

Overview of Forms for Patient Coach Binder

1. Patients on Programs – All Patients at a Glance (By Purchase Date)
2. Patients on Programs – All Patients at a Glance (Alphabetical)
3. Patients on Programs – Scheduled Personal Contact Times
4. Patients on Programs - Patient Follow Up Sheet
5. Patients on Programs – Daily Follow Up Time Log
6. Patients on Programs – Tickler Future Follow Up

(Forms below are abbreviates at P.O.P – instead of Patients on Programs)

Patient Coach Binder Instructions

1. Each day the office manager gives patient coach “P.O.P. – All Patients At a Glance” forms in two forms Alphabetically and By Date Purchased
 - a. Take the new names off of the list and enter them on a new sheet, “P.O.P. – Patient Follow Up Sheet”
 - b. Call each new patient and explain to them that you are their “Personal Coach” and that you will be calling them once a week. Explain the “Hawthorne Effect” and the importance of having someone on their side helping to monitor their progress
 - While on the phone, determine the best time and phone number for the weekly call. When you decide the best time log that on “Patients on Programs – Scheduled Personal Contact Times” so you’ll remember the best time to call them.
 - Enter the new time to call the patient on the “P.O.P. – Tickler Future Follow Up” sheet
2. Each day, your top priority during downtime is calling patients on programs. Using the log “P.O.P. – Daily Follow Up Time Log” enter all the time spent and the results of each call.
 - a. Enter specific patient information about every single call on “P.O.P – Patient Follow Up Sheet”
 - b. If there are ANY problems or concerns that you can’t resolve, “red flag” that and review with the Doctor on that day
 - c. Fill in a new follow up date and enter it on “P.O.P. – Tickler Future Follow Up” sheet
3. If any patients are finished with their program today, put a check by their name on the “P.O.P. – All Patients At a Glance” form and give it back to the office manager so she can take them off the list
4. Take the “P.O.P.-Patient Follow Up Sheet” forms from finished patients and move them into the Maintenance Binder.