

State Board of Chiropractic Examiners

To Whom It May Concern:

This letter is to state that as Director of Parker Professional Programs, I have reviewed the speakers below and determined that they are post-graduate level instructors, through a curriculum vitae or resume, and they have knowledge, training and expertise in the topics to be covered for “Your Role as a Chiropractic Assistant in Creating a Successful Practice”. The documentation appears to fall within chiropractic guidelines of the various state boards.

Parker University  
Continuing Education  
2540 Walnut Hill Lane  
Dallas, Texas 75229  
[www.parker.edu](http://www.parker.edu)

Lori Morgan

Please contact me if further information is needed, my direct phone number is 214-902-3492, or via email at [pfrase@parker.edu](mailto:pfrase@parker.edu).

Sincerely,



Phyllis Frase-Charrette  
Director of Professional Programs

## **METHOD OF CERTIFYING IN ONLINE ACTIVITIES**

1. **Name of Course:** Your Role as a Chiropractic Assistant in Creating a Successful Practice
2. **Organization Sponsoring the Course:** Parker University
3. **Course Objective:** To enhance the expertise of the Chiropractic Professional.
4. **Study Hours Required:** 1 Online
5. **Instructor(s):** Lori Morgan
6. Educational background and experience of instructor(s) is on file in the University offices.
7. **Attendance Verification Method and Certifying Officer:** FL Licensees are required to provide a valid driver's license to be awarded CE. The Online presentation is delivered via web pages in which the participant must review anatomy images, read supporting text, listen to audio instruction, and answer test questions. The time the participant spends on each page is logged and tracked. In addition, the test questions must be passed, or the participant cannot continue on to the following pages. The computerized log files that track the participant's access time and usage will be utilized to validate the attendance and participation. The instructors will be available for questions via e-mail. Upon successful completion, Parker University Continuing Education Department will maintain and distribute attendance records.
8. **Textbooks and/or Equipment Required:** Internet
9. **Outline of Material Covered:** Attached
10. **Location(s):** Computer/Internet Based
11. **Date(s):** Based upon date of actual completion

Lori Morgan  
Team Development Coach

## **Your Role as a Chiropractic Assistant in Creating a Successful Practice**

During this hour you will gain the confidence that every C.A. needs to have a voice in your practice. You will learn how to have better communication with your doctor, your team, and your practice members to implement changes with the procedures and ideas that you have learned here at Parker Seminars. With your voice you can help to take your practice to a new level of success.

Objectives: To give the attendee the basis for understanding their role in helping to create a successful practice.

1 Hour Session

- Introduction 15 minutes: **The role of the CA is a special one**
- **Keys to Communication with your doctor 15 minutes**
  - COMMUNICATION is CRITICAL : The way we communicate, the desire to communicate, the ability to communicate and the frequency with which we communicate is crucial for the CA and team to function optimally
- **Implementation: Your Recipes for Success 15 minutes**
  - Using your voice to help implement the Parker systems and procedures you have learned here this week-end. This will be a review section of other CA tracks as well as importance of WOW.

***WOW: a magical gesture delivered on top of outstanding chiropractic and practice member care –an unexpected touch that leaves them feeling amazing***

- **Power Close 15 minutes**
  - **Chiropractic needs C.A.'s and D.C.'s who are driven to push the Chiropractic profession forward, advocating for it. " If It Is To Be, It Is Up To Me"**

**What action will you take on Monday to expand the reach and influence of your practice**

**LORI MORGAN**  
**CHIROPRACTIC TEAM DEVELOPMENT COACH**

100 Yosemite Dr Tracy, California, 95376 United States 209-815-2971

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**MISSION STATEMENT**

My Purpose is to inspire all C.A's I teach to love chiropractic and to become true Chiropractic Advocates. To support their doctors and their teams so they thrive in practice serving as many people as possible.

**PROFESSIONAL EXPERIENCE**

Dr. Charles Ward's Innate Legacy, Austin, Texas United States

*Chiropractic Assistant Trainer and Coach, Mar 2001 – present*

- As the C.A. coach and trainer of Innate Legacy I am responsible for developing Chiropractic Assistants into true Chiropractic Advocates by teaching basic office systems and procedures that give them confidence to serve the practice to the best of their abilities.
- As the Director of Innate Legacy, I am responsible for maintaining the daily activities of Innate Legacy. Included but not limited to: setting up quarterly seminars, scheduling client appointments, communicating and closing prospective clients, assisting in doctor's training and coaching.
- As a speaker and trainer of Innate Legacy I am responsible for developing and presenting four CA training boot camps per year, as well as four D.C. /C.A. procedure training courses that Dr. Ward and I present live at the quarterly seminars. I also develop and present twelve CA University training calls per year, as well as an annual 52- week Team Training Agenda for our clients to follow for optimal team development. I am also a keynote CA speaker for Chiropractic Associations and Technique groups

**CHIROPRACTIC ASSISTANTS FOR LIFE-OWNER**

*Chiropractic Assistant Trainer and Coach, Mar 2018 – present*

- Personal Coach and Mentor for Chiropractors and Chiropractic Assistants
- In-office Visits to observe and train teams to their fullest
- Chiropractic Assistant University Weekly Podcasts
- Keynote Speaker at Various Chiropractic Events

Burke Chiropractic/Schmidt Chiropractic, Tracy, California United States

*Chiropractic Assistant, Jan 1988 – Feb 2001*

*Jan 1988 - Present*

- I continue to develop myself into a highly trained and respected Chiropractic Assistant trainer and Coach. I study Chiropractic Philosophy and procedures and systems. I follow the top Chiropractic leaders by attending their classes and listening to audio conferences. I also have the opportunity to work with one of Chiropractic Leaders Dr. Charles Ward who continues to mentor and coach me.

## **EDUCATION**

California High School, San Ramon California United States

Parker System for Professional Success, United States

## **LEADERSHIP AND INVOLVMENT**

- Founder of Chiropractic Assistants For Life Coaching and Mentoring Group
- Member of Black Diamond Club; Leadership Development Group
- Member of League of Chiropractic Women
- Founder of Celebration of Hope; Thanksgiving Gathering for those less fortunate
- Speaker at Blair Upper Cervical, ChiroSushi and State Associations

## ONLINE CE ATTENDANCE CERTIFICATE

**Name:** \_\_\_\_\_

**Title:** Online: XXXX

**Address:** \_\_\_\_\_

**Course #** XXXX

**Date:** XXXX

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_

**Location:** Online

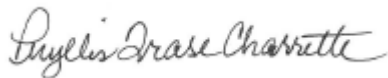
**STATE [only one per voucher]:** \_\_\_\_\_ **YOUR STATE LICENSE #:** \_\_\_\_\_

**DO NOT WRITE BELOW THIS BOX**

Completion Date	Class Hours	Course Title	Instructor
XX/XX/XX			

**TOTAL HOURS ATTENDED:** \_\_\_\_\_

**Board Approval No.** \_\_\_\_\_



\_\_\_\_\_  
**Phyllis Frase Charrette**  
**Director, Parker Professional Programs**

This certificate is to acknowledge your completion of the Online Continuing Education course shown above. This copy is for your records and can be submitted to your board of licensing. Please Note: Verify the information is correct upon receipt – discrepancies will only be accepted up to 6 months after the closing date of the course. Please keep this certificate in a secure place. Any replacement, copy, or fax will incur a \$25 fee per certificate.



These Questions are delivered via the Parker Seminars mobile App.

## Quality Feedback Survey

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Course Name: \_\_\_\_\_

Date: \_\_\_\_\_ Location: \_\_\_\_\_

### How did you hear about this Course?

Parker Brochure     School E-mail     Referral     Parker Web Site     Other \_\_\_\_\_

**Please score each speaker on an “A to E” scale, with “A” Extremely Satisfied and “E” being Extremely Dissatisfied.**

How would you rate this speaker

a      b      c      d      e

Rate the overall content of the session:

a      b      c      d      e

Rate the classroom & facilities:

a      b      c      d      e

Please add any additional comments:

a      b      c      d      e

Is there a certain speaker or topic you would like to see next time?:

a      b      c      d      e

12) What topics would be of interest to you for future classes?  
\_\_\_\_\_

**Comments:**  
\_\_\_\_\_

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### THANK YOU FOR YOUR FEEDBACK!

The purpose of this quality feedback survey is to provide information to the Instructors and to Parker University about extant standards of performance. **Your response will be held in confidence. You will not be identified in any way by reference to your response. For additional complaints or concerns regarding this program please contact Parker University at 800.266.4723.** Parker University will share the outcomes of this evaluation with the Instructor, and will keep a copy on file in the Continuing Education Office to demonstrate compliance with accreditation standards and requirements.