

The Patient Media 12-Visit Patient Education Protocol



“Use these simple procedures to organize and systematize your patient education and maximize patient understanding during their first 12 visits. Improve follow through. Increase retention. Stimulate referrals. And grow your practice from the inside-out!”

Patient Greeting

When your next new patient arrives, make sure the front desk assistant speaks first, warmly welcoming the patient by name. After a few pleasantries, explain the procedures they will be asked to follow on future visits, such as signing in.



We offer two sign in sheet packages. The [Illustrated Sign In Sheets](#) include 50 master sheets with 50 lines each. Photocopy as many as you need for each day’s patient volume. With eye-catching illustrations and brief chiropractic “factoid,” turn an every-visit procedure into a patient education opportunity. Coordinates with our [Thot For the Day](#).

Wellness Wheel



As part of your paperwork, include a [Wellness Wheel](#). Establish a baseline of their well-being in seven dimensions: physical, financial, family, social, career, spiritual and mental. Patients bubble-in their subjective rating on a scale of 1 to 10. Have them complete it again at their progress report for comparison. You may want to send it home with them to complete and return on their second visit.

Show *Getting Started*



Next, put new patients at ease, reduce apprehension and preframe your consultation by showing *Getting Started*. This short 4½-minute video features dozens of chiropractic patients glowingly describing their first visit. Shown in the reception room or private office, the front desk assistant introduces it with its purpose and benefits:

“While Dr. Smith is reviewing your health history, she would like you to see this short, 5-minute video that explains what you can expect on your visit with us today.”

The Consultation

“What brings you to our office?” you ask.

And the patient tells their story. You listen. Take notes. And *actively* listen, repeating back what you’re hearing. You ask more questions.

“What other methods have you used in an attempt to solve this problem?”

The consultation is about listening! Patients find your willingness to listen, emotionally satisfying, building trust and laying the groundwork for better follow-through.

“Why do you think chiropractic care could help you?”

While it’s tempting to tell the D. D. Palmer story and role of the nervous system, slow down. Don’t give away the punch line too soon! The [consultation is far more important](#) than your report of findings.

Five Ways to Use Chiropractic



After expressing your heartfelt compassion, assure them that they’re a great candidate for chiropractic care (if they are). Use the [How Far chart](#) (or a copy of the [tear-off pad](#)) to explain the five ways people use chiropractic care in your practice:

“This shows the five ways our practice members use chiropractic. Most start with relief. Those who discontinue without corrective care often suffer a relapse. Maintenance care involves periodic visits designed to preserve your progress. Preventive care is similar, but the focus is on early detection, catching little problems before they become serious. And wellness care is for those who want to be and do their best. You don’t have to decide now, but be thinking about how far you’ll want to take your care.”

Don’t ask for a commitment now! After all, you’re not even valid for their admitting complaint.

Shall We Proceed?

Conclude your consultation by introducing subluxation and the need for a thorough examination.

“We chiropractors tend to look at things differently. Instead of looking at the problem in the person, we look at the person with the problem. We know that there are only three general causes of problems like yours: physical causes, emotional causes and chemical causes. Shall we proceed with a thorough examination and see what’s going on?”

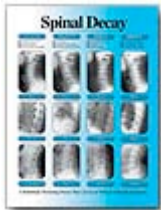
Take the patient to your examination room. While they gown, see any patients who may have arrived during your consultation.

The Examination



Conduct your examination. Explain what you're noticing along the way. When appropriate, point out the [Nerve Chart](#). With it framed behind glass, use a dry erasable marker to circle areas of subluxation, identify scoliosis or other issues. Help patients see that their problem (and the chiropractic solution) is a neurological condition, not a bone problem; a health problem, not a back problem.

If You Take X-rays



Position the [Spinal Decay chart](#) so patients are facing it as you take their lateral views. Introduce the concept of Spinal Decay and how it's an adaptation to unresolved trauma. [Learn more about Phase Placement](#).

Identify the view you're taking, touch that region of their body explaining,

“Now, I’m going to take a picture of your neck. It’s likely to look similar to one of these, either Textbook normal with the graceful forward curve and equal disc spacing, Phase One with a loss of curve, Phase Two with the beginnings of bone spurs or Phase Three with complete fusion. In fact, when you see your X-rays I’m going to have you tell me which view comes closest to matching yours.”

Why Spinal Decay?

We've abandoned the term Subluxation Degeneration (nine syllables), which patients often dismiss as merely an aging process in favor of the simpler term, Spinal Decay (four syllables). Like tooth decay, it can happen at any age and results from neglect or unhealthy habits. We recommend a three-phase approach so the difference between each phase is great enough that patients can see the differences.

To Adjust or Not?

The debate rages. On one hand, you know what you're going to do. The patient is wanting/expecting some type of intervention. Why withhold the adjustment? Yet, if the patient gets the one-visit-relief they're hoping for, they often never see the lifestyle implications of chiropractic and think of it as a short-term treatment for back pain! [Learn more about the pros and cons of first visit adjusting](#).

Your First Adjustment



Whether you adjust on the first visit or not, be sure to present a copy of Your First Chiropractic Adjustments brochure. This diversified technique brochure explains the three possible effects of their first adjustment (Some Improvement, Slower Change, Temporary Setback), the importance of repeated visits and what they can do to enhance their results.

What Did the Doctor Say?



These days, you often don't get to meet the patient's spouse who didn't witness your superb clinical skills and artful explanations. Will he or she talk your patient out of care? Send home a copy of [Answers to the Questions Patients Ask About Chiropractic Care brochure](#). This 16-page handout reassures skeptics and addresses [24 real-world questions](#) that many patients are too polite to ask!

Presented to patients at the front desk as their visit concludes, the scripting is easy:

“Many of our newest patients have questions that they forget to ask, or have a loved one who has questions. The doctor would like you to review this information and share it with your husband.”

Good News Bad News



These days it's increasingly necessary to explain that if they have insurance their coverage is so superficial as to be practically more trouble than it's worth. Welcome to *financial* patient education. Worse, they often think their policy will cover all the care they'll need. Soften the blow by having the staff present the [Good News Bad News brochure](#) as they complete their first visit:

“We noticed you have the XYZ policy. The doctor would like you to review this information before your report so you understand the limitations of your policy.”

First Visit Final Thoughts

In countless [patient focus groups](#), patients mention how delighted they are when their chiropractor surprised them with a call the evening of their first visit. Especially if they were adjusted. It's an old idea but profoundly communicates that you care.

If you're accustomed to consulting, examining, reporting and adjusting on one long visit, recognize that you may be overloading the patient. Breaking the process up over two visits, even if it's morning and afternoon visits on the same day, can improve patient acceptance.

The Second Visit



“Even if it’s later the same day, use a separate visit to deliver your report of findings. A report isn’t a sales session or a chance to scare patients into submission. It’s a report of what you found, your recommendations for care and a review of the choices they have.”

Welcome Back!



When the new patient returns, the front desk assistant speaks first, warmly welcoming the patient by name. Patients may need to be reminded to sign in if you use sign in sheets. Each of these 50 [Socratic Sign in Sheets](#) masters features a thought-provoking question that you can discuss in the adjusting room. Even if you don’t use sign in sheets, the 50 patient questions can be helpful.

Show Making Choices



Show this 7-minute video to introduce the supremacy of the nervous system, the role of vertebral subluxation, the resulting spinal decay and the likelihood of a relapse if they discontinue care too soon. By laying the foundation that applies to all patients, your reports are shorter and more concise. The front desk staff introduces the video by explaining the patient benefits of watching it:

“Dr. Smith would like you to see this 7-minute video before she explains what was found at your examination. This way you’ll be prepared for some of the decisions you’ll be making in the days and weeks ahead.”

Your Report



Many chiropractors give reports with far too much detail, which take too long and are largely passive affairs in which patients sit silently and nod. Instead, report what you found, offer some suggested action steps and find out what they want to do about it. Avoid a radiographic seminar or trying to turn them into chiropractors! No selling required. [Here’s some sample scripting.](#)

A Systematic Approach



The [VIP Report of Findings system](#) brings order and clarity to your reports. This modular approach allows you to deploy the relevant inserts, while simultaneously producing a take home copy for patients and a copy for you. This empowers patients to recreate your report to others, improving compliance and stimulating referrals. Their care plan is a significant investment of time and money. Don’t send them home empty-handed!

Examination Findings



Begin with the [Examination Insert](#). Use a red pen to tick off the exams you conducted, where subluxations were found, home care recommendations, visit frequency and the date of their first progress exam. Use the skeletal illustration to show structural distortions, bilateral scale results and other findings. The original is theirs; the carbonless copy is for your files.

Neurological Findings



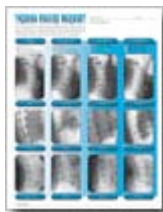
Naturally, the focus of your report is the integrity of the patient's nervous system. Use the [Nervous System Insert](#), circling the problem areas so patients see the potential neurological implications. Use sEMG? Print their scans on the back of this two-part carbonless form.

Posture Findings



If balance, symmetry, posture and curve restoration are important parts of your clinical objectives, use the [Spinal Curve and Posture Insert](#). Both illustrations provide an easy way to document loss of curve, hip imbalances, forward head carriage and other underlying postural problems.

Radiographic Findings



If you take X-rays, use the [Spinal Decay Insert](#) to "phase place" the patient, comparing their X-rays with these printed examples. Having patients phase place themselves is a powerful way to involve them and give your radiological report greater impact. Tick off the descriptions that describe their lateral views. Annotate along the bottom.

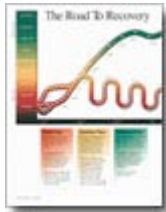
Foreshadow Decision Time



Use [The Road to Recovery](#), our most powerful wall chart to explain the three recovery tracks (quick results, worse before getting better, steady progress) and to prepare patients for "decision time." Graphically show the roller coaster ups and downs from starting and stopping care based on how they feel. Present the case for post-symptomatic care.

"You don't have to tell me now, but be thinking about which road you want to take."

The Take Home Version



Another helpful insert in the VIP Starter Kit is the [Recovery Insert](#). Include this take home version of our wall chart in each patient's report package.

Point out the decreasing healing potential with each relapse and that... "the only way to coast is to go downhill."

"Your policy only covers portions of the red area. Those who want true health choose to pay for the care they need to avoid the inconvenience of repeated relapses."

Improve Patient Participation



Another helpful report insert is the [10 Ways to Help Us Help You](#). Most patients enter your practice with a "Fix me!" attitude. Turn them into active participants by referring to these 10 action steps. Urge them to post it on their refrigerator or tape it to the inside of their medicine cabinet as a reminder of what they can be doing between visits to support their care.

Patient Relevant Brochures



Present each new patient with a brochure from our [What Every Patient Wants to Know About Chiropractic](#) series. Choose individual titles that affirm their decision to consult your practice.

Package Your Findings



Put the patient copies of the inserts you use, relevant brochures, along with your vitae, office policies, home care procedures and your business card (for referrals) in the [VIP Report Folder](#). This contemporary package is clinically "neutral" so it's appropriate for offices using virtually any technique or procedure. (If you use the CLA Subluxation Station you'll want to use the [CLA Scan Folder](#).)

The Financial Report



After your clinical report, it's time to discuss the financial implications of their care. Show [Don't Shoot the Messenger](#). This 5-minute DVD features Bill Esteb speaking patient-to-patient about the realities of higher deductibles, higher co-pays, less coverage and why you don't play the "insurance game."

Systematic Education

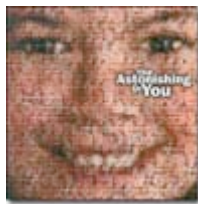


“Don’t allow patient visits to degenerate into talk of the weather or sports scores! Do something on every visit to expand their understanding of chiropractic, stimulate referrals and deepen your influence. It’s tempting to assume that a patient’s perfect follow-through early on means they “get” chiropractic. Unlikely. Changing the beliefs of a lifetime of symptom treating will take a sustained, systematic plan.”

The Third Visit

After the significant download of information on the first two visits, use the third visit to focus entirely on the clinical aspects of your patient care. Field questions. Exude a sense of hope and optimism for the future.

Visit Four



The Astonishing Dr. You is the perfect third visit handout. It’s a 60-page lecture that fits in a pocket or purse. Neutralize the germ-fearing, blood-focused, symptom-treating, pain-reliever mentality of the typical new patient. Conducting lectures? The coordinating PowerPoint lecture can be tailored to a quick 20-minute luncheon talk to an interactive one-hour presentation.

The Fifth Visit



[Your Spine and Nervous System brochure](#) is the most versatile, hardworking brochure we have. Great for reports. Fantastic for screenings. And essential for lectures and outreach events. Side one features the lateral view of a life-size human spine. Side two shows the posterior view and the key neurological connections at each segmental level.

Visit Number Six



Patients, who see visiting your practice as an imposition and intrusion into their already busy life, are contemplating returning to their former lifestyle.

A “patch job” is starting to sound quite acceptable. It’s the perfect time for the staff to present a copy of the [Patch or Fix? brochure](#):

“The doctor would like you to consider some of the options explained in this brochure and discuss them on your next visit.”

Naturally, be sure to follow up on their next visit!

Visit Seven



How well do you empower patients to refer? How many patients are able to motivate their spouse to begin care? Use the [Can Chiropractic Care Help Me? brochure](#) to show patients how to conduct some simple screening tests at home. Cervical range of motion. Posture check. Leg length. Bi-lateral scales. Enjoy more referrals as patients are more effective at encouraging others to come in for a thorough examination.

Urge Patients to Tell Others



By now, patients are showing significant improvement. It's the perfect moment to drop the hint to tell others about chiropractic. Dropping a postcard in the mail can be a simple, but effective gesture. Our [Birds of a Feather](#) is a popular choice. Some ideas you could handwrite on the back:

"We still have room for a few more health-conscious patients like you..."

"We promise to treat your friends and family with dignity and respect."

"We're delighted you're enjoying progress. Will you tell others?"

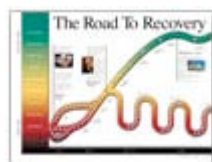
Their Ninth Visit



As your patients who are parents (or grand parents) receive firsthand proof of the value of chiropractic care for themselves, it's a great time to introduce them to the idea of a chiropractic checkup for their children. Use the [Parents Guide brochure](#), which identifies possible signs of subluxations in their children, to stimulate just such a conversation. Present a copy to the patient, observing:

"I'm delighted chiropractic care is starting to work for you. Chiropractic works even better and faster with children who don't have the long-standing problems we often see in adults."

Where Are You?



On the tenth visit, have them step over to your [Road to Recovery chart](#):

"Remember when we talked about Decision Time at your report? I'm just wondering where you see yourself on this chart right about now."

Their perception is crucial. Are they frustrated because they're hardly out of the gate? Or are they bearing down on Decision Time with an eye on the door? Offer encouragement or remind them of the perils of discontinuing care as soon as they feel better.

Progress Exam Preparation



When the patient enters the office on visit 11, have them complete a new [Wellness Wheel](#) as you did on their first visit.

“Remember when you filled this out on your first visit? The doctor would like you to complete this again so we can compare where you are, with where you were.”

At the progress examination, compare aspects of their health that have changed and help patients see the connection between their physical health and other aspects of their life.

Show *Staying Well*



On the 12th visit, right before your progress exam report, encourage wellness care and stimulate referrals by showing the 8-minute *Staying Well* video. This is an unabashed “commercial” for wellness. Patients learn how children benefit from chiropractic care and their responsibility to tell others. You’ll appreciate the fact that these topics are covered in a video for you!

The Take Home Piece



Introduce the concept of ongoing wellness chiropractic care with this 8-page Wellness brochure, describing the six reasons that continued care makes sense. The CA can present it to patients as they complete their 12th visit.

“Once you get well, the challenge is to *stay well*. The doctor would like you to review the information in this brochure so you don’t experience a needless relapse.”

The Step-by-Step Protocol



“There you have it. Use some, or all, of these tools and procedures to leverage your time and talent with patients. Use each visit to increase their understanding and appreciation of just how big chiropractic is!”

Find additional resources on the Patient Media website to enhance your patient education and report of findings procedures:

[Articles about patient education](#)

[Articles about the report of findings](#)

[Articles about financial policy](#)