



## PMA Members Site Index

There are two levels in each category.

Level one is usually the more basic material and level two is more advanced.

When looking for a document or resource, try to find it by using the outline and index below.  
If that fails, use the search engine on the Members site.

Finally, if all else fails, contact us at [Services@pmaworks.com](mailto:Services@pmaworks.com)

- 1. Practice Play Book**
  - 2. Practice Management**
  - 3. Practice Marketing**
  - 4. Special Promotions by Month**
  - 5. Audio Library**
  - 6. Video Library**
  - 7. Special Training Courses**
- 

### PRACTICE PLAY BOOK

#### **Practice Playbook**

Playbook Intro Audio

Welcome-to-your-Practice-Playbook

#### **3 Goals Practice Playbook**

3 Goals Office Manual cover TOC(DOC)

Aristotle Cover Page

1.0 3 Goals Management Introduction(PDF)

#### **General Team Rules**

1.2 JD-General Staff (DOC)

Employee Handbook-SAMPLE(DOC)

Sample Team Mission Statement (DOC)

#### **Front Desk**

0.00 Front Desk Grid 1-5 (DOC)

1.0 1- Front Desk Checklist (DOC)

1.01 Checklist Worksheet - FD (DOC)

#### **Billing and Collections**

0.00 Patient Accounts Grid 1-5 (DOC)

1 00-Billing and Collections Checklist(DOC)

1.01 Checklist Worksheet - B&C (DOC)

#### **Staff Clinical & Hallway Therapy**

0.00 Staff Clinical Grid 1-5 (DOC)

1.00 X-ray-Diagnosis Checklist (DOC)

1.10 Therapy Checklist (DOC)

1.11 Checklist Worksheet - Staff Clinical(DOC)

#### **Doctor**

1.00 Doctor Grid 1-5 (DOC)

1.1- Doctor Checklist (DOC)

1.2 Checklist Worksheet - Doctor (DOC)

#### **Case Management**

0.00 Case-Wellness Grid 1-5 (DOC)

1.00 Case Management Systems Checklist(DOC)

1.10 Checklist Worksheet - Case Mgmt(DOC)

1.13 Case Management Description(DOC)

1.30- New Patient Flow(DOC)

1.40- Tx Program Completion(DOC)

1.50- Patient Progress Sheet(DOC)

Moring Preview-form(DOC)

Starting Your Day(DOC)

#### **Marketing**

1.00 Marketing Grid 1-5 (DOC)

1.01 Basic Mktg Dept Checklist (DOC)

1.02 The Marketing Checklists-1-7 (DOC)

1.03The Marketing Checklists-8-13 (DOC)

1.04 Checklist Worksheet - Marketing (DOC)

1.4 MMS-Basics (DOC)

4.3 One Month Planner (DOC)

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## Leadership

- 1.00 Leadership Grid 1-5 (DOC)
- 1.0-Leadership Checklist (DOC)
- 1.01 Checklist Worksheet - Leadership (DOC)

## Management

- 1.00 Management Grid 1-5 (DOC)
- 1.01 Office Management (DOC)
- 1.02 Checklist Worksheet - Office Mgmt (DOC)

## Business

- 0.00 Business Grid 1-5 (DOC)
- 1 00 Business Checklist (DOC)
- 1.01 Checklist Worksheet - Bus. Mgmt

## PRACTICE MANAGEMENT

### 3-Goals Management Intro

- 1-0-3-Goals-Management-Introduction-rb
- Motivation – Level 1
- Motivation Checklist
- Starting Your Day
- Sample Mission Statement

### General Team Rules

- 1.2-JD-General-Staff
- Employee Handbook-SAMPLE
- Sample-Team-Mission-Statement

### Front Desk – Level 1

- 0.00-Front-Desk-Grid-1-5
- 1.0-1-Front-Desk-Checklist-3a
- 1.01-Checklist-Worksheet-FD (
- Personal-Appointment-Calendar 2011
- Appointment Calendar2011

### Front Desk – Level 2

- A New Way To Monitor Patient Retention
- Health History (DOC)
- Loss Control System - .
- Telemarketing Script - Reactivation

### Billing, Patient Accounts – Level 1

- ABN-Word Format customizable for your office (Doc)
- ABN- Instructions (PDF)
- Medicare Instructions (PDF)
- Patient-Accounts-Grid-1-5 ( Doc)
- Billing and Collections-Checklist ( Doc)
- Checklist-Worksheet-for Billing & Collections ( Doc)

Petty, Michel & Associates, last revised 1/5/2011

- Christmas Letter 50% reduction (Doc)
- Christmas Letter 50% reduction-#2 (Doc)
- Christmas Letter write-off (Doc)
- Do You Have New Insurance (Doc)
- WI CEB Ins Letter .
- ABN –
- ABN-Use
- Medicare Treatment Plan

### Billing, Patient Accounts – Level 2

- Billing & Collections Checklist (Doc)
- Billing and Collections Checklist (Doc)
- Billing and Collections CA Job Description (Doc)
- Post Report Purpose (Doc)
- Post Report Procedure (Doc)
- Post Report Procedure (Doc)
- Post Report Checklist (Doc)
- Patient Policies and Procedures Consult Scripting (Doc)
- Insurance Backlog Procedure (Doc)
- Past Due Reminder (Doc)
- Past Due Reminder (Doc)
- Patient Financial Policies Sample (Doc)
- Staff Policies regarding Patient Finances (Doc)
- New Insurance Tent Poster (Doc)
- REFUND (Doc) SAMPLE customize as needed
- REFUND2 (Doc) SAMPLE customize as needed
- REFUND3 (Doc) SAMPLE customize as needed
- REFUND4 (Doc) SAMPLE customize as needed
- Medi-Fraud-Free-DM
- Year End Checklist for Flex Spend
- MultiCare Treatment Plan pg 1
- MultiCare Treatment Plan pg 2
- MultiCare Treatment Plan pg 3\_5
- Timely Filing

### Staff Clinical – Level 1

- Staff Clinical Grid-1-5
- X-ray Diagnosis Checklist
- Therapy Checklist
- Staff Clinical Checklist Worksheet

### Staff Clinical – Level 2

- Massage Therapy Scripting
- Health History (DOC)

### Clinical – Doctor Procedures – Level 1

- 1.00-Doctor-Grid-1-5
- 1.1-Doctor-Checklist-3a
- 1.2-Checklist-Worksheet-Doctor
- 1.5- PRESCRIPTION FOR CARE
- Medicare subsequent visit documentation
- SOAP Sample

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## **Clinical – Doctor Procedures – Level 2**

SOAP Sample 2  
SOAP Note

## **Case and Wellness Management – Level 1**

Case Wellness Grid-1-5  
Case Management Systems Checklist  
Case Management Checklist Worksheet  
Case Management Description  
New Patient Flow  
New Patient Log & Checklist  
Treatment Program Completion  
Patient Progress Sheet  
Morning Preview form  
Starting Your Day  
Informed consent

## **Leadership – Executive – Level 1**

Leadership Checklist(Customizable WORD Doc)  
Leadership Grid-1-5 (Customizable WORD Doc)  
Leadership Checklist Worksheet

## **Management HR Procedures – Level 1**

Hiring interview evaluation form  
Front Desk Coordinator Craig's List Ad  
Counter Top tent hiring ad  
Management Grid 1-5  
Office Management  
Office Management Worksheet Checklist

## **Management HR Procedures – Level 2**

Ad for CA  
CA performance review form & pay scale  
CA performance review form & pay scale (PDF)  
CA Recruiting Procedure (Doc)  
CA Recruiting Procedure (PDF)  
CA Training Questionnaire (Doc)  
CA-weekly report- new (Doc)  
Craig's List posting for Therapy Assistant (Doc)  
Employee Handbook Questionnaire (Doc)  
Hiring Interview evaluation form (Doc)  
How to Make Your Own Office Manual (Doc)  
Job description for employee reviews (Doc)  
Management Checklist (Doc)  
Memo to Office Managers-Extra Work (Doc)  
Mission And Results Staff Mtg Workshop (Doc)  
Monthly Statistics Report (Doc)  
Office Manager Job Description(Doc)  
Organization Chart-General (PDF)  
Organization Chart-Simple (Doc)  
Performance Monitors (Doc)  
Phone interview (Doc)  
Practice Scorecard (Doc)  
Productive Staff Meeting(Doc)

Productive Staff Meeting(2) (Doc)  
Staff Discipline (Doc)  
Staff Policy Regarding Bonus (Doc)  
Staff Proposals (Doc)  
Staff Training Tips (Doc)  
Statistic Definitions (Doc)  
Target Graph (Doc)  
Target Graph exp (EXCEL)  
Target Graph (EXCEL)  
Target Graph Procedure (Doc)  
The 3 Roles of Staff (Doc)  
Tips on hiring staff (PDF)  
Why Plans Don't Get Done (Doc)  
Your New Staff Member First Week

## **Business – Accounting and Financial – Level 1**

Business Grip – 1-5  
Business checklist  
Business Management Worksheet – Checklist  
Business Management Checklist

## **Miscellaneous – Level 1**

Staff Training Checklist  
Patient Notice  
Notice of Privacy  
FAQs  
Informed Consent  
HIPAA FAQ re-marketing  
HIPAA Compliance Program  
New Patient Log  
Practice Scorecard  
Scorecard Monthly Report(DOC)

## **Miscellaneous – Level 2**

Door sign- -

## **PRACTICE MARKETING**

### **Motivation – Level 1**

Motivation Checklist  
Starting your Day  
Sample Mission Statement  
Your New Staff Member's First Week

What are motivational tent posters and how can I use them?

Ambitious Goal  
Adventure  
Aristotle  
Business-2 functions  
Drive Your Business

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Getting ahead  
Happiness  
Time Will Not Delay  
Visualization  
What you put into the hours

## **Motivation – Level 2**

Motivation Checklist  
Successful Marketing Attitudes:  
Morning Preview-form  
Motivational Quotes  
Knowing Your Competition  
Telling Your Story  
Keeping Practice Fun  
Productive Staff Meeting  
28 Qualities of A Clinic Leader-  
The Certainty Principle of Practice Development  
RULE 9  
The Best Chiropractic Marketer

## **What are motivational tent posters and how can I use them?**

Action Quotes  
BJ Palmer  
Believe in what you do  
Bold Missions Tent Poster  
Confidence  
Courage  
Direction we are headed  
Disney-Special  
Expectation  
Faith Gratitude Tent Poster  
Go after what you want  
Goals- Aristotle  
Heart and Intuition Tent Poster  
Kindness  
Leadership in actions  
Lean purse  
Life is an experiment  
Life is an opportunity  
Inspiration and Action Tent Poster  
Management Tent Poster  
Mission-sony  
Mother Theresa Tent Poster  
Not enough goals  
Old problems  
Opportunity Knocks  
Optimists  
Proverb  
Seriousness  
Setting goals  
Success Tent Poster  
Successful people  
Success - Wooden

Symptoms  
Sunshine to others  
Summer  
The past cannot be changed  
To laugh often  
Vision not clouded by fear  
What it was lived for  
What would you do  
Where we are going

## **Extraordinary Service – Level 1**

General Internal Checklist  
Extra-Ordinary Service Checklist  
Using Patient Surveys.  
Patient Survey  
New Patient Welcome Letter  
Sign In Sheet

## **Extraordinary Service – Level 2**

General Internal Checklist  
Extra-Ordinary Service Checklist  
Birthday Card Procedure.  
Extraordinary Service Tips.  
Speed of Service Survey  
Promoting Massage Therapy Services  
Massage Therapy Poster  
Nutritional Services Letter  
Nutrition Health Care Check  
Promotional Resume Questionnaire  
Resume Promo

## **Patient Education – Level 1**

Patient Education Checklist  
Success-Story-Procedure  
Success Story Form  
Success Story Survey  
Success Story Interview  
Our patients speak  
In Room Rapport  
Report Of Findings Sample Script  
Three Phases of Care

## **Patient Education – Level 2**

Patient Education Checklist  
Dr. Letter to Patients - Last To Show, First to Show  
Dr. Letter to Patients - When You Are 93 –  
Dr. Letter to Patients - Chiropractic is Best.  
Fact of the Week.  
New Patient Workshop Brochure  
Patient Brochure Program  
Patient Education Prompts  
Spinal Care Class (SCC) sign-up sheet  
Spinal Care Class (SCC) Outline

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## **Referral Generations – Level 1**

Referral Checklist  
Referral Scripts  
Good Patient Award  
Business Cards  
Business Card Quota System

## **Referral Generations – Level 2**

Referral Checklist  
Selling Your Services  
Fast and Effective Office Brochure  
Sample Office Brochure  
Guest Pass Program Instructions .  
Guest Pass Program Instructions (PDF)  
Guest Passes - Customizable  
Referral Recognition Programs  
Spinal Care Class Referral Form  
Why we promote - A letter to Patients

## **Retention, Recall, Reactivation – Level 1**

Retention, Recall, Reactivation Checklist  
Exercises in Patient and Staff Communication  
Financial & Service Consultations  
Fall reactivation letter (doc)  
Fall reactivation coupon (doc)  
Reactivation Letter Inside Sample, (front) &  
Reactivation Letter Outside Sample (back)  
Reactivation Letter Inside Sample-2,(front) &  
Reactivation Letter Outside Sample – 2 (back)  
Personal Appointment Calendar .  
Reactivation Program  
Treatment Plan Purpose  
Treatment Plan Forms  
Recall Log Procedure –  
Recall Log -  
Handling Patients that Cancel -  
Missed Appointment Handling -  
Reactivation Tips and Tricks

## **Retention, Recall, Reactivation – Level 2**

Retention, Recall, Reactivation Checklist  
Flex Spending Checklist  
Reactivation Letter (front)  
Reactivation Letter (back)(Doc)  
Unused Benefits Ad  
Health Care Club  
Restart coupon  
Sample Newsletter  
Sample Newsletter  
Sample Newsletter BG  
Sample Newsletter-bg  
Sample Newsletter -SO  
Sample reactivation letter-restart  
Sample reactivation letter-restart

Sample reactivation letter  
Three Phases of Care  
Telemarketing Script - Reactivation  
Loss Control System -  
A New Way To Monitor Patient Retention.

## **Special Promotions – Level 1**

Special Promotions Checklist  
List of Special Promotions  
Dates for Special Promotions  
Patient Appreciation Day Newsletter  
Patient Appreciation Day-Allied Services Voucher  
Patient Appreciation Day-Adjustment Voucher  
Patient Appreciation Day-poster-1  
Patient Appreciation Day-poster-2  
Patient Appreciation Day Poster-3  
Community Appreciation Day - Sample  
Community Appreciation Day Poster  
Care to Share Poster

## **Special Promotions – Level 2**

Special Promotions Checklist  
Leprechaun Week  
Kids Day Ad - Sample  
Kids Day Press Release - Samples  
Seniors Day Program - Cover  
Backpack Safety Week -Poster  
Bring a Buddy  
Teachers Appreciation Program  
Teacher Appreciation - Letter to School  
Administrator  
Low Back Pain Awareness Month  
Subluxation Awareness  
Pinched Nerve Awareness Week  
Mother's Day Poster - Flower  
Father's Day Poster - Front Desk  
Saturday with Santa Poster  
Holiday coupons for referrals  
Valentine's Card - Special Promo  
Cinco de Mayo ad-small  
National Correct Posture Month Program  
Thanksgiving Turkey Drawing Poster  
Donation Drive Handout  
Food Drive Poster  
Ladies Night Out Poster  
Girls Night Out Poster  
Solicit Vendors for Networking Event  
Internal Networking Event

## **Community Education – Level 1**

Community Education Program Checklist  
Community Education Program Steps to Take  
Community Education Program  
Different Topics for Community Education Program

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Community Education Calendar-sample  
Community Education Program Calendar - Blank  
Community Education Program Calendar Checklist  
- Sample  
Community Services Calendar  
Community Education Program Planner-sample  
Community Education Program Planner-blank  
Headache Workshop Poster  
Headache Awareness Week Poster  
Workshop sign-up sheet-Headaches  
Headache Awareness Week ad  
Health Tips  
Scoliosis Workshop Poster  
Scoliosis Workshop Ad  
Neck Pain - Poster  
Neck Pain - Ad  
Stress Workshop Poster  
Strains-Sprains Workshop Poster

## **Community Education – Level 2**

Community Education Program Checklist  
Auto Injury Awareness Month -ad  
Auto Injury ad-general  
Arthritis Press Release  
Arthritis - Nutrition Workshop Poster  
Arthritis Workshop Ad  
Cold and Flu Workshop Poster  
Carpal Tunnel ad  
Carpal Tunnel Awareness Week Poster  
Carpal Tunnel Poster - Sample  
Chronic Fatigue Syndrome Workshop -general  
Face lift and allergy ad-sample  
Foot Pain Workshop Poster  
General Workshop Survey  
Golf Workshop Handout  
Golf Press Release  
Leg Pain Workshop Poster  
Osteoporosis Screening - general- Osco  
Pregnancy Workshop Flyer  
Shoulder Pain Workshop Poster  
TMJ Ad  
TMJ Workshop Poster  
Whiplash Workshop Poster  
Women's Health Workshop Poster - general

## **Direct Advertising – Level 1**

Direct External Checklist  
Advertising Checklist  
A Check Up for Them Offer -  
Marketing Your New Practice  
1 to 1 Marketing  
The 3-Foot Rule  
Direct Mail - Acquainted  
Promotional Sales Letters

Radio Ad  
Sample Ad - General  
Small ad for college  
Testimonial ad  
Chiropractic Internet Marketing Assistant  
Facebook Marketing –  
Care to Share Reviews  
Web Site Information Checklist

## **Direct Advertising – Level 2**

Auto Accident Victim Letter  
Business Card Quota  
Community Information Survey  
Direct Response Ad - Struggle with Pain  
Guest Pass  
Health Care Check  
Phone Book Survey  
Promotional Sales Letters  
Sample PI ad-Injury evaluations  
Sample magazine ad- Your options  
Sample Ad - General2  
Sample Ad - General  
Sample Ad - Osteoporosis  
Secretaries Day Gift Certificate  
Testimonial Sr ad  
Union Directory  
Window Sign  
Yellow Page Ideas

## **Professional Referrals – Level 1**

Business and Professional Checklist  
Relationship Marketing  
What is a Practice?  
Alliance Data Base  
Business Letter  
Letter to Arrange Lectures  
New Patient Letter to M.D  
Year End Thank You to Allies

## **Professional Referrals – Level 2**

Business and Professional Checklist  
Scheduling External Events at Local Businesses  
and Groups (PDF)  
Alliance Data Base  
Attorney Letter  
Attorney Letter-2  
Business Letter-2  
Business Appreciation Wk -2  
Business Appreciation  
Business Follow-up Letter  
Business Outreach Project  
Referral letter from MD to MD  
Secretaries Day Gift Certificate

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## **Public Relations – Level 1**

Public Relations Checklist  
New doctor press release  
Press Release - Headaches  
Press Release - TMJ  
Published Press Release - Donation Program

## **Public Relations – Level 2**

Public Relations Checklist  
Public Relations For Programmer  
Tips for Writing a Press Release  
Press Release - Headaches - Template  
New doctor press release  
Nutritional Services Press Release  
Press Release - TMJ  
Press Release - Ritalin  
Sample press release to chiropractic school  
Published Press Release - Donation Program  
Published Press Release - Grand Opening  
Published Press Release - Grand Opening  
Press Release - Kids Day  
Published Press Release - New Services  
Published Press Release - School Lecture  
Published Press Release - Seniors Day  
What is Public Relations and How does it compare to Direct Marketing

## **Community Services – Level 1**

Screening Manual (PDF)  
Editable Screening Registration Form  
Screening Technician Training Checklist

## **Community Services – Level 2**

Community Marketing Opportunities  
Community Services Phone Interview .  
External marketing script .  
Recurring External Events-Summary (DOC)  
Scheduling External Events(PDF)  
Spring Marketing Plan-10 (DOC)  
Spring Marketing Plan-blank –

## **SPECIAL PROMOTIONS BY MONTH**

### **January Special Promotions – Level 1**

Healthy Start Coupon -  
New Year Health Advertisement –  
Weight Loss Workshop Poster  
Blame Someone Else Day Promo

### **February Specials Promotions – Level 1**

Valenspine Coupon –  
Valentine's Day Massage Poster –  
Valentine's Day Handouts

Valentine's Card - Special Promo  
Have a heart Coupon –

### **March Special Promotions – Level 1**

St Patrick's Day Promotion -  
Leprechaun Week –  
Leprechaun sign up sheet  
Nutritional Workshop  
Chronic Fatigue Syndrome Workshop -gen

### **April Special Promotions – Level 1**

Chiropractic and Earth Day-for patients  
Easter Egg Promotion  
Golf Workshop Handout –  
Golf Press Release  
Golf poster

### **April Special Promotions – Level 2**

Organic Health Week with Posters

### **May Special Promotions – Level 1**

Cinco de Mayo small ad -  
Mother's Day Poster - Front Desk -  
Mother's Day Poster - Flower -  
Mother's Day Card -  
National Correct Posture Month  
May Letter from the doctor  
Letter to school administrator from the Doctor  
Letter to teacher from the Doctor  
Teachers Appreciation Poster  
Teachers Appreciation Pgm-h  
Osteoporosis Screening  
Arthritis Awareness Week Poster  
Arthritis Workshop Poster -gen  
Arthritis Workshop Ad - gen  
Senior's Week Poster  
Seniors Day Program

### **June Special Promotions – Level 1**

Father's day card  
Fathers day card envelope  
Father's Day Poster - Front Desk  
Headache wkshop Ad  
Headache Awareness Week ad  
Headache workshop ad  
Headache workshop Ad - Sample  
Headache Workshop Poster  
Headache Workshop Poster  
Sizzling Summer Special

### **July Special Promotions – Level 1**

Employee Appreciation Day -

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Food Drive Poster July  
Care To Share Massage Credit Program  
Care to Share

## August Special Promotions – Level 1

A Check Up for Them Offer –  
Kids Health Care:  
Kids Day Ad - Sample  
Kids Day Press Release - Samples  
Press Release - Kids Day-h  
Back To School Health Week  
Back to School (pdf)  
Back to School (doc)  
Back to school banner sample  
Back Pack Safety Week  
Back Pack Safety Day - Parent Handout

## September Special Promotions – Level 1

Back Pack Safety Week  
Back Pack Safety Day - Parent Handout  
Meditation Workshop-1  
Meditation Workshop -2  
Bowhunters workshop (doc)  
Bowhunters workshop (doc)

## October Special Promotions – Level 1

Cold and Flu Workshop Poster-1  
The Medical Profession Flu  
Shoo Flu Poster Swine -Flu  
Shoo Flu Poster  
Spinal Health Awareness Poster  
Chiropractic Madness Halloween promotion  
(pdf)  
Health Halloween Program (doc)

## November Special Promotions – Level 1

Thanksgiving Turkey Drawing Poster  
Food Drive-Donation Program  
Food Drive Poster- Donation  
Food Drive Poster - Donation  
Donation Drive Sample Handout  
Donation Drive Press Release - Sample  
Girls-Night-Out

## December Special Promotions – Level 1

Holiday coupons for referrals  
Holiday coupons for referrals  
Poster for Christmas coupon  
Holiday Health Poster  
Holiday Massage Poster  
Poinsettia coupons  
Do You Have New Insurance (Doc)  
Christmas Letter 50% reduction (Doc)

Christmas Letter 50% reduction-#2 (Doc)  
Christmas Letter Write off (Doc)  
Donation Drive Press Release - Sample  
Donation Drive Sample Handout  
Food Drive Poster  
Food Drive Poster  
Food Drive Poster  
Food Drive-Donation Program  
Saturday with Santa Poster  
Girls Night Out-Poster  
tent poster  
tent poster  
Retention, Recall and Reactivation  
Reactivation Tips and Tricks  
Year End Thank You to Allies

## AUDIO LIBRARY

### Classes for Chiropractic Assistants

Part 1: Basic Principles Of Chiropractic and the Professional Chiropractic Assistant (MP3)  
part 2: Creating Life-Time Patients Through Excellent Service (MP3 64MB)  
Part 3: Using the Marketing Manager System to Generate New Patients(MP3)  
Part 4: Supporting Your Doctor, Patients, and Team Through Extra-ordinary Service(MP3)  
Part 5: Scheduling Expertise(MP3)  
Part 6: Chiropractic Philosophy for the C.A.(MP3)  
2009 -Goal Setting for the CA (MP3)  
2009-The Killer Front Desk (MP3)  
2009-Your Career as a Chiropractic Assistant (mp3)  
January 2010- Retention-and-Recalls(mp3) with Phyllis Frase  
February 2010 - Your Spring and Summer Marketing Plan (mp3) with Ed Petty  
May 2010- Chiropractic 101 for the Chiropractic Assistant (mp3)

### Classes on Reimbursement

Part 1 - The Basics - Terms and Technology, #1 Insurance (mp3)  
Part 2 - The Post Report, also known as the Financial Consultation. - #2 Insurance (mp3)  
Part 3 - Account Management - #3 Insurance (mp3)  
Part 4 - Advanced Collections Techniques. #4 Insurance (mp3)  
Patient Financial Consultation Expertise (mp3)  
2009 -10 Steps to Improve Collections at Year End and at the Beginning of the New Year (mp3)



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April 2010 -Converting Insurance Patients to Cash -  
Creating a wellness practice one financial  
consultation at a time (mp3)

August 2010- Tips and Tricks to Better Collections  
with less work. (mp3)

November 2010- Tips to improve year end  
collections and better collections in the new year

## **Basic Doctor Information**

Report of Findings Expertise - Dr. Peter Kevorkian  
(mp3)

March 2010 Reclaiming The Joy of Practice - Dr.  
Tom Potisk (mp3)

July 2010 - Automate Your Practice - Dr. Tom  
Potisk (mp3)

## **Basic Marketing Information**

2009 – Eight Marketing Actions That Work (mp3)

2009 - Chiropractic Marketing (mp3)

2009 - Holiday\_Marketing-2009 (mp3)

2009 - Effective Summer Marketing (mp3) June

2010 - Internet Marketing (mp3)

September 2010 - Marketing to Make the End of  
2010 Rock! (mp3)

October 2010 - Networking & Internet Marketing  
2010

## **Miscellaneous Teleclasses**

December – Year End Rally 2010

## **VIDEO LIBRARY**

Coming Soon

## **SPECIAL TRAINING COURSES**

Coming Soon