

How to Give a Rock-solid REPORT OF FINDINGS

By Jeffrey Grossman, BA, L.Ac.





The inside guide to a rock solid report of findings

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Jeffrey is available to speak on the subjects contained in this e-book. Feel free to contact him for information regarding speaking, teaching and coaching engagements.

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Hello there!

I am pleased to add this e-book to our line of practice e-books.

In acupuncture school, they teach us everything we need to know about making the correct diagnosis, choosing the right formula to treat a specific syndrome. We learn about cupping, Gwa Sha, running piglet syndrome, clean needle technique. The list goes on and on.

School was a wonderful place to learn how to help people to get well and stay healthy. But after being in practice for over 12 years, I have realized that there were some VERY important things that I was never taught, that are NECESSARY in order to establish and grow a fruitful, prosperous practice.

One of the main tools I have learned and mastered over the years is how to give a Report of Findings (ROF). I believe that an ROF is one of the cornerstones for developing a successful practice and having thoroughly educated patients.

When our patients become aware of what's wrong with them, what they will be receiving under our care, their expected number of visits and what it will cost, they tend to stay in care longer and refer others.

An ROF, when done correctly answers the five main questions ALL patients have, whether they come right out and ask them or not. In this e-book you will learn what those questions are and how to give a rock solid ROF.

Take as much away from this e-book as you possibly can. Because I strongly feel that ROF's can make or break a successful practice.

Thank you! I wish you health, joy, peace and prosperity.

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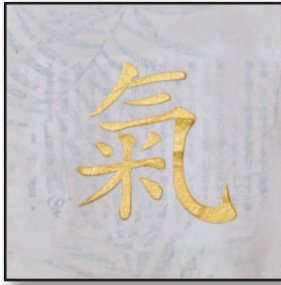
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What is a Report of Findings?

A Report of Findings (ROF) is the cornerstone of a successful, systematized practice. It is one of the most important communication/education tools that you will use with your patients. This brief (10-15 minute) internal procedure defines patient problems and discusses your proposed solutions. The ROF allows you to take all of the diagnostic information that you have gathered from their initial visit and create a clear picture of the specific meridian/organ imbalances. It also helps set a course of treatment and a timeline of care. Patients will take notice when you place all the pieces of their health puzzle together in this simple and organized way.

An ROF is usually given on the second visit and includes:

- What you found
- What meridians/organs are out of balance
- What you are going to do
- How long it will take
- A proposed re-evaluation date
- Self-care recommendations
- Any do's and don'ts you want to suggest

When done correctly, an ROF helps patients recognize the benefits of what you have to offer; through this you will receive better compliance and follow-through on their part. The ROF is imperative to private practice success. This is the single-most important step for the success of your practice, along with your patient's recovery.

How many practitioners offer a Report of Findings? Not many. But this is so important. I believe it is one of the key things you can bring to your practice. I encourage you to give it a try and start doing Reports of Findings with your patients.



Why Present a Report of Findings?

An ROF empowers your patients. Most new patients can be naturally skeptical about acupuncture care because they are uninformed. Part of our job as practitioners is to educate them in the best way possible as to what is wrong and how we can help.

Providing a patient with a comprehensive ROF supports and grows awareness in your patients. After the initial session, your job is not only to present them with a clear outline of what you have discovered, and the type of care and treatment you will provide, but also keep them curious and interested in their body and the overall healing process. It is a way of explaining to them in detail, what you found and how you plan to help them.

An ROF helps foster an understanding of how acupuncture works. And when your patients are aware of what acupuncture is, what it can do and how it can help, they are able to convey a clearer message to their friends, family and co-workers. This translates into word-of-mouth referrals for you.

When presented properly, an ROF will answer the five key questions that most patients have. During your ROF, answering these five important questions to your patient's satisfaction will help get them on board for long-term care. Here are the questions:

1. What's wrong with me? Patients want to know what is wrong with them. As a practitioner, you will need to answer this question to ease their mind.
2. What will you do to help me? Patients want to know not only if you can help them, but how you will do it. I have found that the more you explain, the more they will comprehend. The more they comprehend, the greater the potential for them to follow through with the treatment plan and refer new patients to you.
3. How long will it take? This is important. Create a time frame that both you and your patient will be able to work within. It will provide your patient with the knowledge of how many visits they

will require, and allow them to plan the necessary time and budget for the proposed treatment. Having a time frame also creates a future date in order to re-evaluate the patient's progress, and lets them know they won't have to be on an aggressive treatment schedule indefinitely.

4. How much will it cost? It is important to include this in your ROF so patients will be able to budget the necessary income or co-pay so that there are no surprises. Be sure to include potential costs of adjunct therapies such as herbs, Tui Na, electrical stimulation etc.
5. Will my insurance cover it? A simple yes or no will suffice here.

How Do You Prepare to Give a Report of Findings?

During the initial visit, gather all of your patient's diagnostic information. These are the diagnostics I use:

- I check their tongue
- I check their pulse
- I perform some Ashi point muscle-testing
- I use an electro-meridian imaging scan on the AcuGraph™
- I perform some abdominal palpation

Once you have completed your diagnostic exam, you may want to do a basic treatment. I explain to my patients that this is not a “full” acupuncture treatment. Instead I tell them that I am using specific needle locations to evaluate how their body responds to treatment, and that I am also giving them an idea of what treatment will be like.

Some patients come with expectations of getting better right away, almost like magic-bullet acupuncture. But by explaining the first visit is only an evaluation visit, their “getting better immediately” expectations won't exist. Let them know that if they don't feel any dramatic changes, it's par for the course. This will also create a picture for your patient so they understand exactly what is going on. Most patients want to know what is happening in their body and this is a good way to answer their questions and relieve their fears.



How Do You Present the Report of Findings?

As we discussed earlier, the ROF is presented at the second visit. How you relay this information is key to your success. If you downplay the results too much, a patient will not take the treatment plan seriously. If you use language that is “over their head”, they will not understand the importance of the treatment schedule.

One thing that is very important to relay is that you are reviewing with them their imbalances according to Traditional Chinese Medicine (TCM) diagnosis. The terminology may be foreign to them and they need to know that this is not the same as a Western diagnosis. I want them to know that if I talk about their organs in any way, it doesn't mean they need to run out and get a CAT scan or MRI. I let them know that as we go over the different organ systems that I'm talking strictly from the perspective of TCM, how it views the organ systems and how they correspond to symptoms exhibited, and how acupuncture can be used to help balance the body's systems.

Conveying this clearly is very important; when you are discussing the heart, stomach, and liver, the patient can become quite concerned. You can see it on their face. You need to make explaining Chinese medical diagnosis, in terms they can understand, one of your first priorities. Keep it simple, straightforward and clear.

When you discuss a TCM diagnosis with a patient, it is extremely important to preface ANY conversation about specific organs with a statement like, “The information I am going to share with you today is strictly according to the theories and concepts of Traditional Chinese Medicine (TCM), so, if I say that your Heart is out of balance or your Spleen is out of balance, please, don't run out of here thinking that your are going to have a heart attack or your spleen is going to burst. Remember, I am not making a Western diagnosis; everything from here on out is in terms of TCM. The way an acupuncturist and a Western MD view the body is entirely different. Does that make sense?” Please, don't let your patients leave the ROF thinking that they have a serious problem from the perspective of Western medicine.

Report of Findings

Personal Report of Findings for Huang Di

Date 6/9/2009

Your health concerns
 1) Neck pain
 2) Sleeping problems

3) Fatigue
 4)

What we found

Pulse Spleen, Kidney, Heart
 Tongue Spleen, Lung, Heart
 Abdomen Lung, Spleen, Stomach, Liver, Heart
 Ashi points Lung, Spleen, Stomach, Kidney, Heart
 Emi Lung, Large int., Spleen, Heart, Stomach, Kidney, Bladder

Health Score: Add up the number of signs and symptoms that appear in each meridian network. According to traditional Chinese medical diagnosis, your health score can reflect an overall imbalance within a particular meridian network.

Health Score 10 **Lung & Large Intestine Meridian/Organ Network**

<input type="checkbox"/> Allergies	<input type="checkbox"/> Frontal/sinus HA	<input type="checkbox"/> Small problems
<input type="checkbox"/> Arm/wrist/elbow pain	<input type="checkbox"/> Sneef/sadness	<input type="checkbox"/> Stiff joints/neck
<input type="checkbox"/> Asthma/bronchitis	<input checked="" type="checkbox"/> Lethargy/fatigue	<input type="checkbox"/> Sweating prob.
<input type="checkbox"/> Constipation	<input type="checkbox"/> Loose stools	<input type="checkbox"/> Weak voice
<input type="checkbox"/> Cough/sneeze/phlegm	<input type="checkbox"/> Mucus	<input type="checkbox"/> Wheezing/SOB
<input type="checkbox"/> Eczema/psoriasis/itch	<input checked="" type="checkbox"/> Nasal problems	Other <u>Abdomen</u>
<input checked="" type="checkbox"/> Frequent colds	<input type="checkbox"/> Shoulder pain	<u>Emi 2x</u>
	<input type="checkbox"/> Sinusitis	<u>Ashi</u>

Health Score 7 **Kidney & Bladder Meridian/Organ Network**

<input type="checkbox"/> Adrenal weakness	<input type="checkbox"/> Hot flashes	<input type="checkbox"/> Sciatica/back pain
<input type="checkbox"/> Back/hip/knee pain	<input type="checkbox"/> Impotence/libido	<input type="checkbox"/> Sore throat in a.m.
<input type="checkbox"/> Bladder infec./control	<input type="checkbox"/> Infertility/sterility	<input type="checkbox"/> Tight hamstrings
<input checked="" type="checkbox"/> Brittle bones	<input checked="" type="checkbox"/> Lethargy/fatigue	<input type="checkbox"/> Tinnitus
<input checked="" type="checkbox"/> Cold hands/feet	<input type="checkbox"/> Loss/thinning hair	<input type="checkbox"/> Urine problems
<input type="checkbox"/> Dark/puffy around eyes	<input type="checkbox"/> Night sweats	Other <u>Ashi</u>
<input type="checkbox"/> Depression/fear	<input checked="" type="checkbox"/> Poor memory	<u>Emi 2x</u>
<input type="checkbox"/> Edema/water retention	<input type="checkbox"/> Premature gray	

Health Score 5 **Liver & Gallbladder Meridian/Organ Network**

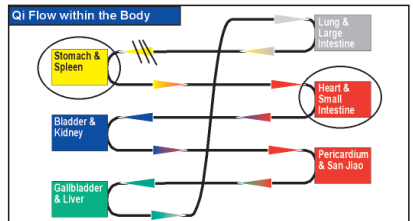
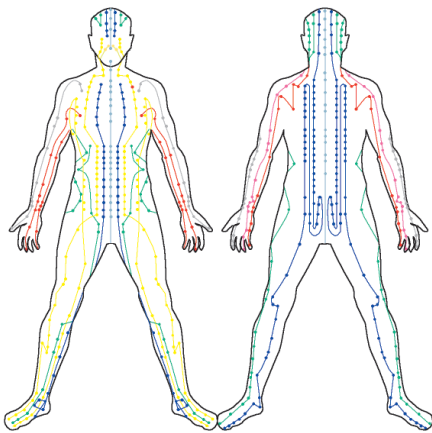
<input type="checkbox"/> Anger/irritability	<input type="checkbox"/> Headaches	<input type="checkbox"/> Nausea/vomiting
<input type="checkbox"/> Breast tenderness	<input type="checkbox"/> Hemorrhoids	<input type="checkbox"/> PMS
<input type="checkbox"/> Brittle/coarse nails/hair	<input type="checkbox"/> Indigestion	<input checked="" type="checkbox"/> Stiff neck/shoulders
<input type="checkbox"/> Bruising	<input type="checkbox"/> Irritable bowel	<input type="checkbox"/> Tension/cramps
<input type="checkbox"/> Depression	<input type="checkbox"/> IT Band tightness	<input type="checkbox"/> Tinnitus
<input type="checkbox"/> Distention/bloating	<input type="checkbox"/> Lack of flexibility	Other <u>Abdomen</u>
<input type="checkbox"/> Eye/vision problems	<input type="checkbox"/> Menstrual irreg.	
<input type="checkbox"/> Fatigue	<input type="checkbox"/> Migraines	

Health Score 11 **Heart & Small Intestine Meridian/Organ Network**

<input type="checkbox"/> Abdominal pain	<input type="checkbox"/> Hot flashes	<input checked="" type="checkbox"/> Sleep problems
<input checked="" type="checkbox"/> Anemia	<input type="checkbox"/> Hot/painful joints	<input checked="" type="checkbox"/> Tongue/speech
<input checked="" type="checkbox"/> Anxiety/dread	<input type="checkbox"/> Lack of joy/humor	<input checked="" type="checkbox"/> Upper back pain
<input checked="" type="checkbox"/> Digestive troubles	<input type="checkbox"/> Mouth/tongue sores	<input type="checkbox"/> Urine problems
<input type="checkbox"/> Dream dist. sleep	<input type="checkbox"/> Neck pain	<input type="checkbox"/> Wrist pain
<input type="checkbox"/> Elbow/shoulder pain	<input checked="" type="checkbox"/> Palpitations	Other <u>Abdomen</u>
<input type="checkbox"/> Hearing problems	<input checked="" type="checkbox"/> Poor circulation	<u>Ashi</u>
<input type="checkbox"/> Heart problems	<input checked="" type="checkbox"/> Restlessness	<u>Emi</u>

Health Score 15 **Spleen & Stomach Meridian/Organ Network**

<input type="checkbox"/> Abdominal pain	<input type="checkbox"/> Distention/bloating	<input checked="" type="checkbox"/> Muscle weakness
<input type="checkbox"/> Aching/heavy limbs	<input type="checkbox"/> Headaches	<input checked="" type="checkbox"/> Nausea/vomiting
<input type="checkbox"/> Anemia	<input type="checkbox"/> Heaviness at head	<input type="checkbox"/> Poor memory
<input checked="" type="checkbox"/> Appetite/digestive prob.	<input type="checkbox"/> Hemorrhoids	<input type="checkbox"/> Prolapse
<input type="checkbox"/> Belching	<input type="checkbox"/> Hiccups	<input checked="" type="checkbox"/> Worry/overthinking
<input type="checkbox"/> Bruise easily	<input type="checkbox"/> Irritable bowel	Other <u>Abdomen</u>
<input type="checkbox"/> Colic/indigestion	<input checked="" type="checkbox"/> Lethargy/fatigue	<u>Ashi</u>
<input type="checkbox"/> Difficulty focusing	<input type="checkbox"/> Loose stools	<u>Emi 2x</u>



During the ROF, I go over all of the diagnostic information I collected at the first visit. I pull up the EMI scan on the computer to review it. When I go through the ROF, I try to get across all their symptoms and signs, and how they are affecting their body. Then I give them a health score. People relate to numbers. The idea is to get them from whatever number they are at currently, down to zero. Zero means that they have NO signs or symptoms. Not many people have a zero health score, but the goal is to get the initial number of symptoms/signs lowered after

Care Plan & Financial Policy

● = Visits

Care Plan	Relief Care <u>1</u> X week/month for <u>8</u> (weeks) / months
	Corrective Care _____ X week/month for _____ weeks / months
	Maintenance & Wellness Care _____ X week/month for _____ weeks / months

Goals Alleviate neck pain, Improve ROM, Improve sleep and energy levels

Treatment Plan SI 3, Bl 62, Tw 5, LLL7, HT 7, St 36, PC 6,

Recommendations Oriental Nutrition Meridian Exercise Herbal Therapy Self-care education Meditation

Other _____

Date of reevaluation 8/9/2009

Financial Policy	<u>8</u> Acupuncture Visits @ <u>65</u> = <u>520</u>
CARE PLAN DETAILS	<u>1</u> Reevaluation @ <u>125</u> = <u>125</u>
	_____ Cupping/Gua Sha/Tui Na @ _____ = _____
INSURANCE COVERAGE	Hot/Cold/Moxa therapy @ _____ = _____
_____ Number of visits	<u>2</u> Self-care education @ <u>15</u> = <u>30</u>
_____ Co-Pay	_____ Consulting @ _____ = _____
_____	<u>2</u> Herbal therapy @ <u>15</u> = <u>30</u>
	Estimated health care investment <u>\$705</u>

AT THIS CLINIC WE OFFER

MONTHLY PLAN

I, _____ will pay for all outlined acupuncture treatments and services every 2 weeks on the 1st and the 15th of the month for a total of 2 months until my obligation is paid in full. The first installment of my payment is due on _____. I authorize my practitioner to charge my credit card monthly in the amount of \$176.25.

PREPAYMENT PLAN

I, _____ would like to pay for my entire treatment plan with a one-time payment of _____.

TIME OF SERVICE PLAN

I, _____ would like to pay for each of my treatments and services on the day I receive them.

I understand and agree to my Acupuncture Care Plan and financial obligation. I also understand that the success of this plan is dependent upon keeping my appointments, following my acupuncturist's instructions and communicating with my acupuncturist about my case, care and treatment.

Patient Signature _____	Date _____	Acupuncturist Signature _____	Date _____
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your suggested course of care. I let them know where most of their symptoms and signs are, and explain why their health score is what it is. I also explain how an imbalance in one meridian can affect other meridians.

As I go through each of the diagnostic criteria, I use color highlighters. I let my patients know that I want them to see a visual representation of which meridian is out-of-balance. By using color highlighters, and

highlighting each meridian as they show up from your initial exam, they will begin to see the color pattern emerge. It helps create a quick visual reference for the patient, and you, as to which meridian system is most out-of-balance, and may be contributing to their symptoms and signs.

After you have gone through their ROF, the next step is to give them their care plan and recommendations. Not only do your patients want to know what's wrong with them and what you found, but also how long it's going to take. After you present the findings and answer any questions, transition to the recommended care plan and your practice's financial policy.

There are three phases of care: relief, corrective and maintenance/wellness care. It's important to define which phase of care your patients are in. By defining their phase of care, you also define their treatment visit average.

Each phase of care dictates a certain number of treatments. When people/patients are in acute pain, you will want to treat more frequently to help them get out of pain fast. Once ALL symptoms and signs are gone, you may request that they come to see you for seasonal tune-ups and rebalancing treatments. On my forms, I have depicted green dots above their care timeline. Each of the green dots represents a treatment. In relief care they are close together because each treatment builds on the next, and we want to get things moving during relief care, so they will feel better, faster. I will explain the three phases of care, relief, corrective and wellness. I tell them that I don't want to see them forever, but I want to help them move from relief to wellness, as soon as possible. Ultimately, I will only want to see them for seasonal tune-ups a couple of times per year.

In relief care, I usually see people once or twice a week for the first couple of months. I tell them that after two months, we will do re-evaluation so that they can see the changes. When I do a re-evaluation, essentially I will do another ROF in detail.

I will pull out a new ROF form, and go through each of the symptoms and signs that I checked off in their initial ROF. I'll compare them side-by-side and we will see how their health score and symptoms have changed. I'll write down the new goals and recommendations of

care, exercises, self-care techniques, or herbs, etc. If most or many of their symptoms and signs have changed or disappeared, this will be the time to make your patients as well as yourself aware of all of the changes that have happened. Hopefully, your patients will be getting better and by virtue of their improvement, their health score will lower.

When I present the financial policy, I detail the cost broken down by the number of visits and all other things involved in the treatment plan, like self-care and herbs. I give them three options:

1. Monthly Plan – For this, I spread out the cost of treatment over four months, even if the plan only covers two. I tell them that on the 1st and 15th of each month, we will be drafting a set amount from their account.
2. Pre-Payment Plan – We may give a 10% discount if they choose to pay for the recommended services in advance.
3. Time-of-Service – This is self-explanatory.
4. Once the patient chooses which financial option they want, we both sign the form. I place one form in the patient file and send a copy home with the patient in their new patient pack.

The main thing you are doing during an ROF is educating your patients. Remember that this can be very overwhelming, but it is well worth it. Educated patients get better results and stay in treatment longer because they know the plan, and realize that there may be an end of care from you. With this realization, patients understand that you don't want to drain them of their money and suggest you see them weekly, for life! Hopefully, if we do our jobs right, patients come in, get better, tell others and come back to see us for tune-ups or when they become out-of-balance. They become more invested in their health because they are educated and know where to turn in their times of need and support. It builds a connection and trust with you.

At the end of the ROF, pick a date for the re-evaluation. Let's say you tell your patients that after eight visits you will re-evaluate their progress. On the ninth visit, you review your initial exam findings and go over every sign and symptom with them one, by one. Take note of

everything that has changed and the things that have not. Also note the severity, frequency and quality of changes in their initial symptoms and signs.

Re-evaluation When a patient comes to visit you, they do so with obvious symptoms and signs. After you go through your ROF with them, you schedule them for care and after your initial suggested number of visits it's time to evaluate if they made any progress. Setting up a re-valuation date creates a timeline for when you reassess their health and care.

Grab your initial ROF form, the one you went over with them in the first round of treatments. Grab a blank ROF form and compare them side-by-side. As you rattle off the symptoms and signs that they first presented with, you and your patients will notice what did and what did not change. The patient will see the improvements made while under your care and in the diagnostic health score. They will hear you mention symptoms they used to have that they may no longer be experiencing.

I have found that many patients often forget they even had some of the things we initially talked about because as the old saying goes “out of sight, out of mind”. When patients begin to feel better they often forget about the nagging, smaller complaints. It's important to remind them of everything that has shifted for them while under your care. You'll be surprised as to how many complaints seem to disappear as they begin to move their way through the steps of care.

Conducting a re-evaluation is an important step to provide witness to the changes that have occurred from their very first visit, until re-evaluation. After my first re-evaluation I will make further recommendations of care. Hopefully their stage of care has shifted from relief care, obvious pain and other symptoms, to corrective care, things are feeling much better and they still have a few problems, although slight, they still may need to have them addressed.

Conduct a More Effective Report of Findings

Record and rehearse the ROF before you go over it with them. Then you will realize if you are using filler words like “you know” or “like”. Scripting this helps you disseminate the information you want, and it lets you know what props you may need. Know what you are going to say. It is important to come across as a confident professional, communicating in a way that is clear, succinct and straightforward. When you begin to add ROF’s to your practice take out a few files, and present an ROF to a patient that is not there. Have your spouse, friend, colleague or front desk manager there to give you feedback.

Record it so you can go over it and refine it as needed. There is a process that you will and should develop around giving ROF’s. If you have never done them, it will come in time. But don’t let the idea of “perfecting” them keep you from doing them. Jump right in, act as though you have always given them, and everything will fall into place. Practice makes perfect!

Have your tools ready. Have your forms, meridian model, color charts, markers. Whatever you need in order to make your ROF smooth and simple should be easily accessible. I usually have the forms that you see on the previous pages, color markers (so I can highlight each meridian imbalance so they can clearly see a visual representation), a plastic meridian model (so I can show them where their problems are based), and an AcuGraph electro-meridian imaging printout.

Once you have gone through your entire ROF and they have committed to care, schedule them out for ALL recommended treatments. Most patients have a particular day and time that works best for them. I’ll ask them what that is and tell them that it’s best for them to schedule out ALL their treatments so they can be assured to get the day and time that works best for them.

The ROF is one of the most important procedures that you can do to help your practice grow. Your patients become empowered because, to my knowledge, there are few MD’s and other practitioners who use an ROF that clearly point out what’s wrong, what they will be doing for them, how long it will take and how much it will cost.

When patients are informed, they are 10 times more likely to follow through with your suggested care plan, commit to long-term care and refer friends, family and co-workers!

How Do Educated Patients Benefit Your Practice?

Almost every patient who comes to you for acupuncture will inevitably be asked by someone about their acupuncture experience, what you did, what is wrong and even if the needles did or did not hurt. It's important for your patients to have a simple and clear understanding of acupuncture and what you found, so they can pass on the information in an intelligent and correct way that eventually leads to more referrals for your practice.

Educated patients:

- Get better results
- Stay in care longer
- Tell others
- Bring their families
- Become more invested

Well-educated patients also become ambassadors for your clinic. They are people who go out there and talk about you, hopefully with the best of intentions. They can share in a precise way why they are coming to see you, where their Qi is blocked, and what meridian might be out of balance, all in a logical way.



What YOU want them to know - Part 1

When giving an ROF, there are a few things I want my patients to know. First of all, I want a patient to know that there is a clear meridian/organ imbalance and that something is wrong. They obviously know that something is wrong, or else they would not be coming in to see you in the first place. That “something,” can be neck or back pain, PMS, depression, etc. Something is wrong, they know it, and that’s why they are coming to your clinic.

I have found that by working with my patients, rather than “on” them, they seem to get better faster. I have a job to do, i.e. be their acupuncturist, and they have a job to do, i.e. be my patient, keep their appointments and continue with any and all life-style recommendations I may have for them, including taking their herbs. I tell them that my job is to let them know:

- What is out-of-balance
- Whether or not I can help them
- What stage of care they are in – Relief, Corrective, or Wellness
- How long they can expect to receive care
- And the cost of their care

It’s a known fact that patients will get better and stay healthier longer if they are better informed and actively participate in their care plan. I tell them that their job is to work with me as closely as possible, follow ALL recommendations of care and the suggested course of treatment. This includes herbs, exercises, meditations etc. I tell them that together we’re a team focused upon achieving a strong and healthy body and mind for them. That isn’t something I can do alone.

I invite them to be proactive in their health care, make good choices and commit to care. This allows them to return from pain to good health. It also empowers them with the knowledge to take better care of themselves.

It’s important to let your patients know that they play a large part in the success of their treatment. For example, someone coming for help with golfer’s elbow needs to stop golfing, or there will be no

improvement. It's essential to let them know what their problems are, and that together with acupuncture and lifestyle changes, a difference can be made. Let them know that you have identified not only the problems, but the causes of the problems as well. This style of communication lets your patient know that seeking help from you will help to relieve their pain and help move them toward wellness. It shows that there is a depth to this medicine. Let them know what you found – both the good and bad news.

The “good” news is that you found out which meridian is out of balance that is causing/leading to their main symptoms and signs. The “bad” news is that there is a meridian that is out of balance in the first place.

Telling Your Patients About Their Problems

I have found that it is important to let your patients know what you discovered in the diagnostic process. They are coming to you because they have problems, so I refer to their symptoms and signs as “problems”. I have also found that when you mention the word “problems” people usually listen more closely to what you are saying. It’s important to let them know that you have diagnosed both facets of their problem - the pain and the cause of their pain. You have! After conducting a thorough exam, you have created a differential diagnosis as to which meridian/organ system is out of balance leading to their health concerns.

Over the years, I have had my fair share of blank stares when discussing organ system imbalance. So when I go over the ROF with my patients, I keep it simple, straightforward and succinct. As practitioners, we received good schooling and have the capacity to discern what the underlying blockage or imbalance is. That’s good, but keep it to yourself. Hopefully you don’t assume that all of your patients will become schooled in the principles and theories of TCM. They won’t, that’s why you need to keep it simple, so it’s easy to disseminate and clearly get across the information you need to get across.

When discussing things like, Liver Qi Stagnation or Spleen Qi deficiency, I want my patients to understand what is going on, but I don’t want to lose them in the process. So I simplify what I tell them. Instead of talking about the excess and deficiency and Yin and Yang imbalances, I just mention the organs that showed up as out of balance for them, “Spleen, Liver, Kidney, etc.” I know what the underlying problem is, but all I want to get across to them is a pattern of disharmony and not go too deeply into theory with them.

A few important things you want your patients to know when they come out of the ROF:

1. Something is wrong, it is relatively serious, and it needs to be addressed.

2. If it doesn't get addressed, something a little more serious could happen to them.

3. and, of course everything else we mentioned in the early part of the "What you want them to know" section.

Wouldn't you agree that we have all seen patients with some pretty serious imbalances? A big imbalance, when not treated, can cause serious problems and you need to let them know that this is a possibility. Explain to your patient what your job is and what their job is to improve this situation.

Your 3-minute acupuncture 101 speech

Each of us should have a 3-minute or less canned elevator speech. What I mean by this is that if you're on an elevator and someone asks you what you're doing walking around with a miniature meridian man model with dots and lines on him, you'll be able to tell them what you do in three minutes or less. Like your ROF, keep it simple, straightforward and succinct.

Acupuncture 101 is a three-minute speech on the philosophy of acupuncture and Chinese medicine. Have this 3-minute speech down so that you can educate them. You need to have a well-prepared mini-lecture explaining what acupuncture is. A 3-minute acupuncture script is the quickest and easiest way to explain the what, why, and how of acupuncture. Think of it as acupuncture in a nutshell. It's good to have this canned speech in your pocket, ready for the telling.

There are three main analogies I have used. Try one and see how it fits into your practice style.

The Rubber band analogy I place a rubber band tightly around their finger. Within a few seconds it will start to turn red and purple. I will then ask them other than taking off the rubber band, what do you think can help resolve the problem that would happen if we just left it on? Even if you exercise or eat right, that blockage may still be there. Only by removing it will it go back to normal and no serious problems would occur.

As you can see, exercise itself won't solve your finger problem, medication won't solve your problem, and wishful thinking won't solve your problem. Only the removal (acupuncture treatments) of the rubber band (blockage/imbalance) can solve their problem and allow the return of the necessary vital energies to your finger (the body) restoring health and wellbeing.

The Hose Analogy What does a kink in a hose do? It keeps the water/nutrition from flowing to the plant and it will die. A "kink" in the energy flow of a meridian will prevent optimal nutrition and information from flowing to that area of the body. Eventually that will create symptoms and signs.

Here is a simple hose analogy:

The hose - If your garden hose has a kink in it, the plants will not receive adequate water with which to thrive.

What will happen to the plants? They will wither and die.

What happens if they receive adequate water flow? They will thrive, grow and flower.

Acupuncturists detect and correct where the kinks, or blockages in the flow of Qi, or vital life energy are. Once located, we can use specific points to un-kink and restore the proper flow of Qi, so that your cells, muscles, tissues and organs can receive vital energy with which to function correctly.

The River Analogy You can also use the river analogy. Just as we have rivers that flow through our planet that bring water to everyone, the meridians bring energy through the body. If you place a dam in a river, what happens? The rushing of the water will be blocked and only a limited supply of water will trickle through the dam. Everything on the upside of the dam will receive plenty of water to survive, and everything downstream will receive a less-than adequate flow of water. Eventually things may wither and die.

Energy flows in the meridians through a series of pathways inside the body. When people experience physical trauma, scars, or repetitive stress, our body's energies will become blocked. If there is a blockage of energy in the body, then the different organs and cells in areas will not be properly nourished, and eventually lead to various symptoms and signs. You can trace the meridian that is contributing to their pain.

These analogies work well.

Script for using with patients Use this script with a Meridian poster during your initial visits, screenings, talks, or whenever anyone asks you what acupuncture is. Feel free to embellish the basic script and add your own personality to it after you get comfortable with the following basic sample:

ACU: Hello, Mr. Smith. Today I am going to share with you a brief overview of acupuncture. Acupuncture has been around for the past 2,500 years. It has helped millions of people move from a place of pain and discomfort to a place of health and well-being, hopefully that's something you're seeking.

Thousands of years ago, practitioners of Chinese medicine mapped out a series of pathways within the body called meridians.

At this point, show your patient the poster or a Qi meridian chart and trace the pathways up and down, pointing out the organ system connections as you go.

ACU: All of these lines running up and down this model are your meridian pathways. They travel throughout your entire body on the front and back, connecting every organ and gland. All of these dots (pointing to the acupuncture points) are acupuncture points that are located on each meridian and have certain effects upon the body and mind when stimulated. Together, these pathways and points form what we call your Meridian and Organ network. Does this make sense? Within the Meridian and Organ network flows the vital energy called Qi. Qi is the spark of energy that animates and brings life to the body.

It's a substance that provides energy, nourishment, and support for every cell, tissue, muscle, organ, and gland. There is an old saying that goes something like this, "without the free-flow of Qi, there is no life. With the free-flow of Qi, there is life."

Direct your patient to the area of the poster or chart that shows how Qi moves through the body and trace how Qi flows from one organ system to the next.

ACU: Qi travels through the body in precise and predictable ways, from one organ system to the other, providing nourishment for the body and mind to function and work optimally.

Imagine a river, Mr. Smith. Rivers travel throughout our entire planet carrying water that provides sustenance and nourishment to all plants, animals, and people. What do you think would happen without that water?

Your patient should answer something to the equivalent of lack of water equals death.

ACU: Meridians are like great rivers flowing inside each and every one of us.

As I said earlier, Qi flows within these pathways, activating, enlivening and vitalizing your entire being while providing the power to accomplish everyday activities.

Mr. Smith, what do you think would happen if a dam were placed over one of these areas?

Your patient will probably answer that they are not sure, or that it would block the flow.

ACU: Well, the flow of Qi would be restricted and blocked.

Place your finger or a pencil over the line, creating an imaginary dam.

ACU: That means that everything downstream will not receive proper support and nourishment required to keep the body and mind healthy and flourishing. Can you see that? If Qi becomes restricted or blocked, an imbalance will occur. If this imbalance goes undetected and uncorrected, eventually, our health and well-being will become compromised.

Here's the important part. When a particular meridian is blocked and out-of-balance, a variety of symptoms and signs will appear. For instance, when the Lung meridian is out-of-balance and not receiving adequate Qi to nourish it, there are some specific symptoms and signs that will appear, same thing with the Spleen Meridian, there are specific symptoms that will appear. Make sense? Each Meridian and Organ network has certain s/s that a trained acupuncturist is familiar with.

Mr. Smith, my goal in this clinic is to discover where Qi has become restricted, blocked, and out-of-balance. Once we uncover this problem, we will then use certain methods to remove the blockage, uncover the root cause of your problem(s) and facilitate the free flow of Qi.

Once this is accomplished, your body now has the capacity to return to a state of balance, and ultimately health and well-being. I am here to help you move from a place of pain and discomfort (if that is what they are coming in to see you for), to a place of health and well-being. How does that sound to you Mr. Smith?

That's it, a simple, straightforward and to the point introduction to acupuncture. I urge you to take parts of this and make it your own. Many of us shy away from scripted materials, but scripts have their part in helping us organize what and how we want to say something. They are also helpful in letting us touch upon everything we wish to convey in a well-organized way.



What YOU want them to know - Part 2

There are a few things that you as a practitioner want your patients to know. Aside from the obvious ones - what acupuncture is, what is wrong with them, what you will be doing with/to them, and the cost, you may want them to:

- Know what the treatment plan and goals are
- Understand the need for care
- Know when, where and why you will do a re-evaluation
- Know what their financial commitment is

Treatment Goals and Plan

It is important to let your patients know that feeling healthy goes beyond relieving the symptoms of an acute or chronic illness. In Western medicine, most patients are not familiar with how long their care will take or even the type of care they may need. Most patients only acknowledge that something is wrong when their health and/or lifestyle become compromised.

The idea of setting treatment goals and coming up with a treatment plan is to give your patients a guideline as to what they can expect in regards to length and course of treatment. Whether the care your patient requires is relief, corrective or maintenance and wellness, educating them about their steps of care, clearly and effectively walks each patient through your care process and instills awareness as to how long it may take them to get better.

As a practitioner you may have certain goals for their treatment and by presenting them an outline of what you will be doing is how you are going to achieve them. Let them know that relief care is like a hurting tooth. You want to get out of pain. Corrective care is like wearing braces. You spent time and money getting them in the right place, now its important to keep them there, your teeth that is. Wellness care is like wearing a retainer. You are maintaining the stability and correction you've achieved thus far. They need to understand that just because the pain stops doesn't mean that they're healed. Patients need to understand the purpose of ongoing care. You will ask them for their help. They need to understand that even if they are out of pain, it

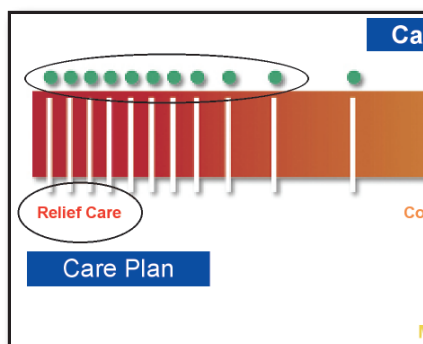
doesn't mean that they can resume any and all activity. Being patient and following your recommendations of care will get them healthy as quickly as possibly.

There are three main steps of care that most patients will go through. It's important to let them know:

- The phase of care they are in
- What they should expect during the different phases of care
- The length of time they will be under your care

The Three Phases of Care

Phase One - Relief Care. Most patients begin acupuncture treatment to receive quick relief from pain, discomfort and other symptoms. In this phase patients have obvious symptoms and signs. They are coming to you because something is “out-of-whack” and they are usually in pain. Relief care is designed to get them out of pain, fast. This type of care allows you to help your patients feel better faster. Each visit builds on previous visits, paving the way toward eliminating their initial problems and complaints.



Phase Two – Corrective Care. In this phase, their signs and symptoms have been reduced, and visits are less frequent. This phase maintains and supports the changes they have achieved and provides a foundation for deeper healing. This is also the time when underlying imbalances can be addressed.

Even though a patient may not be experiencing symptoms, it is important to remind them that they need to continue to strengthen, build and support their body and mind. Stopping care now could disrupt the progress they have already achieved, and even simple activities could cause a relapse.

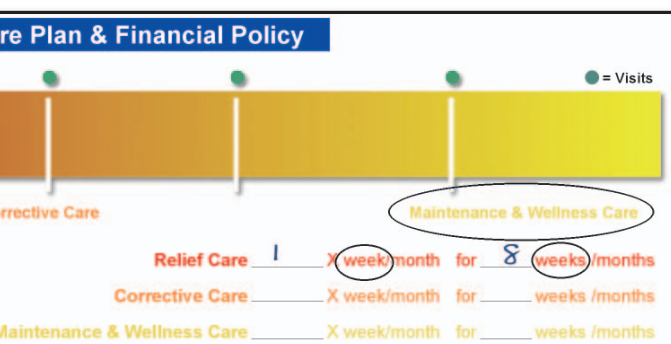
Phase Three – Maintenance and Wellness Care. This type of care preserves all the progress they have made. Visits may be monthly, every other month or seasonal. Preventative maintenance tune-ups

further strengthen their body’s resistance, keeping them healthy, balanced and potentially free from illness. Little imbalances may be caught before they become major concerns.

Wellness care is the root of healing. In ancient times, we were only compensated as long as our patients remained healthy. If they became ill, it was our duty to get them well again, without compensation. That is true wellness care!

Here’s a great analogy I will often share with my patients. I will talk about a hurting tooth. When a tooth hurts, what’s the first thing you want to do? Ignore it or get it to stop hurting? Most likely they will say get it to stop hurting. That’s relief care. Get rid of the pain fast!

Braces. If we have braces, they are there not to get rid of pain, but to



correct our teeth so we can have a healthy, bright smile with straight teeth. Braces are correcting the problem of bad and crooked teeth. That’s corrective care.

Lastly, after braces come off, most people have to wear a retainer for a short period of time. Why? Because they want to maintain the changes that have been achieved from wearing the braces. If we were to remove the braces and not use a retainer, chances are things could shift, changes could occur, and that may disrupt all the work that has been done thus far.

This little analogy has created an “aha” awareness in my own patients. They see the correlation and between their own acupuncture steps of care. When you clearly define and outline the steps of care for your patients, you pave the road for life-long happy and healthy patients. From that, your practice will not only survive and thrive, but you will have the opportunity to help many more people to get well and stay healthy!

Financial Policy	<u>8</u> Acupuncture Visits	@ <u>65</u> = <u>520</u>	_____
CARE PLAN DETAILS	<u>1</u> Reevaluation	@ <u>125</u> = <u>125</u>	_____
	_____ Cupping/Gua Sha/Tui Na	@ _____ = _____	_____
INSURANCE COVERAGE	_____ Hot/Cold/Moxa therapy	@ _____ = _____	_____
_____ Number of visits	<u>2</u> Self-care education	@ <u>15</u> = <u>30</u>	_____
_____ Co-Pay	_____ Consulting	@ _____ = _____	_____
_____	<u>2</u> Herbal therapy	@ <u>15</u> = <u>30</u>	_____
_____	Estimated health care investment	<u>\$705</u>	_____

AT THIS CLINIC WE OFFER _____

MONTHLY PLAN

I, _____ will pay for all outlined acupuncture treatments and services every _____ and the 15th of the month for a total of 2 months until my obligation is paid in full. The first installment of _____, I authorize my practitioner to charge my credit card monthly in the amount of _____.

PREPAYMENT PLAN

I, _____ would like to pay for my entire treatment plan with a one-time payment of _____.

TIME OF SERVICE PLAN

I, _____ would like to pay for each of my treatments and services on the day I receive them.

I understand and agree to my Acupuncture Care Plan and financial obligation. I also understand that the success of this plan depends on my keeping my appointments, following my acupuncturist's instructions and communicating with my acupuncturist about my progress.

Patient Signature

Date

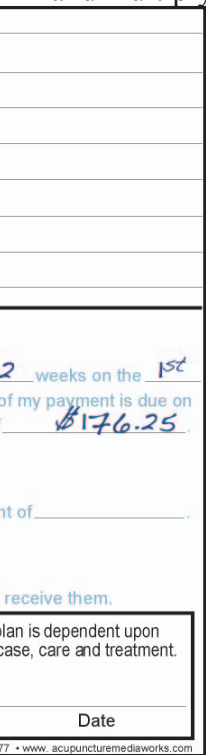
Acupuncturist Signature

The money game

Dealing with finances can be tricky. I remember when I first started practicing, I had a hard time collecting my money. It was difficult for me to go from being the “healer guy” to “thanks, give me your money and schedule again.” It wasn’t that bad. But many of us would just like to be the wonderful healers that we are, shifting roles and collecting money can be difficult for some of us.

When going over finances, it’s best to be as clear as possible. I’ll tell you how I do it now, and you can revise it and do it in a way that works best for you and your practice.

Let’s say I suggest that patients come in for 8 acupuncture visits, I will put the number 8 next to acupuncture, my cost per acupuncture visit and multiply it by eight. For instance if I charge \$75 per treatment, it will cost \$600 for acupuncture alone.



I proceed down the list and input my price and multiply what the cost will be. You can best see what I do through the image on this page.

At the end, I will tally everything up and let them know that their projected health investment cost will be \$XXX amount of dollars.

Then I will let them know about the three payment options we have available for them. If they choose the monthly payment plan, I don’t give them a discount. Make sure you get a credit card number on file for payment purposes. You may also want to put together a reminder on your schedule or in your computer that will alert you as to when and who needs to be charged.

If a patient chooses the one-time cash payment, I usually will give them a 10% discount. Make sure you check with the insurance companies or your state laws about offering cash discounts. If you are a provider who is contracted with insurance companies, legally, you may be bound by contract NOT to offer any discounts.

And if a patient chooses time-of-service payment, I will bill them for what I do during that visit. If they just receive acupuncture, then it's just \$75, if they get acupuncture plus Tui Na, it's \$90, acupuncture plus herbs and cupping, \$105. You get the picture.

When you are upfront and straightforward with your patients and what their financial commitments will be, you will have compliant, happy and healthy patients, who have nothing to say about you but really good things!

That's it. I think ROF's are the cornerstone to a successful practice. When you do them and do them correctly, your patients will:

- Get better results
- Stay in care longer
- Tell others
- Bring their families
- Become more invested

And through it all, your practice will grow and you will become more prosperous. Good luck and most of all, be easy on yourself, especially if you have never given a ROF before. It took me years to perfect mine and get to the place where I can clearly explain, to you, what it is I do so that you can benefit from it. Hopefully in a lot less time than I did!



Stay hopeful, stay positive and feel free to send me any questions, concerns, insights and inspirations that you have along the way! Until then, may you prosper and flourish!

