

	Front Desk	Notes
	<p><b>Communication</b></p> <ul style="list-style-type: none"> <li>appropriate greeting and goodbye</li> <li>maintain a professional demeanor</li> <li>instructing the patient on completing admittance forms</li> <li>collecting payment</li> </ul>	
	<p><b>Telephone Technique</b></p> <ul style="list-style-type: none"> <li>answering the telephone</li> <li>scheduling new and established patients</li> <li>rescheduling and missed appointments</li> <li>protecting the doctor</li> <li>taking messages</li> <li>patient recalls</li> </ul>	
	<p><b>Scheduling Patients</b></p> <ul style="list-style-type: none"> <li>how the appointment book works</li> <li>new and established patients</li> <li>exams and re-exams</li> <li>consultations</li> <li>report of findings</li> <li>multiple appointments</li> </ul>	
	<p><b>Documentation</b></p> <ul style="list-style-type: none"> <li>assembling patient files</li> <li>handling requests for x-rays and copying files the following parties: patient, attorney, other provider, insurance company</li> </ul>	

	<b>Insurance</b>	<b>Notes</b>
	<p><b>Front desk</b></p> <p>collecting accurate and updated insurance information from the patient copying patient insurance cards verification of benefits</p>	
	<p><b>Types of insurance</b></p> <p>personal injury work comp managed care general coverage medicare/medicaid</p>	
	<p><b>Communication</b></p> <p>helping patients understand their coverage interacting with insurance adjusters</p>	
	<p><b>Forms</b></p> <p>filling out forms appropriately interacting with insurance adjusters re-submissions</p>	

# Correspondence and Financial

## Learning Objectives

	<b>Correspondence</b>	<b>Notes</b>
	Understand the necessity for an authorized request for records.	
	Demonstrate the ability to develop and understand when to send letters of referral.	
	Demonstrate the ability to write a narrative report.	
	Understand how to effectively and appropriately assign work, activities of daily living and recreational restrictions to patients determining the restriction documenting the restriction taking patients off restriction notifying third parties	

	<b>Financial</b>	<b>Notes</b>
	Understand appropriate compensation levels for office visits narrative reports supplemental insurance reports depositions arbitrations	
	Understand effective and ethical techniques for collection of services rendered front desk collection letters using a collection service	

# Health Promotion and Preventive Care

## Learning Objectives

	<b>Health Promotion</b>	<b>Notes</b>
	Demonstrate an ability to educate and inform patients, and the community, about health-related issues and topics	
	Demonstrate an ability to motivate patients to make healthy lifestyle choices	

	<b>Preventive Care</b>	<b>Notes</b>
	Understand, and be able to provide an explanation to the patient, about the nature and effects and limitations of chiropractic care in the absence of a clinical problem	
	Provide information and advice about health risks and behaviors	
	Explain to patients the limitations of third-party reimbursement when chiropractic care is delivered in the absence of a clinical problem	
	Know when and how to revert to problem-based care (due to an exacerbation, new problem, need for full work-up, etc)	
	Be able to recognize when a patient has reached, is maintaining, or is regressing from maximal clinical improvement	

	<b>Practice Ethics/Legal Issues</b>	<b>Notes</b>
	Maintain patient confidentiality understand State regulations authorization phone or personal inquiries about patients in and out of the office	
	Recognize the ethical obligation to provide the patient with accurate information about the nature of their clinical problem and the role and reasonable outcomes of chiropractic care.	
	Understand the definition of “patient abandonment” and the steps that should be taken to ethically and legally discharge a patient.	
	Understand and assess the liability exposure that occurs as a result of personal relationships with patients.	
	Understand the ethical considerations inherent in treating relatives, friends and office staff.	
	Recognize the signs of abuse or neglect, understand reporting requirements, action steps, and the appropriate agencies to contact.	
	Understand how an effective doctor/patient relationship may be jeopardized by: accepting gifts from patients/giving gifts to patients unethical and illegal billing practices unprofessional or inappropriate language misinterpretation of appropriate physical contact inappropriate physical contact inappropriate familiarity or social interaction between office staff and patients	

	<b>Practice Management</b>	<b>Notes</b>
	Understand the dynamics, structure and implications of involvement in provider networks.	
	Be familiar with ethical, effective practice promotion techniques in and out of the office <ul style="list-style-type: none"> <li>advertising</li> <li>open houses</li> <li>patient appreciation days</li> <li>door to door</li> <li>shows</li> </ul>	
	Understand ethical, effective techniques for generating referrals from current or established patients.	
	Effectively and ethically generate referrals from current or established patients	
	Understand effective and efficient appointment scheduling and professional time-management procedures	
	Understand insurance coverage for the doctor and clinic <ul style="list-style-type: none"> <li>malpractice coverage</li> <li>workers comp</li> <li>disability</li> <li>liability and contents</li> <li>personal umbrellas</li> </ul>	
	Be familiar with business issues associated with clinical practice: <ul style="list-style-type: none"> <li>contract structure and negotiation</li> <li>tax obligations</li> <li>federal and state labor law</li> <li>OSHA regulations</li> <li>employee relations</li> <li>financing, loans, leases</li> <li>practice and personal financial management</li> <li>Americans with Disabilities Act (ADA) regulations</li> <li>equipment acquisition and financing</li> </ul>	