

Virtual Online Module
New Patient Workshop

Workbook



New Patient Workshop

# Workbook

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#### **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





**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			





**New Patient Workshop** 

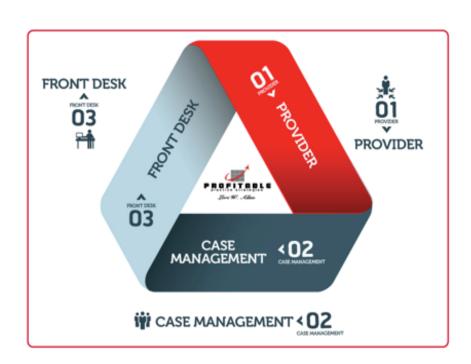
# **Clinical Report of Findings Script - Provider**

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."







**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.





**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			

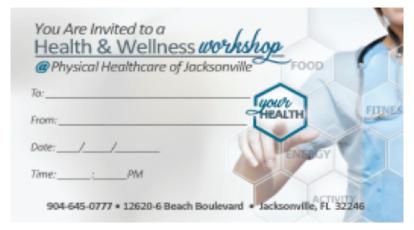




**New Patient Workshop** 

#### **New Patient Workshop Guest Invitation**





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**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."







# **New Patient Workshop**

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

# **Sign Up Sheet**

Health of Jac	YSICAL ICAPE cksonville		nt workshop of Jacksonville
Patient	Phone	Email Address	Guest (non-patient)
			1
	+	1	
	<del>                                     </del>		
	<del>                                     </del>		
	+		1
	<del>                                     </del>		

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





**New Patient Workshop** 

# **Outline of the Actual Workshop**

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

Persona	al	[Company Logo]			
Data Form		Source/Event	Day	Date	Time
atient Information					
Name:		Date of Birth:			
Street Address:	Cell Phone#:		Work P	hone#:_	
Street Address:  City:	State:		Zip Co	de:	
Email Address:	State:	Occupation:	,		
Lower Back Pain		Dizziness	_	Digestive	
Upper Back Pain	Arm/Shoulder Pain	CarpalTunnel		Asthma/	Allergies
Headaches		Sinus Problems	_	☐ Weight is	
			_		
Tingling/Numbness		Arthritis	_	Hormone	: Imbalance
Muscular Aches	Leg/Ankle Pain	☐ High Blood Pres	sure		
15 15			0 1	1.14	Years
Have you ever had an Health Insurance Information below is to Do you have Medical Do you have Medicare	accident? () Auto _ () Other _ check coverage ONLY.	(Mo./Yr.) _/_ (Mo./Yr.) ] No ] No	() v	/ork/_	) No _ (Mo./Yr.)
Health Insurance Information below is to Do you have Medicare Do you have Medicare Do you have Medicare Do you have Medicare	accident? () Auto () Other _ check coverage ONLY. Insurance? () Yes () e? () Yes ()	(Mo./Yr.) _/ (Mo./Yr.) ] No ] No ] No	() W	/ork/_ one/_	) No _ (Mo./Yr.)
Health Insurance Information below is to Do you have Medicare Do you have Medicare Do you have Medicare Do you have Medicare	accident? () Auto () Other _ check coverage ONLY. Insurance? () Yes () e? () Yes ()	(Mo./Yr.) _/ (Mo./Yr.) ] No ] No ] No	() W () N	/ork/_	() No (Mo./Yr.) (Mo./Yr.)
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Have you ever had an Health Insurance Information below is to Do you have Medicare Do you have Medicare Do you have Medicare Policy Number:	Auto _ () Auto _ () Other _	(Mo./Yr.) _/ (Mo./Yr.) ] No ] No ] No	Phone	/ork/_ one/_	No (Mo./Yr.) (Mo./Yr.)





# 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 (school) and a specialty in	
Give an overview of the services and depart	ments of your practice.
"Let me give you a quick overview of all the ser combine the expertise of medical with physica acupuncture. We have a medical massage dep department, a newly created diabetes program	I therapy, as well as chiropractic and artment and a medical weight loss
Notes	





**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		





**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		





**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!

