

CHAPTER 1:

The Professional Chiropractic Therapy Assistant

Review pages 1-8 of the textbook for this section of the workbook.

DEFINE YOUR KNOWLEDGE

Introduction to the Profession

Finding a solid profession that supports your financial goals and makes you proud to come to work every day is often called the American dream. Whether you are just coming out of school or moving from another professional field, pursuing a new career can be daunting. The healthcare industry offers a career that is both challenging and exciting. The service you will provide as a Chiropractic Therapy Assistant has many rewards and requires a commitment to your patients, your team, and the chiropractic practice. If you possess the right qualifications and are willing to learn, being a CTA can be your dream profession.

Basic Qualifications for the CTA

To be a professional in your field, you must possess the right qualities and qualifications. Many traits you already have, while others will come with experience and training. The following are a list of attributes required for a CTA to be successful in the chiropractic practice:

- Honesty
- Intelligence
- Self-Motivation
- Ethics
- Courtesy
- Tactfulness
- Loyalty
- Compassion
- Reliability
- Caring
- Effective Time Management
- Cooperative
- Work well with others

A professional Chiropractic Therapy Assistant should be described as a person who is competent, focused, accountable, confident, and motivated toward a particular goal.

The Importance of Professionalism in Your Field

Since chiropractors are well respected healthcare providers, people have high standards of what their experience will be when they visit a chiropractic office. How you look, speak, act, write and work determine whether you are a professional in your field or just doing your job. Society does not always emphasize the importance of professionalism, so some people believe that just doing your job is all that is required. While some businesses will accept less-than-standard results, that is not acceptable in the healthcare profession. As a CTA, when you communicate and interact with patients, they are ultimately putting their health in your hands. Anything you do in the chiropractic office should be performed with professionalism and to the highest standards.

STUDY TIPS

The core definition of professionalism never changes—to provide a foundation for effective communications and efficient performance.

Beyond the character traits that a CTA should possess, there are other aspects critical to your overall success. A professional personal appearance is a direct reflection on the care you take with patients. If you do not show care in how you treat yourself, it is only natural that others will be less confident in your ability to care for them. Remember, how you look demonstrates how you feel and will define how people see you as a professional, inside and out.

Equally important is the way you carry yourself in the office. Chiropractic is a proponent of good posture. Be a good example to your patients by practicing correct posture and you will reap those benefits as well. Body language and facial expressions are a key component of your appearance. Things may seem small in the moment, but have the potential to be perceived negatively. Yawning, slouching, or rolling eyes are all examples of unacceptable body language. A successful CTA is always aware of the environment they are creating for their patients; making sure that it is a healthy and happy atmosphere where their health is your main focus.

POSITIVE PATIENT CARE PROCEDURES TO REMEMBER

Provide a Polished & Professional Image

- Smile – Introduce Self
- Have good posture
- Eye contact
- Respect personal space and privacy
- Attitude and Disposition, all conveyed
- Voice – Convey enthusiasm, be compassionate, speak clearly
- Watch body language

Patient Arrival

- Stand
- Greet

Patient Care Process

- Provide office tour
- Give office brochure to read while waiting
- Introduce other staff members
- Handle any chiropractic misgivings
- Educate, Educate, Educate

STUDY TIPS

PRACTICAL:

Perform an Individual Assessment

*Take a moment to reflect on the qualifications discussed in Chapter 1. Construct a list of those qualifications that you feel you **most** identify, those you **somewhat** identify and those you feel you **can improve**. Revisit this list each month and note the areas where you have improved. Of course, your doctor will undoubtedly notice, too!*

Team Assessment

At your next staff meeting, ask your doctor to discuss his/her professional expectations for staff. Open communication provides an opportunity for everyone to be reminded of the office policies, as well as make adjustments in any areas that may be new or need updating. This is a good practice to utilize when orientating new staff members to your office team.

Communication is Key

Effective communication between a health care provider and patients are important elements for improving patient satisfaction, treatment compliance, and health outcomes. Patients who understand their treatment plan are more likely to complete their care. Likewise, in any chiropractic office, communication between the doctor and staff is essential for a successful practice. Good communication with your team can eliminate problems before they begin.

Poor and ineffective communication will cause problems. Effective communication with your patients is vital, especially on the first visit when they may not have had chiropractic care. For example, informing a patient on what you are going to do before you do it, can help nervous patients feel more at ease.

The benefits of effective communication are many and obvious as they enhance all aspects of our personal and professional lives. Ineffective or misunderstood communications in our personal lives may give rise to problems or embarrassment, but in our professional lives, the results of misunderstandings may yield more serious results.

It is rare to have a “typical” day at the office, which makes it hard to predict what challenges you may encounter from moment to moment. That is why it is important to prepare and train for a variety of stressful situations related to your administrative and clinical duties and develop strategies to successfully handle each without emotion. The advantage of staying objective and non-emotional in professional business situations is that it provides an opportunity for resolution where business relationships can thrive. In the process, you will also garner respect from your superiors, peers, subordinates and the patients to whom you provide care. When an office has proper communication, the guesswork is removed and assures your patients that you and your staff are efficient and professional.

STUDY TIPS

Examples of Stressful Situations

- *Patient frustrated with care response*
- *Patient talking loudly or making negative comments with other patients hearing*
- *Patient oversharing personal information*
- *Patient asking personal questions about doctor or staff*
- *Patient gives health information, but asks you not to tell the physician*
- *Patient asks a difficult question, you don't know the answer*
- *Co-worker is angry or upset with another staff member*
- *Staff's personal situations carrying over into work.*

Common Responsibilities of the Chiropractic Therapy Assistant

The responsibilities of a Chiropractic Therapy Assistant vary from office to office and depend on the size of the practice and specialty. In small practices, CTA's often handle both administrative and clinical duties. In large practices responsibilities may be more focused on clinical duties. Knowing the roles and responsibilities required of you will eliminate guesswork.

Administrative responsibilities may include opening the office, answering phones, scheduling appointments, greeting patients, updating a patient's medical records, filling out insurance forms, handling correspondence, handling billing and bookkeeping, ordering supplies, patient education materials and many other tasks.

Clinical duties may vary depending on state law. Some common tasks include taking medical histories and recording vital signs, explaining treatment procedures to patients, preparing patients for examinations, and assisting physicians during examinations. As directed by a physician, they might instruct patients about a care plan, administer physical agent modalities, manual therapy, exercise rehabilitation, schedule patients to see another healthcare professional, keep the clinical area neat and clean, teach home exercises, and even x-ray processing and developing.

Chiropractic Therapy Assistants should always know the patient's treatment schedule or frequency of patient visits. If this information is not given to the CTA, they may need to interrupt the doctor to find out when the patient will need to come back. This is considered lost time for the CTA, possible loss of confidence from the patient as well as an inconvenience for them to have to wait.

It is important for us to handle their treatment program so they know our main concern is their health. Whether you use hands signals, write it down or simply walk the patient to the front desk, have a system in place so your team is always informed and the patient feels that you are handling their healthcare needs. Knowing the patient's treatment plan will lower the chance of a patient leaving the office without re-scheduling, and thereby increases patient compliance and retention.

Below is an example of general duties that might be assigned to a CTA. The duties are not listed in priority or to be considered a complete list of CTA responsibilities, as priority and responsibilities vary from office to office and state to state.

SAMPLE

Chiropractic Therapy Assistant Job Description

STUDY TIPS

DUTIES:

■ **Phone Responsibilities**

- *Schedule patients for care*
- *Explain the services offered by the practice*
- *Take messages for the doctor(s) and other staff members*
- *Place reminder appointment calls to patients*

■ **Inventory and Purchasing**

- *Inventory forms, chemicals, and supplies on the schedule established by the doctor*
- *Purchase items as necessary following the doctor's guidance on lead times and quotes*
- *Other duties as assigned*

■ **Patient Interaction**

- *Greet patients*
- *Direct patient to appropriate treatment room*
- *Schedule future treatment*

■ **Patient Treatment**

- *Take and process patient x-rays per training level and as assigned by doctor*
- *Obtain preliminary patient histories as assigned by the doctor*
- *Obtain patients height, weight, and vitals as assigned by the doctor*
- *Apply physiological therapeutics as assigned by the doctor*
- *Apply manual therapy as assigned by the doctor*
- *Record clinical documentation as dictated by the doctor*

■ **Administrative Duties**

- *Assemble the clinical records necessary for the treatment of patients*
- *Provide a routing slip or other accounting document to record the services received by a patient during the course of an office visit*
- *Transcribe doctor's dictation*
- *Sequence and file clinical documentation*
- *Contact insurance companies or other third party payers for patient insurance benefit information*
- *Contact employers when necessary to obtain information about worker's compensation claims*
- *Screen mail, telephone calls, and visitors*
- *Purge patient files on a schedule established by the doctor*
- *Prepare newsletter on a schedule established by the doctor*
- *Explain the office policy regarding payment for services*
- *Prepare correspondence for the doctor*
- *Contact Medicare as necessary to obtain guidance on their reimbursement policies*
- *Listen patiently to patient complaints and refer them to the appropriate staff person or doctor for resolution*
- *Attend programs as necessary to improve clinical/administrative skills*

■ **Billing**

- *Process routing slips of the accounting documents used to record patient services*
- *Enter data into computer for billing*
- *Bill for patient services on a timetable established by the doctor*
- *Prepare billing for mailing*
- *File office copy of Insurance forms appropriately*
- *Prepare patient statements*
- *Prepare statements for mailing*
- *File office copy of statements appropriately*

■ **Accounting**

- *Apply payments from patients and insurers to patient accounts*
- *Make bank deposits on a schedule established by the doctor*
- *Balance cash drawer on a schedule established by the doctor*
- *Verify payroll data before each payroll date*
- *Prepare payroll*
- *Pay invoices on a schedule established by the doctor*

- *Complete appropriate employment forms for new employees*
- *Arrange benefits for new employees*
- *Make all state and federal tax and other required payments on a timely basis*
- *Prepare accounting reports on a schedule established by the doctor*
- *Answer patient inquiries as it relates to their account*
- *Prepare and review financial statements*
- *File state and federal tax forms*
- *Conduct periodic audits*

■ **Maintain the Office**

- *Clean equipment/treatment rooms after each use*
- *Straighten office furniture as necessary*
- *Vacuum and dust office as necessary*
- *Empty waste receptacles as necessary*
- *Arrange reading material and treatment brochures as necessary*
- *Tidy bathrooms as necessary*
- *Clean employee lunchrooms as necessary*
- *Change chemicals in x-ray unit as necessary*
- *Provide maintenance of office equipment as necessary*
- *Organize and maintain storage areas as necessary*
- *Change light bulbs as necessary*
- *Laundry dressing gowns and other items as necessary*
- *Decorate office under guidelines established by the doctor*
- *Arrange for grass cutting/snow plowing as necessary*
- *Arrange for carpet cleaning, painting, or other office maintenance as necessary*

■ **Collections/Accounts Receivable**

- *Collect for services from cash paying patients*
- *Collect applicable patient co-payments and/or deductibles on the timetable established by the doctor*
- *Follow-up with insurance companies on the status of unpaid claims*
- *Follow-up with patients on the status of unpaid claims*
- *Provide clinical documentation as necessary to expedite payment of claims*
- *Keep documentation or records for **ALL** activities*

■ Office Management

- *Serve as the office Medicare Compliance manager*
- *Serve as the office HIPAA contact and compliance manager*
- *Train staff as necessary in the performance of their duties*
- *Supervise the work of staff as assigned by the doctor*
- *Set goals for the staff as assigned by the doctor*
- *Attend programs to improve/enhance clinical and/or administrative skills*
- *Prepare internal marketing information as requested by the doctor*
- *Make all of the preparations necessary for patient education programs*
- *Prepare and place employment ads as assigned by doctor*
- *Interview potential staff members*
- *Design and revise policies and procedures for office staff*
- *Conduct periodic audits*
- *Conduct performance reviews of employees work on schedule established by the doctor*
- *Enforce disciplinary rules as established by the doctor*
- *Make recommendations for payroll and/or benefit increases for staff members*
- *Manage the storage, processing, flow of paper, and electronic records*
- *Provide for the security of electronic and paper records*

Human Relations in Healthcare

Throughout your career you will continually learn the important role human relations provide in healthcare. You will use your knowledge of human behavior to better understand yourself, the patients you serve and your chiropractic team. You play a vital role in building relationships between the patient, doctor, as well as the staff. An effective CTA should strive to evaluate your life experiences in an effort to understand how behavior influences outcomes. By implementing what you learn from these experiences you can then eliminate ineffective behaviors and develop positive behavior patterns that produce favorable results.

A good way to reinforce positive outcomes is to practice different scenarios you may encounter in the practice. Utilizing role play as part of your staff training procedures will allow you to increase your human relation skills and positively impact the growth of your practice. On the following page is one example you can use to improve your patient interaction skills.

STUDY TIPS

PRACTICAL:

Difficult types of patients . . . and how to handle them

Study the table below. With a co-worker, role play different scenarios that can occur in the chiropractic office using the defining characteristics and solutions below. Have your doctor or team leader offer suggestions on ways to improve your scripts so you will be prepared for all types of patients.

Defining Characteristic	Symptoms	Solution
Irritable	tired, nervous, chronically ill, contradictory, jumpy	patience
Inconsiderate	makes trouble, fumes, argues, misrepresents facts	polite patience, respond firmly without argument
Cautious	slow-moving, slow-thinking, indecisive	speak slowly, clearly, taking one thing at a time
Talkative	babbles, loses track of conversation, tells family history, over shares	tolerance, courteous closure of the conversation
Snobbish	high hats (to snub) the DC or CA, makes patronizing remarks	rigid politeness, good disposition without defensiveness
Suspicious	doubts sincerity, accuracy, and representations, cynical of claims	clear, detailed description of points, and unruffled temperament
Decisive	smart-alec, impatient, intolerant	good humor, respect, and patience
Indecisive	timid, indefinite	clear presentation of facts, tactful making up of his/her mind
Frugal	stingy, thrifty, interested in price and expense	justification and understanding

“People need loving the most when they deserve it the least.”

Creating a Positive Work Environment in Your Practice

The work environment is key in determining employee satisfaction and productivity, and in turn, in achieving the organization’s mission. Although management plays a major role in shaping the environment, we all play a part, regardless of the position we hold.

The following 10 tips will assist you in building a positive work environment:

- Treat others with respect.
- Communicate effectively.
- Create an inclusive work environment.
- Be proactive in identifying and solving problems.
- Coach, counsel, document, and provide feedback on a regular basis.
- Ensure your organization is in compliance, adopts sound policies, and communicates expectations.
- Provide excellence in internal customer service, as well as external.
- Be discreet and ethical in all interactions.
- Build the best team possible.
- Infuse fun with work.

Responsibilities of Licensure

To be a professional in your field, continued learning is a key element of a successful individual. Even if your state does not yet recognize a Chiropractic Therapy Assistant as a licensed profession, the Chiropractic physician you work for is licensed. Visit your state's website and read the statutes and rules for chiropractic. If your state does have a recognized licensure or certification, it is your responsibility to stay on top of laws and regulations that are continually evolving.