

*Lori W. Allen's*  
 **INTEGRATED**  
PHYSICAL MEDICINE *training series*  
**TWO**

Virtual Online Module  
*New Patient Workshop*

**Workbook**

**2015**

# Virtual Online Module

## New Patient Workshop

# Workbook

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## Virtual Online Module

### New Patient Workshop

#### Why a New Patient Workshop?

- A new patient workshop is an internal marketing program designed to educate patients and help garner referrals to the practice. Patients are asked to bring a guest with them to the workshop where they will learn the importance of following the treatment plan, the true definition of health, and the programs available to them to achieve and maintain health and wellness.
- By educating your patients you will instill in them the knowledge and motivation to become good patients, thus increasing their likelihood of success, as well as your retention. The guests will learn the benefits of treatment at your practice, be scheduled for a complimentary consultation, and you will grow your outreach database through gathering their demographic information.

#### The Communication Triangle – Everyone is Involved in the New Patient Workshop



*The Provider* - Invites the patient at the end of the Clinical Report of Findings

*The Patient Care Coordinator/Case Manager* – Invites during the Business Report of Findings

*The Front Desk* – Schedules the patient for the workshop when they are scheduling them for their treatment plan

## Virtual Online Module

### New Patient Workshop

#### Two purposes of the New Patient Workshop

- Educate the patient so they understand the integrated model and the importance of their treatment plan in gaining their desired outcome.
- Internal Marketing Perspective – You introduce your services to a potential new patient (the guest) and invite them in for a complimentary consultation

#### How Often Should We Hold a New Patient Workshop? What Time of the Day?

Should be done every other week, and your patient demographic will determine the time of day that works best for your practice.

*For Instance:*

If you have a large Medicare demographic – perhaps a lunchtime workshop is best

If you have a professional demographic – perhaps evenings are best

A mixed demographic? – offer 2 workshops; one at lunchtime and one in the evening

#### Notes

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## Virtual Online Module

### New Patient Workshop

#### Clinical Report of Findings Script - Provider

The provider at the end of the Clinical Report of Findings extends the initial invitation to the patient to attend the New Patient Workshop.

“I have all my new patients attend a new patient workshop. This is a great class, and it will help you to better understand your treatment plan and our integrated model. Please bring a guest with you to help you during the trigger point therapy demonstration. Trigger point therapy is a great alternative therapy for you to do at home in conjunction with your in-office treatment”

#### Provider Handoff to Patient Care Coordinator

“Sally is on a three-day-a-week treatment plan, and will be attending next Tuesday’s workshop.”



## Virtual Online Module

### New Patient Workshop

#### **Business Report of Findings Script – Patient Care Coordinator**

The Patient Care Coordinator - Repeats the invitation during the Business Report of Findings.

“We have all of our new patients attend a workshop held here in the office. It’s not just educational; it’s fun too. By participating, you will gain a better understanding of our integrated model, the importance of your treatment plan, and how to achieve optimal health. There will be a hands-on demonstration on trigger point therapy, an excellent alternative therapy for temporary pain relief. We have found patients who attend the new patient class do very well with their care here and progress in their treatment.”

“The next class is on [Date]. I look forward to seeing you here. The only thing I ask you to bring is a guest – you will need someone to act as your partner during the trigger point therapy. Please bring a family member or anyone who is in pain and has health problems who would benefit from the class and our facility.”

Present the patient with an invitation.

- Sign him/her and their guest up for the class; if your patient does not know who they are going to bring, make sure on their next visit to the office they let you know.

Virtual Online Module  
**New Patient Workshop**

**New Patient Workshop Patient Invitation**



If you would like help in creating this for your office, please contact PPS Design Studio at 412-765-2065 for pricing

**Notes**

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Virtual Online Module  
**New Patient Workshop**

**New Patient Workshop Guest Invitation**



**Join Us & Learn**

- Learn the true benefit of an integrated model
- How to reach & maintain optimum health
- Feel the benefits of Trigger Point Therapy
- Speak with a doctor privately about any questions or concerns you may have about your own health
- Tour the facility

*Refreshments will be served.  
The Entire Program Is free of charge*



You Are Invited to a  
**Health & Wellness workshop**  
@ Physical Healthcare of Jacksonville

To: \_\_\_\_\_

From: \_\_\_\_\_

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

Time: \_\_\_\_:\_\_\_\_ PM

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## Virtual Online Module

### New Patient Workshop

#### Patient Care Coordinator Handoff to the Front Desk

"Sally is starting care with us and she is to come in three days a week. Her preferred days are Monday, Wednesday, and Friday and she prefers a morning appointment. She will be attending next Tuesday's New Patient Workshop."




**Virtual Online Module**

**New Patient Workshop**

The Front Desk schedules the patient for the workshop when they are scheduling them for their treatment.

**Sign Up Sheet**


  
**PHYSICAL Healthcare of Jacksonville**

New Patient *workshop*  
@ Physical Healthcare of Jacksonville  
 Date: \_\_\_\_\_

Patient	Phone	Email Address	Guest (non-patient)

Name – Phone # - Email – Guest Name

Use this list to confirm attendance. Decide where the invitation/attendance date will be tracked on the patient’s chart or paperwork, so that you can ensure that all new patients attend a workshop

Virtual Online Module  
 New Patient Workshop

Outline of the Actual Workshop

Personal Data Form – Have Guests Fill Out at the Beginning of the Workshop

## Personal Data Form

[Company Logo]

Source/Event	Day	Date	Time

**Patient Information**

Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Home Phone#: \_\_\_\_\_ Cell Phone#: \_\_\_\_\_ Work Phone#: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Email Address: \_\_\_\_\_ Occupation: \_\_\_\_\_

Please check any of the following symptoms you have experienced in the past six months:

<input type="checkbox"/> Upper Back Pain	<input type="checkbox"/> Arm/Shoulder Pain	<input type="checkbox"/> Carpal Tunnel	<input type="checkbox"/> Asthma/Allergies
<input type="checkbox"/> Lower Back Pain	<input type="checkbox"/> Fatigue	<input type="checkbox"/> Dizziness	<input type="checkbox"/> Digestive
<input type="checkbox"/> Headaches	<input type="checkbox"/> Stiffness	<input type="checkbox"/> Sinus Problems	<input type="checkbox"/> Weight Issues
<input type="checkbox"/> Tingling/Numbness	<input type="checkbox"/> Knee Pain	<input type="checkbox"/> Arthritis	<input type="checkbox"/> Hormone Imbalance
<input type="checkbox"/> Muscular Aches	<input type="checkbox"/> Leg/Ankle Pain	<input type="checkbox"/> High Blood Pressure	

How long have you suffered these symptoms: ( ) Weeks ( ) Months ( ) Years

If there was an affordable way to treat these symptoms, would you? ( ) Yes ( ) No

Have you ever had an accident? ( ) Auto \_\_\_/\_\_\_ (Mo./Yr.) ( ) Work \_\_\_/\_\_\_ (Mo./Yr.)  
 ( ) Other \_\_\_/\_\_\_ (Mo./Yr.) ( ) None \_\_\_/\_\_\_ (Mo./Yr.)

**Health Insurance**

Information below is to check coverage ONLY.

Do you have Medical Insurance? ( ) Yes ( ) No

Do you have Medicare? ( ) Yes ( ) No

Do you have Medicaid? ( ) Yes ( ) No

Insurance Company: \_\_\_\_\_

Policy Number: \_\_\_\_\_ Group: \_\_\_\_\_ Phone: \_\_\_\_\_

Insured Named: \_\_\_\_\_ Phone: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Place of Work: \_\_\_\_\_

(Office Address)  
 (Office Website)

## Virtual Online Module

### New Patient Workshop

#### **The Open – done by someone other than the provider**

“Thank you for coming to the New Patient Workshop tonight. We appreciate all of our new patients and their guests for being here. Tonight you will gain a better understanding of the integrated model, the 4 phases of care, and the importance of following your treatment plan. You will then be participating in a hands-on demonstration of a great alternative therapy, trigger point therapy.

Tonight’s guest speaker is going to be Dr Miller. He/she is (title), with an education from (school) and a specialty in \_\_\_\_\_ etc. go into bio credentials”

#### **Give an overview of the services and departments of your practice.**

“Let me give you a quick overview of all the services we offer here at our practice. We combine the expertise of medical with physical therapy, as well as chiropractic and acupuncture. We have a medical massage department and a medical weight loss department, a newly created diabetes program....”

#### **Notes**

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## Virtual Online Module

### New Patient Workshop

### The Body

Provider Presentation – PowerPoint

- The Beauty of the Integrated Model – Talk about your services and how they tie into all the conditions that you treat
- The importance of treatment plan frequency
- The 4 Phases of Care
  - Relief
  - Correction
  - Strengthening
  - Maintenance
- Trigger Point Therapy Hands on Demonstration
  - Trigger Point Injection Education

### Notes

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## Virtual Online Module

### New Patient Workshop

#### The Close –

The same staff member who did the opening will/should do the close

“Thank you for attending the New Patient Workshop this evening/afternoon. Patients, I hope that you can see the benefits of the retention of your treatment plan, the importance of the integrated model, and your progression through your 4 Phases of Care.

Guests, I would like to invite you to tour our facility and I want to present you with a gift certificate for a complimentary consultation to see how we may be able to help you the way we are helping so many others.”

#### Notes

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## Virtual Online Module

### New Patient Workshop

#### Team Members to Attend

- Someone to open and close the workshop and schedule consultations – public relations staff member or patient care coordinator – Welcome the patients, set up, check for attendance
- Provider
- Clinical Staff – to assist the provider and the patients with the trigger point therapy demonstration
- Encourage all staff members to attend - at one time or another

#### Conclusion

##### Benefits of a New Patient Workshop

- Educating the Patient
- Increase Retention
- Deliver Positive Patient Outcome
- Internal Marketing

The Entire Staff Must be Aware, Involved, and Excited!