

## **Financial CA Responsibilities**

1. Support and uplift the doctor
2. Accountability
3. Finances
4. New patient, re-exam and anniversary reports

Take day's schedule and do a preview (PRES)

Special projects (flyers, filing, etc.)

Work the front desk on (Monday) nights

Review current day's upcoming financial agreements (ARs and NPRs)

Insurance billing

Cash billing

Create follow up on OTC's on the 1st and the 15th of the month

Stats

Generate monthly itemized statements

Insurance follow up calls

Discharge process

Check out at front desk when needed

Enter insurance payments from the mail

NP/Re-exams (when needed)

Update NP checklist

## **Financial (F) CA 1 on 1 Meeting Guidelines**

*\*\*This is a suggested guideline of some of the questions the team can check on at any given meeting. It would be impossible to address all of these issues in every single meeting. It would be the team leader or doctor's responsibility to select the ones most important to go over at each weekly gathering.*

### **New patients**

1. Spot check lifetime care all mapped out from NPs 1-2 weeks ago
2. Spot check SWS scheduled in book on same NP from 1-2 weeks ago
3. Spot check any NP folders filed and NP checklists are complete (EX: FHH completed)
4. Spot check monthly swipes for entirety of care plan for any NP 2 weeks ago

## **Accountability**

5. How many heart touch notes have you written out this week to patients and secretaries and members of third party billing companies spoken to on the phone?
6. What part of the last seminar attended did you still feel the most fresh or diligent in following up on?
7. Have you called your accountability partner from the TLC seminar on the prescribed 30 day post seminar check up?
8. How is your attendance on TLC CA training calls on the second Tuesday of every month at 1:00 P.M. Est?
9. When was the last cross training week where each team member had to perform at least one day in another team member's job description?
10. Have you engaged in at least two seminars and one leadership camp in your past year of employment?
11. How are you in some way initiating a procedure that enhances practice efficiency/profitability or decreases practice overhead? There should be at least one statement in this area per week per team member.
12. Spot check bins on financials CA's desk
13. Spot check copies of their P.R.E.S. sheets
14. What is our percent on continued care conversions?
15. What is our percent of new patient conversions?
16. What is our PVA? (Patient Visit Average = total office visits for the month divided by total NPs for the month)
17. What is our DVA? (Dollar Visit Average = total collections for the month divided by total office visits for the month)
18. What is our case average? (Case Average = total collections for the month divided by total NPs for the month)
19. What are our average services per visit?
20. What percentage of patients are on wellness care? (Percent of Wellness Care = total office visits divided by wellness office visits)

## **Re-Exams**

21. For each patient's re-exam, are you utilizing these times to reassess their status with keeping up on their financial agreements as well as their attendance in SWS?
22. Are you reading and reviewing the print out of this month's OTC sheet?

## **Finances**

23. How are we doing updating the follow up assessment of last month's OTC sheet?
24. How have you reviewed the OTC for accuracy and success? (Review the scripts of how the financial CA finishes an NPR by doing all parts of the financial CA NPR script and how a CA addresses resigns for continued care as well as patients who have missed a payment)
25. How many follow up calls to insurance companies are being done per day? (minimum of X times per week and get clear on this)
26. Spot check notes entered on someone whose insurance promised to pay in computer - read notes
27. See alarms set for date and monies promised
28. Spot check on rejected credit card swipes
29. Review printout of the 30, 60, and 90 day accounts receivable report

## **Anniversary Reports**

30. Spot check AR box and pull out cards from 2 months out
31. Open and inspect the Anniversary Report (AR) box
  - a. See that a paper is filled out that states who has their anniversaries coming up in three months, two months, within this month and who is past due
  - b. For the three month people - Have you already gone through and reviewed the status of their finances?
  - c. How up to date are they and do any changes need to be made?
  - d. Have note cards gone out from each of the team members to stagger and write acknowledgement notes to these people three months from their anniversary? (the note cards are acknowledging something genuinely virtuous about the nature of how they have engaged in their care)
  - e. Asses the participants in SWS (three in the first month then once weekly after)

## **Patient Education**

32. How many additional patients per week are you scheduling for spinal workshops?
33. How many guests are you scheduling for spinal workshops?
34. How likely are you, when out of the financial office, in the midst of patients to stop and speak with patients and initiate warm dialogue?