

SOAP Training Manual

Please Note: For the documents listed and linked to here, you will need to be logged into one of the clinics' gmail accounts to view them. There's also a lot of links to stuff on the website for the People's Organization of Community Acupuncture (POCA). Many of the links will require a membership in POCA to view. If you don't already have a POCA membership, we highly recommend getting one. It comes with enough free CEU's to make it worth the price of admission.

Introduction to the Job

Before we get into how to do the job. Let's start with what the job is, because you might be wondering what the hell you are getting yourself into.

SOAP (Sacramento/Oakland Acupuncture Project) has 2 simple goals: 1. We want to provide acupuncturists with decent, meaningful jobs. 2. We want to make acupuncture accessible to diverse people with ordinary means. To accomplish these two goals means that we have some limitations and certain ways we have to do things in order to function well. Because of these limitations and the need to be functional in the reality we live in, this is not the right job for some people, nor is it the perfect clinic for some patients. That's okay. Hopefully, we can help you to understand how our clinics operate because it is likely different from other jobs you may have had. Also, treating people in this setting is likely different from any clinical experience you have ever had before.

SOAP differs from other, more traditional, employers in two major ways: We have limited resources and we do not treat our employees like crap. With limited resources we cannot make large sweeping expensive changes and we cannot afford large fancy treatment spaces. We do not have multi-million dollar budgets and our goal is not to increase profits for our shareholders. In any given year, 80-90% of our total revenue goes to rent and payroll. SOAP is a social business and reinvests any profits back into its community. On a practical level, this means incremental raises for punks, surviving pandemics, and opening more clinics. This speaks to the idea that it's best not treat employees like crap. We have tried to create an anti-authoritarian way of organizing ourselves where each individual is encouraged to exercise their autonomy and mastery of the job. Also, we pay you as much as we can, not as much as we can get away with. We are very transparent about this and are willing to show you where all the money goes and why if you are interested. Let us know.

Furthermore, we are not just a regular Community Acupuncture (CA) clinic. With 3 locations and 10 + punks on staff, we are one of the bigger CA clinics in the country. The systems that we have in place are the result of 11+ years of trial and error. We are hesitant to change a lot of our core functions because they work. Our policies and procedures are often based on previous failures. We are always happy to explain how we arrived at our systems, but we ask that punks abide by our rules and ways of doing things because this is what lets the clinics run smoothly. If you have an idea to increase either our efficiency or refine our ethics, let us know. We're always looking for ways to improve.

There are a lot of things that SOAP can offer:

- A predictable liveable wage in the field that you trained for.
- The opportunity to be a part of overdue revolutionary health care reform.
- An existing infrastructure that is built on the sacrifices and efforts of many previous people, so that you can show up to work and have a huge patient base to treat without having to work to build that patient base.
- The privilege of treating a ton of people. You may realistically treat more people in one shift than your colleagues do in an entire week or month.
- Coworkers who are happy to share their successful distal treatment strategies and help you succeed. Plus the chance to interact with colleagues and not feel isolated.
- A work culture that promotes clear honest communication and doing good in the world.
- For full-time permanent staff we pay for license renewals, and some, if not all, of the CEU's required for license renewal. You may also qualify for paid vacation days each year.

Here are some things that SOAP cannot offer:

- We do not offer holiday pay. We do not guarantee weekends or holidays off, nor can we guarantee that if you can take long or frequent vacations, your job will be there for you when you return.
- We do not offer massage tables, moxa, e-stim, cupping, or an herbal pharmacy. This will never ever change.
- While we can change what we do and how we do it, it takes considerable time and effort and may not be done in the way you wished for.

Please do not gripe about our limitations. If our limitations are deal breakers for you, please do yourself a favor and seek work elsewhere. If you do have a gripe about something, we will assume that you wish to take it upon yourself to help fix it. Jeff is fond of the saying, "If you see a problem, you're a volunteer."

Some people find their dream job here at SOAP. These are the folks you will meet who have 3 or more shifts, have a module, and are working the machine that makes the clinic run smoothly. Some think that this will be a good job for them and only end up working here for a few months. That is fine, too! Part of providing acupuncture to people in need is hiring people for a limited time so that we can feel each other out. Sometimes you don't know if a workplace culture is a good fit until you have tried it.

You will notice that no one is around to micromanage how you do things. We are all too busy keeping the machine running! Also, nobody likes micromanaging because it's a stupid way of managing people. If you feel lost or confused, please ask for a check in with a senior punk or meet with Jeff (he will likely buy you a cup of coffee!). We are happy to help! Seriously. We genuinely want you to succeed. Otherwise, we will assume that you are doing okay. This goes both ways: no news is good news. If you don't hear anything from us it is because we all think that you are doing fine. If we get feedback from patients or coworkers that you need improvement with something we will check in right away and give you a chance to work on it. This feedback will come to you quickly and clearly. If you have difficulty accepting criticism, our direct and forthright way of communicating feedback will be very challenging for you. Most

people make mistakes when they are first starting out doing this kind of work; it would be very rare that you'd receive no feedback or criticism in the beginning.

It is important to know that if you are not completely invested in SOAP, we will not be completely invested in you. It's nothing personal. There are plenty of wonderful acupuncturists who are not a perfect fit for SOAP. If you love community acupuncture but don't love SOAP, please feel free to work for a different clinic or start your own! Nothing would make us happier. We are of the strong opinion that there is plenty of room for more CA clinics out there and that each POCA clinic should have its own personality. Check out the [POCA forums](#) for more info on how to do this. As long as you don't sabotage your relationship with us, we will happily offer you guidance for how to open a clinic.

One huge part of the learning curve of becoming a Super Punk (a.k.a. high-volume community acupuncturist) is letting go of a lot of the stuff you learned in school and/or may have served you in private practice. You do not have to take elaborate patient histories, give elaborate interviews, palpate, talk a lot, or give lifestyle and dietary advice in order to give effective treatments. Keeping things simple is effective. If you try to do all of these unnecessary things you will confuse our patients. You might think you are doing a great job, or even have the hubris to think you are doing a better job than other punks, but you're wrong. You are creating complication and confusion where there should be simplicity and clarity. So, don't be fancy. Here are some common questions we get from new employees. If you have any other questions after this please just ask.

Q: Can't you pay more? Those wages look kinda low.

A: It is true that starting out part time at \$15/hour plus commission is not a lot of money. As it was explained before, we are still feeling each other out and neither of us has a lot of skin in the game. If you stick around and get permanent shifts, you will be earning a wage that is consistent with, if not better than many of [your colleagues](#). We schedule periodic performance reviews and give raises and benefits at each review that are consistent with one's job performance. If you also take into account the value of not paying self-employment taxes, insurance, some free CEU's and licensing fees. This means that you would need to earn quite a bit more in private practice annually to have the same quality of life and pay for those things yourself.

Q: Can't we put up a few tables around here? It would be nice to give a back treatment sometimes

A: Hell no. We've never had tables and we never will.

Q: I really love herbs and wish that we had more of them for people.

A: Some of us love herbs, too, but our clinic is not set up to dispense TCM herbs. This is one of our limitations. If your patient is interested in more herbs, please refer them to your local herb dispensary. If you strongly wish to be working more with herbs, please find a clinic where that is appropriate or get a part time job at your local herb dispensary. We know of a few and can help you locate them and see if they are hiring.

Q: Why don't we do moxa, cupping, estim, and other modalities? They are so helpful!

A: That's true, those things can be really helpful. However, we (and many other clinics) have never been able to successfully incorporate those types of modalities into our clinic without compromising our values of accessibility and consistency. If you are unsure how to turn a breech, induce labor, or treat pain without these modalities please ask a senior punk. We are happy to help.

Q: I learned a lot about diet and lifestyle in school. I can help so many more people if I give them advice!

A: I know it seems that way, and it is tempting to share your beliefs as an effort to be helpful. However, we have patient-centered care. That means that our prime directive is to meet people where they are at and not to make assumptions about how they need to change. We don't know their situations or the implications of our advice. Let's put it this way: we are willing to hire you whether you smoke, drink, are vegan. Please do our patients the common courtesy of extending the same respect.

Q: I apprenticed with a master, have a martial arts background, and/or studied some esoteric system that is really important to me. Can't I just talk about/do a little extra with my patients because that is the type of practitioner I am?

A: That's great for you. But, don't use it here. Again, we keep our treatments consistent so that our patients know what to expect. While we want you to show up and be yourself, we still need for you to adapt as part of the team and hold yourself to the same standards of treatment that we do. Excessive pulse taking, talking about qi cultivation, and other subtle systems can give the impression that we are psychically "seeing things" or makes our medicine look exotic or gives it an unnecessary aura. It also makes you seem special. Don't try to be special. This causes patients to develop "guru mentality" toward some punks and distrust others. This is not trauma-informed care and it actually limits patients access to acupuncture. Just like you wouldn't show up at a fertility or orthopedic sports medicine clinic planning to only use 5 element treatments, do not show up at SOAP planning to treat patients drastically differently than the rest of us. If you are unsure how to incorporate your unique style into this setting please just ask! We are more than happy to help you and show you how to be successful within the limits of what we offer.

How To Do The Job in 3 Parts.

It is helpful to split up the different aspects of the job into 3 parts. We tend to think of them like Russian Dolls, each one nesting within the one before. The first part is the actual infrastructure. Do you have a nice warm peaceful place in our physical reality that is well set up to accept many diverse patients for acupuncture? The second part is the logistics. Do you know who is coming to see you, what they are coming in for, and can you document the interaction when you are done? The third part is patient care. Doing the actual acupuncture and flowing through a busy shift with ease and grace.

Part One: Actual Infrastructure in our Physical Reality:

Obviously this is about tending to the space and making sure that it is ready, comfortable, and safe to receive patients. On a more subtle level, it's also about tending to yourself and making

sure that you are ready, in your mind, body, and soul, to have a busy shift. It seems a little fruity tooty, but being psychologically ready and willing to treat a ton of people will make your shift busier.

Here's some basic advice on making sure you are internally ready for a shift:

- Make sure you have water. You should be drinking about a pint of water for every 15 treatments that you do.
- Make sure that you have food and snacks. If your shift overlaps your normal mealtimes, consider having a quick meal ready to eat in the office. High protein snacks are good. Consider a previously shelled and salted hard boiled egg.
- Adequate coffee and tea, AKA caffeine, is also a consideration if you're into it.
- Before you come in make sure you are well rested and have a clear mind. Mindfully incorporate whatever self-care you need before a shift into your routine.
- If you need to, consider taking breaks. You can block out actual time in the schedule or you can just find time on the fly. Even on a fully booked schedule, there are moments that can be stolen to eat, drink, and catch your breath.

To get the clinic itself ready there is a checklist. It's called the "[Opening/Closing checklist](#)" There should be a laminate copy hanging on the wall in the office if,

It's there to make sure that you turned on all the fans, heaters, lights, noise makers and music necessary to make the clinic a comfortable place to receive acupuncture. The treatment area should be orderly and clean.

Here are some other details about the facility you should think about:

1. Your license will not be on the wall when you are first starting out so make sure that you have your pocket license on you while treating patients, as required by the California Acupuncture Board (CAB).
2. What should you do if the power goes out? There's flashlights stashed all over. Hopefully you'll find one. If it's night time and too dark to treat people, take out everyone's needles and send them home. If anyone is pissed, give them a free card. Put up some kind of handwritten temp closed sign on the door and get yourself home before a riot starts. If it's the day time and you can see alright, open some curtains and carry on.
3. If you find a small bolt on the floor, DO NOT THROW THIS AWAY!! It has fallen off of one of the chairs leaving it pretty unstable. Immediately look on all the nearby chairs for one that is missing the bolt that holds the arm rest to the back of the chair. Once you locate the chair remove it from the rotation and replace with a back up, unless you have time to screw the bolt back on (you will probably need tools for this). If you remove the chair, tape the bolt to the chair and leave a detailed note that it needs fixing.
4. If you find that the sharps containers are really full, be careful with these. If you feel that one is dangerously full take it off the wall and put it in the office, but DO NOT lock it closed yet. At Grand, there are spare sharps containers in the back storage area and keys to take them off the wall in the big desk. At Laurel, empty sharps are in "the cave" in the cabinets under the sink, and the key is hanging on the wall. It's likely that with a little shaking we can get more needles in most "full" containers. If you want to shake em yourself, here is how:

- a. Small Sharps - take off the cap, turn the cap upside down over the hole and shake the hell out of it in many different directions.
 - b. Large Sharps - If the clear plastic at the top starts looking full you can start by giving the sharps some left and right shakes. Then you want to wiggle the clear plastic part a bit to see if you can fit some more under it. Then shake it some more....or pound it on the ground (just be careful as this will sometimes cause a few to jump ship). The one thing you NEVER want to do when it is pretty full is close the top all the way when you are shaking it around, as once you do this it can be impossible to open again.
5. Laundry At Laurel: Keep the laundry flowing. Doing more smaller loads is better for all involved. There is a sign on the wall at Laurel with more info about how to handle laundry.
- DO NOT overfill washer as this can cause our poor little washer to break. Fixing the washer when it breaks is extremely expensive and getting appliance repair people to show up is a huge pain in the butt.
 - DO NOT touch massage laundry. This includes all sheets in the 2 large laundry bins under the sink and white plastic drawers in the front kitchen. Our only laundry is in the bathrooms, the bin in the treatment room and the orange bucket in the kitchen.
 - DO leave a note about what's what for the next person coming in if there is a mix of Grand and Laurel Laundry in the mix.
- At Grand: Blankets and fitted sheets are separate from hand towels and pillowcases.
 - Blood Stains - If you see a blood stain make sure to hit it a few times with peroxide. There are little spray bottles of peroxide for this purpose. Above washer at Laurel. In the office, on shelves between the little desk and needle boxes shelf at Grand.
 - Lumbar Supports - If these end up in the dirty laundry, wipe down with antimicrobial wipe and let dry before putting back on the shelf.

Navigating Payment Glitches

If a patient asks you about making change for payments you can say that we do not do this. You can say something about: it's because the office has been burglarized so many times. Which is true but not exactly why we don't make change. People can go out and get change or consider buying an easy card. See "[Financial and Cancellation Policy Rules for Punks](#)" in either the g-drive or taped to the wall.

If someone doesn't have cash they can go out, get cash and come back to make a payment. There are maps/addresses by the payment box about where to go to find an ATM.

No shows: If someone no shows on the shift there's a protocol for that you can find here: [No Show Protocol](#)

If they don't have an easy card to mark off for their no show, you'll need to mark them on the [Invoice tracker](#) so we can collect funds later.

Easy Cards: Patients can prepay for treatments. These are called easy cards. Patients may ask you to mark them off or how to purchase them. For all easy card questions look at "[A Punk's Guide to Easy Cards](#)"

Behind the Curtain Logistics

This is about knowing what is happening or going to happen. You know who is coming in and what they are likely coming in for. When you arrive and turn on the computer, the passwords to these programs should be saved. There are 3 programs you will need to access to be able to do the job: Our online scheduling, the electronic health records (EHR), and your clinics gmail account (there's a different account for each clinic).

The scheduling and the gmail should have the same password. We'll give you the current password when you start officially training.

Online Scheduling AKA Schedulicity AKA "Schitty": Oakland Log in "oaklandacu@gmail.com" do not use oaklandacugrand@gmail.com. SAP log in is sacacuproject@gmail.com

Someone will need to show you how to navigate this program. It's not super hard, but not always intuitive. You will need to know how to

- Find your schedule for the day. You might be on the second page (click the arrow to the right of practitioners names) as OAP Staff or something like that.
- Create, move, and cancel appointments.
- How to charge someone if they book a [new patient appointment](#) over the phone or in person.
- How to mark, in an appointment if someone is a "no show"
- Make sense of the color coding: Color Code (change color by clicking on pt appointment, clicking edit, clicking colored square with arrow and changing color): New patients = Pink. Yellow = they have been called/talked to and confirmed. Drop in = grey

The schedule on Schedulicity is our sign in sheet and should accurately reflect the actual reality of who you saw (when is not as important). All drop ins should be added on there. If someone is booked twice, because they are booking for themselves and another person, one of those appointments should be edited to reflect the name of the person you treated. Sometimes people will leave a note inside the appointment (you have to open up the appointment to see this) with the name of their plus one. If you see two duplicate names, open both appointments to see if this is the case.

EHR AKA POCAchart

This is a very intuitive and simple program and generally involves little training. You will be invited to the account and will need to make your own password with one of your own email addresses as your log in. You will need to know how to:

- Add new patients
- Find and open charts, and how to leave them unsigned.
- Complete unsigned charts during and/or after the shift and sign them.
- When and how to use a private note and when to sign it.

Chart it up: Try to get your charts done during your shift. Even with very full shifts this is possible with proper time management. While charts need to be accurate, they can also be brief. The hour after the last needle of a shift goes in should be plenty of time to finish all charts and leave enough time and focus to tidy up the clinic. If you're averaging more than 30-60 seconds per return visit chart, you are writing too much. Again, if you need help talk to us. Especially, before we feel the need to talk to you. That said, most punks, when they are first starting out, take a little longer than normal to finish their charts and close the clinic. It's better to start out making sure you're getting it all correct, than try and rush so that you appear to be more efficient than you actually are.. Eventually, these routines will become more streamlined. If they don't, we'll talk about it and try to help you. No big whoop.

But what if someone has the same name as someone else? If you come across 2 patients with the same name make sure and ask them their DOB and middle initial and change this in both the EHR, their Schedulicity account..

If you can't find a patient's name in PC - Click on the patient's name in schedulicity and see if they have any notes about them going by another name, or that they schedule for another patient. Also, make sure they have actually been in before and didn't accidentally sign up for a return slot when they are really a NP. If this is their first visit in Schedulicity, give them a call and see if you can find a NP slot for them that works. If a patient comes in and swears they have been in before and do not go by any other names and you still can not find them in Practice fusion or POCA Chart, DO NOT make them a new chart. Just leave us a note and we will look into it further. Having 2 charts for the same patient is super annoying.

Clinic Gmail Accounts:

Each clinic has its own gmail account.

OAP Laurel: oaklandacu@gmail.com

OAP Grand: oaklandacugrand@gmail.com

SAP: sacacuproject@gmail.com

First and foremost, this is the place where voicemails (from people calling us on our landline) and emails directed to the clinic end up. Check these voicemails and emails for patients looking to schedule. Especially, if they are trying to schedule on your shift and your shift is slow. You will also find people trying to cancel and reschedule their appointments. Please take care of these as well.

This part is really important. Don't fuck this up: If you answer an email or voicemail, **delete the message**. If you read it and don't answer it, **mark as unread** so it floats back to the top and someone else can take care of it. Don't let it just float in the grey ether of uncertainty.

Drive Files: There are documents you will need to access in google drive to complete your shift. There's a ton of stuff in there, both random crap and super important info. If you have a minor question about how something is done, feel free to peruse the drive to find your answer.

Documents you need in Drive:

- [Timesheets](#): This is where you mark your time in and out and how many people you saw. Don't mark your hours in tenths; mark the time in the closest quarter hour. As a sub, mark your time in the subs sheet. At the bottom are names of regular punks along with one sheet called "subs". Click the subs sheet, scroll down to the bottom and enter the required info. If you stick around long enough you'll get your own sheet. Fill out your name how you want it to appear on a check. When counting commissions, do not count SOAP punks or anyone you comped. New patients count as two appointments.
- [Employee Manual](#): All our procedures and policies are outlined here in soporific detail. Please review and ask us any questions.
- [What not to do when subbing at OAP](#): Seriously, don't do any of this shit. If, for some unknown reason of the mysteries of shenanigans, you do one of these things, your best bet is to own up to it, with speed and honesty. Because we'll find out about it. Trying to hide the truth is just as bad as lying. If you make a mistake and tell us, we might put you on probation, but if you make a mistake and lie about it, you'll definitely be fired.
- [Substitutes/Vacations](#)(to view but not to edit): Here you'll find all shifts that we need coverage for. Email the scheduling guru (subzatoap@gmail.com) and let them know if there's an open shift you can cover. This is also the place where you can double check the shifts we have you scheduled for. Showing up for a shift you aren't scheduled for, kind of sucks, but you'll get a free treatment out of it. Not showing up for a shift you are scheduled for is all kind of bad and will ruin your day and probably the day of at least a half dozen other people.

Canned Responses / Email Templates: These can be a little tricky to find if you've never used them before. To find them, click compose. In the new message box that appears there are 3 little dots "AKA more options" that appear in the bottom right corner of the box. Click that and a list will appear with "Templates" as one of the options. Click on that and it'll show you a long list of canned responses we have. For the most part there are only two you'll need.

1. New Patient Welcome Letter: "Welcome to Oakland Acupuncture Project" All new patients need to be sent a Welcome Letter. Write in their name and cut and paste the patient's email from Schedulicity.
2. No Shows: "We Missed You Today." Send this to anyone who doesn't show on your shift. You can cut and paste their email from Schitty. Make sure to write in their name, the time they were scheduled for.

Emails about records' requests. If you get any type of request for records or for a receipt for a patient please forward all info to Sarah at the subzatoap@gmail.com. If there is paperwork involved please scan and send as well or just send the hard copy to laurel. If a patient is requesting a receipt to send in for some kind of insurance, ask what dates they will need it for and make sure they know that we do not keep track of how much they pay each visit, so they will have to send us that info as well. Also, make sure they have tried to submit the handmade receipts (which are not available during covid times) first before asking us for a fancy one. If you get a call from

someone regarding a records request and have a second, you can look up the status of this request by opening the following spreadsheet called "[Record Requests / Receipt Requests](#)". If we do not have any info listed about the request they are talking about, make sure to get as much info from them as possible and let subzatoap@gmail.com know that it was not yet on the spreadsheet.

Patient Care and Finding your Flow.

Over time we've noticed some aspects of performance in new subs are consistently muddled. These are issues that don't happen with everyone all the time, but have occurred often over the years that we give a lot of the same advice to everyone. Fundamentally, these issues are rooted in the necessity of what we call finding your flow. Finding your flow is the first step to becoming a super punk.

It is difficult to describe this phenomenon in words and we often find ourselves using esoteric metaphors to capture what this is like. If you've seen the movie "The Matrix" you may recall the scene where Keanu Reeves (AKA Neo) really realizes that there is no spoon, he sees through the matrix, and begins dodging bullets. Or maybe you're more of a Star Wars fan and you want to become one with The Force. In all metaphors, a busy shift turns into a graceful dance, efficient but un-rushed, fully present but knowing exactly what comes next. There are certain repetitive habits that lend themselves to accomplishing this state, similar to Daniel-san putting wax on and off old cars until he can do Karate with Mr. Miyagi. Here are some of those habits to master:

1. Stop Talking Move Faster: Don't talk too much. For real, stop talking! You can usually figure that you have about 3 minutes or less to perform an intake, a few minutes to get needles in, a minute to wrap up and get their wake up time and then you need to be moving on. For real, move on. Ideally you should have a chance to breathe or pee or laugh between patients, even when it's busy. Occasionally, some complicated or chatty clients take up a little more time but don't get trapped. There's a great video about how to manage patients and intake time on [POCA TV](#) by Moses at WCA. Check it out.
2. Keep the order of operations in mind.
 - a. Make sure there are no rouge needles.
 - b. Pull Needles outta people who want/need to get up
 - c. Make sure the clinic looks nice and is clean.
 - d. Poke People.
 - e. Check in with people, if you're running late, to give them a heads up on the wait.
3. Keep your pace steady at all times. Even when it's slow, don't get into the habit of taking extra time with patients. They will come to expect that extra time with their next treatment which is bound to be during a busy time. While speed often comes with experience, there's a lot of helpful advice in the Acupunk Skills section of [POCA TV](#). If you need more help with this, talk to any OAPster. We're here to help.
4. Don't Screw up the Names of Drop Ins. If you get a drop in, make sure to get their name clearly. Check that they are in our charting and/or scheduling program as soon as you can. If you don't find them there, get their name again and ask them if they might be listed under another name.

5. Count your fracking needles. Don't leave needles in people. Seriously. It happens to all of us from time to time, but it's NOT good. This kind of carelessness can lead to a needlestick which ruins a lot people's day (including your own!). If you find yourself forgetting needles, use a consistent amount of needles with each patient, or write down, next to your wake up calls, how many needles you used. Also during, and especially after, your shift scan/scour the floor for any rogue needles. If you know that a needle is missing, but you can't find it please tell the patient not to put their pillows and blankets (not something to worry about during covid) back on the shelf. You can move the pile of nest materials to the office and double check everything when you have time, but the chair and the area around it should be triple checked before someone else has a chance to sit down.
6. Don't let anyone overcook. If someone gives you a time that they need to be up or wants you to check in make sure to do this at that exact time. Getting people up late is very bad for business and, with enough instances, will get you kicked off the sublist.

New Patients

Because of the DIY nature of navigating our clinics, all NP's require some orientation. In addition to getting enough information to give them a good treatment and giving that treatment, you need to tell them what they are expected to do when they come back for a follow up appointment. Things like, don't wait in the waiting room, where to pay and how, getting set up in a chair and being ready for their appointment at their appointment time. It's good to walk around to different parts of the clinic as you are giving this information and give it in little bite sizes and different points in time. This process is outlined well in the document: [NP Sushi Bites](#)

If someone is filling out the paperwork in the clinic, do NOT forget to have NPs sign the informed consent, and always double check that you have the patients Date Of Birth as you will need this to make a chart. Make sure you are refilling the clipboards with the New Patient Paperwork (NPP) on them.

The way to navigate New Patients is a little different in the time of covid. [This document](#) has some more information about what that looks like.

Establishing Patient Rapport is something that can be a little tricky. You want to connect with people and have them feel connected with you. Eye contact is good. When someone tells you information about themselves that relates to their chief complaint, repeat it back to them, so that they know you heard them, and let them correct you if you got it wrong. If you can, find something in common and use that to relate to them. You are not an arrogant white-coated doctor. You have the right and privilege to be human and to be yourself (unless you're really a jerk, then don't be yourself). Let the authenticity of who you are shine through and that will help you connect with people.

Trauma Informed Care (TIC): If you don't know about TIC, then hop on the trolley. It's like universal precautions for Bloodborne Pathogens but for PTSD. Just assume everyone has had some kind of previous traumatic experience for which you, as a scary healthcare provider with

unlimited needles, are a potential trigger. Don't stand over people and talk down to them; sit or squat so your eyes are level with each other. Tell people what you are going to do before you do it. Ask people for permission before touching them, starting a treatment, or moving their clothing. Don't be judgemental! People judge themselves enough. When people are talking about their bad habits and judging themselves poorly, you can say, "if you wanted to be judged, you came to the wrong place." Do NOT give people a hard time for smoking, drinking, drugging, purging, or any of the other activities we can burden our colorful lives with. It's great that they have made a small change to come get acupuncture and that they are being honest about the issue with themselves.

There's lots of good information about TIC out there. Here's a helpful post on the [POCA website](#) to get you started.

Dealing with Patient Care Hiccups in your Shift:

Even more hiccups can be found in the [SOAP's Quick and Easy Guide](#).... A hard copy should be hanging on the wall at all clinics.

A patient is really upset with you and/or is walking out pissed?

Give them a free treatment card. What? You don't have any? Jeff should have given you some at some point, talk to him. There should be some stashed in the center drawer of the big desk as Grand, front office in the right top drawer at Laurel, R side of desk at SAP. But, wait. Are they walking out because they were a big pain in the butt and you didn't put up with their crap and you kicked them out. Good job! Then, let them go, and send Jeff a detailed [incident report](#) at soap.jeff.levin@gmail.com about what happened. Patients are not allowed to be total assholes to you. We might try to placate the patient, but please know that we have your back. If the patient emails to complain about you, don't be the one that replies. Send this email to Jeff or Whitney; they will ask your side of it and follow up with the patient.

There's too many drop ins?

Ahhh. That's a wonderful problem to have. And it's good for patients to see us so busy that we're too busy. If you don't have time in your schedule to see them, do the following.

Are they a follow up? Turn them away and tell them they should schedule.

Are they a New Patient? Same answer, but give them new patient paperwork and be really nice about it. Say something like, "We don't like to rush with new patients. If we rush, you might get sub par service, and I don't want you to have poor service be a part of your first experience here."

A patient demands a refund?

Tell them you don't have a key to the drop box (which is sorta true! You have the key, it's just unlikely we've shown you where it is yet.) and that they should call or email the clinic with their information and we'll mail them a refund.

Someone comes in with a gift certificate (GC)?

Please enter it into the patients private notes in PocaChart in the following way and shred the physical GC (If the GC is for a dollar amount you will have to ask the patient how many

treatments they want to use it for):

Example: Gift Certificate Redeemed 10/25/20 \$60 (or 3 tx) se

- 1.
- 2.
- 3.

If someone does not have their physical GC, you can look up info on the [Gift Certificate Log](#) and then enter into PocaChart the same way as above.

Someone wants to buy a gift certificate (GC)?

GC's can be bought in a dollar amount, or by number of treatments. See "[Gift Certificate Instructions](#)" for more info. These instructions should also be with the GC's. Center drawer big desk at Grand. Front office in right top drawer at Laurel, right top drawer at SAP.

A patient tells you they are going to kill themselves?

If a patient tells you that he or she is thinking about death or suicide, it's important to evaluate the immediate danger the person is in. Those at the highest risk for suicide in the near future have a specific suicide PLAN, the MEANS to carry out the plan, a TIME SET for doing it, and an INTENTION to do it.

The following questions can help you assess the immediate risk for suicide:

- Do you have a suicide plan? (PLAN)
- Do you have what you need to carry out your plan (pills, gun, etc.)? (MEANS)
- Do you know when you would do it? (TIME SET)
- Do you intend to take your own life? (INTENTION)

If a suicide attempt seems imminent, do not leave a suicidal person alone. Attempt to contact the patient's emergency contact. If they don't have one or you are unable to make contact, ask the patient if they have a friend, family member, case worker, that can be with them; contact them to leave the patient in their care. As a very last resort, call 911. If other patients are waiting, explain that there is a crisis, they will understand. When you have times, also look at the document entitled "[mental health crisis contacts/resources](#)" for other sources of help

Someone comes in for just a NADA treatment?

We're currently (during covid times) not advertising that we do this. You can do this if there is room on your schedule, otherwise tell them to schedule (and pay for) a regular appointment. If a pt wants to come in for just a NADA ear treatment for addiction or PTSD, in normal times, they can drop in it will cost them \$5. Fit them into your schedule if you can. If you cannot accommodate them, tell them so, and that we can't really can't sustain \$5 treatments right now. If you do a NADA only Tx., make sure to include them on schedulicity and chart them as normal. On your timesheet, mark them in the nada column instead of the commissions column.

Someone is too large for the chairs in our treatment room?

Set up MEGA CHAIR for them.

If someone seems uncomfortable in our chairs you can let them know we have a larger chair available if they would like to use it. If they say yes, pull out the Mega Chair and set it up for them. Mega Chair can be found:

- Laurel - in the far back office behind the door
- Grand - behind the shoji screens in the clinic space

Please leave a note in the EHR private notes for the next practitioner that they should have Mega Chair set up for this patient. That being said, if you see a note saying Mega Chair is required for a patient, try to set it up before they come in and put the reserved sign on it so no one else takes it.

How Best to Work with Us

We attempt to make all important clinic communication quick and clear. If you receive emails from us, especially ones that have to do with your job performance, please reply, at the very least that you've received those emails.

If you have an issue with how the clinic is run, or with how you are being treated by co-worker, patients, or management, please bring it to our attention immediately.

If you are working a shift, and you don't know something, don't be afraid to tell someone you don't know and you'll find the answer. For the answer, you can leave a note for the next punk on the schedule or you can email punks working at the other two clinics. There is also a feature on gmail called google chats where you can have a quick conversation of texts with the other two punks working at the same time you are. There are also some helpful quick answers in the [SOAP's Quick and Easy Guide...](#) It might be a little out of date, but you can often find the answer you're looking for quicking and easily, hence the name. There should be one up in the office too.

Get some acupuncture. If you are actively subbing, you get free acupuncture. If you haven't been in to work for us for a long while, please pay. Getting acu in a CA setting, and noticing what other punks do and say, is a good way to get better at what you do and feel better in the process.

Do your homework: There are a lot of documents to look through here. Don't blow it off or it'll bite you in the ass. Make sure you are acquainted with the process for how to do all these things. It's not that we are trying to be hard asses, but when you screw up something, it'll make the job much harder for your co-workers. Not only does this suck at a basic level, but it takes away time and energy from our mission of providing meaningful jobs and accessible acupuncture, which should really matter to you, otherwise, why the hell are you doing this?

If you want to get better at the job (and earn some CEU's) on the poca website, in [POCA CEU's](#) there's a great class called "How to Treat in a CA setting" This has a lot of good info on how to do the job well and repeats a lot of what is ready said here.

Before your first shift, log into and navigate EHR and Schitty. Make sure you know what the hell you are doing. If you don't, let us know and we can help.