Dynamic Chiropractic

YOUR PRACTICE / BUSINESS

You're a Class Act, So Show It! Part 1 of 2

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Editor's note: Part 2 of this article will appear in the March 25 issue.

This is the second article in a series covering the basic office procedures for building a healthy and successful practice. Last time, we discussed where to find patients and what your office should do to prepare for your initial contact. In this two-part article, you will learn the essential new patient first-visit procedures. Your practice is like a bucket: When it's full, your practice is strong. However, when things fall through the cracks, you lose patients, stress increases and the bucket springs leaks. Learn to prevent holes in your bucket - starting today!

Find the holes and fill them with the following:

- adequate time set aside for completion of paperwork;
- prepared new patient file folders/packets, containing all paperwork for the first and second visits;
- the defined role of the New Patient Advocate;
- prepared consultation, examination and X-ray rooms;
- scheduled future appointments; and
- collected first-visit fees.

What is the average time needed for patients to complete the required first-visit paperwork? Every office has a required patient history form that must be completed prior to seeing the doctor. Your office may only have one page, or as many as four. Regardless of the number of pages, determine prior to scheduling the first visit, the average amount of time it takes for patients to complete the required forms. Remember that the patient's appointment time is when the patient will see the doctor. Since all new patients must complete a history form, and you also have to prepare some paperwork before the patient sees the doctor, it is important that the appointment time you tell him or her includes time to complete the paperwork. For example, if it takes 15 minutes, on average, to complete the paperwork in your office, tell the patient that the appointment is at 9:45, but write "10:00" in the appointment book. Do not mention the paperwork.

In some offices, the forms are sent to the patient in advance by mail or fax, or the patient can access the forms from your Web site. In these situations, the patient must bring the completed paperwork to their appointment. The arrival time is shortened, but advance time is still required for the team to complete its part of the paperwork.

Do you have a minimum of 10 new patient file folders or packets pre-made for each financial category your office serves? Nothing looks worse than when a new patient arrives and the doctor or CA who does patient intake is unable to find the required forms. Preparing file folders or packets in advance is not just important; it also saves time. And please do not make copies of copies! This is unprofessional, and it indicates that you are cheap or broke. When you are preparing your new files and find that you are running low on required forms, promptly order more.

In most offices, patients fall into five major financial categories: cash, private health insurance, personal injury, workers' compensation, and Medicare. If you are a provider with an HMO or PPO, you may require a sixth set of files. "Be prepared" is the motto of the Scouts, and it should be your motto, too; nature will always fill a void. When the number of new patients drops off in my offices, one of the first things I look at is the number of new patient files/packets we have on hand. Quite often, we only have a few, and once we build our supply back up, the phone starts to ring again. And of course, as mentioned in my last article, we must have new patients' times set aside in our appointment book. Invite success by preparing the files ahead of time and creating space in your book for new patients. If you create the space, the universe will fill it with patients!

In each file folder, place all the required forms in the order that they will be needed. For example, here in California, a Workers' Compensation file folder should contain the following items (in this order):

- a new patient history form, the state-mandated Doctor's First Report of Occupational Injury, and the Workers' Compensation Questionnaire. These forms will be given to the patient and completed prior to the patient seeing the doctor.
- the examination form, X-ray flash-maker, treatment/travel card, and routing/fee slip. The doctor will require these items prior to seeing the patient.
- a ledger card, a welcome note for the new patient, and a thank-you note for the referring party. If your system is not computerized, you'll also need a 3" x 5" index card for the birthday card file.

While the patient is having his or her consultation, history, examination, and X-rays, the CA completes the above items.

New patient checklists are strongly recommended for each file folder to ensure that all procedures are completed. In my offices, the checklist is stapled to the front of the patient's file folder. This way, every team member knows exactly what to do and when it should be completed. When all of the items on the checklist have been completed, the bills go out right away. Otherwise, there is an unnecessary delay. After procedures are completed and signed off, the checklist is removed and placed in the patient's file folder.

Each financial category must be assigned a color, used by the doctor and team to determine what financial situation they are dealing with. This color reminds us to complete any special paperwork that is required and tells us how the account is handled financially. For example, our workers' compensation cases are green. When the front-desk team members see the green dot on the ledger card and/or travel/treatment card, they know it is a workers' compensation case, and will ensure that the progress exams and required reports are completed on time. They will also know not to collect a payment from the patient at the time of the visit, because the billing will be sent to the workers' compensation insurance carrier.

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