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**52 Weeks to Success**

**Chiropractic Assistant Program**

**Benchmark 5 The First Visit**

**Core Objective:**

First impressions with your New Patient can determine if your New Patient continues on in your practice or discontinues. Having an inviting, caring attitude along with an organized system for processing your new patients can ensure that they have a great experience in your office and are confident that they are in the right place. It starts before they ever enter your practice with the New Patient telephone call and continues throughout the initial visit.

The objective of this benchmark is to

1. **Keep the patient**
2. **Get necessary information and documents**
3. **Schedule 2nd visit Report of Findings**
4. **Schedule Doctor’s Report (New Patient Orientation)**

**Key Takeaways:**

* Review telephone procedures for NP’s.
* Review scheduling procedures for NP’s.
* Gathering all necessary forms and information.
* Collecting fees.
* Scheduling 2nd Visit Report of Findings.
* Scheduling the NP Talk (Doctor’s Report).

**Questions for Team Discussion:**

1. How consistent are we with our NP scheduling?
2. How consistent are we at getting the necessary paperwork from the NP?
3. How can we streamline our paperwork to be more efficient?
4. How long is the Doctor in with a New Patient?
5. Are we giving our new patient an exceptional experience?
6. Are we following up with Welcome letters, Thank you notes, NP Welcome call from the Dr.?
7. What are some changes that we can implement to begin improving in this area?

**Resources:** Benchmark 5 (Powerpoint/Worksheets/Team Discussion); Benchmark 3 Telephone Procedures; Benchmark 4 Scheduling Procedure.