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## TLC's Training ALL CA's – the Drs. Overview

Task	Who to train CA on this task	When to train a CA on this task	Whose zone is this primarily?	When is training on this task completed
5 Primary Scripts	Dr.	1st	ALL	
CA's #1 Job	Dr	1st	ALL	
Zones observations	Dr.	1 <sup>st</sup> 4 weeks	ALL	
4 Things a CA does	Dr	2nd	ALL	
30 Second Rule	Dr/ CA	4th	ALL	
Scheduling & No missed appointment	Dr/ CA	5th	ALL	
Recapture Calls	Dr/ CA	6th	ALL	
When to answer questions	Dr/ CA	7th	ALL	
1 on 1 Accountability Meetings		7th	ALL	
Team Training	Dr	8th	ALL	
Promotional Calendar		9th	ALL	
Spinal Workshops Additions		10th	ALL	



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## Drs. Overview of CA training procedures for ALL CA's

Task	Who to train CA on this task	When to train a CA on this task	Whose zone is this primarily?	When is training on this task completed
Everyone gets adjusted		11th	ALL	
Spontaneous Training		12th	ALL	
Checking Posture	Dr	13th	Tech	
Honeymoon TIC's		14th	Front Desk and Tech	
14-Day Policy		15th	ALL	
Expansion Cycles		16th	ALL	
3 Strike Rule on Finances		18th	Financial and Front Desk	
Family Health History		19th	Front Desk and Tech	
All Care Plans Scheduled Out		20th	Front Desk and Financial	
Specialty Hours		21st	Front Desk and Tech	
Get the DR moments		22nd	ALL	
Team Huddles		23rd	ALL	
Cluster Booking		24th	Front Desk	



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## Front Desk CA Training Guidelines & Resources

Task	Who to train Front Desk CA on this task	When to train Front Desk CA on this task	Resources and how to train Front Desk CA on this task	When is training on this task completed
Supporting the Doctor	Primary CA's	1st Day	4 things the Dr. does	
Supporting the Team	Primary DRs	1st Day	Speaking up lifting and encouraging	
5 Primary Scripts	CA's	within 1st 2 weeks (Memorized and tested)	TLC Team Training videos, Printed copy for CA	
New Patient Prep Folders	CA's	within 1st 2 weeks	Visual Examples	
Greet Patients	CA's	Week 3	Role Play with CA's	
P.R.E.S.	Dr	Week 4	TLC Website- Video examples	
TIC Patients	Dr	Week 5	TLC website audios and role play	
Scheduling Patients	Dr and CA's	Week 6	Dr and CA's – cluster scheduling on TLC website	
Answering Phones	Primary DRs	Week 7	Role Play	
Patient Flow Prioritizing	Primary DRs	Week 8	Dr	
Front Desk Zone Checklist	CA's	Week 9	Print Zone Checklist	
1 on 1 Accountability Meetings	Dr	Week 12		
Keeping Front Desk Zone Clean	CA's	Week 13		
Payment processing	CA's	Week 14	Your own computer software	
Recapture Calls	Dr	Week 15	Role Play with Dr	
Back up to Tech Zone	Dr	Week 16		
Back up to Financial Zone	Dr	Week 17		
Back up to Promotional Zone	Dr	Week 18		
14 Day Rule	Dr	Week 19	Dr and Team Training videos	



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## TLC's Team Training Guidelines & Resources for Drs.

Task	Who to train Team on this task	When to train a Team on this task (Enter Dates)	Resources and how long to train Team on this task	When is training on this task completed
Sharing the practice's vision – with the team	Dr.	Every Day	TLC's Sermon on the mount resource.	
<b>Team Trainings</b>			26 WTM Calls & Manual	
Openings	Dr.	Week 1		
Content- 1 bullet- team does drill	Dr.	Week 1		
HOPE- accountability take a ways		Week 1		
P.R.E.S. - individually	Dr.	Week 2	TLC Website video examples	
Huddles	Dr.	Week 3	TLC Website video examples	
Share team wins at end of each shift	Dr.	Week 3		
<b>Spontaneous Training</b>	Dr.	Week 4	TLC Website video example & create log book	
initiate, participate, brief, fun & Specific				
Time Outs to huddle and Re-connect in the midst of flow	Dr.			
1 on 1 Accountability Meetings	Dr.	Week 5	TLC Website Audios and text	



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## TLC's Team Training Guidelines & Resources for Drs.

Task	Who to train Team on this task	When to train a Team on this task (Enter Dates)	Resources and how long to train Team on this task	When is training on this task completed
Structure of meetings	Dr.	Week 5		
Team Checklist	Dr.	Week 5		
Opening with their WHY	Dr.	Week 5		
Target #'s	Dr.	Week 5		
Dr. Spot check tasks (2-3)	Dr.	Week 5		
Take aways and accountability	Dr.	Week 5		
<b>Quarterly Trainings</b>		Week 6		
Recap past 3 months of team trainings and one on one accountability meeting	Dr.	Week 6		
2-3 bullets training	Dr.	Week 6		
Team Building Activities	Dr.	Week 6		
Accountability and new Checklist	Dr.	Week 6		
End with hope and what's possible	Dr.	Week 6	Create video and send it to your AC Coach	
TIC with urgency and intensity and from your heart	Dr.	Week 7	TLC Website Audio example	



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## TLC's Tech CA Training Guidelines & Resources

<b>Task</b>	<b>Who to train Tech CA on this task</b>	<b>When to train Tech CA on this task (Enter Dates)</b>	<b>Resources and how to train Tech CA on this task</b>	<b>When is training on this task completed</b>
Supporting the Dr	Primary Cas	Week 1	4 things the DC does	
Supporting the team	Primary Drs.	Week 1	Speaking, uplifting and encouraging	
5 primary scripts	CA's	Week 2- Memorized and tested	TLC team training videos, printed copies for CA's	
Greeting patients	CA's	Week 3	Role Play with CA's	
PRES	DR	Week 4	TLC website video examples	
Confirming appointments	DR	Week 4	Role play	
TIC with patients	DR	Week 5	TLC Website audios	
Taking Dr adjusting notes	DR	Week 6	Dr. Demonstrates	
In putting X-Ray into Computer Software – (Ex- ChiroTouch)	DR	Week 6	software tutorial	
Diagnosis entered into computer software	DR	Week 6	software tutorial	
Tech Zone checklist	DR	Week 7		



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## TLC's Tech CA Training Guidelines & Resources

<b>Task</b>	<b>Who to train Tech CA on this task</b>	<b>When to train Tech CA on this task (Enter Dates)</b>	<b>Resources and how to train Tech CA on this task</b>	<b>When is training on this task completed</b>
Taking REX notes	DR	Week 8	Dr. Demonstrates	
Checking Posture	DR	Week 9	Dr. Demonstrates	
30 Second Rule	CA's	Week 10	TLC Website examples	
Article of the week - TIC	Dr & CA	Week 10	Role Play	
Addressing patient questions	DR	Week 11	Dr. Role Play	
1 on 1 Accountability meetings	DR	Week 12		
Inventory for Tech items	CA's	Week 13	Checklist of inventory	
Keeping tech zone clean	Dr & CA	Week 14		
Extending the patient's adjusting experience	DR	Week 15		
Answering phones	DR	Week 16	Role Play	
Scheduling patients	DR	Week 16		
Day 2 with NPs	CA's	Week 19	TLC Team Training Videos	



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<b>Task</b>	<b>Who to train Tech CA on this task</b>	<b>When to train Tech CA on this task (Enter Dates)</b>	<b>Resources and how to train Tech CA on this task</b>	<b>When is training on this task completed</b>
Taking NP exam notes	DR	Week 17	TLC Team Training Videos	
OPQRST	DR	Week 17	TLC Team Training Videos	
5 traumas/history NPs	DR	Week 18	TLC Team Training Videos	
X-ray taking	DR	Week 18	Dr. Demonstrates	
Day 3 with NPs	CA's	Week 19	TLC website video examples	
Highlighting REX	DR	Week 20	Dr. Demonstrates	
Teaching Exercises	DR	Week 21		
Office Tours	CA's	Week 22	Role play	
Patient Flow prioritizing	Dr & CA	Week 23		
14 day rule	CA's	Week 24	TLC Team Training Videos	
Promotional calendar TIC		Week 26	TLC website video examples	
Back up to front desk zone	Dr & CA	Week 25		
Back up to financial zone	Dr & CA	Week 26		
Back up to promotional zone	Dr & CA	Week 26		





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## TLC's Financial CA Training Guidelines & Resources

<b>Task</b>	<b>Who to train Financial CA on this task?</b>	<b>When to train Financial CA on this task</b>	<b>Resources and how to train Financial CA on this task?</b>	<b>When is training on this task completed?</b>
Support the Dr.	All CA's	Week 1	Validate DR	
Supporting the team	DR	Week 1	Uplifting, encouraging statements	
5 Primary Scripts	All CA's	Week 2	Team training videos, printed scripts & Role Play	
Insurance Verified	All CA's	Week 3	Watch CA do this and use form	
Stats	All CA's	Week 4	enter on TLC website and on your computer	
Ordering supplies for all zones	All CA's	Week 5	Watch other CA do this	
New Patient Care Plans prepared	Dr	Week 6	Care Plan Worksheet	
New Patient Financial Plans created	Dr	Week 7	Financial Plan Worksheet	
Re-Exam Finances Reviewed	Dr	Week 8	9 things to Re-Exam at REOF	
Insurance follow up calls	Financial CA or Front Desk CA	Week 9	Watch Financial CA or FD CA	
Anniversary Care Plans	DR	Week 10	Worksheet	
Delivering NPR- Financial Report	DR or Financial CA	Week 11	TLC Team Training Videos	
Accounts Receivables reduced daily	Financial CA	Week 12	Financial Freedom Workbook	