR)	Progress Review History Road to Recovery Chart Escan Comparison Posture Screen Comparison
Escan	None
Escan Review	Escan Comparison
Continued Wellness Review (CWR)	History CWR Escan Comparison Posture Screen Comparison
New/Old	History Examination Relevant Past Notes Escan Posture Screen
Reactivation	History Examination Relevant Past Notes Escan Posture Screen

- **Day 1 Visit — New Patient Experience (Examination)**

Allow up to:
Appointment length:
Paperwork:
Charge:
Other details:

- **Day 2 Visit — New Patient Experience (Care Plan)**

Allow up to:
Appointment length:
Paperwork:
Charge:
Other details:

- **Progress Report — 20th Visit**

Allow up to:
Open Plan:
Closed Plan:
Paperwork:
Charge:
Other details:

- **Escan — After every 10th Adjustment**

Allow up to:
Open Plan:
Closed Plan:
Paperwork:
Charge:
Other details:

- **Escan Review — Escan**

Allow up to:

Open Plan:

Closed Plan:

Paperwork

Charge:

Other details:

- **Chiropractic Adjustment**

Open Plan:

Closed Plan:

Charge:

Other details:

- **Child Chiropractic Adjustment**

Open Plan:

Closed Plan:

Charge:

Other details:

- **Continued Wellness Review — End of Each Year**

Allow up to:

Open Plan:

Closed Plan:

Paperwork:

Charge:

Other details:

Terminology / Jargon / Definitions

Subluxation:

Adjustment:

Sub-goal:

Post-goal:

Diversified Technique:

McTimoney Chiropractor:

ADIO:

Where can you find any information?

Why?

Why do we serve with high energy?

Why should we be positive?

Why should we smile?

Why do we say, I can help you?

Why do we ask if it's the clients first visit?

Why do we ask if they have been referred in?

Why do we ask if it is for themselves or their whole family?

Why do we offer AM or PM and 2 times?

New Client Telephone Call

Answer the phone with:

- _____
- _____
- _____

What is Saltash Chiropractic's unique way of answering the phone?

-
1. Establish if it is the client's first visit?
 2. Who referred them?
 3. You or family?
 4. Client details
 - first and last name
 - Mr/Mrs/Miss/Dr
 - Address
 - Two contact numbers
 - Email address
 - D.O_B
 - Marketing details
 5. AM or PM & two times
 6. Explain the appointment
 - 2 Day process (NPE)
 - 1 hour
 - 1st Full assessment (relevant charges)
 - Scans and Posture Photos
 - 2nd visit CP, practitioner will go through findings & will offer 1st ADJ of care
 - Clinic location / parking
 - Reconfirm (All) appointment date(s) and time(s)
 - We look forward to meeting you

What is Funnelling?

New Practice Member Call Scenarios

How would you deal with each scenario?

1. They want treatment on the first visit

2. They want to be seen today

3. They've been to a Chiropractor before and just want cracking

4. They don't want an Examination / Scan / Posture Photos

5. They want to see a female chiropractor not a male

6. They have been referred by a patient

New clients — Marketing categories

Marketing Categories	Source	Assessment
Walk-in	Walk-in	
Internet search NOTE this is NOT social media	Company website Google (general)	
Google Funnel	Pay to Click link	
Online Marketing	Facebook funnel Instagram	
Internal Referral	Any existing practice member who refers, place their name in the enquiry information	
Screening: Allocated	Person who saw a specific team member at Fair/ Fete/ Venue	
Screening: Unallocated	Person who DID NOT see a specific team member at a Fair / Fete / Venue	
Promotion	Christmas / Reactivation	
Health Talk	Book with the Chiropractor giving talk	
External Referral	Anyone outside the clinic such as GP, Other Chiro / health professionals	
Staff	Members of Staff	

'Paying for the expertise, not the time.'

New/Old Practice Members

What is a new/old client?

How will you explain to the practice member that they need to have a reassessment?

Are they eligible to be adjusted? How do you explain this?

What are the relevant charges?

How can you see when the practice member was last in the clinic?

Day 1 visit — New Patient Experience: Initial consultation

What service do you think a practice member should receive on their first visit to the clinic?

How we greet every new practice member at Saltash Chiropractic Clinic?

1. _____
2. _____
3. _____
4. _____

Clinic Tour

Why do we do a clinic tour?

What areas of the clinic need to be introduced, how would you explain them?

- | | |
|-----------|-----------|
| 1. _____ | 6. _____ |
| 2. _____ | 7. _____ |
| 3. _____ | 8. _____ |
| 4. _____ | 9. _____ |
| 5. _____ | 10. _____ |
| 11. _____ | 12. _____ |
| 13. _____ | 14. _____ |

Day 1 visit scenarios

How would you deal with each scenario?

1. The Practice Member is extremely nervous

2. The Practice Member is in a rush/ pushy

3. The Practice Member has forgotten their glasses/ struggling to fill the history form

4. The Practice Member doesn't want to have a Scan / Posture Scan

5. The Practice Member has not allowed enough time for the appointment

6. The Practice Member has forgotten their purse / wallet?

History Form

Why is the History Form an important document?

What is the process for dealing with the History Form?

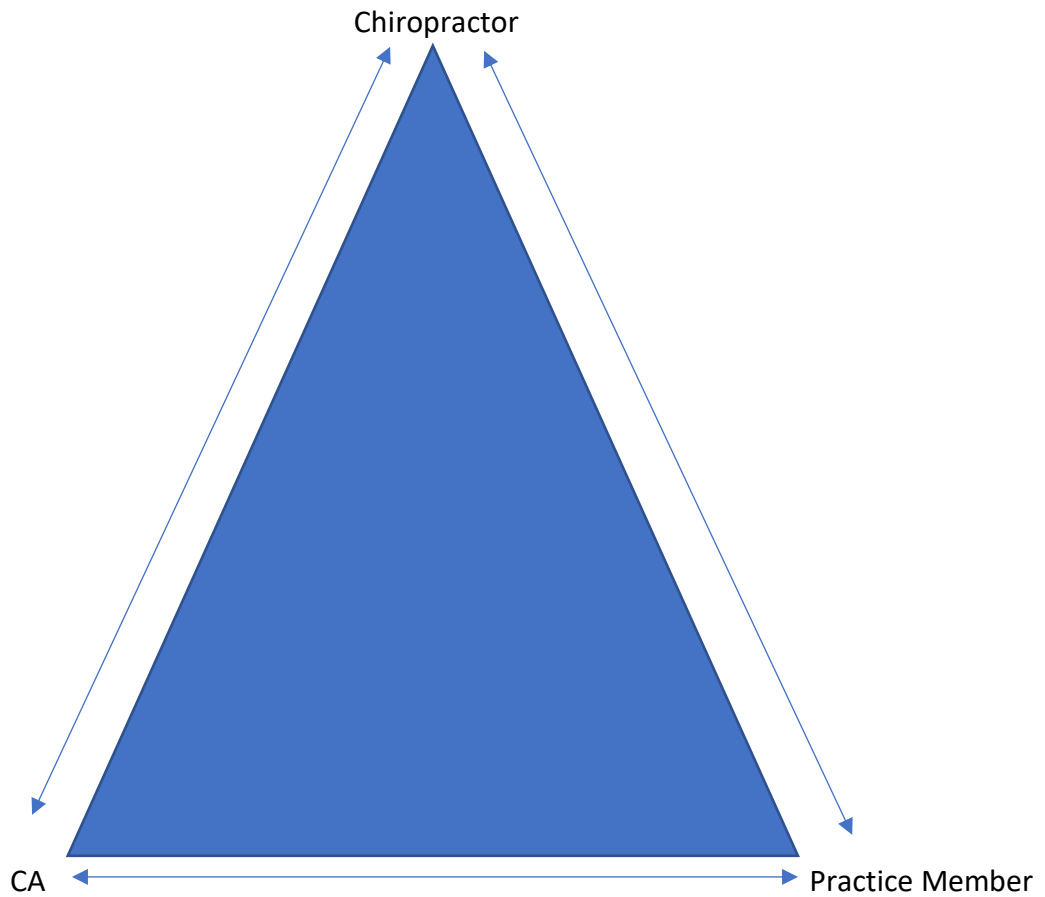
What are the sections of the History Form?

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____

What are SIX 'must haves' on the History form?

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

The Triangle



The triangle is a _____ between the Chiropractor, _____ and _____.

The Practice Members is more likely to _____ when they are being _____ about
rather than _____ to.

A triangle should always take place at the end of every special appointment

Day 2: Care Plan Visit

How do we welcome the practice member back to the clinic this visit?

What is the Care Plan Visit (CP)?

What involvement does that CA have in the CP?

At the triangle what information does the CA need from the practitioner?

Do you book the appointments or take the money first?

When is it ok to discuss pre-payment plans at the front desk?

Advanced booking practice members

- Repeat to the practice member what the Chiropractor has recommended
- Tell the practice member the Chiropractors schedule
- Select with the client the days that are best (AM or PM)
- Give the client a 30-minute window that the appointments can be booked between
- Book the client to the end of the week and write their schedule on an appointment card and tell them you will email the schedule to them.

Notes: -

Block booking:

Offer an AM or PM appointment and then give 2 available times

Diary control - open plan

Office Policy

What is an office policy?

What are the 9 main points to point out to the practice member?

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____

What document do you need to give with the office policy?

Look at copy of OFFICE POLICY

The First Open Plan Adjustment

What do you explain to the practice member when they arrive for their first open plan adjustment?

1. _____
2. _____
3. _____
4. _____
5. _____

Why do we ask the practice member to use a basket?

Why do we ask them to lay face down?

Why do we stay in the room until they lay down?

Cancelling Appointments

When is it ok for a client to cancel their appointment?

How would you explain to, a practice member that they are rescheduling their appointment?

What reasons might a practice member give for cancelling their appointment and how would you deal with it?

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

If the appointment is not rescheduled, notes need to be added in comms/ diaries and arrange a future time to contact the client

DNA Procedure

What does DNA stand for?

When do we make DNA calls and what is the purpose of this process?

What happens if you are unable to speak directly with the practice member?

How do you communicate this to the practitioners and CA's in your clinic?

Will the practice member get charged for not showing up to their appointment? How /
When do you communicate this?

How many DNA calls should a practice member receive to reschedule one missed
appointment (in clinic)?

Practice Hub (Computer system) Essentials

How do you get to the home page?

How to get to the today's list:

How to create a new client profile:

How to make an appointment:

Any critical information where do you put it?

What must you NOT put in comms?

Chiropractic FAQ

Give 5 benefits for children being under Chiropractic care.

1. _____
2. _____
3. _____
4. _____
5. _____

What is the difference between a Chiropractor and a Physiotherapist or Sports Therapist?

What is the difference between a Chiropractor and an Osteopath?

What is the difference between Vitalistic and Mechanistic care?

How many sessions will I need?

Initial Training review

What are the clinic opening hours?

Monday to Friday

Saturday:

What are the CA working hours?

AM shift: Saturday shift

PM shift:

What are the appointment types that can be booked with a Chiropractor?

- | | |
|----------|-----------|
| 1. _____ | 6. _____ |
| 2. _____ | 7. _____ |
| 3. _____ | 8. _____ |
| 4. _____ | 9. _____ |
| 5. _____ | 10. _____ |

What are the standard charges for the following appointment types?

- Wellness Induction: _____
- New Patient Experience - Adult: _____
- New Patient Experience – Child: _____
- Adult Chiropractic Adjustment: _____
- Child Chiropractic Adjustment: _____

Day 1 visit

How do we welcome ALL new clients into the clinic?

What should be written on the history form before the client goes through to see the Chiropractor?

What information do you need from the practitioner at the CP triangle?

First Open Plan

How do we prepare the client for their first (open plan) adjustment?
