

NEW CA TRAINING GUIDE & CHECKLIST

PURPOSE

As a Chiropractic Assistant, you will be called on to guide people through the change in thinking from a medical mindset to a chiropractic perspective.

In order for this to occur there are two primary requirements:

1. That you know the office procedures and policies so that you can perform your position of service to our people with efficiency and effectiveness.
2. That you are chiropractically aware and can educate people on chiropractic and offer them viewpoints and references that enhance their understanding.

The following is guide to read and also a checklist that we ask you to complete as a part of your induction into this practice. Please liaise with the chiropractors in your learning process to ensure that you have sufficient understanding of the subject matter.

This is a lifelong process of learning so don't expect to fully understand all aspects of your position overnight. There is a lot to know so be curious, ask lots of questions and be willing to give it a go and make mistakes that you will learn from.

PROCEDURE

Thoroughly acquaint yourself with the Office Policy Manual Purpose, Procedures and Scripts in the areas that are relevant to your position as described in your job description.

ROLES OF THE CHIROPRACTIC ASSISTANT

1. The CA as a Team Player

The theme of cooperation and being a team will be felt immediately by people, and gives them confidence in the chiropractic office. Coming together with the office mission is paramount as well as supporting each other. It is the responsibility of each team member to make working with the team a fun and growing experience.

Create a congruent environment. The CA's number one priority is to assist the chiropractor when servicing practice members. The number two priority is assisting other CAs and the overall priority is serving chiropractic.

2. The CA as an Advocate for Practice Members

Give people reassurance. They need to know they're in the right place.

Guide people through office procedures in a loving manner to assure that they have a quality experience.

Always leave personal challenges outside the practice.

Service is the name of the game in our industry. If a CA is unable to personally handle a problem, he/she must guarantee to find someone who will.

3. The CA as a Referral Source

Enthusiastic people will refer on their own volition. Satisfied people don't refer — excited people do, so get excited for the results that your practice members are getting and they, in turn will get excited.

Use tools that are available to explain chiropractic outside the office such as referral brochures and cards. A CA wants to excitedly share chiropractic with family, friends, and social groups, and the community at large.

4. CA as an Educator

Every conversation you have with a practice member is an opportunity to re-educate them with chiropractic principles. Our goal and responsibility is to shift patients from a medical/sickness disease orientation to a chiropractic model.

A new statement or concept must be heard eleven times before it is processed, accepted, or understood. A CA will create opportunities to congruently reinforce with people their new-found chiropractic knowledge.

5. CA as Administrator

The practice will not function properly without the fine detail being taken care of. The Front Desk CA is the captain of all of the detailed function in the practice. Every activity apart from the clinical processes (and even many of them) filter through the front desk.

As a front desk CA you are driving the ship so make sure that you take ownership of the role. It is very important and very powerful. Be stickler for the details and make sure that people follow the rules contained in the Office Policy Manual.

ACCOUNTABILITY

The team is here to support and challenge you to be your best in this most important role as a CA. Remember that you are here to represent and assist chiropractic as it is offered to the practice members. This is the beginning of what could be a lifelong journey of learning and discovery of the chiropractic paradigm so be patient with yourself as there is a lot to learn.

The **New CA Training Checklist**, which follows this guide, will begin your journey in our practice. It is designed to guide you through the initial 'baby steps' of orientation and is by no means a comprehensive training in all things CA.

Be curious. Be open. Be helpful. Be on your 'A Game' and Be Joyful.

Typical Job Description

Role: Chiropractic Assistant – Front Desk

Purpose: The primary role and focus for Front Desk Chiropractic Assistant (CA) is the practice member contact. The CA welcomes people by phone and in person, and is responsible for ensuring that their experience of the practice exceeds their expectations.

The CA pays great attention to detail and is committed to service excellence, and chiropractic care and the integrity of the practice and team.

Staff: (Insert name)

Period: (Insert dates)

Specific Roles: (List all activities which the CA is to perform)

New CA Training Checklist

Name: _____ Date Commenced: _____

Item	Overseen By	Completed Date
Initial On Boarding		
Make sure that you understand your employment agreement/contract.		
Understand the Practice SOP		
Read relevant sections of the OPM. (List)		
Observe 5 shifts – Taking notes on creating atmosphere and use of language and procedures employed		
Attend or watch at least 3 PCAs		
Attend or watch at least 3 RCAs		
Read all of the brochures in pamphlet racks		
Get a reading list assigned to you (List)		
Front Desk Operations		
Operating phone system and answering and returning phone calls including message system		
Orientation around the basic operations of the computer system		
Function of the filing systems		
Operation of the financial systems (Credit Card, EFTPOS etc)		
Input data, scanning, attaching files & attachments		
Welcoming regular visit people		
Welcoming New People		
Taking payments		

Management of appointment book		
Scheduling Care Plans		
Prepare New Person's paperwork		
Open with assistance from CA		
Running Shift with CA support		
Close with assistance from CA		
Attend all AHCs for 1 year		
Monitor and respond to emails		
X-ray procedures		
File practice member information and x-rays		
Monitoring and action of bring-ups, and recalls required.		
Record and respond to messages as required		
Book and track patient attendance to PCA, RCA & AHC		
Reconciliation of transaction summary		
Preparation for next shift		
Memo and action of reminders		
Report of Findings visit		
Progressive Report visit		
Present CA Report, following ROF and Prog. Report visit according to script and procedure manual.		
Appointment reminder process		
Birthday Cards		
Reconciliation of the transaction summary at the end of shifts		
Booking, preparation of spinal screenings		
Book appointment for x-rays		

Booking of various appointments for new and existing patients.		
Follow-ups (bring-ups and recalls)		
Intranet function		
Maintain daily clinic stats		
Preparation of next shift according to appointment book.		
Practice Operations		
Learn the workings of the music system including playlists		
Attend to practice odours (aromatherapy sprays)		
Attend to practice aesthetics (visual noise control)		
Participation and contribution to clinic marketing, and events.		
Technical Training		
Attend Procedure and Technical CA training sessions & seminars		
Have one of the Chiropractors explain the brain, spine and nerve system		
Have one of the Chiropractors go through the techniques and their application that are used in the practice		
Spend 5 shifts with chiropractors in adjusting area		
Watch Insight Training DVD and receive practical training from a senior CA		
Learn how to provide assistance to Chiropractor by recording examination findings as called out during New Person and Progressive Examination.		
Participation in team training and events as and when required. Support of team members.		