



**GUIDELINES FOR COSPONSORSHIP  
McKenzie Educational Programs**

Thank you for your interest in hosting courses with us.  
Please take time to carefully read the following information.  
Our Program Coordinator, Cindy Butler, welcomes any questions,  
alternative ideas or feedback anytime  
[cindy@mckenzieinstituteusa.org](mailto:cindy@mckenzieinstituteusa.org)

**Table of Contents**

---

<b>BENEFITS OF COSPONSORSHIP</b> .....	2
<b>SERIES STRUCTURE</b> .....	3
Participant Eligibility .....	3
CEUs .....	4
Program Details/Fees .....	4
Scheduling .....	4
<b>COSPONSOR RESPONSIBILITIES</b> .....	5
Venue Requirements .....	5
Catering, Lodging, Transportation .....	6
Financial Arrangements .....	6
Pre- Onsite- Post-Course Duties .....	7
Purchasing Course Materials .....	8
<b>** Employee Attendance/Free Tuition</b> .....	9
<b>** Patient Recruitment</b> .....	10
Venue Details Form .....	11

**\*\* EXTREMELY IMPORTANT FOR YOUR REVIEW AND ACCORDANCE**

## GUIDELINES FOR COSPONSORSHIP

### The McKenzie Institute® Educational Programs

The McKenzie Institute is committed to the highest standard of education providing the best preparation in the application of McKenzie principles through our Program of Certification. To provide this post-graduate education service in targeted geographic locations nationwide that are time, travel and cost-efficient, we seek the assistance of a local cosponsor who is interested in building an on-going relationship with the Institute that is mutually beneficial.

#### Each of the following is required to qualify as a Cosponsor Organization:

*(The availability of these requirements necessary to host our courses will determine what portion(s) of the program can be held with your organization.)*

- 🚩 A course venue (with an optimum learning environment)
- 🚩 Reasonable proximity to suitable lodging and airports
- 🚩 Provisions that include A/V equipment and catering options
- 🚩 A good volume of spine/extremity patients to draw from for patient demonstrations
- 🚩 An on-site coordinator who has taken at least one McKenzie course

## BENEFITS OF COSPONSORSHIP

In recognition of the efforts put forth by the cosponsor, The McKenzie Institute will provide direct benefits, to include:

### 1. Free or Reduced Course Tuition

Tuition assistance is the most valued benefit of hosting McKenzie courses. Typically, the free tuitions accrue based on the number of **fully** paid participants (excluding audits and other possible gratis registrants) as follows:

Total of Paid Participants	Part A	Part B	Part C	Part D	Adv Ext	Adv Clinical Decision
15 paid participants	1 free	1 free	1 free	1 free	1 free	1 free
19 paid participants	2 free	2 free	2 free	2 free	2 free	2 free
23 paid participants	3 free	3 free	3 free	3 free	3 free	3 free
27 paid participants	<b>4 max free</b>	<b>4 max free</b>	<b>3 max free</b>	<b>3 max free</b>	<b>4 max free</b>	<b>4 max free</b>

*(Note: If the course attendance numbers are not sufficient to earn spots, we expect registered staff tuition to be paid. If you know this is not an option, please advise Cindy so we can prepare accordingly.)*

We also offer a *Semi-Private Course* option for cosponsors with a high number of staff that replaces the free tuition option with a greatly reduced per tuition fee that enables an organization to cost-effectively train more staff at once. Typically, a minimum of 15 staff are required for a Semi-Private course and individual fee discounts.

For long-term cosponsors that have exhausted their need for free tuition, the Institute is willing to discuss on an individual basis other possible incentives to the cosponsoring organization to continue to host courses.

### 2. Free McKenzie Products (OPTP)

OPTP, North American distributor of McKenzie products, provides the following products for the appropriate course in the series: lumbar and cervical rolls, the patient book series *Treat Your Own...Back, Neck, Shoulder and Knee*, and MDT assessment forms (lumbar, cervical/thoracic and extremity).

We ship product two weeks prior to the start of the course based on estimated final attendance and we often have extras leftover; you are welcome to keep these products at no cost to you or your company!

#### 4. Free Job Opp Advertising on our Website

As a bonus to assist your hiring needs, if you seek additional staff you can advertise a listing on our website's Job Opp section at no cost. Clearly, a selling point to a prospective employee might be your cosponsor relationship to allow them to get free training in the McKenzie Method of MDT!

#### 5. Gain Patient Referrals from our Certified MDT Provider Online Referral Network

By hosting our courses and training your staff towards MDT certification, your organization could greatly benefit with increased patient referrals and recognition.

Our online Certified MDT Provider Locator provides immediate access to the magnitude of potential patients, referral sources, insurance companies, and other health care professionals seeking qualified McKenzie MDT providers in their areas. The policy of the Institute is to release only the names of those practitioners who have successfully passed the Credentialing Exam and/or Diploma Program, who actively meet the [MDT Certification Continuing Education Standards \(CCES\) Policy](#).

### SERIES STRUCTURE:

#### ELIGIBILITY

In response to our ever-changing healthcare environment which has prompted many healthcare centers to adopt a team approach to patient care, The McKenzie Institute recognizes the need for those providers who have become more involved with direct patient care to receive a comparable level of training appropriate to their discipline.

<b>Program of Certification: (A-D, Credentialing Examination):</b>	<i>Approved healthcare providers: PT, DC, MD, DO, NP, and PA; and in some cases ATC, OT, and RCEP (by ACSM).</i>
<b>Parts A &amp; B:</b>	<ol style="list-style-type: none"><li>1. Healthcare providers with an Associate's Degree in the field of study AND current licensure in the state of practice (<i>Approved providers: PTA's</i>). Only those PTAs who are currently working with and directly supervised by certified McKenzie MDT providers may complete Parts C and D, if desired. A letter from the certified MDT provider who is also active with our CCES policy must accompany each course registration to verify direct supervision.</li><li>2. A Bachelor's or Master's Degree in the field of study, but in a state without licensure or registration, or the provider has yet to become licensed or pass registry exam requirements. (<i>Approved providers: ATC, OT, EP</i>)</li></ol>
<b>Part A only</b>	A Physical Therapy student matriculating full-time in the professional phase of an accredited physical therapy program who has successfully completed at least one course in musculoskeletal examination and treatment (orthopaedics) in the physical therapy curriculum and an orthopaedic clinical affiliation. A letter from the Physical Therapy Program Director or Chair must accompany the Part A course registration to verify the student meets these requirements and is in good academic standing.

**It is not our role as an educational provider to enforce each individual health profession's regulations. All course participants are legally and ethically responsible for reviewing the applicable laws, the Standards of Practice, and the Code of Ethics of their profession to determine whether they may use the information, material and techniques taught in the courses within their professional and provincial jurisdictions. The McKenzie Institute cannot advise a participant as to whether he or she may use the information, material and techniques in the geographic areas in which he or she practices.**

We certainly welcome professionals who do not intend to become Credentialed to take our courses. However, to be recognized or promote oneself as being certified in the McKenzie Method of MDT and to receive patient referrals from the Institute referral network, providers must have passed the Credentialing Exam.

**Please refer to our website for the complete Eligibility Policy guidelines:**  
[http://www.mckenzieinstituteusa.org/eduCourse\\_eligibility.cfm](http://www.mckenzieinstituteusa.org/eduCourse_eligibility.cfm)

## CEUs

All courses are approved by the states that require pre-approval for CEU credit and we are an approved provider with NATABOC (Prov. #P931) Level 1: Clinical EBP Category.

Details can be found at <http://www.mckenzieinstituteusa.org/ceu-approvals.cfm>.

COURSES	DETAILS	TIME	COST	MAX Attend	MIN Attend	Hours
<b>Part A:</b> <i>MDT of the Lumbar Spine</i> <i>(Must be completed first)</i>	Primarily lecture and patient demonstration with some lab. Precursor to intensive hands-on workshops.	Online pre-req. 3 days	\$650	45	15	26
<b>Part B:</b> <i>MDT of the Cervical/Thoracic Spine</i> <i>(pre-requisite Part A or C)</i>	Primarily lecture and patient demonstration with some lab. Precursor to intensive hands-on workshops.	Online pre-req. 3 days	\$650	45	15	26
<b>Part C:</b> <i>Advanced Lumbar Spine and Extremities - Lower Limb</i> <i>(pre-req. Part A or B)</i>	Lecture, practical workshop and hands on lab with patient demonstration	4 days	\$690	27	15	28
<b>Part D:</b> <i>Advanced Cervical &amp; Thoracic Spine and Extremities - Upper Limb</i> <i>(Must be completed last)</i>	Lecture, practical workshop and hands on lab with patient demonstration	4 days	\$690	27	15	28
<b>Credentialing Exam</b> <i>(pre-req. Part A – D)</i>	Multi-method testing including written & practical portions	1 day	\$500		25	8
<b>Credentialing Exam Retakes</b>	<ul style="list-style-type: none"> <li>▪ entire exam</li> <li>▪ written section only</li> <li>▪ performance section only</li> </ul>	1 day ½ day as needed	\$250 \$200 \$50	25 Variable w/ retakes	n/a	varies
<b>Advanced MDT:</b> Extremities <i>(Pre-req. Part D)</i>	Hands-on, practical workshop with patient demonstration	2 days	\$400	60	15	14
<b>Advanced MDT:</b> Clinical Decision Making [Two Instructors] <i>(Pre-req. Part D)</i>	Intensive clinical reasoning, problem solving exercises, case study analysis and patient demonstrations for spine and extremities.	2 days	\$450	50	20	14
<b>Advanced MDT:</b> Fine Tuning Clinician Procedures [Two Instructors] <i>(Pre-req. Part D)</i>	Enhanced psychomotor skill practical sessions and critical thinking to consider evidence of thrust and non-thrust manips	2 days	\$450	<b>24</b>	20	14

### PLEASE NOTE:

There is no formal time span between courses. However, it is **highly recommended** attendees allow for sufficient time to clinically practice the method, develop experience with difficult patients and be better prepared for the problem solving, advanced problem solving and clinical reasoning, and technique practice in the next course in the series.

## AUDITS

We do allow a restricted number for audit (retake) participation in all of our courses. Three spots are held for this purpose unless sufficient additional room in the course is available and only individuals who have taken the course previously in its entirety are eligible as an audit. The fee for an audit varies based on course and a complete registration form must be submitted.

## **SCHEDULES**

The following represents a fairly typical timeline; however the actual order of topics and timeline may vary between individual instructors' activities and patient simulation scheduling. Each day also typically incorporates 45-minute lunch break midday and a fifteen-minute break morning and afternoon except the final day. The four-day courses are held Thursday–Sunday and the three-day courses are Friday–Sunday and two-day courses Saturday–Sunday. However, modifications of this may be possible (i.e., Friday–Monday, etc.)

<b>Parts</b>	<b>Day 1</b>	<b>Day 2</b>	<b>Day 3</b>	<b>Day 4</b>
Parts A and B <b>Pre-requisite online component</b>	<b>Registration 7:30am</b> 8:00am-5:30pm	7:30-8:00 cont'l bfast 8:00-5:30	7:30-8:00 cont'l bfast 8:00-1:15	
Parts C and D	<b>Registration 7:30am</b> 8:00am-5:15pm	7:30-8:00 cont'l bfast 8:00-5:15	7:30-8:00 cont'l bfast 8:00-5:15	7:30-8:00 cont'l bfast 8:00-1:00
Advanced Extremities	<b>Registration 7:30am</b> 8:00am-6:00pm	7:15-7:30 cont'l bfast 7:30am-1:15pm		
Clinical Decision Making	<b>Registration 7:30am</b> 8:00am-6:00pm	7:15-7:30 cont'l bfast 7:30am-1:15pm		
Fine Tuning Clinician Procedures	<b>TBD</b>	<b>TBD</b>		

***Due to CEU state regulations, it is mandated by the Institute that all faculty adjust accordingly to maintain the stated contact hours requirement.***

## **CREDENTIALING EXAM**

Typically on Saturdays, registration begins at 8:00am and room availability is required through 6:00pm. There are occasions when it may be more convenient for an individual to be re-tested for the performance section at a course location rather than traveling to an exam location. If this is necessary, and the instructor can accommodate the request, we would appreciate your assistance and support.

**COSPONSOR RESPONSIBILITIES**

- ✚ **COSPONSOR COORDINATOR:** A representative **who will be available throughout the course** from the cosponsoring organization. Due to the patient requirements for our courses, this individual needs to be a clinician and should have at least taken Part A, or have experience in organizing continuing education programs.
- ✚ **COMMUNICATION:** Timely correspondence and adhering to deadlines with the Institute's Program Coordinator regarding all issues associated with course coordination and processing documentation.
- ✚ **COURSE SCHEDULING:** Secure the appropriate venue and assist us in determining the ideal dates for courses **insuring that there are no scheduled conflicts in the area** (i.e., state chapter meetings, professional or collegiate athletic events, conventions, etc. A local Chamber of Commerce is a great resource!) You know better than we do when clinicians are most likely to attend courses in your area.

✚ **COURSE VENUE SELECTION:**

- **Parts A, B, Adv Extremities & Clinical Decision Making:** The room should be able to accommodate 40 participants (min 20 - max, 50).  
The ideal room will provide all participants with an unobstructed view of the teaching area, primarily for the patient demonstrations. There must be suitable writing surfaces and comfortable seating. Classroom style set-up with 6' - 8' conference tables and chairs is most appropriate.  
**There is a "lab" portion in these courses, so sufficient space to move around, sturdy tables or access to clinical area with treatment tables on weekends is essential.**
- **Parts C, D & Fine Tuning Clinician Procedures\*:** The room must be able to accommodate 27 participants with 8-10 treatment tables.  
This can be a conference room, gym, clinic setting that provides space workable for practical sessions. Again, suitable writing surfaces and comfortable seating is also important.

**For Parts C & D, while it is desirable to have access to treatment tables each day, we respect that in some clinics tables may only be available on weekends. If this is the case, please inform the instructor or Cindy in advance so that scheduling of lab and patients can be managed as needed.**

**VENUE REQUIREMENTS:** *Typical A/V and other equipment utilized by our faculty.  
(Please be sure to verify specific needs with assigned instructors.)*

Part A, B, Adv Ext & Clin Decision	Part C*	Part D* & Fine Tuning Procedures*
<ul style="list-style-type: none"> <li>▪ Suitable microphones for both speaker &amp; patients</li> <li>▪ <b>LCD projector/screen</b></li> <li>▪ 1 whiteboard or flip chart w/markers</li> <li>▪ <b>1 adjustable height treatment table</b></li> <li>▪ <b>Weekend clinic access or sturdy tables for lab</b></li> <li>▪ Bath-sized towels/pillows</li> <li>▪ 1 straight - backed chair</li> <li>▪ 1 articulated spine</li> </ul>	<ul style="list-style-type: none"> <li>▪ Suitable microphones for both speaker &amp; patients</li> <li>▪ <b>LCD projector/screen</b></li> <li>▪ 1 whiteboard or flip chart w/ markers</li> <li>▪ <b>8 treatment tables* 4 participants per table</b></li> <li>▪ Bath-sized towels/pillows</li> <li>▪ 1 straight - backed chair</li> <li>▪ 1 articulated spine</li> </ul>	<ul style="list-style-type: none"> <li>▪ Suitable microphone for speaker</li> <li>▪ <b>LCD projector/screen</b></li> <li>▪ 1 whiteboard or flip chart w/ markers</li> <li>▪ <b>10 treatment tables* 4 participants per table</b></li> <li>▪ 2 to 3 low stools for participants to stand on</li> <li>▪ Bath-sized towels/pillows</li> <li>▪ 1 articulated spine</li> </ul>

**\* TREATMENT TABLES ARE CRITICAL TO THESE COURSES.** *Adjustable height treatment tables are strongly preferred. If you cannot provide what is required, talk with the instructor about an adequate alternative.*

**Venue Directions:** We will need specific details on the exact location, including the main facility and specific room names. We currently have a "Map It" feature on our website for participants to locate the course venue, so it is imperative an accurate address is used.

## **CATERING**

- ✓ Coordinate and arrange for refreshments. Costs are not to exceed \$10 per person/per day.
- ✓ Breaks required include morning continental breakfast (i.e., coffee & tea, and light fare) and a mid-afternoon break (soda or juice and light snacks). Participants are on their own for lunch.  
***NOTE: There is no afternoon break on the last day since the course ends early.***
- ✓ Options might include the cosponsor facility's food services, external catering services, or a local wholesale market – the latter is our preference for catering since the students often remark that the food is much better than provided by catering services! If you do pay out-of-pocket, we will reimburse you within one week of your submitting a written invoice and receipts.

## **LODGING**

- ✓ Research and provide a written list of hotels in the area that we can offer to the instructor and participants who are not commuting daily to the course.
- ✓ *Ideally, one hotel within walking distance.* The list should be comprised of safe properties including the most convenient as well as a variety of cost structures (i.e., low budget, mid-range, higher end), even Bed & Breakfast accommodations are worth suggesting.
- ✓ If cosponsor has not used hotel(s) previously for events or is unfamiliar with distance from course site, quality, or safety, we request you make a quick site visit.
- ✓ Please provide the following information for each hotel:
  1. Identify your recommendation of the most ideal selection to highlight to attendees/instructor
  2. Hotel Name, Address and Phone
  3. Provide the distance and transportation options to/from airport and to/from course venue.

## **TRANSPORTATION**

To advise faculty and out-of-town course participants, we also ask for this assistance in determining the need and availability of transportation to and from the hotel to the course, and the airport/train station etc. (i.e., does the hotel have a shuttle service or what local transportation services are available?)

Many Cosponsor Coordinators, or their representatives, offer to provide transportation for the Instructor to and from the airport and hotel, if necessary. Though this is not a requirement, it is greatly appreciated when available. This is also a wonderful opportunity to get to network with a tenured professional, a perk well worth taking advantage of.

## **FINANCIAL ARRANGEMENTS**

- ✓ The McKenzie Institute will collect all course fees.
- ✓ The Institute will incur the cost of general marketing materials to include eblasts, advertising in national publications, and local publications, as appropriate, etc. We welcome ideas from cosponsors for local or state marketing initiatives to consider.
- ✓ The Institute will incur all material cost and associated shipping costs of course materials to and from the cosponsor by UPS ground service.
- ✓ The Institute will incur costs for refreshments within the guidelines.
- ✓ If necessary, and with **prior approval\***, the Institute will pay for all reasonable and customary fees associated for a successful course to include: room rental, audio-visual equipment, tables, etc. The cosponsor must provide a written cost breakdown of these anticipated costs before confirming the course. If an unforeseen need arises, we must be notified immediately.

***\*NOTE: If we are not notified and provided with a written breakdown for any of the above provisions **BEFORE** the course, we reserve the right to not reimburse the cosponsor, or cosponsor will be required to make payment accordingly.***

## PRE-COURSE PLANNING:

1. **Contact the assigned instructor early.** Verify his or her individual requirements for AV, room setup, etc. Faculty can also offer some valuable suggestions to assist in the scheduling of patients. If you are having difficulty reaching your instructor(s), let us know and we will help to facilitate this.
  2. **Patient Search:** Seek and schedule patients for course demonstrations.\* (See page 8)
  3. **Course Materials/Products:** Two weeks prior to the course –
    - MIUSA will ship course manuals from Syracuse NY
    - OPTP will directly ship from MN the McKenzie products: rolls, books and assessment forms.
    - **Immediately upon receipt of both shipments, please open boxes to verify both the condition and quantity of contents.**
  4. **Local Marketing:** We ask for your assistance, particularly for Part A courses.
    - Please contact state PT chapters to provide us with options for promotion i.e., eblasts, newsletters, mailing lists, etc. We will cover these costs, if agreed helpful.
    - Send out Emails, Tweets, Facebook posts, flyers, faxes throughout your facility or contact other local facilities about upcoming courses – this could also greatly assist with getting patients for the course.
  5. **Employee registration forms: (See page 9 for important details)**
    - **Must be sent at least one (1) month prior to the course**
    - Each form must have registrant's credit card information (*no charges ever occur without notice or permission*)
    - Please be sure to check the box for *Cosponsor Employee*.
    - Submit individually by registrant, or collectively by you
    - **If we do not receive completed registration forms by this date, you may forfeit your spots!**
- ✚ **For Certified Cosponsor Reps only:** You can fulfill the three-year requirement for the [MDT-CCES Policy](#) by active participation or assistance in one or more courses hosted by your company. Active participation is defined as full attendance and assisting the instructor when appropriate subject to:
- ✓ You notifying the MIUSA Program Coordinator **before** the intended course(s) to count toward this requirement, and
  - ✓ Written verification of your attendance/assistance from the instructor provided to the Institute.

## ONSITE AT THE COURSE:

### **Registration:**

Staff the registration table to assist with registrant's needs including but not limited to:

- ✓ Welcome and sign in participants.  
(Registrants must sign in the first day **and** sign out the last day. The list must then be verified and signed off by the instructor. This is critical since we are required to have these lists on file for CEU verification.)
- ✓ Distribute course materials.
- ✓ Assist with directions to restaurants, etc. for lunch and entertainment.
- ✓ General support and participants questions.

### **During The Course:**

- ✓ Introduce the instructor and go over any housekeeping items (i.e., bathroom location, time of breaks & lunch, etc.)
- ✓ Assist the instructor with audio-visual needs: set-up and use.
- ✓ Welcome and guide 'volunteer patients' for evaluation demonstration. [Arrange for an appropriate waiting area; **no volunteers are allowed to observe demonstrations before or after their appointments.**]
- ✓ Greet the participants each day
- ✓ Set up and monitor refreshment breaks.
- ✓ General support to the instructor and participants throughout the course.



---

**AFTER THE COURSE:**

---

- ✓ Collect all course evaluations and release forms in exchange for providing the course certificate.
- ✓ Return all documentation and materials **within a week** of the completion of the course including:
  - ✓ Course evaluations, sign in sheets and additional material (i.e., catering bill).
  - ✓ Complete the Course Summarization Form which includes your feedback about the course, recording of extra materials, etc.

**Additional Course Materials**

As indicated in the Cosponsor Benefits, you may be eligible to retain leftover materials at no charge to you, or if requirements are not met to earn this extra benefit, you may also purchase these products at cost -- still a discounted opportunity. Contact Cindy Butler for further information.

For additional purchase of McKenzie products, direct your inquiries and requests to OPTP at 1-800-367-7393. OPTP brochures with discount coupons should have been enclosed with course material shipment. No products are to be sold to participants at the course.

---

**STAFF ATTENDANCE AND FREE TUITION (Please read carefully)**

---

1. We will ask for your projected number of employees immediately upon scheduling the course so we can insure saving a sufficient number of spots.
2. Please be sure these forms are submitted at least one month prior to the course if not before. ***If the course fills up and employees are not registered, you may forfeit these free spots.***

**VERY IMPORTANT NOTE:**

*Part A and B courses have a pre-requisite online component and only three-days live onsite, designating employee registrants as soon as possible is critical to allow sufficient time to complete the online component with a test ("open book") that must be passed to be eligible to attend the live course.*

3. There is never a guarantee\*\* of "free tuition" spots as they are typically based on the number of full paying registrants. While we endeavor to make a determination of the number of confirmed "free tuition" spots as early as possible, there are occasions when it cannot be decided in advance. Remember, even if payment for tuition is necessary, the considerable savings for employees not having to travel is already a huge advantage for hosting courses.

**\*\* However, if employees will not attend if tuition is required, please inform MIUSA immediately upon scheduling the course – NOT right before the course.** When determining the viability or breakeven point for courses, we take into consideration the number of employees who are projected to attend.

4. It is up to the discretion of the Cosponsor Coordinator who will be eligible for the tuition and confirming those individuals to MIUSA. Inviting healthcare professionals from outside of the cosponsor organization is permitted, provided they are *eligible* to take McKenzie courses. (Refer to the eligibility chart in Cosponsor Guidelines or on our website: [http://www.mckenzieinstituteusa.org/eduCourse\\_eligibility.cfm](http://www.mckenzieinstituteusa.org/eduCourse_eligibility.cfm).)
5. A registration form must be completed for each employee. Be sure to advise them to:
  - ✓ Check the box at the top of the form noted *I am a cosponsor employee*, and
  - ✓ Sign the disclaimer.
6. A credit card must be provided on the registration form to hold the spot. (*It will not be charged at that time unless confirmed to do so.*)
7. When "free tuition" spot(s) are confirmed, the Cosponsor Coordinator informs MIUSA who will get the free spot(s), who is required to pay, and whether personal or company paid. Payment for any outstanding registrations will be required immediately upon course completion if paid by the individual and within 30 days if a company check is required. *No participants will be allowed to register for the subsequent Part in the series until previous course tuition has been paid in full.*
8. An alternative to assigning free tuition spot(s) to an individual(s) would be dividing the value of the earned tuition amongst the number of staff registered. However, this must be handled internally within the cosponsoring organization and the preference confirmed with the Institute as well as who is responsible for payment.

**For example:** *On Part A course, four employees are registered and only two "free tuition" spots are earned. The value (\$1300) may be split amongst the four employees (i.e., \$325 per person).*
9. Remember, if you have numerous employees, our *Semi-Private Course* option that offers a discount off the tuition fee versus "free spots" might be more beneficial.

Your adherence to this policy is critical for the accurate tracking of registrations both in terms of course viability as well as our database records.

## **PATIENT RECRUITMENT & SELECTION: A Critical Aspect of Our Courses**

Selecting appropriate patients as well as a variety of patients for demonstration on the courses helps us educate the participants, and more fully demonstrate the complete system of MDT.

1. For clinicians who are not familiar with MDT, or if you are not sure whether a particular patient would be appropriate for demonstration, please contact the course instructor. *(Please Note: Instructors reserve the right to not see a patient on a course if they are deemed inappropriate for any reason.)*
2. **In states without direct access, patients must have a signed referral from a physician for evaluation at the course.** The Institute will provide patient consent / release forms that must be signed by the patient and attach a copy of the physician's prescription – unless it is a state with full direct access, and then only the patient's signed release is required.
3. **Recruiting the number of appropriate patients is vital for the effectiveness of all courses.** In addition to your own patient population, contact other hospitals, clinics, etc. in your area. The Registration Confirmation letter sent from our administrative office offers participants to contact the cosponsor if they have potential patients. **This is also a good opportunity to cultivate local physicians.** We welcome you to invite, and highly recommend, the physician attend the course during his/her patient's evaluation as our guest.

**PART A:** Five (5) patients

**PART C:** (6) 2 Lumbar / 4 Lower Extremity

**ADV EXT:** 4-6 patients

**PART B:** Five (5) patients

**PART D:** (6) 3 Cervical / 3 Upper Extremity

**Clin Decision:** 6-7 patients

4. If appropriate to their condition, the Institute will provide each patient with the recommended McKenzie roll and book from the *Treat Your Own...* series, as a free gift in appreciation of their time.
5. **Please be available to greet all patients and bring them into the course** at the appropriate times for class presentation. [You must determine an appropriate waiting area; **no volunteers are allowed to observe demonstrations before or after their appointments.**] The Cosponsor is responsible to keep all patients informed of their time schedules, to follow up with them for their return on subsequent days of the course, and to insure they have continued care with a qualified provider after the course.

### **EXAMPLES OF THE MOST SUITABLE PATIENTS ARE AS FOLLOWS:**

These are basic guidelines; however, please make every effort to still confer with the instructor to insure suitability and scheduling.

**Part A courses:** We are looking for patients experiencing back pain with or without referral into the buttock/thigh/leg. The patient should have a loss of motion in the lumbar spine. The patient may have neurological signs. What we are attempting to demonstrate is:

- Rapid lasting changes in symptoms and mechanics (range of motion, neurological signs)
- Centralization
- Directional preference
- Aggravating factors
- Alleviating factors

**Part B courses:** We are looking for patients experiencing neck pain with or without referral into the arm/forearm/hand. The patient should have loss of motion in the cervical spine. The patient may have neurological signs. In addition, if you have a patient with mechanical headache or midback pain, this would be great for Day 2.

**Part C and D courses:** The clinicians from A and B courses can bring more difficult patients, patients they haven't been able to figure out. This is where we usually can demonstrate the lateral component, adherent nerve root syndrome, and patients that just will not respond to the system. Extremity patients that are NOT recent post surgical or chronic problems are desirable.

**Advanced MDT: Extremities and Clinical Decision Making courses:** Please contact the instructor.

### **Patients not appropriate for courses:**

- Please **do not** bring in patients with what we call Red Flag symptoms
- Pain and paresthesias in all four limbs
- Recent trauma, unscreened, constant pain, not able to move head or trunk in any direction
- Progressive neurological deficit
- Any patients that are currently in litigation or medical / legal suits

## Program Information

PRIVATE (circle one): YES or NO

Cosponsor City & State:

Preferred Dates:

Desired Part(s): (please circle)

A B C D

Extremity Credential Exam CDM

## SITE DETAILS:

Venue Name:

Contact Name: \_\_\_\_\_

Occupation: \_\_\_\_\_

Venue Address:

Contact Phone: \_\_\_\_\_

Contact Fax: \_\_\_\_\_

**\*\*PLEASE PROVIDE COMPANY WEBSITE ADDRESS BELOW\*\***

E-mail addr: \_\_\_\_\_

Venue Phone #:

**Max occupancy:**

**How many staff do you plan on sending?**

## Shipping address (ONLY if different from site)

Shipping Address:

## Airport

Airport Name:

Distance to venue:

Airline Hub (if known):

## Transportation

Transport provider from *airport to hotel*:

Transport provider from *hotel to venue*:

Phone:

Phone:

Cost:

Cost:

**IF YOU ARE NEW COSPONSOR, please answer the following:**

Why do you think McKenzie courses would be successful in your area?

What will you do to insure patient requirements are met?

# Hotels

## 1<sup>st</sup> Choice (Best options):

Name:

Address:

Distance to venue:

Distance to airport:

Phone #:

## 2<sup>nd</sup> :

Name:

Address:

Distance to venue:

Distance to airport:

Phone #:

## 3<sup>rd</sup> :

Name:

Address:

Distance to venue:

Distance to airport:

Phone #:

# Cost Breakdown (per day)

Site/Room Rental: \$ \_\_\_\_\_ Per day or Total (please circle)

Other Costs (please explain): \_\_\_\_\_  
\$ \_\_\_\_\_ Per day or Total (please circle)

<b><u>Audio/Visual Equipment</u></b>			<b><u>Type of services:</u></b>	
May include (depending on instructor):			In-house media:	
	<b><u>Per day</u></b>	or	<b><u>Total</u></b>	Y      N
LCD Projector	\$ _____		\$ _____	
LCD Screen	\$ _____		\$ _____	
Whiteboard or flip-chart	\$ _____		\$ _____	
Markers	\$ _____		\$ _____	
Microphone	\$ _____		\$ _____	
Other equipment: _____	\$ _____		\$ _____	
<b>Grand Total \$</b>				_____

<b><u>Catering</u></b>	Continental breakfast \$ _____ (Usually includes coffee, tea, juice, muffins or bagels, etc)
<b><u>Type of services:</u></b>  Wholesale market: Y / N  In-house catering: Y / N  Catering company: Y / N	Afternoon break \$ _____ (Soda or juice, snacks)  <div style="border: 1px dashed black; padding: 5px; text-align: center; color: red; font-weight: bold;">                         * WE DO NOT PROVIDE AFTERNOON SNACK ON LAST DAY OF COURSE *                     </div>  Total \$ _____
IF YOU CAN STAY WITHIN BUDGET, (NO MORE THAN <b>\$10.00</b> PER PERSON/PER DAY) CHECK HERE: _____	
<div style="background-color: yellow; display: inline-block; padding: 2px 10px; font-weight: bold;">                         **THEY ARE ON THEIR OWN FOR LUNCH**                     </div>	