

# Empowering the Chiropractic Assistant: Strategies for Practice Success



Presented by  
**Holly Jensen**

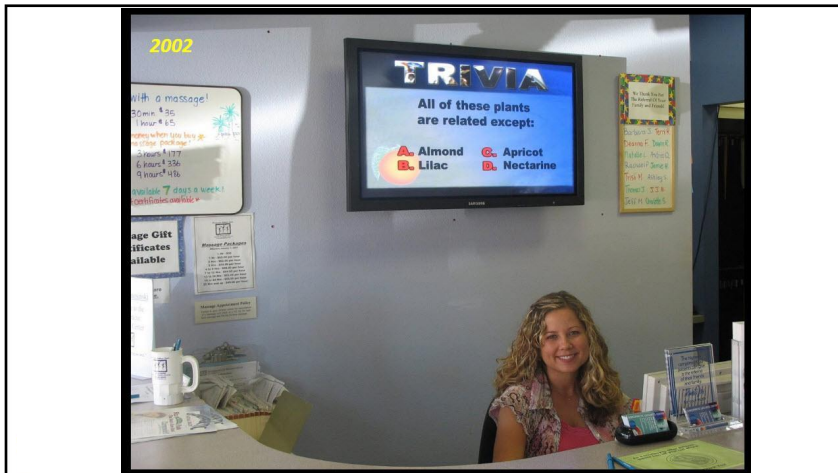
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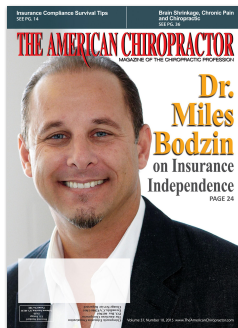
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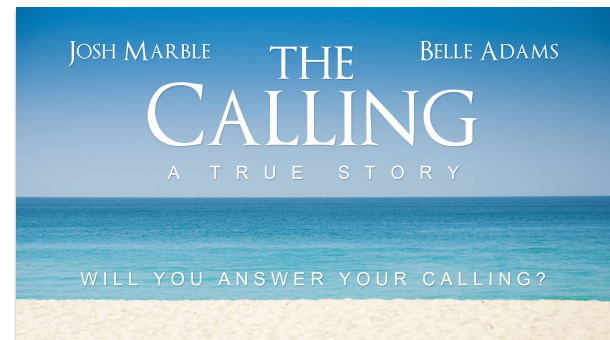
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- (2) Any agreement not to compete among business firms is also a "per se" violation of the antitrust laws. Thus, no discussion of division of territories or customers, or limitation on nature of business, should be held at any function. Joint refusals to deal (boycotts), including discussions of blacklists, are likewise unlawful "per se", and no discussions related to these practices are permitted.
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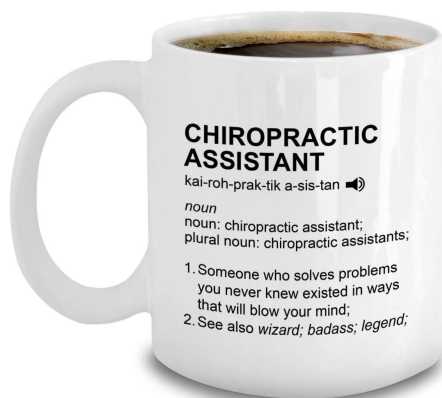
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## The Valuable Role of the CA

Interacting with and caring for patients is one of the most enjoyable experiences of working in a chiropractic office.

Not only do we get to witness the impact chiropractic care has on patient lives, but we also get to cheer them along their health journey while fostering meaningful connections.

## The 7 Pillars of a Professional CA

1. Purpose Driven
2. Beliefs
3. Positive Attitude
4. Coachable
5. Work-Ethic
6. Communication
7. Systems-Oriented

## The 7 Pillars of a Professional CA

### Purpose Driven

Being purpose-driven at work means approaching your job with a clear sense of why it matters and how it contributes to something bigger than yourself. It's about finding meaning in your daily tasks and aligning your work with your personal values and goals.

## The 7 Pillars of a Professional CA

### Beliefs

Supporting beliefs in a chiropractic workplace refer to the shared values and philosophies that guide the practice's approach to patient care and overall operations.



## The 7 Pillars of a Professional CA

### Positive Attitude

Having a positive attitude in the workplace means approaching your work with optimism, enthusiasm, and a can-do spirit. It involves viewing challenges as opportunities for growth, maintaining a cheerful demeanor, and being supportive of your colleagues and patients.



## The 7 Pillars of a Professional CA

### Coachable

Being coachable in the workplace means being open to feedback, instruction, and guidance from others, such as managers, mentors, or colleagues. It involves a willingness to learn, grow, and improve your skills and performance.



## The 7 Pillars of a Professional CA

### Work-Ethic

Having a strong work ethic means approaching your job with dedication, diligence, and a commitment to excellence. It involves consistently putting in effort, taking responsibility for your tasks, and striving for high-quality results.





## The 7 Pillars of a Professional CA

### Communication

Having good communication skills in the workplace means effectively conveying your thoughts and ideas to others, while also actively listening to and understanding what others are saying. It involves both verbal and nonverbal communication, and it is essential for building strong relationships, resolving conflicts, and achieving goals.



## The 7 Pillars of a Professional CA

### Work-Ethic

Having a strong work ethic means approaching your job with dedication, diligence, and a commitment to excellence. It involves consistently putting in effort, taking responsibility for your tasks, and striving for high-quality results.



## The 7 Pillars of a Professional CA

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## The 7 Pillars of a Professional CA

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7. Systems-Oriented



Systems refer to the **processes, routines,** and **habits** that individuals employ to consistently work towards their goals.

They provide a framework that ensures **progress** and **productivity**, enabling individuals to stay **focused, motivated,** and **accountable.**

## The 7 Pillars of a Professional CA

### Systems-Oriented

Being systems-oriented in the workplace means approaching challenges and problem-solving with a holistic perspective, considering how different parts of a system interact and influence each other. It involves having systems and procedures in place that assists in business operations.

- **Systems** create **behaviors**
- **Behaviors** become **habits**
- **Habits** drive **outcomes**

*"You either have systems by intent or default. Your systems are always a result of what you have created or tolerated."*

Craig Groeschel, Author & Pastor

There are 3 ways you can feel  
doing your job:

1. Satisfied
2. Engaged
3. Inspired

When you feel inspired, you're drawing  
from deep and lasting meaning from  
the work that you do.

You perform with purpose and passion.

It's not a job - it's a calling.



Ok, so what about CA job stress?



## Some Causes of Job Stress

- Poor patient retention
- Awkward financial conversations
- Scheduling
- Lack of training
- Strained team relationships



## Poor Patient Retention Challenges

- Always looking for new patients
- Constantly marketing
- Patients not getting full benefits of care
- More work for everyone



## Poor Patient Retention Causes

- Pain went away
- Lack of follow-through
- Insurance is exhausted
- Time to pay again

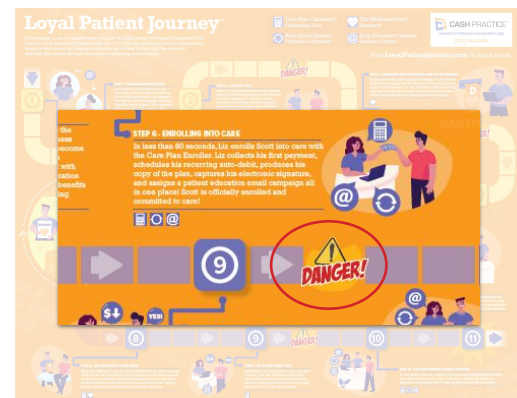
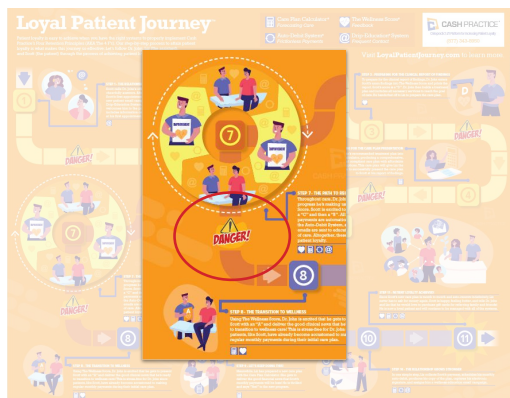
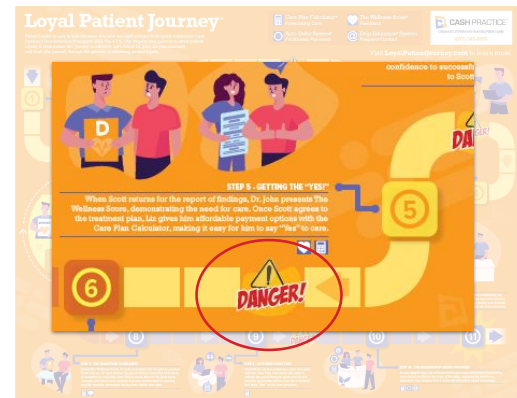
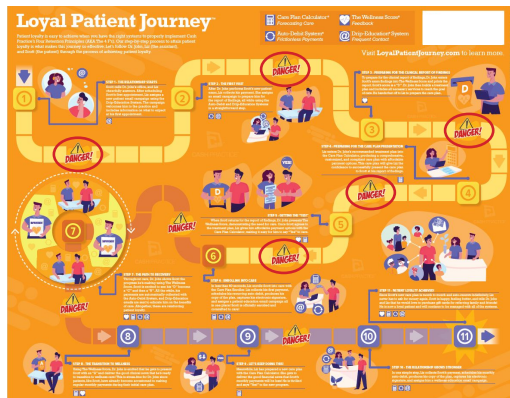


## Patient Retention Systems

1. **F**requent Contact
2. **F**eedback that's intuitive
3. **F**rictionless Payments
4. **F**orecasting Care

The Retention Principles









How do we fix this?

Systems!

## Patient Retention Systems

1. **F**requent Contact
2. **F**eedback that's intuitive
3. **F**rictionless Payments
4. **F**orecasting Care

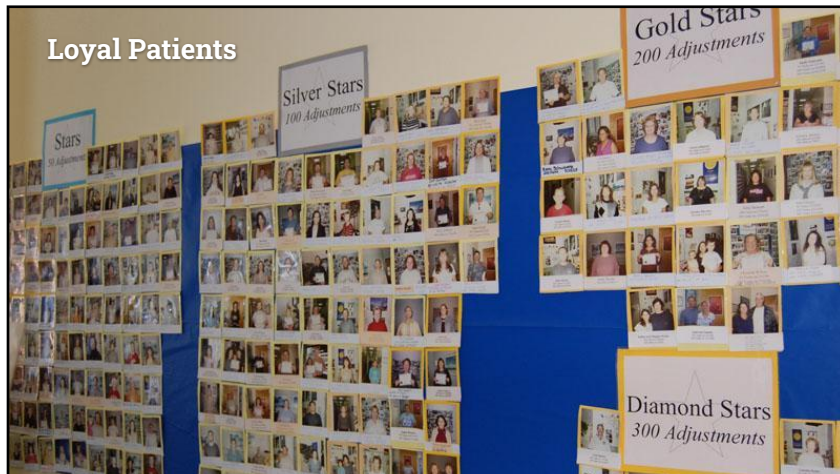
The Retention Principles



Your *Patient Compliance* is  
significantly impacted by  
2 of the 4 F's.



Your *Patient Compliance* is  
significantly impacted by  
**Forecasting** patient care and how  
**Frictionless** your office makes  
patient payments.



The only practices that grow like this  
month after month and year after year  
are those who continually convert new  
patients and more importantly  
retain them.



## Improving Retention with Frictionless Payments



## Payment Friction



## Payment Friction



## Payment Friction



## Payment Friction



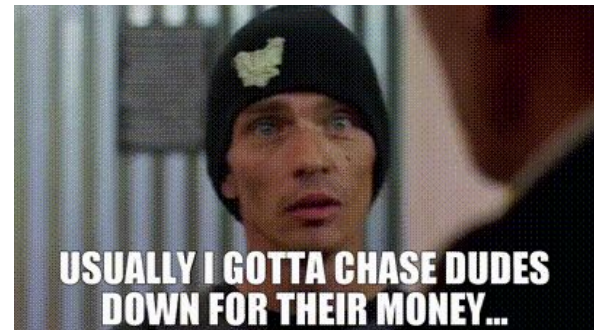
## Payment Friction



## Payment Friction



## Payment Friction



## Awkward Financial Conversations

- Fees
- Discounts
- Insurance
- Balance due
- Insurance paid differently than expected
- Poor understanding of financial policies



## Collection Solution

Create a frictionless payment experience for all payments being collected.



For the past two years, we've had the pleasure of training with Holly Jensen, and it has greatly increased my certainty in my role as a CA. Before, I would go into financial appointments with a lot of nerves and fear that I wouldn't be able to answer the patient's questions.

Now, because of sessions with Holly, I have gained confidence in interacting with patients and can do financial appointments with ease. Our whole team is so thankful for the team at Cash Practice for their help and support in making us an A+ team. I would definitely recommend sessions with Holly to anyone looking to improve their patient interactions.



Faith, Chiropractic Assistant  
Courtley Chiropractic



Before, I would go into financial appointments with a lot of nerves and fear that I wouldn't be able to answer the patient's questions.

Now, because of sessions with Holly, I have gained confidence in interacting with patients and can do financial appointments with ease. Our whole team is so thankful for the team at Cash Practice for



## Store Billing & Signatures On-File



**Riverwalk Chiropractic**  
9550 Cuyamaca Rd., Suite 102  
San Jose, CA 95071  
(877) 343-8950  
www.riverwalkchiro.com

**E2-Pay Signature-On-File Authorization**

I, Jessica Jones, hereby authorize Riverwalk Chiropractic to initiate payments from my Credit/Debit Card with the Financial Institution Identified by me on this form for payment of services and/or products provided to Jessica Jones, Jessica@jones.com by Riverwalk Chiropractic, not to exceed \$200.00 per transaction, and agree to perform the obligations set forth by the Credit/Debit Cardholder.

I further understand that this authorization will remain in effect until I cancel it in writing, and I agree to notify Riverwalk Chiropractic in writing of any changes to my account information or termination of this authorization at least 5 days prior to any further charges to my Credit/Debit Card account.

I certify that I am an authorized user of this Credit/Debit Card and will not dispute these transactions with my Credit/Debit Card company so long as the transactions correspond to the terms indicated in this authorization form. Written notice to cancel can be delivered in person or by either mailing to 9550 Cuyamaca Rd., Suite 102 San Jose, CA 95071 or emailed to [info@riverwalkchiro.com](mailto:info@riverwalkchiro.com).

Credit/Debit Cardholder: Jessica Jones  
Credit/Debit Card Number: VisaXXXXXXXXXXXXXXXXXXXX1111 Exp: 02/20

Jessica Jones  
Date Signed: 09/11/2023 11:35 am



## Automate Recurring Payments

**Riverwalk Chiropractic**  
9550 Cuyamaca Rd., Suite 102  
San Jose, CA 95071  
(877) 343-8950  
www.riverwalkchiro.com

**Auto-Debit Payment Authorization**

I, Jessica Jones, hereby authorize Riverwalk Chiropractic to automatically debit my Credit/Debit Card (not to exceed \$200.00 monthly on 15th days), and agree to perform the obligations set forth by the Credit/Debit Cardholder.

I further understand that this authorization will remain in effect until I cancel it in writing, and I agree to notify Riverwalk Chiropractic in writing of any changes to my account information or termination of this authorization at least 5 days prior to the next scheduled payment. In the event of a transaction being rejected by the Financial Institution, Riverwalk Chiropractic may attempt to reschedule the payment or process the charge again within 30 days, and agree to an additional \$25 charge for each attempted reschedule until it is successfully processed as a successful transaction.

I certify that I am an authorized user of this credit/debit account and will not dispute these scheduled transactions with my bank or credit card company, as long as the transactions correspond to the terms indicated in this authorization form. Notice to cancel can be given by either mailing to 9550 Cuyamaca Rd., Suite 102 San Jose, CA 95071 or emailed to [info@riverwalkchiro.com](mailto:info@riverwalkchiro.com).

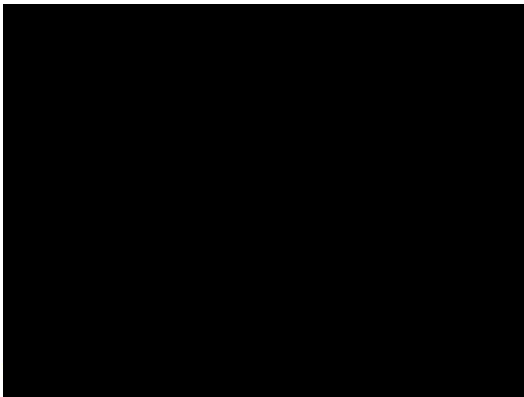
Client Name: Jessica Jones  
Credit/Debit Card Number: XXXXXXXXXXXXXXXXXXXX1111 Exp: 12/23  
Credit/Debit Card Billing Name: 9550 Cuyamaca Rd. Suite 102 San Jose, CA 95071

Signature: Jessica Jones Date: 01/20/2023 08:09 am

MONTHLY PAYMENT SCHEDULE	
1. January 1, 2023	\$150.00
2. February 1, 2023	\$150.00
3. March 1, 2023	\$150.00
4. April 1, 2023	\$150.00
5. May 1, 2023	\$150.00
6. June 1, 2023	\$150.00



## Automate One-Time Payments



**Riverwalk Chiropractic**  
9550 Cuyamaca Rd., Suite 102  
San Jose, CA 95071  
(877) 343-8950  
www.riverwalkchiro.com  
Check-OL-2304-0  
Main Office, Test Account

**SALES RECEIPT**

DATE: Oct 21, 2024 08:52 AM  
REF #: 5264728  
APP #: 265265  
NAME: Jennifer Jones  
ISSUER: Visa  
ACCT #: XXXXXXXXXXXXXXX1111  
EXP: XX/XX  
CVV: 9

Jenny Jones \$60.00  
**TOTAL: \$60.00**

CUSTOMER ACKNOWLEDGES RECEIPT OF GOODS AND/OR SERVICES IN THE AMOUNT OF THE TOTAL SHOWN HEREON AND AGREES TO PERFORM THE OBLIGATIONS SET FORTH BY THE CUSTOMER'S AGREEMENT WITH THE ISSUER.

Thank you for using Visa

**SIGNATURE ON FILE**  
09/11/2023 11:35 am  
Jennifer Jones  
Printed: 10/21/2024 08:52 am

## Automate Receipts

**Riverwalk Chiropractic**  
9550 Cuyamaca Rd., Suite 102  
San Jose, CA 95071  
(877) 343-8950

October 21, 2024

We have charged your credit card in the amount of \$60.00 for services and/or products purchased from Riverwalk Chiropractic.

Thank You,  
Riverwalk Chiropractic  
9550 Cuyamaca Rd., Suite 102  
San Jose, CA 95071  
(877) 343-8950

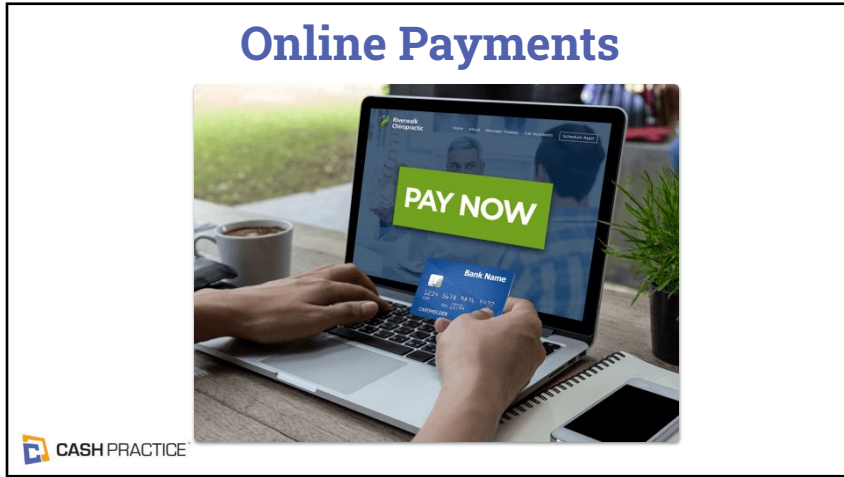
**Receipt**

Patient ID: 7995290  
Reference: 5264728  
Date: 10-21-2024  
Time: 09:20 am  
Amount: \$60.00  
Billing Name: Jennifer Jones  
Card: Visa  
Account #: XXXXXXXXXXXXXXX1111  
Expiration: XXXX  
Status: Approved 595596

Confidentiality Note: This transmission is intended only for the addressee and contains privileged and/or confidential information of Riverwalk Chiropractic and its affiliates. If you are not the intended recipient, please destroy any copies.



# Automate Declined Payments



## Improving Conversion & Retention with Forecasting Care

The diagram illustrates the 4F's framework, centered around a purple rounded rectangle labeled "4F's". Surrounding this center are four orange circles, each containing a concept: "Feedback" (top-left), "Forecasting Care" (top-right, highlighted with a green border), "Frictionless Payments" (bottom-left), and "Frequent Contact" (bottom-right).

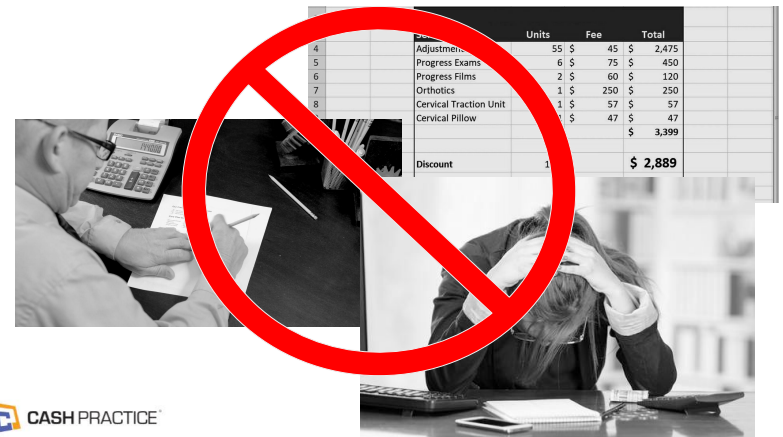
**4F's**

- Feedback
- Forecasting Care
- Frictionless Payments
- Frequent Contact

**CASH PRACTICE™**

# Forecasting Care with Care Plans

2					
3	Services	Units	Fee	Total	
4	Adjustments	55	\$ 45	\$ 2,475	
5	Progress Exams	6	\$ 75	\$ 450	
6	Progress Films	2	\$ 60	\$ 120	
7	Orthotics	1	\$ 250	\$ 250	
8	Cervical Traction Unit	1	\$ 57	\$ 57	
9	Cervical Pillow	1	\$ 47	\$ 47	
10				\$ 3,399	
11					
12	Discount	15%		\$ 2,889	
13					
14	Payment Options	Total	Down	Recurring	



## Benefits of Care Plans

- Streamlines the flow at the front desk
- No confusion over patient finances
- More time to focus on patient care & education
- Better treatment plan compliance
- Better clinical outcomes
- Increased cash collections
- Increased patient retention (Loyal Patients!)
- Happy team & practice members 🕶️



**“**

The excellent training Holly has provided our team over the past few years has been an absolute game-changer for our practice! She was amazing at breaking down both the major mistakes that many of us were making but also the sneaky little issues that each of us individually were unaware we were doing.

Personally, my confidence and conviction in presenting financial plans and providing excellent customer service to our patients has grown exponentially. Also, from a purely business standpoint, our conversion rates for patients getting on plans increased almost immediately following our training. You can't beat those results!

**”**



Carol at Courtney Chiropractic  
Chiropractic Assistant



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## Care Plans for Forecasting Time & Money

**Six Month Corrective Care Plan**

Service/Item	Amount	Chiropractic Plan
Adjusted Not Covered by Insurance	40.00	\$750.00 = \$200.00
Program Costs	4.00	\$50.00 = \$20.00
Program Fees	1.00	\$100.00 = \$100.00
Healthcare Class (300 Value)	1.00	\$100.00 = \$100.00
Therapy Unit	1.00	\$100.00 = \$100.00
Therapy	20.00	\$200.00 = \$200.00
<b>Net Total</b>	<b>Value \$4,500.00</b>	<b>\$1,150.00 Savings</b>

**Payment Options with ClearwaterUSA.com**

Person	Total	Initial	Monthly	Start/End
Member (Patient)	\$1,150.00	\$250.00	\$100.00	\$1,150.00
Initial Member (Patient)	\$1,150.00	\$250.00	\$100.00	\$1,150.00
Proposed (Patient)	\$1,150.00	\$250.00	\$100.00	\$1,150.00

**Terms of Agreement**

I, the undersigned, hereby acknowledge that I have read and understand the terms and conditions of the Riverwalk Chiropractic Care Plan. I agree to the terms and conditions of the plan and to the payment of the plan. I agree to the terms and conditions of the plan and to the payment of the plan. I agree to the terms and conditions of the plan and to the payment of the plan.

**Patient Acknowledgment**

I, the undersigned, hereby acknowledge that I have read and understand the terms and conditions of the Riverwalk Chiropractic Care Plan. I agree to the terms and conditions of the plan and to the payment of the plan. I agree to the terms and conditions of the plan and to the payment of the plan. I agree to the terms and conditions of the plan and to the payment of the plan.



## Care Plans for Forecasting Time & Money

Care plans are a reflection of the patient's treatment plan.

## Care Plans for Forecasting Time & Money

Care plans cover all the care the patient will need during the course of treatment.

## Care Plans for Forecasting Time & Money

Care plans include all services, including those covered and not covered by insurance.

## Care Plans for Forecasting Time & Money

Care plans must be compliant to satisfy the Good Faith Estimate your legally required to provide per the Federal "No Surprises Act" of 2022.



### Care Plans for Forecasting Time & Money

Care plans are not presented until the patient has agreed to your treatment plan.

### Care Plans for Forecasting Time & Money

Care plans can be presented to the patient by either the doctor or assistant.

### Care Plans Require

1. Compliant Fee Schedules
2. Compliant Discounts (OIG)
3. Compliant Good Faith Estimate (NSA)
4. Compliant Collections

### Compliant Fee Schedules

- Your fee is your fee
- No such thing as “Cash Fees”
- You bill the SAME fee per code for all case types

## Compliant Discounts

The only time we offer a discount is when it is:

- Required by mandate
- Documented hardship
- Contractual agreement
- Compliant prompt pay

## Compliant Discounts (Mandated)

If you are covered by a State or Federal program with a mandated fee schedule.  
(Medicare, Medicaid, etc)

## Compliant Discounts (Hardship)

Patients who meet state and or federal poverty guidelines or other special circumstances outlined in our “Hardship Policy” may be offered a discount for a period of time as determined by the clinic. Verification will be required.

## Compliant Discounts (Contractual Agreement)

- If we are a participating provider in your health plan.
- If you are a member of a Discount Medical Plan Organization you will be entitled to network discounts similar to our insured patients. Ask our staff for more information.

## Compliant Discounts (Prompt Pay)

In 2009, the O.I.G. issued an opinion that discounts of 5% to 15% were “reasonable” for prompt pay discounts.

**Anything over 15% is risky!**

## Compliant Care Plans

- Have all services and fees clearly itemized.
- Applies compliant discounts to non-covered services only.
- Has a compliant Terms of Agreement, including how refunds are handled.
- Includes all Good Faith Estimate Disclaimers

## No Surprises Act (NSA)

The “No Surprises Act” is meant to prevent patients from getting a large bill as a “surprise” when they assumed the provider was in network and turned out to be out of network.

## No Surprises Act (NSA)

To accomplish this, the NSA states that patients must be made aware of:

- Cost of services
- Patient portion due

## Does NSA affect Chiropractors?

Simple answer is Yes! Whether the patient has insurance or not or is self-pay or not, does not matter.



## NSA - Good Faith Estimate Requirements

This Good Faith Estimate Care Plan was created by Dr. Miles Bodzin as a licensed member of CP for Mrs. Alyson Andrews and printed on Monday, April 18, 2022.  
Riverwalk Chiropractic Four Month Corrective Care Plan ID: 1148053-1650313932 V8.2

**Riverwalk Chiropractic**  
Dr. Miles Bodzin  
1224 Main St. #100  
San Jose, CA 95071  
(877) 343-8990

**Four Month Corrective Care Plan**

The purpose of this program is to provide an affordable all-inclusive program of chiropractic care with the goal of spinal correction/stabilization. Based on the recommendations of Dr. Miles Bodzin, the following four month corrective care plan has been outlined for you.

**Good Faith Estimate**

1: Mrs. Alyson Andrews	Actual Fees	ChiroHealthUSA Plan
Adjustments Not Covered by Insurance 98941	36 @ \$65.00 = \$2,340.00	\$1,778.40 36 @ \$49.40
Progress Exams 99212	3 @ \$75.00 = \$225.00	\$8.55 3 @ \$2.85
Therapy 1 97012	30 @ \$14.00 = \$420.00	\$31.35 12 @ \$2.61
<b>Visits: 36</b>	<b>\$2,985</b>	<b>\$1,818</b>



## NSA - Good Faith Estimate Requirements

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**Riverwalk Chiropractic**  
Dr. Miles Bodzin  
1224 Main St. #100  
San Jose, CA 95071  
(877) 343-8990

**Good Faith Estimate Disclaimer**

This Good Faith Estimate only provides an estimate of the charges for those items or services reasonably expected to be furnished to you upon your receipt of the scheduled/required primary item or service. There may be additional items or services which the provider recommends as part of your course of care that you will be required to schedule separately which may not be reflected in this Good Faith Estimate. An additional estimate may be required.

If the actual charge for these services exceeds our estimate by the greater of (i) \$100, or (ii) 5%, we will provide a written explanation as to why the charges exceed the estimate. This Good Faith Estimate is not a contract and does not require you to obtain any of the items or services from any of the providers or facilities identified in this Good Faith Estimate. If you are uninsured or do not intend to submit your charges to your health plan ("self-paying") and you are billed at least \$400 more than this Good Faith Estimate, you have the right to dispute the bill.

If you are uninsured or self-paying, you may contact the health care provider or facility to let them know the billed charges are higher than the Good Faith Estimate and ask them to update the bill to match the Good Faith Estimate, ask to negotiate the bill or ask if there is financial assistance available.

Uninsured or self-paying individuals may also start a dispute resolution process for uninsured with the U.S. Department of Health and Human Services (HHS). If you choose to do so, you must start the dispute process within 120 calendar days (about 4 months) of the date on the original bill. There is a \$25 fee (updated annually) to use the dispute resolution process for uninsured and self-paying individuals. If the agency reviewing your dispute agrees with you, you will have to pay the price on this Good Faith Estimate. If the agency disagrees with you and agrees with the health care provider or facility, you will have to pay the higher amount. To learn more and get a form to start this process, go to [www.cms.gov/nosurprises](http://www.cms.gov/nosurprises) or call 1-800-855-3029.

Dr. MBO:0  
Tax ID: 14-023454  
NPI: 46064660

Signature: \_\_\_\_\_ Date Signed: \_\_\_\_\_



## NSA - Good Faith Estimate Requirements

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**Riverwalk Chiropractic**  
Dr. Miles Bodzin  
1224 Main St. #100  
San Jose, CA 95071  
(877) 343-8990

**Plan Enrollment**

I, Mrs. Alyson Andrews have read and accept the terms of agreement.  
Plan Members: Mrs. Alyson Andrews DOB: 02/03/1987  
Plan Start Date: \_\_\_\_\_ Plan Completion Date: \_\_\_\_\_  
Signature: \_\_\_\_\_ Date Signed: \_\_\_\_\_

**Auto-Debit Payment Authorization**

I hereby authorize Riverwalk Chiropractic to auto-debit my account for \$455 per month for three months. (initial) \_\_\_\_\_

I further understand that this authorization will remain in effect until I cancel it in writing, and I agree to notify Riverwalk Chiropractic in writing of any changes in my account information or termination of this authorization at least 3 days prior to the next scheduled payment. In the case of a transaction being rejected for Non-Sufficient Funds, I understand that Riverwalk Chiropractic may at its discretion attempt to process the charge again within 30 days, and agree to an additional \$25 charge for each attempt returned NSF which will be initiated as a separate transaction.



# Forecasting Care with Care Plans

Good Faith Estimate			
1: Mrs. Alyson Andrews	Actual Fees	Payment Plan	ChiroHealthUSA Plan
Adjustments Not Covered by Ins 98940 Series	40 @ \$65.00 = \$2,600.00	\$2,470.00 40 @ \$61.75 \$130.00 Savings	\$1,976.00 40 @ \$49.40 \$624.00 Savings
Exams Not Covered by Ins 99212	4 @ \$75.00 = \$300.00	\$285.00 4 @ \$71.25 \$13.00 Savings	\$228.00 4 @ \$57.00 \$72.00 Savings
X-Rays Not Covered by Ins 72040	1 @ \$150.00 = \$150.00	\$142.50 1 @ \$142.50 \$7.50 Savings	\$114.00 1 @ \$114.00 \$36.00 Savings
Healthcare Class (\$50 Value)	1 @ \$50.00 = \$50.00	Include at No Charge	Include at No Charge
Therapy (Traction) 97012	10 @ \$35.00 = \$350.00	\$332.50 10 @ \$33.25 \$17.50 Savings	\$266.00 10 @ \$26.60 \$84.00 Savings
Therapy (Heat) 97010	10 @ \$25.00 = \$250.00	\$237.50 10 @ \$23.75 \$12.50 Savings	\$190.00 10 @ \$19.00 \$60.00 Savings
Therapy (E-stim) 97032	10 @ \$40.00 = \$400.00	\$380.00 10 @ \$38.00 \$20.00 Savings	\$304.00 10 @ \$30.40 \$96.00 Savings
Visits: 40	\$4,100	\$3,847 \$252.50 Savings	\$3,078 \$1,022.00 Savings


The estimated costs of this good faith estimate are valid for up to 12 months.

 CASH PRACTICE<sup>®</sup>

For illustration purposes only. This is NOT a recommendation for your fees.

## Offer Affordable Payment Options

Payment Options with <u>ChiroHealthUSA Plan</u>				
1 Person	Total	Initial	Monthly	Savings
Recurring (Option 1)	\$3,078	\$513	\$513	(\$1,022.00)
Initial + Recurring (Option 2)	\$2,924	\$964	\$392	(\$1,175.90)
Prepayment (Option 3)	\$2,739	\$2,739	N/A	(\$1,360.42)

 CASH PRACTICE™

For illustration purposes only. This is NOT a recommendation for your fees.

Good Faith Estimate				
1: Mrs. Alyson Andrews	Actual Fees	Payment Plan	ChiroHealthUSA Plan	
Est. Adjustments to Meet Deductible W9040 Series	10 @ \$65.00 = \$650.00	\$650.00 (\$ 650.00)	\$650.00	\$650.00 (\$ 650.00)
Est. Adjustments Cov by Ins (Copays) R9040 Series	15 @ \$35.00 = \$525.00	\$525.00 (\$ 525.00)	\$525.00	\$525.00 (\$ 525.00)
Adjustments Not Covered by Ins W9040 Series	15 @ \$65.00 = \$975.00	\$926.25 (\$ 916.25) \$48.75 Savings	\$741.00 (\$ 731.00) \$24.00 Savings	
Exams Not Covered by Ins 99212	4 @ \$75.00 = \$300.00	\$288.00 -\$ 12.00 \$12.00 Savings	\$288.00 -\$ 12.00 \$12.00 Savings	
X-Rays Not Covered by Ins 72040	1 @ \$150.00 = \$150.00	\$142.50 -\$ 7.50 \$7.50 Savings	\$114.00 -\$ 18.00 \$18.00 Savings	
Healthcare Class (\$50 Value)	1 @ \$50.00 = \$50.00	Include at No Charge	Include at No Charge	
Therapy (Tractor) 97012	10 @ \$35.00 = \$350.00	\$322.50 (\$ 312.50) \$17.50 Savings	\$266.00 (\$ 256.00) \$84.00 Savings	
Therapy (Heat) 97010	10 @ \$25.00 = \$250.00	\$237.50 (\$ 227.50) \$12.50 Savings	\$190.00 (\$ 180.00) \$60.00 Savings	
Therapy (E-stim) 97032	10 @ \$40.00 = \$400.00	\$380.00 (\$ 370.00) \$20.00 Savings	\$304.00 (\$ 294.00) \$94.00 Savings	
<b>Visits: 40</b>	<b>\$3,650</b>	<b>\$3,478 \$171.25 Savings</b>	<b>\$3,018 \$632.00 Savings</b>	

The estimated costs of this good faith estimate are valid for up to 12 months.

For illustration purposes only. This is NOT a recommendation for your care.



## Offer Affordable Payment Options

Payment Options with <u>ChiroHealthUSA Plan</u>				
1 Person	Total	Initial	Monthly	Savings
Recurring (Option 1)	\$3,018	\$503	\$503	(\$632.00)
Initial + Recurring (Option 2)	\$2,925	\$960	\$393	(\$724.15)
Prepayment (Option 3)	\$2,815	\$2,815	N/A	(\$834.67)

## Reviewing Care Plans with Patients

- Finances properly set up
  - Compliant discounts
  - All fees/deductibles/copays
  - Single fee schedules
  - Written policy
- Great communication
  - Create clarity
  - No misunderstandings
  - Consistent answers for team members

## Getting “Yes” To Care



## Getting Permission to Talk Money



## Reviewing Care Plans with Patients



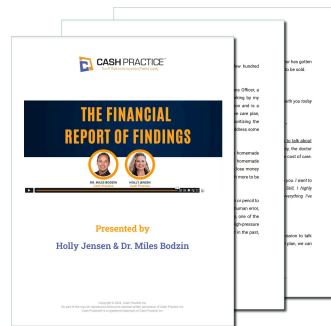
## Forecasting Care with Care Plans

[illegible]

## My Free Gift to You: FROF Video & Script Training



**CashPractice.com/FROF**



## Some Causes of Job Stress

- ✓ Poor patient retention
- ✓ Awkward financial conversations
  - Scheduling
  - Lack of training
  - Strained team relationships



## Scheduling Challenges

- Patients not on time
- Doc not on time
- Congestion at the front desk
  - How are you handling these things?
- Do you have adjusting times versus special appt times?

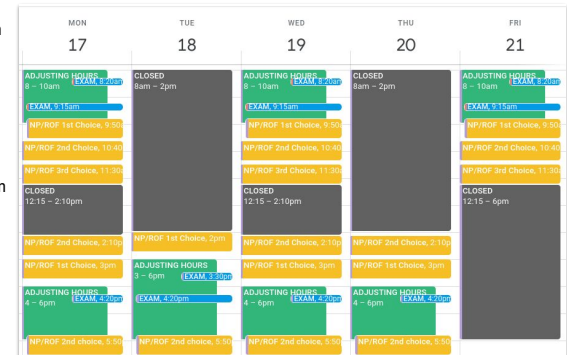
## Scheduling Systems

- Cluster book all appointments.
- Set aside special times for exams and new patient appointments.
- Schedule standing appointments.
- Call/text missed appointments after 15 minutes.
- Don't allow patients to cancel their appointment - get them in or reschedule for the same week.
- Don't allow patients to leave without a future scheduled appointment.

## Scheduling Systems

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- Adjusting Hours: 8am-10am
- Re-exam:
  - 8:20 am
  - 9:15 am
- Special Appts:
  - #1 9:50 am
  - #2 10:30 am
  - #3 11:15 am
- Adjusting Hours: 3 pm -6 pm
- Re-exam:
  - 4:20 pm
- Special Appts:
  - #1 2:15 pm
  - #2 3:00 pm
  - #3 5:50 pm



### New Patient Phone Form

When's the last time you saw the doctor?

Name \_\_\_\_\_ Date \_\_\_\_\_

Address: \_\_\_\_\_

Phone: (\_\_\_\_) \_\_\_\_\_

Email: \_\_\_\_\_

How did you hear about us?

Is this appointment for you or your family?

Is this for Chiropractic or Massage?

Were you injured in an accident?

Did it involve an auto or on the job injury?

When was the date of injury?

(Auto) Who else was in the car with you?

What seems to be the problem you're having?

How long has this been troubling you?

How often does it bother you?

Sounds like this is really bothering you.

Let's see if we can get you in right away.

**GET THEM IN TODAY!**

We have special times set aside for new patients. Do

you prefer mornings or afternoons?

We have an appointment available at \_\_\_\_\_

We're conveniently located at the corner of Hwy

52 and Santo Rd. The address is 6030 Santo

Rd., Suite 2, on in David. We're between the Post

Hospital and the Post Office. You can't miss us.

If you have an insurance card, be sure to bring it

so we can have your benefits verified. Again my

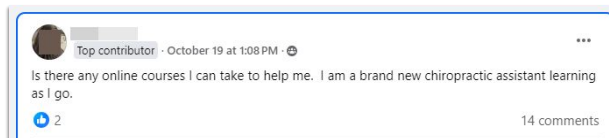
name is \_\_\_\_\_, and we look forward to meeting you.

Comments: \_\_\_\_\_

## Team Training Challenges

- Inconsistent training schedule
- Not enough time
- Lack of direction or leadership

## Team Training Challenges



## Team Training Systems

- Weekly Training (Rotating Agenda)
  - Master the basics
  - Standard operating procedures
  - Compliance (HIPAA, PCI, Security)
  - Company Culture
- Document attendance & meeting notes

Is being on the same page important?

## Team Training Systems

### Patient calls out sick:

*"Mary, getting adjusted helps you feel better, faster. It's the most important time to get adjusted since it makes for a strong immune system."*

*We encourage you to keep your appointment. I'll let the doctor know you're not feeling well and we will get you taken care of when you come in at 2pm today."*

## Team Training Systems

### Patient calls to cancel appointment:

*"I'm not authorized to change your treatment plan. May I place you on a brief hold and I'll ask the doctor? (Check your smile and return to the call.)"*

*Mary, I spoke to the doctor and he said that it's important that you come in for your visit today or make it up on another day this week. We can keep you on the schedule for today or reschedule you for tomorrow at the same time. Which do you prefer?"*

## Team Training Systems


### Financial Policies


- Do you know what they are?
- Are they documented?
- How is it communicated to the patient?

*"Mary, our financial policy is that your billing is securely stored on file and we will only charge your card based on your pre-authorized payment agreement when services are rendered and we're happy to email the receipts to you."*

# Team Relationship Challenges

- Lack of training
- Communication
- Unclear about job duties
- Lack of accountability
- Workplace atmosphere & company culture

The logo for CASH PRACTICE, featuring a stylized 'C' icon and the text 'CASH PRACTICE' with a registered trademark symbol.

- # Team Relationship Challenges
- Lack of training
  - Communication
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- 
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# Team Relationship Challenges

**Anonymous member**  
October 14 at 10:17 AM · 🌐

How do you guys handle a coworker who comes to work each day and does the bare minimum? She will sit back there and do her notes and then sit on her phone. This is an all day thing. Meanwhile the other girls are running the whole front desk and therapy.

👍👍💕🥰 4

26 comments

Like Comment Send

View more answers

 Do we work in the same office 😞


1w Like Reply 3 🥰


 CASH PRACTICE®



# Team Relationship Systems

- Regular training
- Effective communication
  - What happens in the exam & ROF
  - Patient treatment plan
  - Job duties & accountability
- Clearly defined expectations of conduct

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- # Team Relationship Systems
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- 
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# CA Accountability Checklist

# CA Accountability Checklist

# CA Accountability Checklist

**FRONT DESK CA DAILY CHECK LIST**      **WEEK OF** \_\_\_\_\_

	MON	TUES	WED	THUR	FRI	FRONT DESK DUTY—Opening
7:30am/1pm						Turn off Alarm
						Turn on lights, Music and Copier
						Turn on all TVs (reception, adjusting rooms, bathroom)
						Turn on Air/Heater
						Check Voice Mail, write and deliver messages
						Turn on processor, water and set timer for 25 minutes
						Check bathroom (clean with empty trash, TP and paper towels)
						Check adjusting tables to see if new headrest paper is needed
						Check hydro tables and straighten out sheets
						Turn on Open Sign
						Straighten reception area
						Place Weekly Handouts in adjusting rooms
						Check date stamp for today's date
						Return any calls regarding appointment requests
						Take mail to post office and get mail from mailbox
						FRONT DESK DUTY—Pre Close

# New Patient Accountability Checklist

After the Doctor Takes Blank Folio	Patient RE-ENTRIES to front desk
<ul style="list-style-type: none"> <li>Take down NP Welcome Sign</li> <li>Print X-ray Card &amp; Labels and place in Dark Room</li> <li>Enter rest of XRF information in computer</li> </ul>	<ul style="list-style-type: none"> <li>Check NPDC Checklist for treatment schedule, financial plan, Review of Process Fee and family referral signature.</li> <li>Step 1 - Take care of all financial matters.</li> </ul>
<ul style="list-style-type: none"> <li>Place Patient's Letter (include calendar, bookend and flag) in drawer</li> </ul>	<ul style="list-style-type: none"> <li>Cash and Health Insurance Plans</li> <li>Convenient Care Plan</li> <li>Have a patient sign off &amp; sign</li> <li>Give one copy to patient</li> <li>Collect fees</li> <li>Remove Red Flag from TC</li> </ul>
<ul style="list-style-type: none"> <li>Review NPDC Checklist (revenue) &amp; Collect Fees</li> </ul>	<ul style="list-style-type: none"> <li>Collect fees &amp; number the visit (1, 2, 3, 4, 5 or 6-1) on Add Page</li> <li>Sign acknowledgment of Cash Fees</li> <li>Remove Red Flag from TC</li> </ul>
<ul style="list-style-type: none"> <li>Schedule R1 &amp; R2 (opposed), Enter on NPDC Checklist</li> <li>Review NPDC Welcome Packet with patient, note R1 &amp; R2 app. inside &amp; include</li> <li>Work Comp: Pain Drawing, X-C, HA &amp; Quesada</li> <li>Personal Injury: Pain Drawing, X-C, HA &amp; Quesada</li> </ul>	<ul style="list-style-type: none"> <li>Block of Visits</li> <li>Collect fees (visit, deductible &amp; copay)</li> <li>Sign acknowledgment of Cash Fees</li> <li>Enter Red Flag on front TC</li> </ul>
<ul style="list-style-type: none"> <li>Set Cash Type in computer (must be done prior to printing - cash if none)</li> <li>Enter NP services from NPDC Checklist on account Page and print on computer</li> <li>Print word card (TC) address label</li> <li>Assemble TC &amp; attach a Pink &amp; Red Flag (on red flag the "WCP")</li> <li>NPDC: place WCP forms packet in TC for completion at R2</li> <li>Put Email Request form in deposit envelope for doctor</li> <li>Popularity NPDC Checklist to back of TC and put on desktop desk</li> </ul>	<ul style="list-style-type: none"> <li>Health Insurance &amp; Med Pay</li> <li>Sign off &amp; acknowledge receipt of TC &amp; C. Fee.</li> </ul>
<ul style="list-style-type: none"> <li>Double check if insurance benefits need to be verified</li> <li>Once complete place TC in front desk BOF Bin</li> </ul>	<ul style="list-style-type: none"> <li>Personal Injury</li> <li>ALL PT. Training app. acknowledge receipt of Claim &amp; Customer Fee.</li> <li>No Med Pay</li> <li>PT Credit Card Form</li> <li>Alimony</li> <li>Take drawing Patient Letter</li> <li>Revisions of drawing, AOB</li> <li>No Attorney</li> <li>Letter to 3rd party Authorizing CWC's name on settlement check</li> </ul>
<ul style="list-style-type: none"> <li>Insurance: Submitting Complaints (S-CASE #1)</li> </ul>	<ul style="list-style-type: none"> <li>Written Complaints</li> <li>Sign Electronic of Training (S-CASE #2)</li> <li>Sign Take Care Letter</li> <li>Have patient fill in "Voluntary Complaint" on Doctors Peer Report</li> </ul>
<ul style="list-style-type: none"> <li>Insurance: Submitting Complaints (S-CASE #1)</li> </ul>	<ul style="list-style-type: none"> <li>Period: liability to start at time date given 2 weeks from now</li> <li>Phone completed Agent Reminders Print Card in table box for 3 days before next app.</li> </ul>
<ul style="list-style-type: none"> <li>Insurance: Submitting Complaints (S-CASE #1)</li> </ul>	<ul style="list-style-type: none"> <li>Patient: Review not to start</li> <li>Place Red Flag inside with "Visit Stop" to be taken. Place TC in BOF bin for follow-up. Only removing once 250/250/250</li> </ul>
<ul style="list-style-type: none"> <li>Insurance: Submitting Complaints (S-CASE #1)</li> </ul>	<ul style="list-style-type: none"> <li>Step 2 - Take care of all scheduling matters</li> <li>Verify Patient's Appointment &amp; print them on TC</li> <li>Write standing appointments on computer and give to patient</li> <li>Schedule family for group within age range</li> <li>Revisions, Revisions, Revisions on all appointments, (Revisions, Revisions, Revisions)</li> </ul>

***"Both successful & unsuccessful people often have the same goals. But they don't get the same results. Systems ultimately determines success, not goals alone. Goals without systems is just a dream."***

James Clear, the author of the book Atomic Habits

# What is Company Culture?

Your company culture defines the environment you work in, inspires and motivates your team members.

People will gravitate towards it and want to be a part of its success.



## Challenges of Poor Company Culture

Negative company culture is toxic, cold, leads to unhappy team members and unsatisfied patients.

Your company culture may include a variety of elements, including the beliefs, attitudes, behaviors, values, and goals of the organization.



## Fostering Company Culture

Our core values drive the way we conduct business, how we serve our clients and how we function as a team.

These core values help us to define our company culture.



## Fostering Company Culture

The most successful businesses create a culture that celebrates, promotes, and rewards people who make the people around them better.



## Fostering Company Culture

Each of us will be rewarded based on our effectiveness in making the people around us better.



## Fostering Company Culture

A top performer has the desire and ability to perform excellent work and, through their constant effort, elevates themselves and the people around them.

## Fostering Company Culture

If the practice were a person:

- What impression would it give?
- Is it a consistent experience?
- Do people want to be there? (pts & staff)
- Would people talk about it?

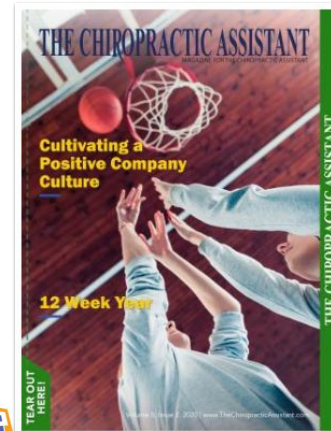
## Fostering Company Culture: Core Values

- |                |              |
|----------------|--------------|
| • Team         | • Loyalty    |
| • Perseverance | • Innovation |
| • No Gossip    | • Quality    |
| • Optimism     | • Service    |
| • Integrity    | • Well-being |
|                | • Heart      |

Knowing these core values guides us in everything we do as a company.

## What Are 3 Core Values of the Practice?

Would the team operate better if everyone was on the same page?



Good morning, Holly. Something came on my heart this morning that I just wanted to share with you. It was probably a little over five years ago that I went to a CP seminar with you and Miles in San Diego that really changed my life: I encountered in-person, a quality of customer service and true client care that I honestly didn't know was possible from an organization that also provided high-quality, professionally delivered technical products.

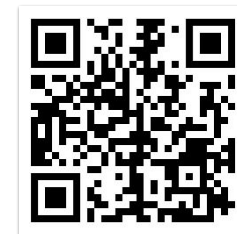
This opened my eyes to the possibility of upping my own game both in professionalism as well as attention to what is most meaningful to my patients. Yes, it has helped quite a bit financially, but even more so in terms of my being so comfortable in my own skin that I can be that much more fully present and effective for my patients and my team. Please know that you and Miles have truly changed my life. 🙏🏻

- Dr. Vince B.



Book a Demo

[CashPractice.com/Success](https://CashPractice.com/Success)



## 195 Five Star Reviews



### Cash Practice Reviews

EXCELLENT rating  
5.0 ★★★★★  
195 reviews • Verified

- Jonas Berman** ★★★★★  
I have been using cash practice for about 10 years now and I can't say enough about how much I love it. It has helped me grow my business and I highly recommend it to anyone looking for a software solution.
- Dr. Tigran Avetisyan** ★★★★★  
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## 195 Five Star Reviews



**Dani Oberg**  
2 reviews • 0 photos

★★★★★

I have been using cash practice in various offices over the last 10+ years! Hands down the best software for keeping track of over the counter collections. But there is so much more than just that! All they have to offer for patient retention, automatic debits, the CARE PLAN CALCULATOR (my personal fav) and wellness scores is such a seamless system to incorporate in any office! The team at Cash Practice is amazing to work with! They are very helpful and quick to respond when you have an uh-oh moment and need a hand. Amazing, all the way around!

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