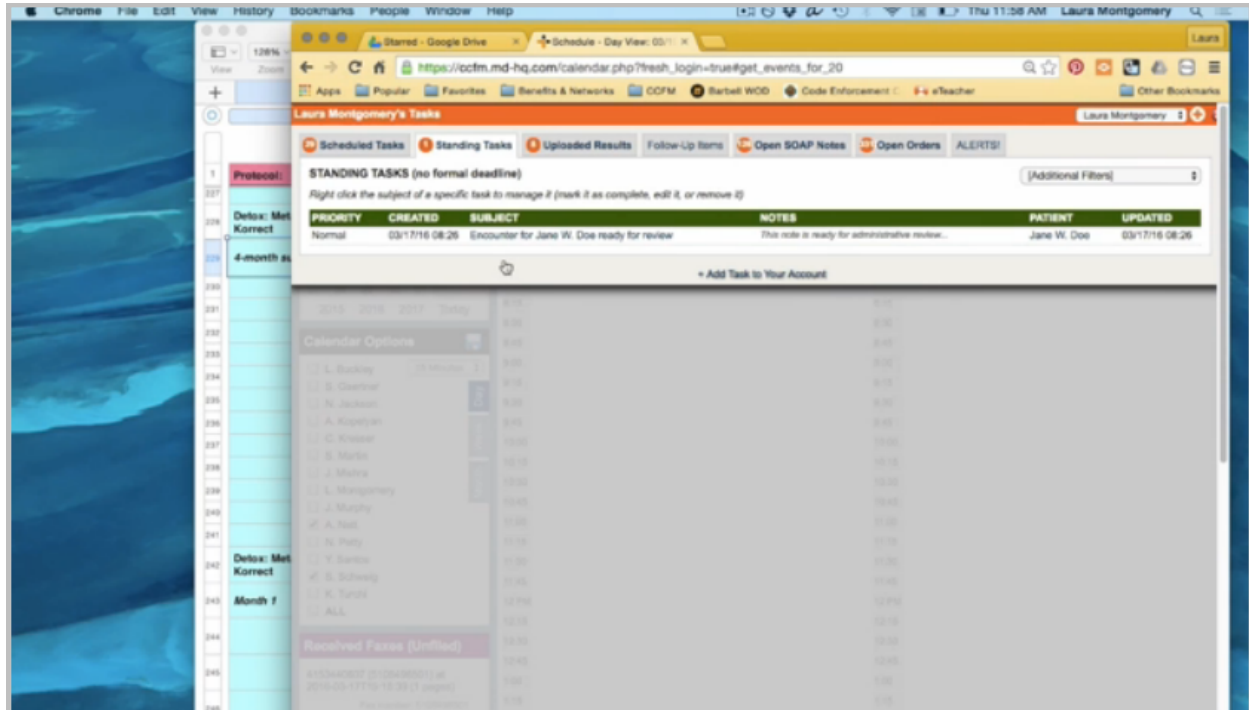
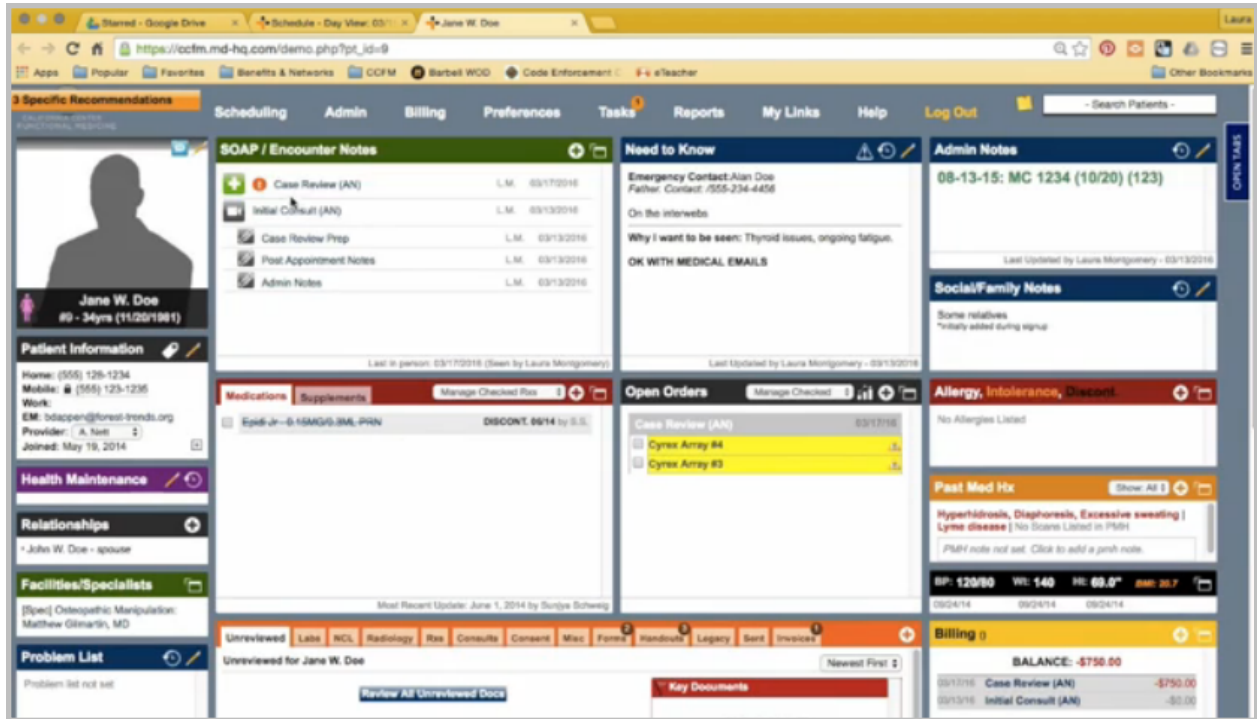


Processing Charts: Case Review – Part 1

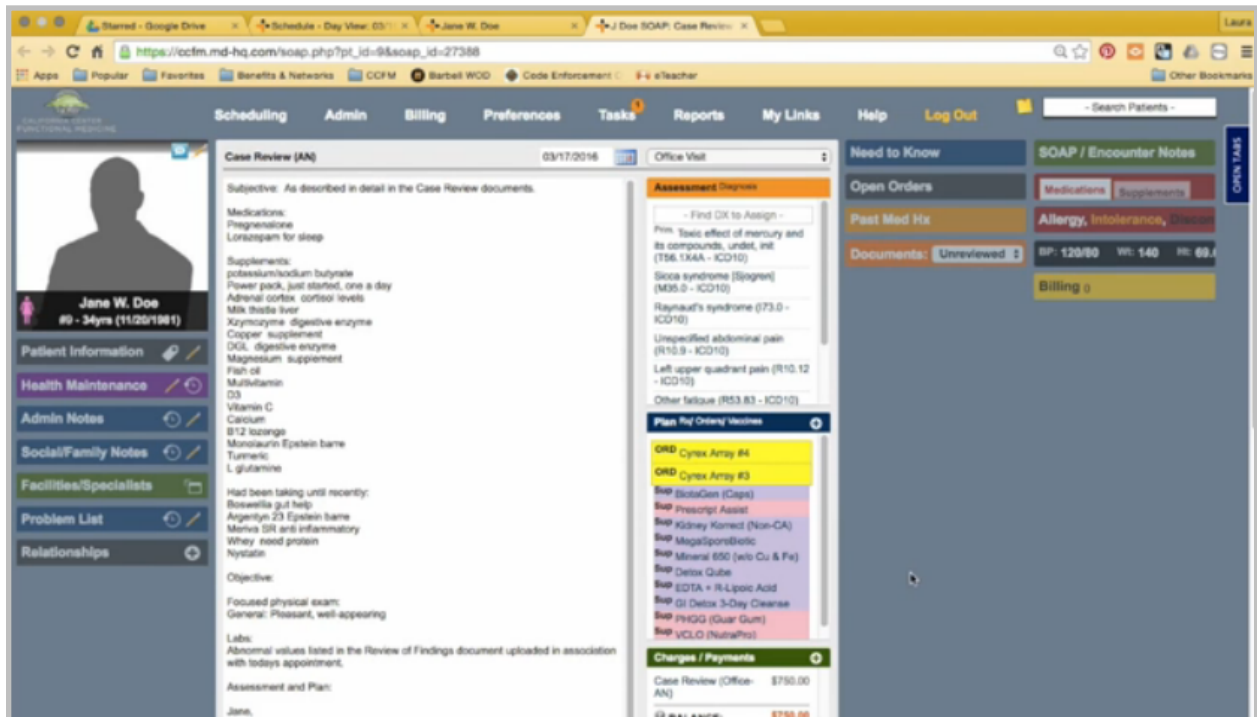
This is how to process an encounter for case reviews.



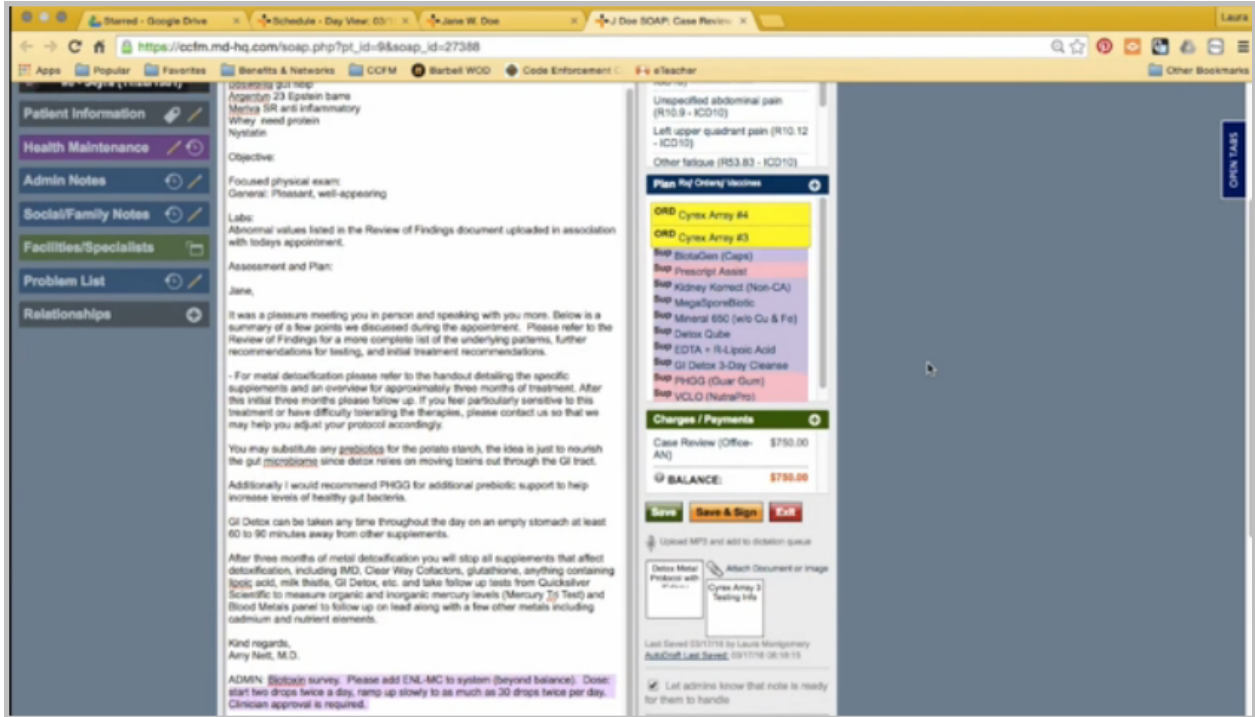
Once admin staff receives the standing task notifying them that an encounter is ready for review, clicking on the patient's name opens the chart.



You'll see the encounter listed here. Clicking on the encounter title opens the encounter.

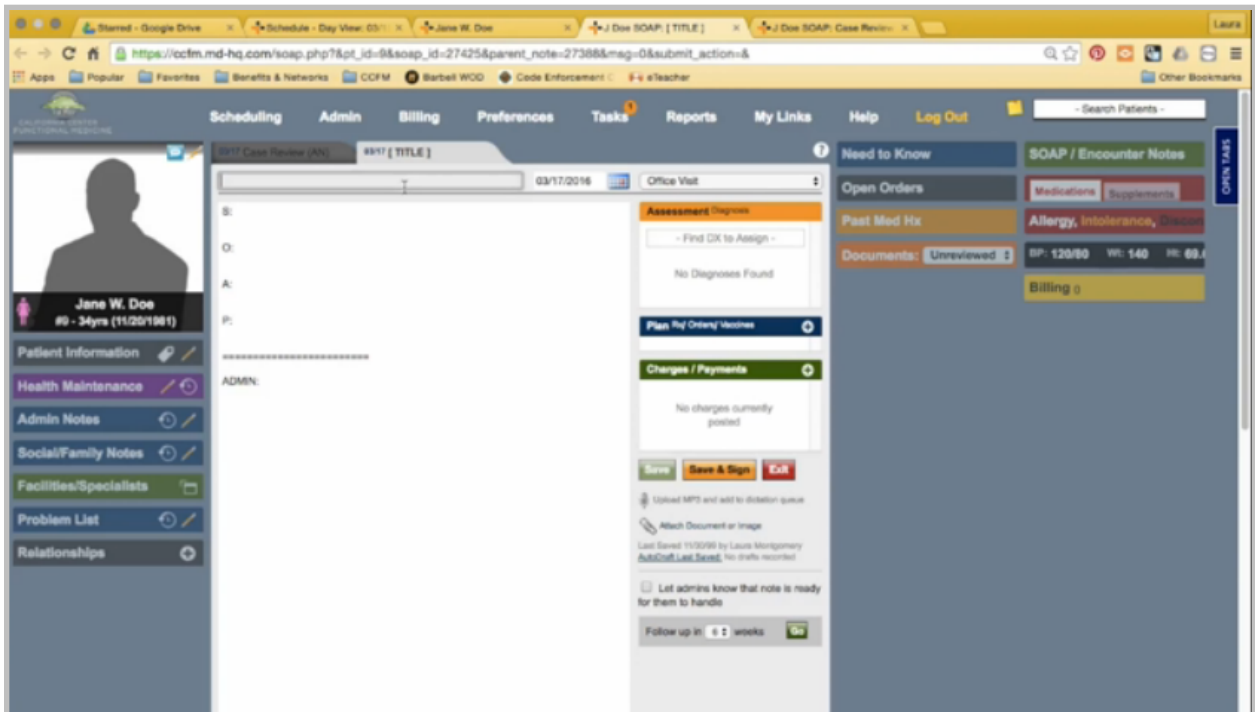


The first thing to do is look to see if there are any admin notes from the clinician to admin staff at the bottom. In this case, there are.

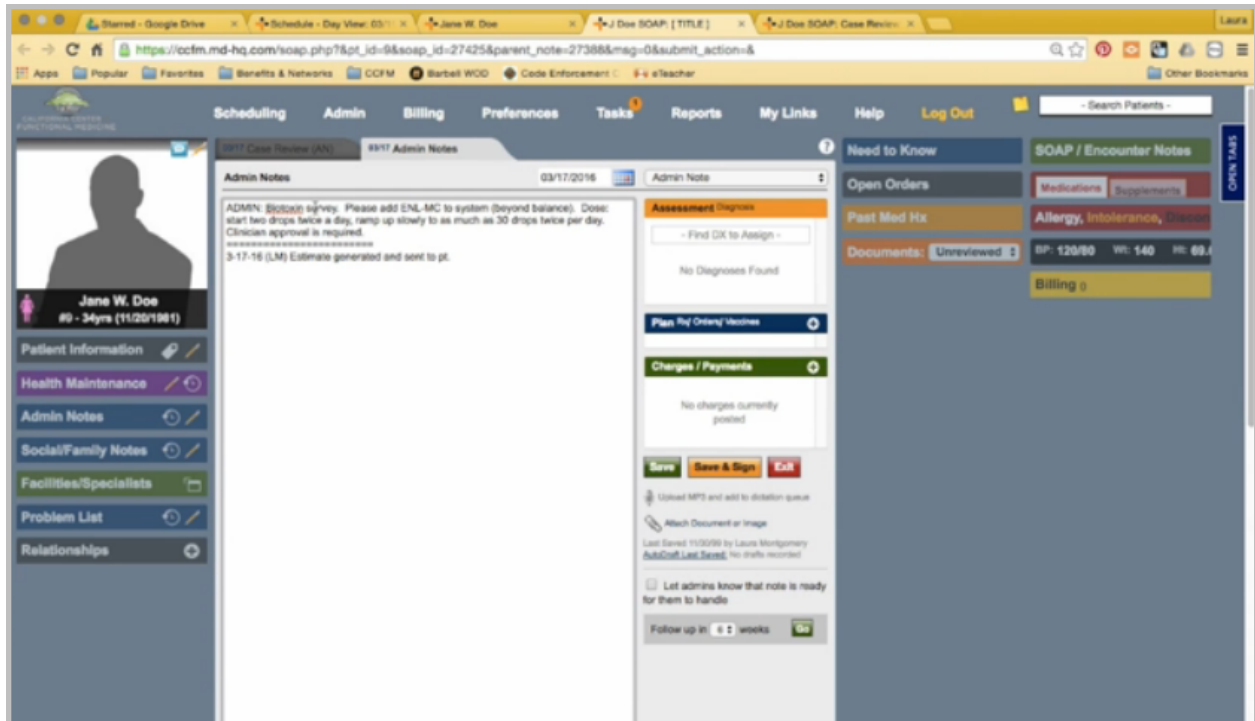


I'm going to copy them. I also want to make a note here that there is no Quest testing that has been ordered.

I'm going to go back to the chart, right-click, and create a subnote of the encounter.

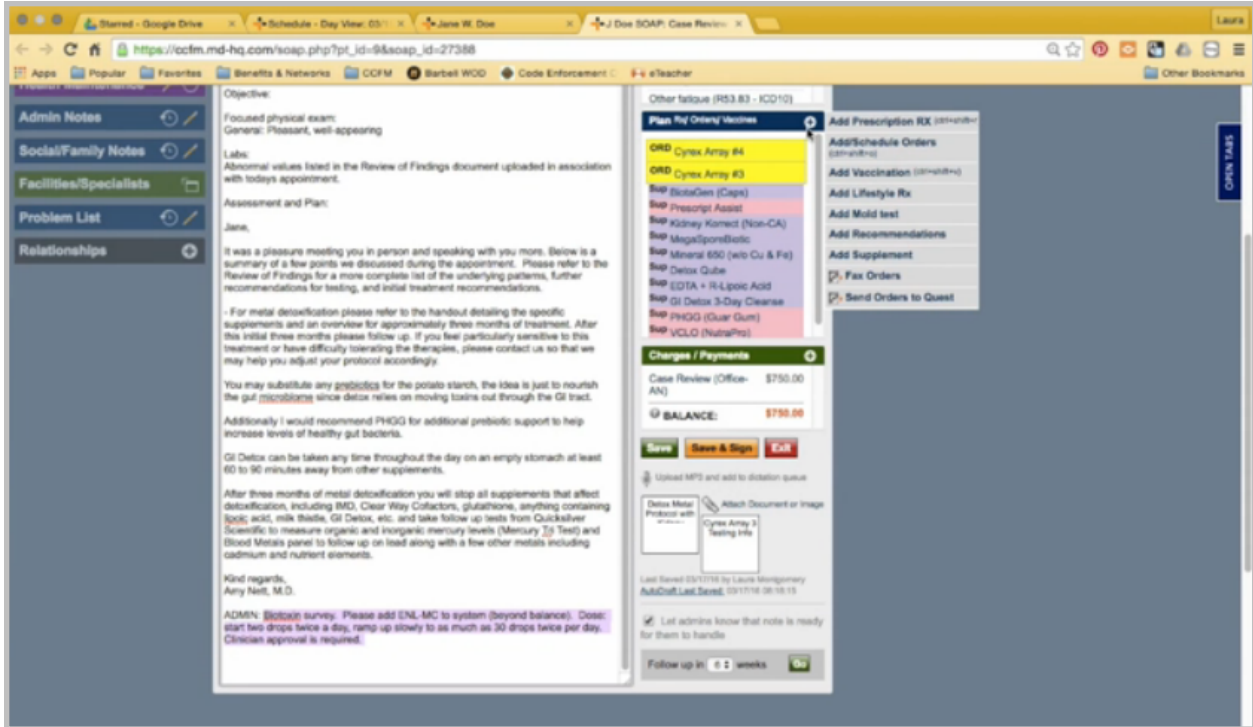


I want to create my admin notes, so I'll title it and categorize it as an admin note. I need to put my message here that I'm generating an estimate. There is no Quest testing ordered, so I'm going to take that off, and I'm going to paste the clinician admin note here.

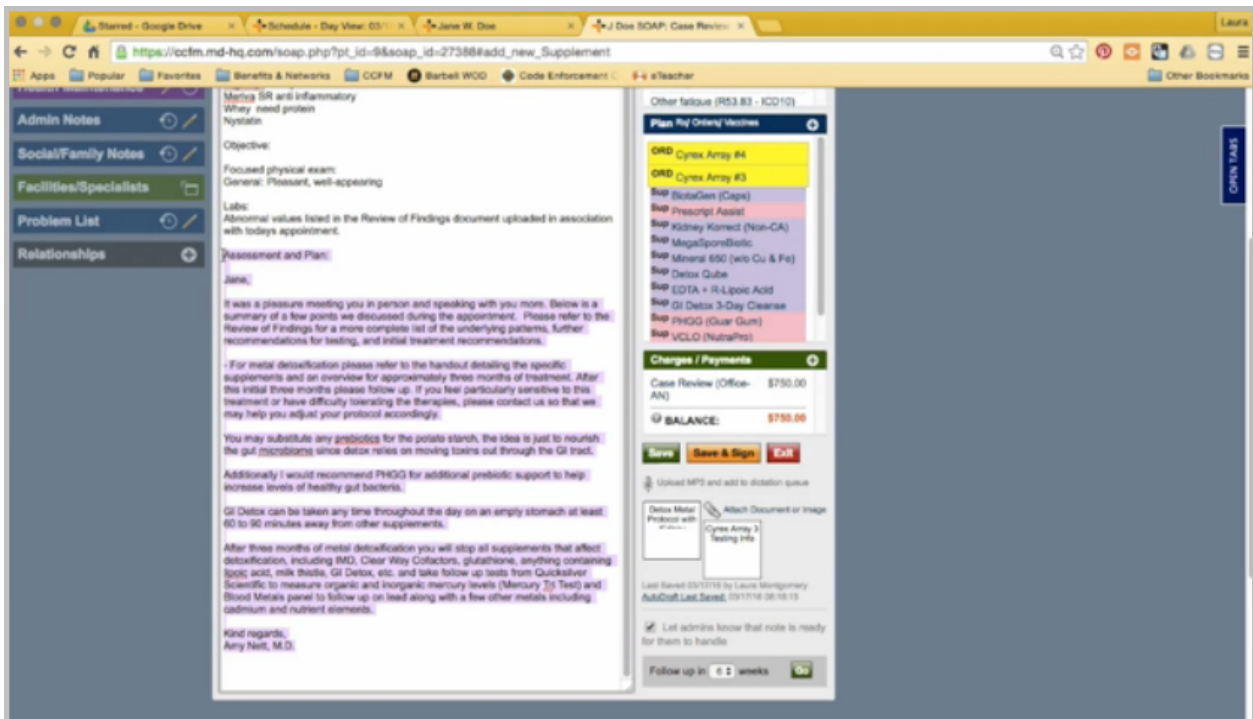


In this case, Amy is asking us to send a biotoxin survey to the patient, which is a taggable form. I can click on the tag, mark the correct form, save, and close. I'm going to note that I did that here.

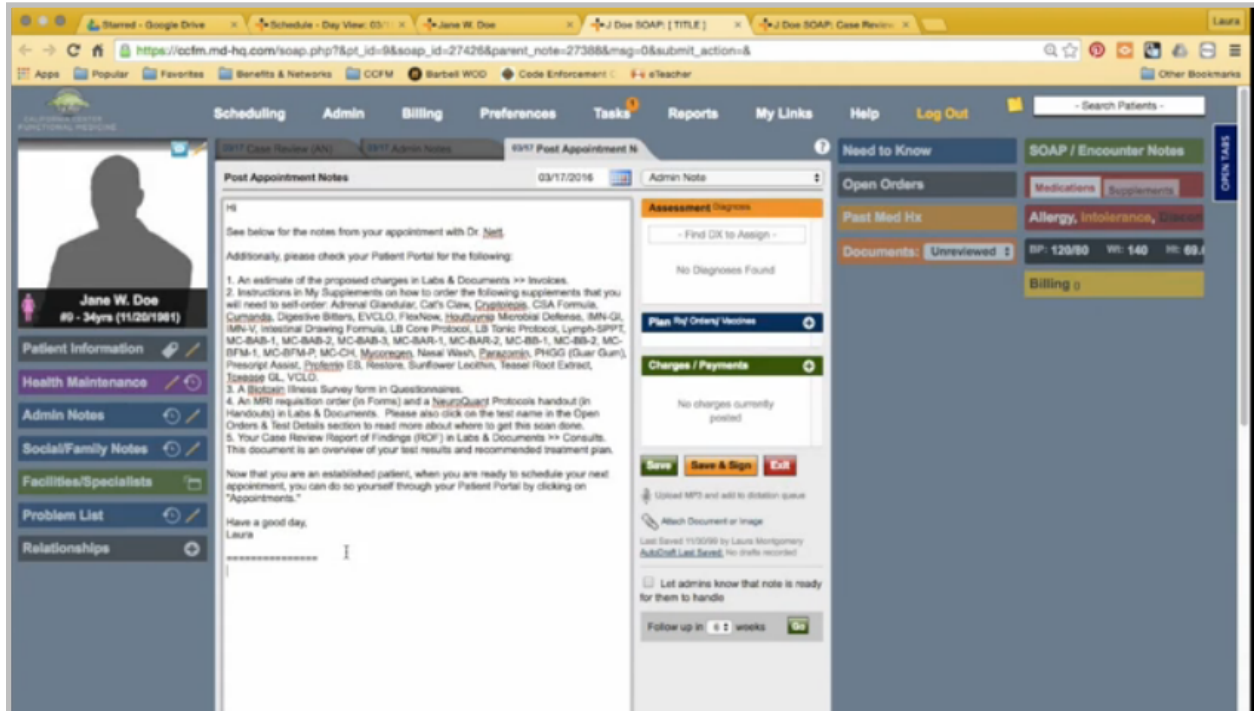
She is also asking us to add a supplement to the database, a brand new supplement. I've already put it in the system, so here I'm just going to note that I added it. Then I can save and close my admin notes and go back to the encounter.



I'll want to make sure that I add the supplement here to the plan box by clicking the plus sign and then Add Supplement. Then I'm going to remove the admin notes from the bottom.

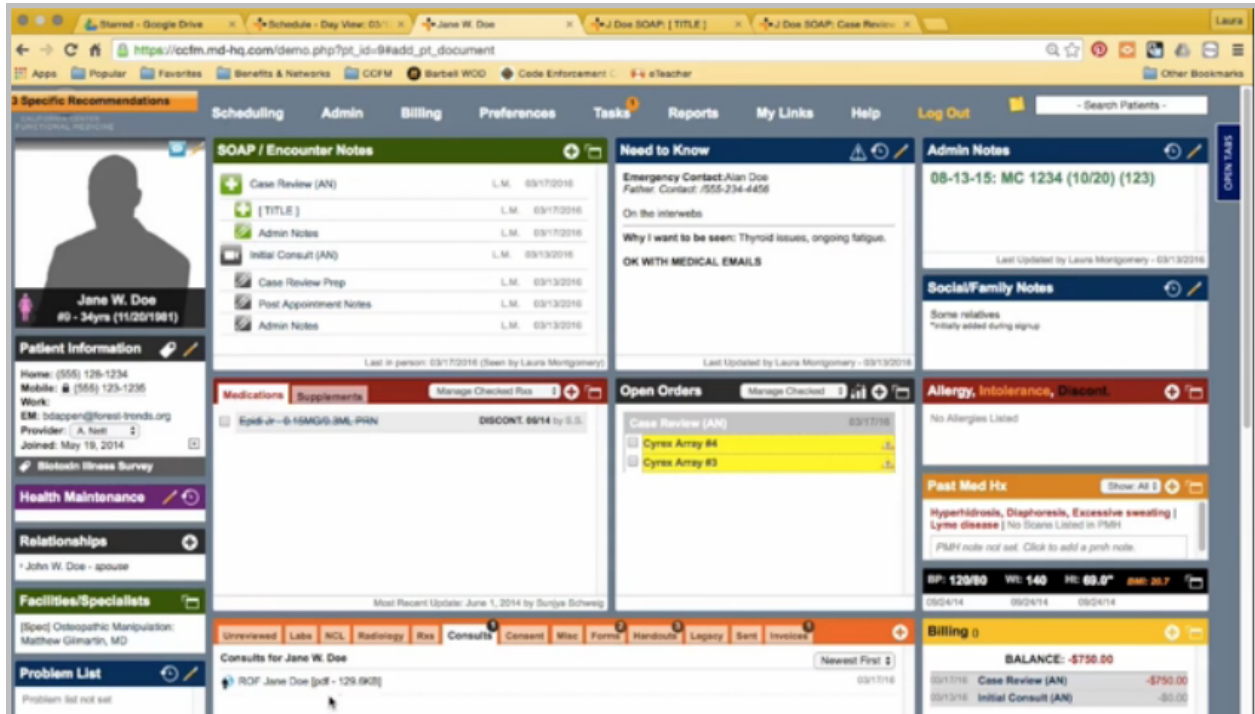


Now, I'm ready to create the post-appointment notes, so I want to highlight everything in the assessment and plan. Go back to the chart, right-click, and create another subnote. Title it, and make it an admin note.



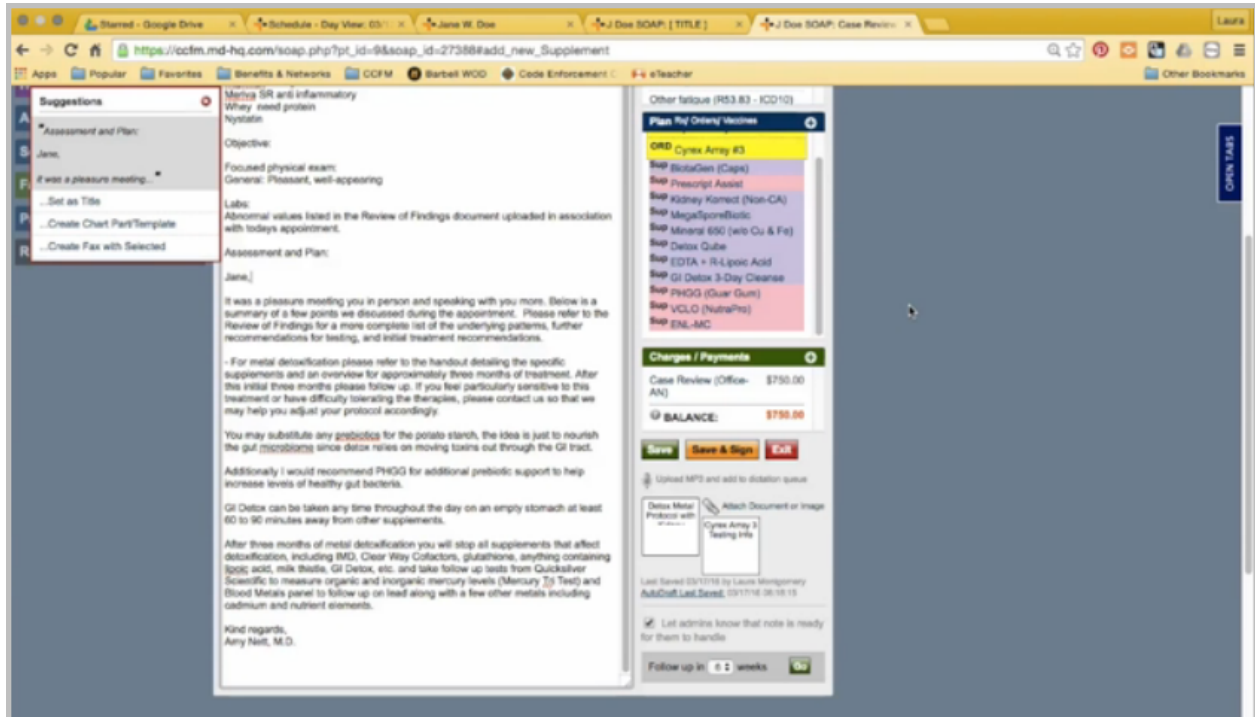
I'm going to paste the clinician's notes at the bottom of my message.

Now I want to go through and pick out what applies to this encounter and what needs to be sent to the patient, so I'll address it to the patient. She is going to have an estimate, and I need to go back and look and see. There are several self-order supplements, so I want to make sure I note to her which ones those are so that she can order. The first one is the new supplement that was just added, the PHGG, the Prescript-Assist, and the VCLL. I did send her a biotoxin survey, so I'll leave that there. There are no requisitions that are going to be created.

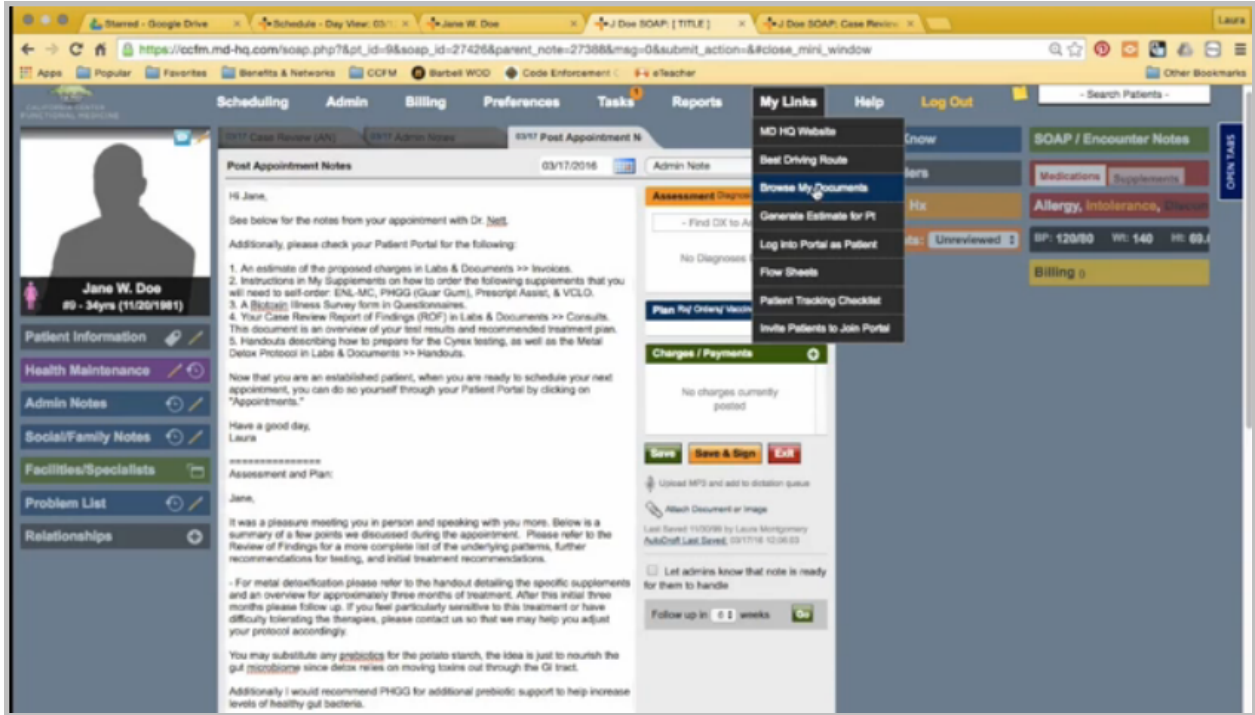


For the case review, there should be a report of findings already in the chart. I want to double check that it is there, so I'll click on her chart and click on Consults. I can see that it is here, and it's visible to the patient's portal.

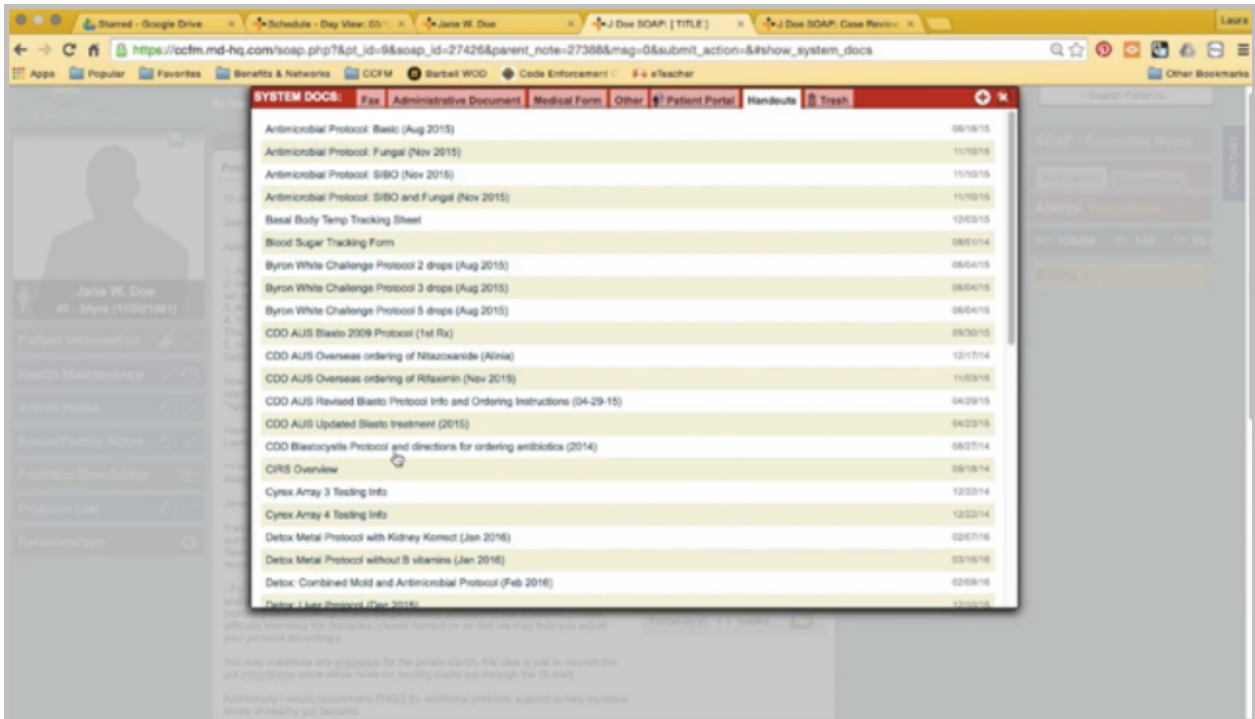
I can go back to my appointment notes. There is also a message here to remind the patient that now that she is an established patient, she will be scheduling her own appointments, and this is how she can do it through the portal.



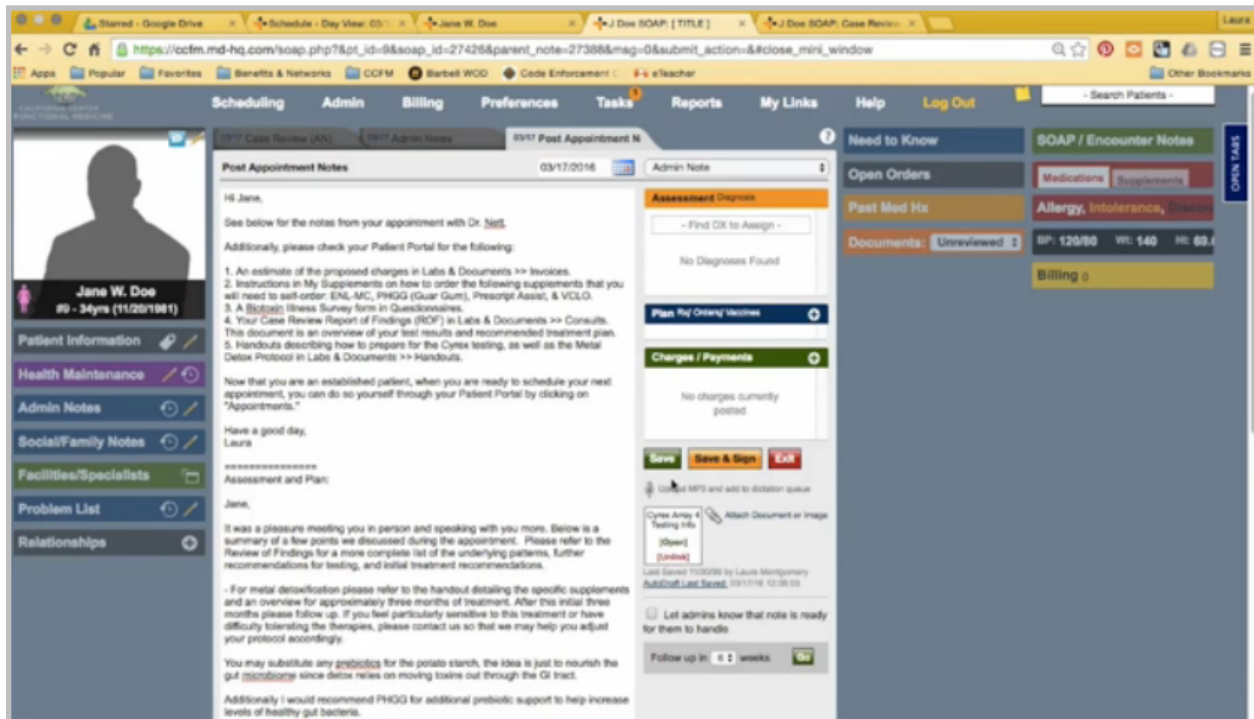
Before I send this to the patient, I want to go back to the note, read through everything, and make sure everything is here. Amy is recommending a metal detoxification, so the handout is already attached. In addition to those supplements, she is recommending the PHGG, which we know is here, and discussing her future testing plans, which are not ordered right now. The other thing that I notice is that a Cyrex 3 and 4 are ordered. There is a handout here with the Cyrex 3 testing, but it looks like the handout is not added for Cyrex 4.



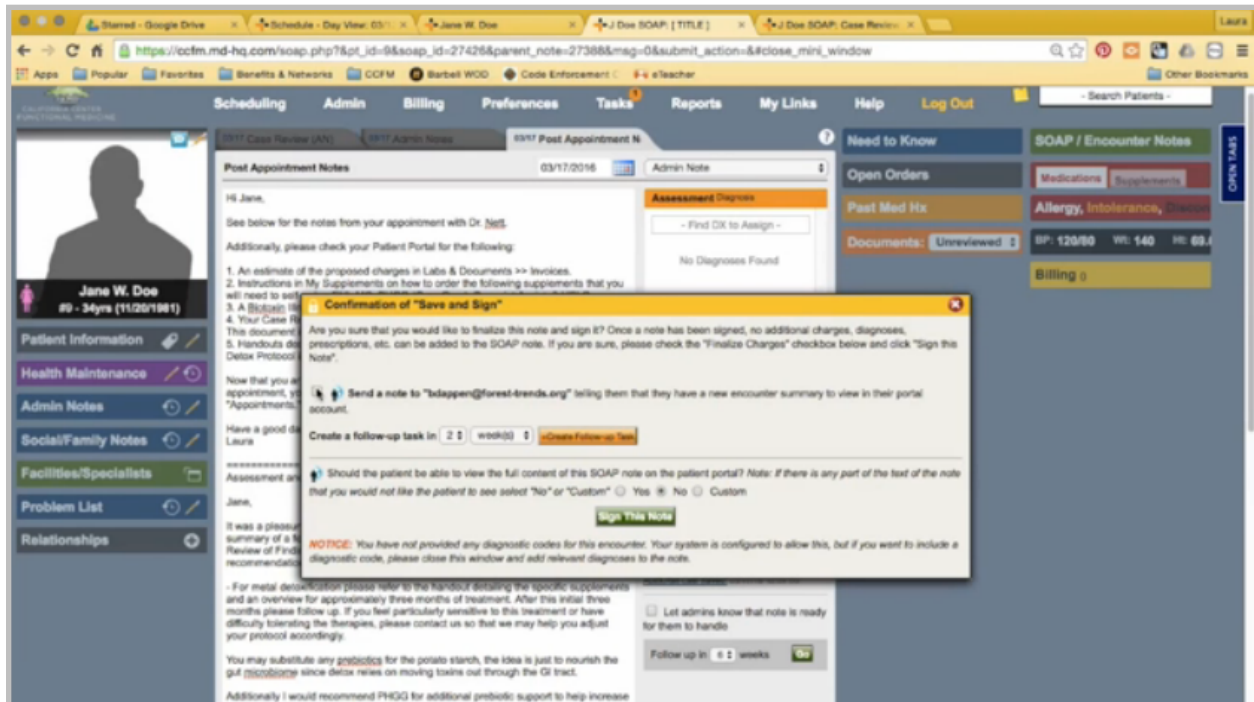
So, in my post-appointment notes, I do want to draw attention to the fact that the patient has handouts now. I'm also going to add the Cyrex 4 handout by going to My Links, Browse Documents, Handouts.



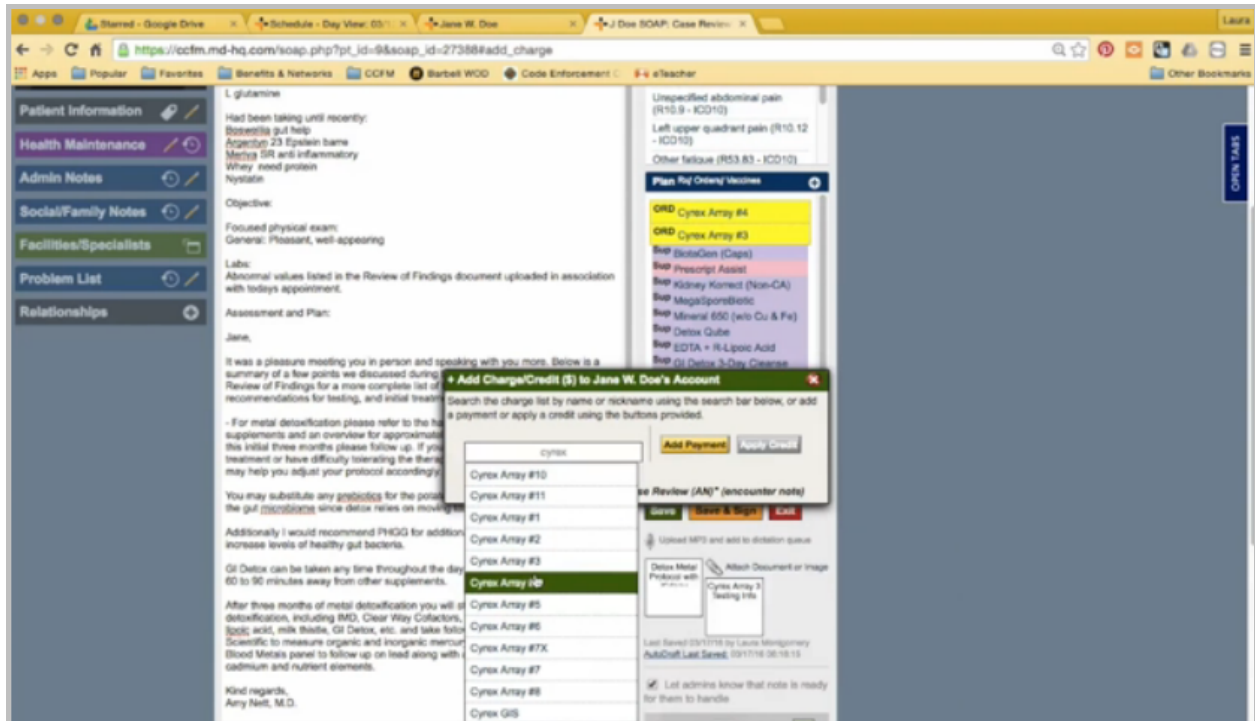
I'll right-click on the Cyrex 4 testing, copy to current patient's chart, and leave all this to the default, and then click Done, File Document.



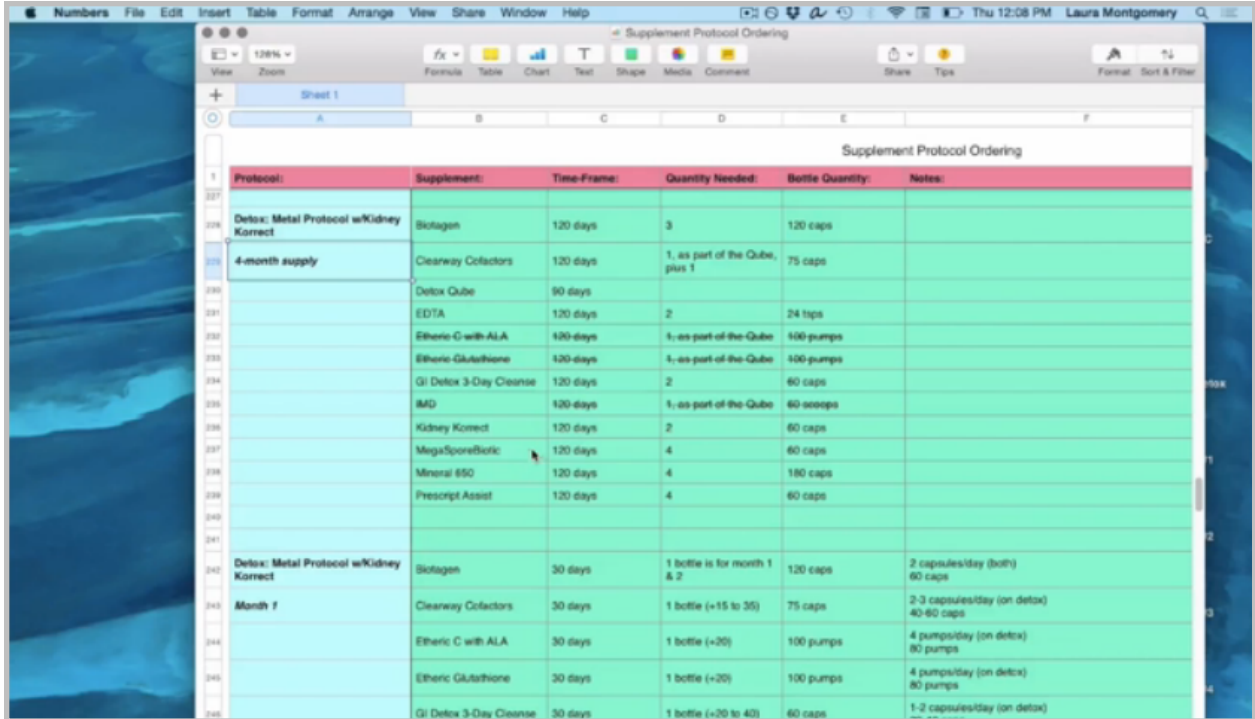
You can see it attached here. You can also see the handouts in the chart in the handout section.



Now that I'm done with my post-appointment notes for the patient, I will save and sign them. I do want to send her a message to let her know that there is a new message for her, and I want to make sure that she can see this whole note. I can sign that and close.

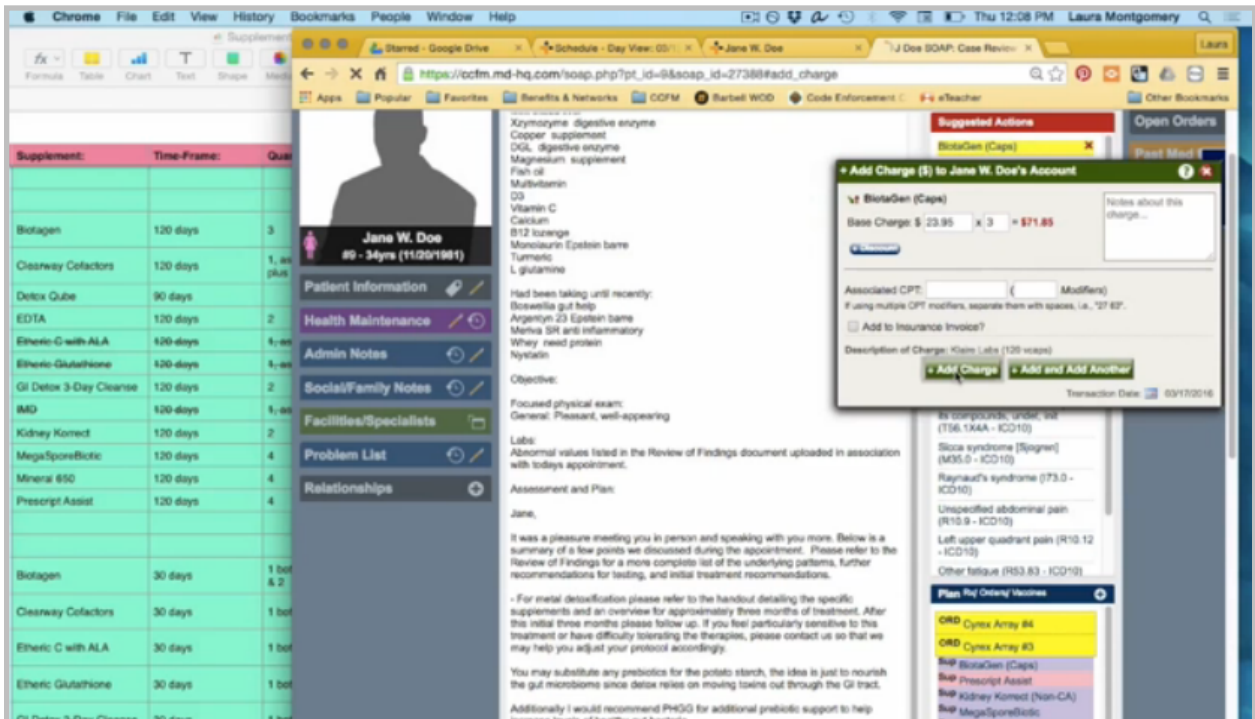


Now I need to put together the estimate. First, I'll add the testing. Everything is always ordered in the same order it is entered into the plan box. So now I want to add the supplements for the detox protocol. Again, I can click the plus button and add each individual item, or I can use my chart part.



Protocol:	Supplement:	Time-Frame:	Quantity Needed:	Bottle Quantity:	Notes:
Detox: Metal Protocol w/Kidney Korrect 4-month supply	Botagen	120 days	3	120 caps	
	Clearway Colectors	120 days	1, as part of the Qube, plus 1	75 caps	
	Detox Qube	90 days			
	EDTA	120 days	2	24 tps	
	Etheric C with ALA	120 days	1, as part of the Qube	100 pumps	
	Etheric Glutathione	120 days	1, as part of the Qube	100 pumps	
	GI Detox 3-Day Cleanse	120 days	2	60 caps	
	IMD	120 days	1, as part of the Qube	60 scoops	
	Kidney Korrect	120 days	2	60 caps	
	MegaSporeBiotic	120 days	4	60 caps	
Detox: Metal Protocol w/Kidney Korrect Month 1	Botagen	30 days	1 bottle is for month 1 & 2	120 caps	2 capsules/day (both) 60 caps
	Clearway Colectors	30 days	1 bottle (+15 to 35)	75 caps	2-3 capsules/day (on detox) 40-60 caps
	Etheric C with ALA	30 days	1 bottle (+20)	100 pumps	4 pumps/day (on detox) 80 pumps
	Etheric Glutathione	30 days	1 bottle (+20)	100 pumps	4 pumps/day (on detox) 80 pumps
	GI Detox 3-Day Cleanse	30 days	1 bottle (+20 to 40)	60 caps	1-2 capsules/day (on detox)

In this case, I know that some of these supplements require more than one bottle to be ordered in order to last for the duration of the protocol, so I do have another document that I'll reference that lists a total four-month supply and how many bottles of each supplement are needed.



Supplement List:

Supplement:	Time-Frame:	Quantity
Botagen	120 days	3
Clearway Colectors	120 days	1, as plus
Detox Qube	90 days	
EDTA	120 days	2
Etheric C with ALA	120 days	1, as
Etheric Glutathione	120 days	1, as
GI Detox 3-Day Cleanse	120 days	2
IMD	120 days	1, as
Kidney Korrect	120 days	2
MegaSporeBiotic	120 days	4
Mineral 850	120 days	4
Prescript Assist	120 days	4

Medical Note:

Supplement List:

- Xylozyme: digestive enzyme
- Copper supplement
- DGL, digestive enzyme
- Magnesium supplement
- Fish oil
- Multibiotin
- Vitamin C
- Calcium
- B12 tincture
- Monoamine Epinephrine
- Turmeric
- L glutamine

Objective:

Focused physical exam:
General: Pleasant, well-appearing

Lab:

Abnormal values listed in the Review of Findings document uploaded in association with today's appointment.

Assessment and Plan:

Jane,
It was a pleasure meeting you in person and speaking with you more. Below is a summary of a few points we discussed during the appointment. Please refer to the Review of Findings for a more complete list of the underlying patterns, further recommendations for testing, and initial treatment recommendations.

- For metal detoxification please refer to the handout detailing the specific supplements and an overview for approximately three months of treatment. After this initial three months please follow up. If you feel particularly sensitive to this treatment or have difficulty tolerating the therapies, please contact us so that we may help you adjust your protocol accordingly.

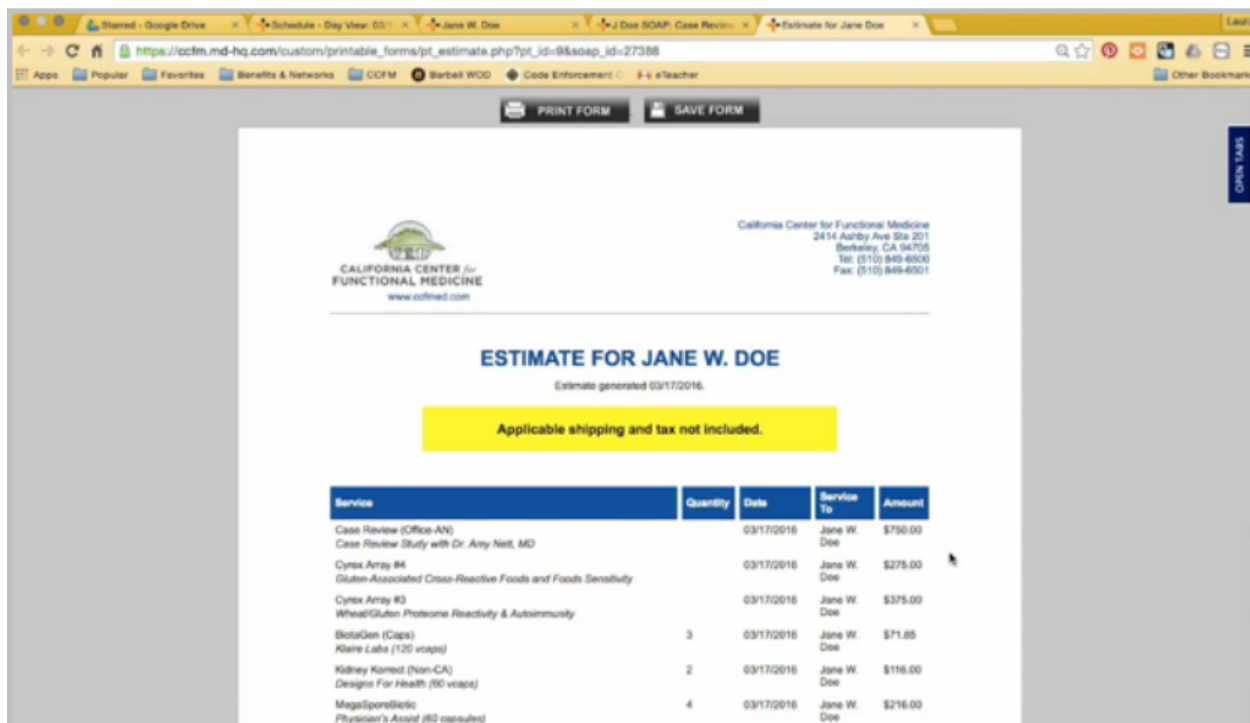
You may substitute any prebiotics for the potato starch, the idea is just to nourish the gut microbiome since detox relies on moving toxins out through the GI tract.

Additionally I would recommend PHGG for additional prebiotic support to help

So as I add them, I want to look and make sure what quantity is needed. Oops, rewind that before I started adding that last supplement.

In this case, we need to order an extra bottle of Clearway Cofactors in addition to what comes as part of the cube. The plan box always needs to match the charge box, so I'll go ahead and add a Clearway Cofactors here, and then I can add it to the charge box as well. So, some will come as part of this cube, and then the patient needs an additional one bottle.

Now that I have everything added to the charge box, I can save this note. Come up to My Links, and generate my estimate.



PRINT FORM SAVE FORM

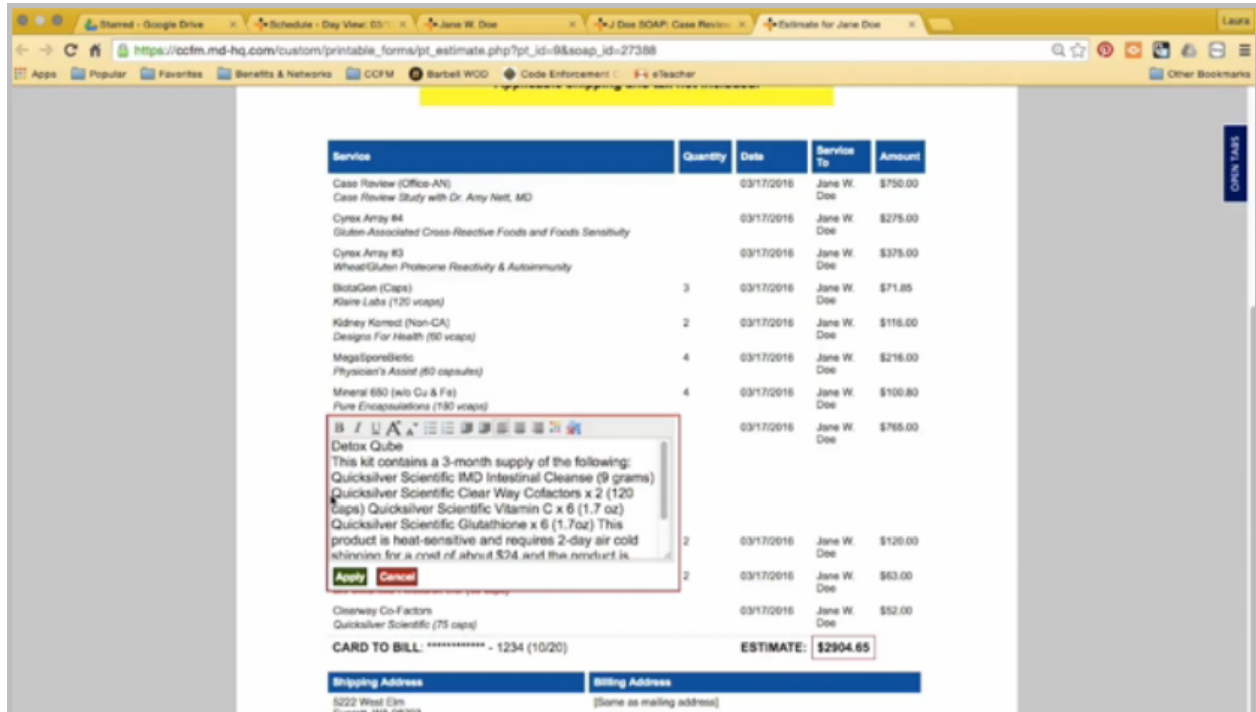
California Center for Functional Medicine
2414 Ashby Ave Ste 201
Berkeley, CA 94705
Tel: (510) 849-6500
Fax: (510) 849-6501

ESTIMATE FOR JANE W. DOE
Estimate generated 03/17/2016.

Applicable shipping and tax not included.

Service	Quantity	Date	Service To	Amount
Case Review (Office-At)		03/17/2016	Jane W. Doe	\$750.00
Case Review (Study with Dr. Amy Natt, MD)				
Cytex Array #4		03/17/2016	Jane W. Doe	\$275.00
Gluten-Associated Cross-Reactive Foods and Foods Sensitivity				
Cytex Array #3		03/17/2016	Jane W. Doe	\$375.00
Wheat/Gluten Proteome Reactivity & Autoimmunity				
BiotGen (Caps)	3	03/17/2016	Jane W. Doe	\$71.85
Klaire Labs (120 vials)				
Kidney Remed (Non-CA)	2	03/17/2016	Jane W. Doe	\$116.00
Design For Health (50 vials)				
MegaSporibiotic	4	03/17/2016	Jane W. Doe	\$216.00
Physician's Assist (60 capsules)				

Look it over to make sure quantities are here and everything appears as it should.



Service	Quantity	Date	Service To	Amount
Case Review (Office-AN)		03/17/2016	Jane W. Doe	\$750.00
Case Review Study with Dr. Amy Nett, MD				
Cyrex Array #4 Gluten-Associated Cross-Reactive Foods and Foods Sensitivity		03/17/2016	Jane W. Doe	\$275.00
Cyrex Array #3 Wheat/Gluten Proteome Reactivity & Autoimmunity		03/17/2016	Jane W. Doe	\$375.00
Biotin (Caps)	3	03/17/2016	Jane W. Doe	\$71.85
Klein Labs (120 vcaps)				
Kidney Kornd (Non-CA) Designs For Health (50 vcaps)	2	03/17/2016	Jane W. Doe	\$116.00
MegaSporobiotic Physician's Assist (60 capsules)	4	03/17/2016	Jane W. Doe	\$216.00
Mineral 650 (w/ Cu & Fe) Pure Encapsulations (180 vcaps)	4	03/17/2016	Jane W. Doe	\$100.80
Detox Qube		03/17/2016	Jane W. Doe	\$765.00
Quicksilver Scientific Glutathione x 6 (1.7oz) This product is heat-sensitive and requires 2-day air cold shipment for a cost of about \$24 and the product is	2	03/17/2016	Jane W. Doe	\$120.00
Quicksilver Scientific Clear Way Collectors x 2 (120 Caps)	2	03/17/2016	Jane W. Doe	\$63.00
Clearway Co-Factors Quicksilver Scientific (75 caps)		03/17/2016	Jane W. Doe	\$52.00

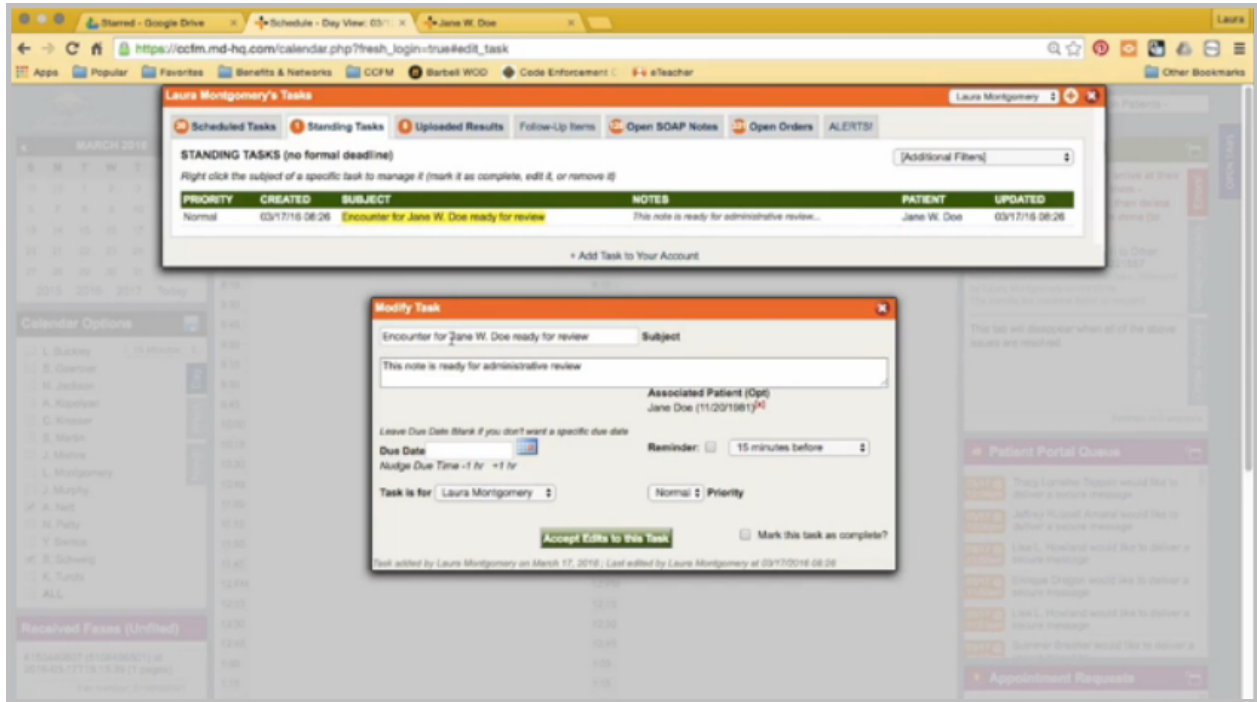
Detox Qube
This kit contains a 3-month supply of the following:
Quicksilver Scientific IMD Intestinal Cleanse (9 grams)
Quicksilver Scientific Clear Way Collectors x 2 (120 Caps)
Quicksilver Scientific Vitamin C x 6 (1.7 oz)
Quicksilver Scientific Glutathione x 6 (1.7oz) This product is heat-sensitive and requires 2-day air cold shipment for a cost of about \$24 and the product is

CARD TO BILL: ***** - 1234 (10/20) **ESTIMATE:** **\$2904.65**

Shipping Address: 5222 West Elm
Billing Address: [Same as mailing address]

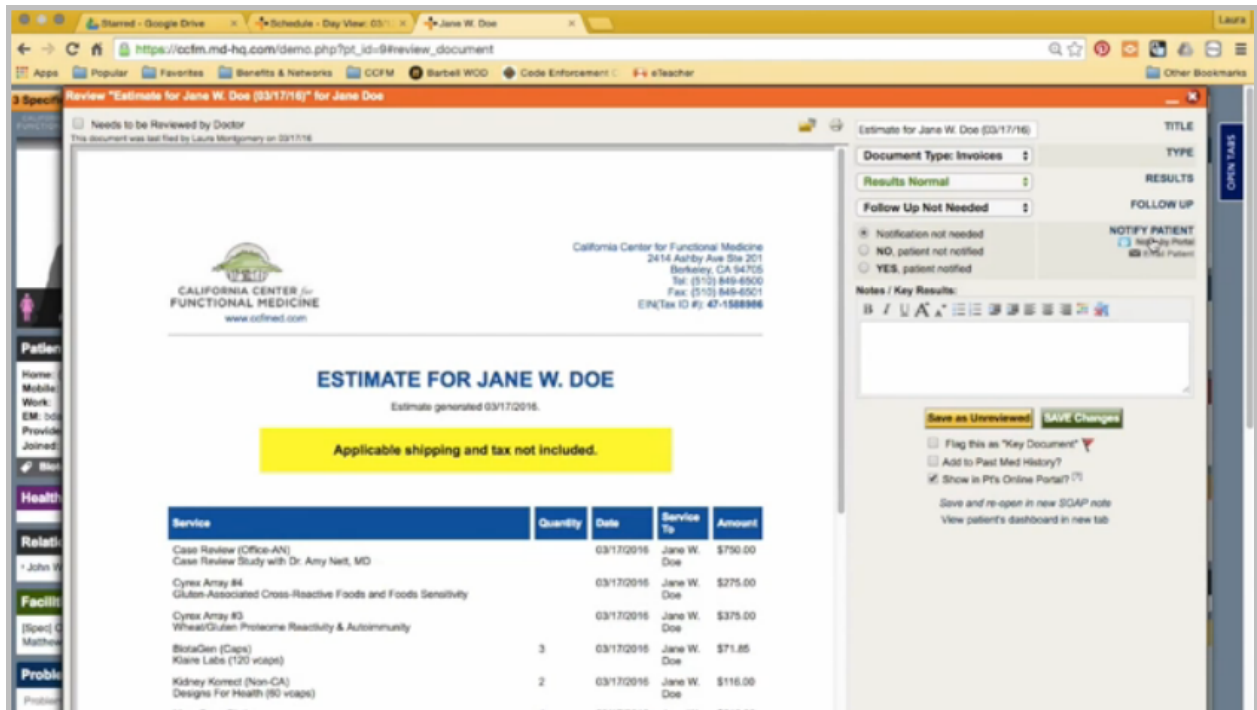
For the cube, I like to break this out a little nicer for the patient just so it is easier for them to read the notes here underneath it. The credit card is not expired. Good shipping address. So now I'm going to save it.

We leave the default title. Do not attach it to a note, and yes, we want it to be visible to the patient's portal, and save to patient chart. I can highlight the title of this note here. I can close it.

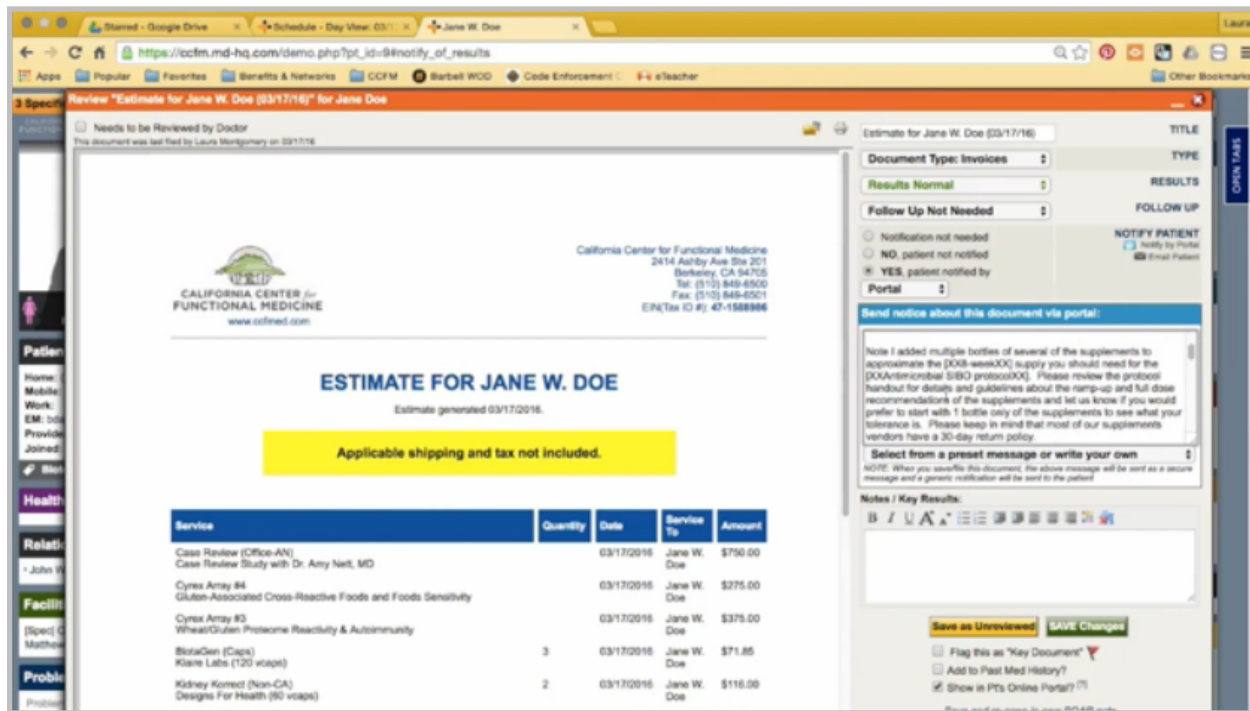


Back on My Task, I'm going to rename it so that the patient's name is first. I'll paste the name of the title, and then I'm going to stamp it and note that I sent the estimate to the patient.

I want to follow up on it in two weeks. I'll leave it assigned to myself, and I accept the edits.



Then back in the chart, I'm going to send the final message to the patient that the estimate is ready, so I'll notify the patient by portal. I'm going to address it to the patient.



Review "Estimate for Jane W. Doe (03/17/16)" for Jane Doe

Needs to be Reviewed by Doctor
This document was last filed by Laura Montgomery on 03/17/16

Estimate for Jane W. Doe (03/17/16)

Document Type: Invoices

Results Normal

Follow Up Not Needed

Notification not needed
NO, patient not notified
YES, patient notified by Portal

Send notice about this document via portal:

Note I added multiple bottles of several of the supplements to approximate the [008-week000] supply you should need for the [00Antimicrobial SIBO protocol000]. Please review the protocol handout for details and guidelines about the ramp-up and full dose recommendations of the supplements and let us know if you would prefer to start with 1 bottle only of the supplements to see what your tolerance is. Please keep in mind that most of our supplement vendors have a 30-day return policy.

Select from a preset message or write your own

NOTE: When you save this document, the above message will be sent as a secure message and a generic notification will be sent to the patient.

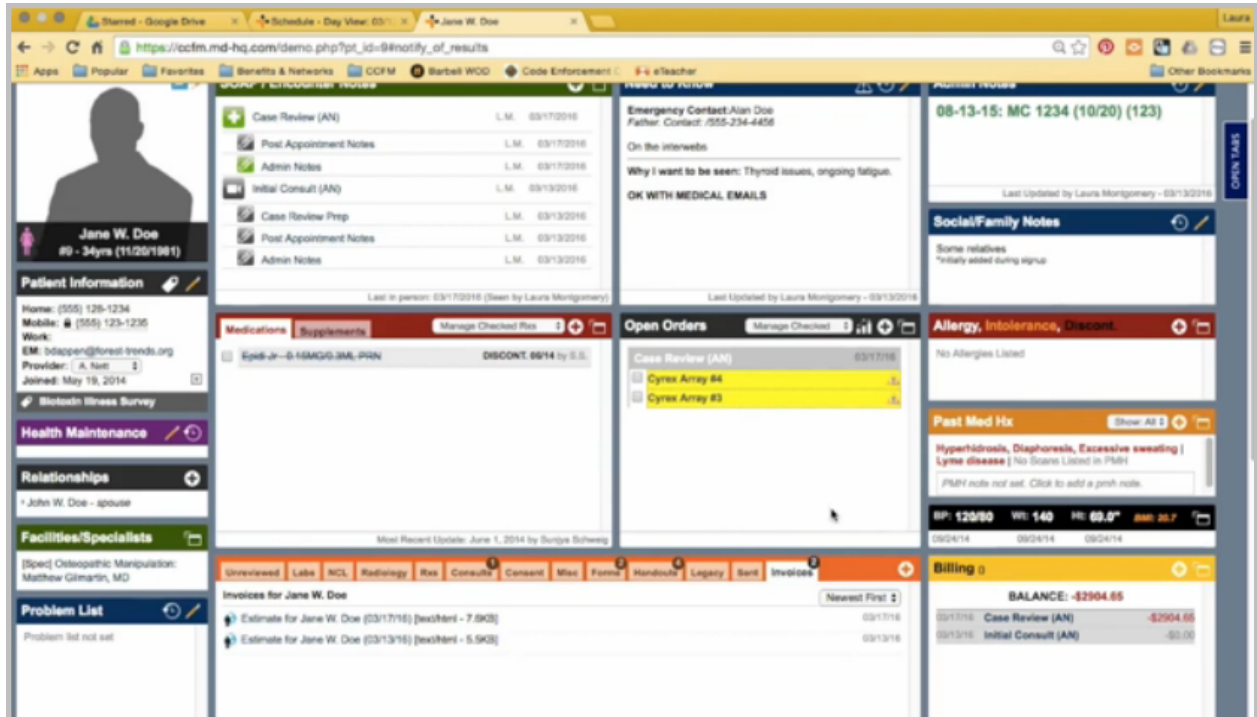
Notes / Key Results:

Save as Unreviewed SAVE Changes

Flag this as "Key Document"
Add to Past Med History?
Show in Pts Online Portal?

Service	Quantity	Date	Service To	Amount
Case Review (Office-AN)		03/17/2016	Jane W. Doe	\$750.00
Case Review Study with Dr. Amy Neri, MD				
Cytex Aray 84		03/17/2016	Jane W. Doe	\$275.00
GLUTEN-Associated Cross-Reactive Foods and Foods Sensitivity				
Cytex Aray 80		03/17/2016	Jane W. Doe	\$375.00
Wheat/Gluten Proteome Reactivity & Autoimmunity				
BiotacGen (Caps)	3	03/17/2016	Jane W. Doe	\$71.85
Kiame Labs (120 vials)				
Kidney Korrec (Non-CA)	2	03/17/2016	Jane W. Doe	\$116.00
Designs For Health (80 vials)				

Then I want to make sure I have a specific note on there to draw attention to the fact that I have increased the quantities on some of the supplements and kind of explain to the patient that it will last them for the four months but also that they need to review the handout, review the instructions for the supplements, and let us know if they want to start with only one bottle of each. We'll remove the extra quantities. Otherwise, they can order this bundle as it is to save the shipping. I'm going to take off these messages that don't apply. My name is at the bottom, so I can save it, and the message has been sent to the patient.



The screenshot shows a patient's medical record for Jane W. Doe. Key sections include:

- Patient Information:** Jane W. Doe, #9 - 34yrs (11/20/1981), Home: (555) 126-1234, Mobile: (555) 123-1236, Work: (555) 123-1236, EM: bdappen@forest-trends.org, Provider: A. Scott, M.D., Joined: May 19, 2014.
- Case Review (AN):** A list of appointments including Case Review (AN), Post Appointment Notes, Admin Notes, Initial Consult (AN), Case Review Prep, and Post Appointment Notes, all dated 03/13/2016.
- Medications:** Epilex Jr - 6-MAGG-3M, PRN, DISCONT. 06/14 by S.S.
- Open Orders:** Case Review (AN) 03/17/16, Cyrex Array #4, and Cyrex Array #3.
- Billing:** BALANCE: -\$2904.85, with charges for Case Review (AN) at -\$2904.85 and Initial Consult (AN) at -\$0.00.
- Notes:** Emergency Contact: Alan Doe, Father, Contact: 555-234-4456. On the interwebs: Why I want to be seen: Thyroid issues, ongoing fatigue. OK WITH MEDICAL EMAILS.

I'll use my assigned task to follow up on this in two weeks. If we have not heard from the patient, I'll send a follow-up message and wait another week. If we still don't get a response, I'll make a phone call to the patient.