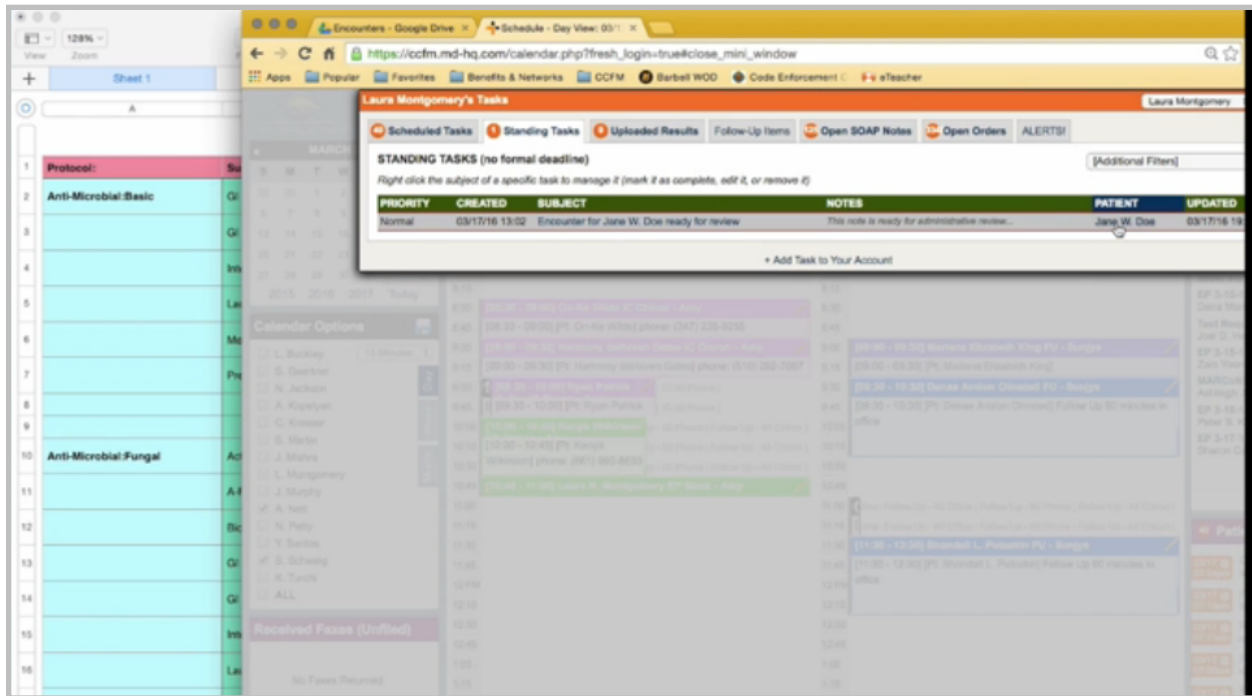
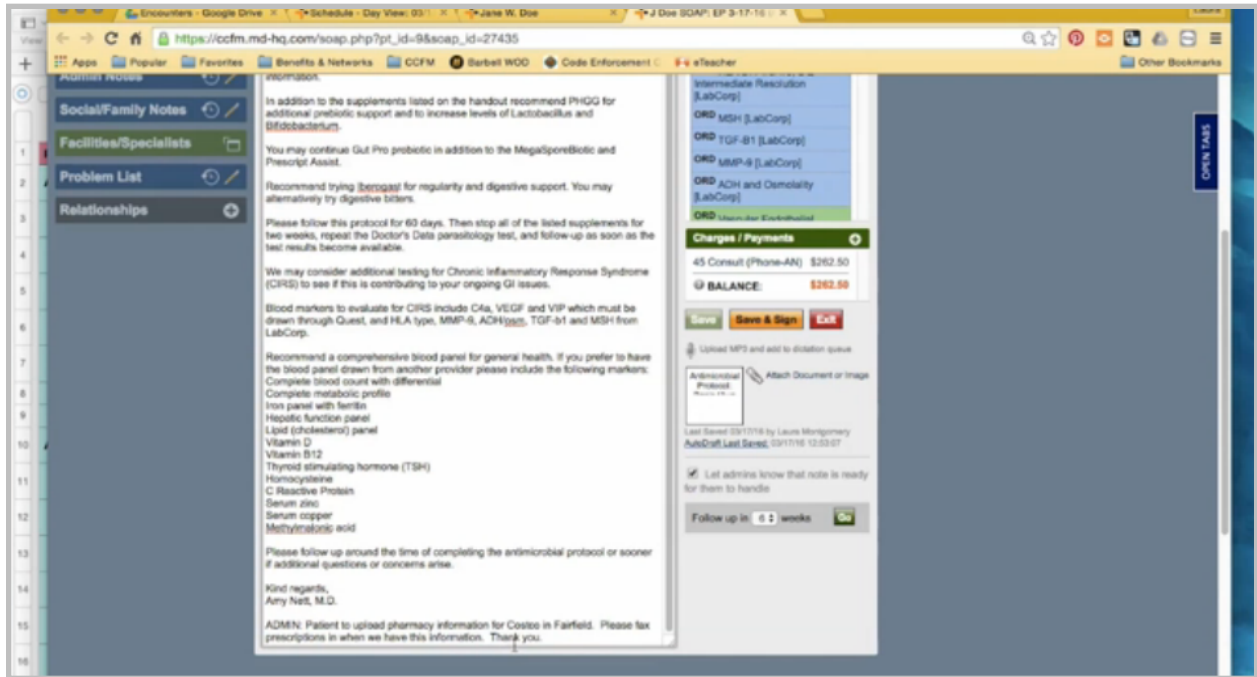


# Processing Charts EP - Part One

This is how to process EP encounters that have plan items that get charged. Once admin staff receive a standing task notifying them that an encounter is ready for a patient, click on the patient's name to open the chart.

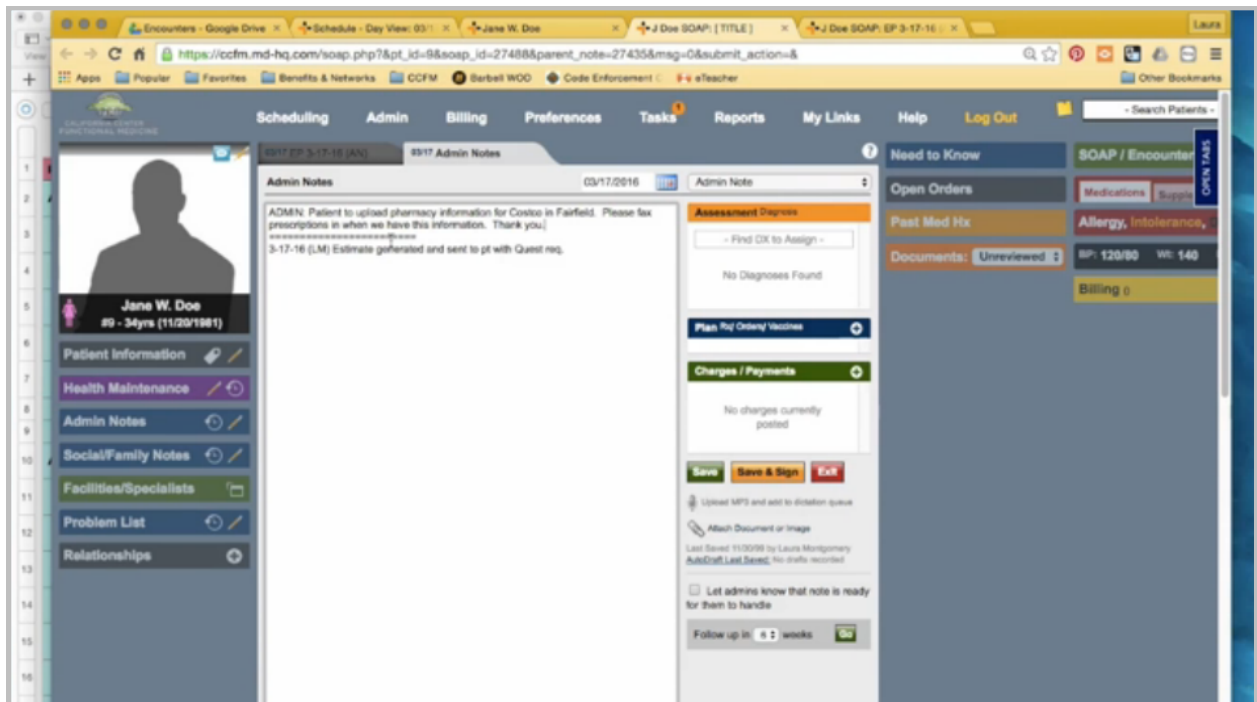


Click on the encounter to open it, and scroll down to view if there are any admin notes from the clinician to admin staff.



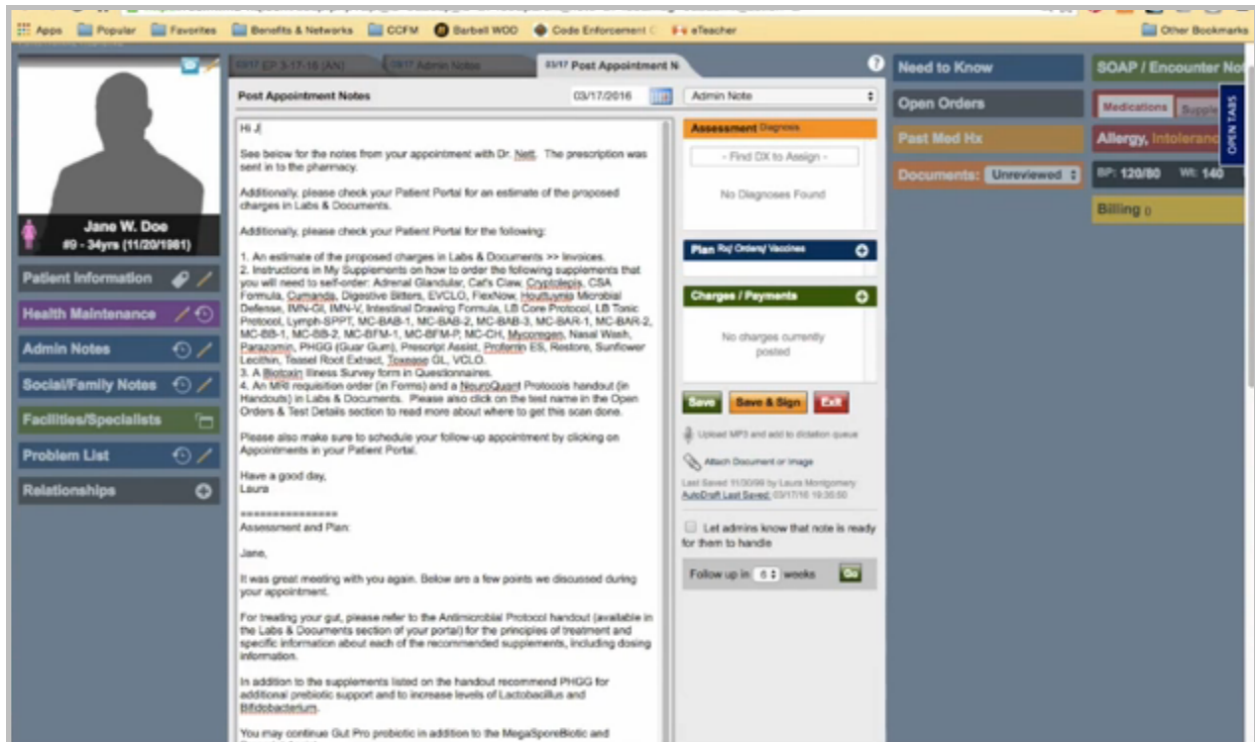
There are, so I'm going to copy them. I'm also going to check here. There are some Quest tests ordered.

Go back to the chart. Right-click to create a subnote. Make the admin notes. Put on my note I'm generating the estimate and sending the Quest requisition.

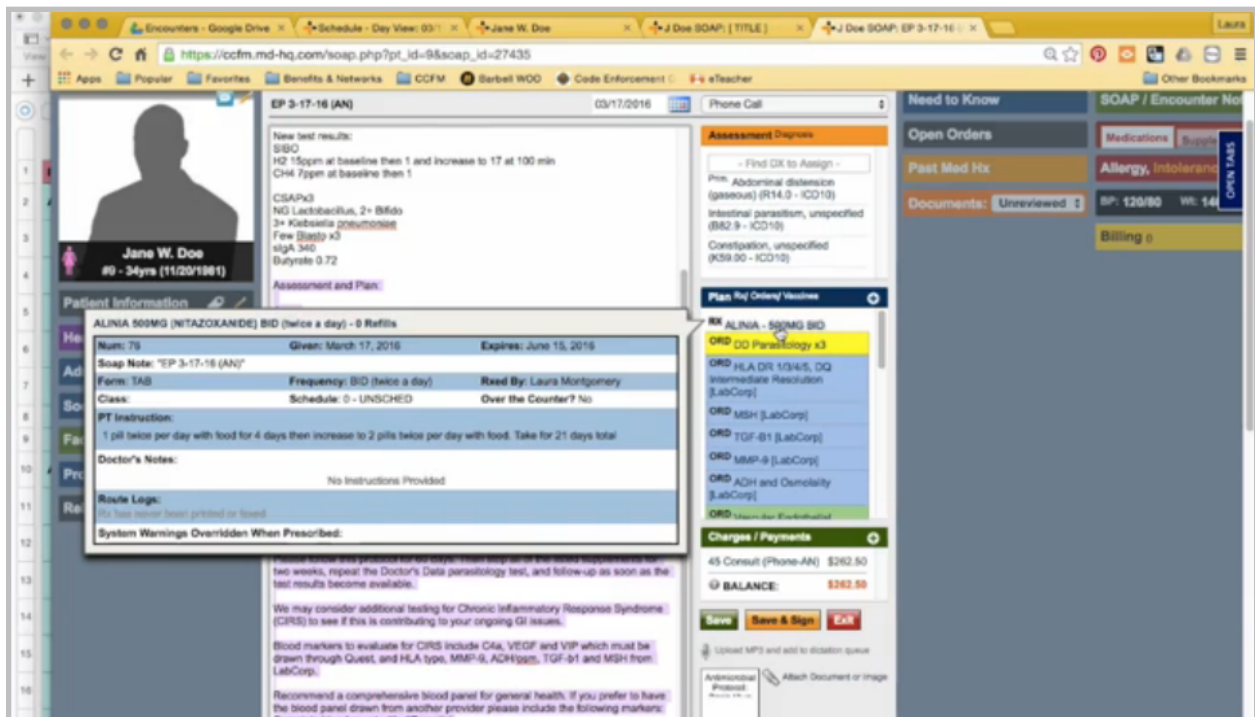


I'm also going to paste the admin notes here. You can save this and close out of it.

Back in the encounter, I'm going to delete the admin notes. Then I'm going to copy everything from the assessment and plan. Go back to the chart, right-click, and create another subnote. This will be the post-appointment notes.

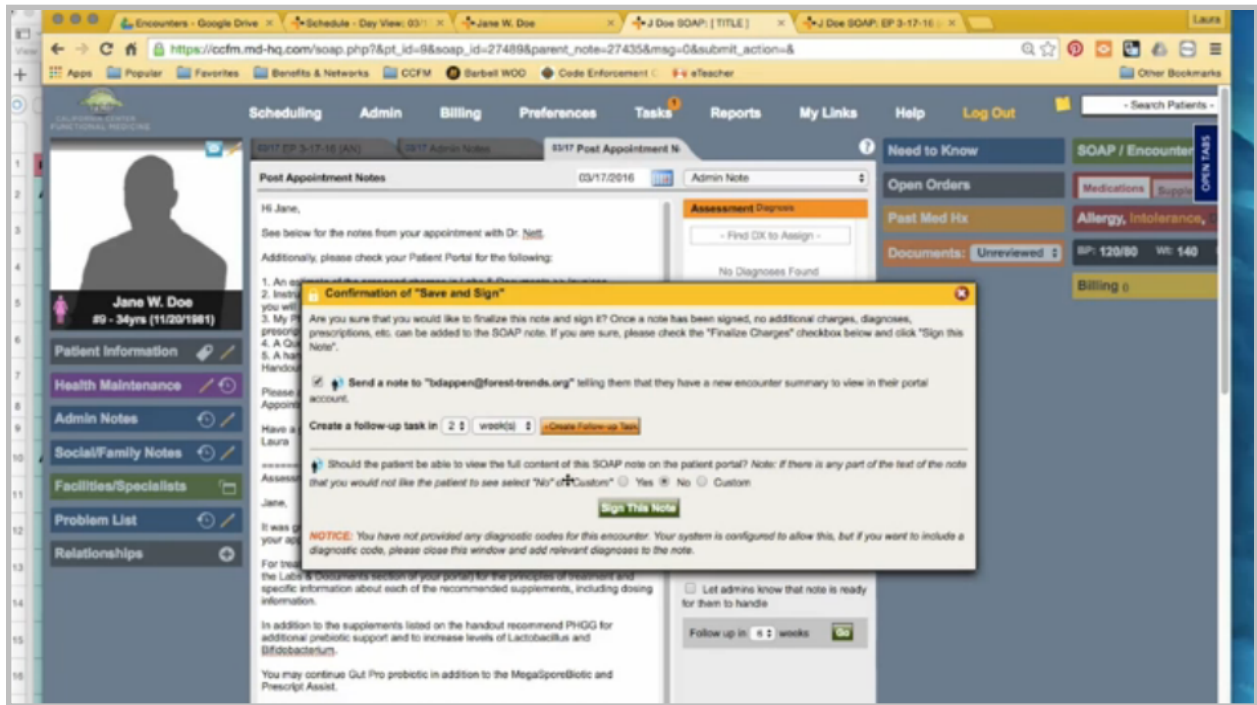


Down at the bottom, I want to paste the clinician's notes. Go back up to the top, address the note to the patient, and then I'll go back to the encounter and start going through to take off everything that doesn't apply here.

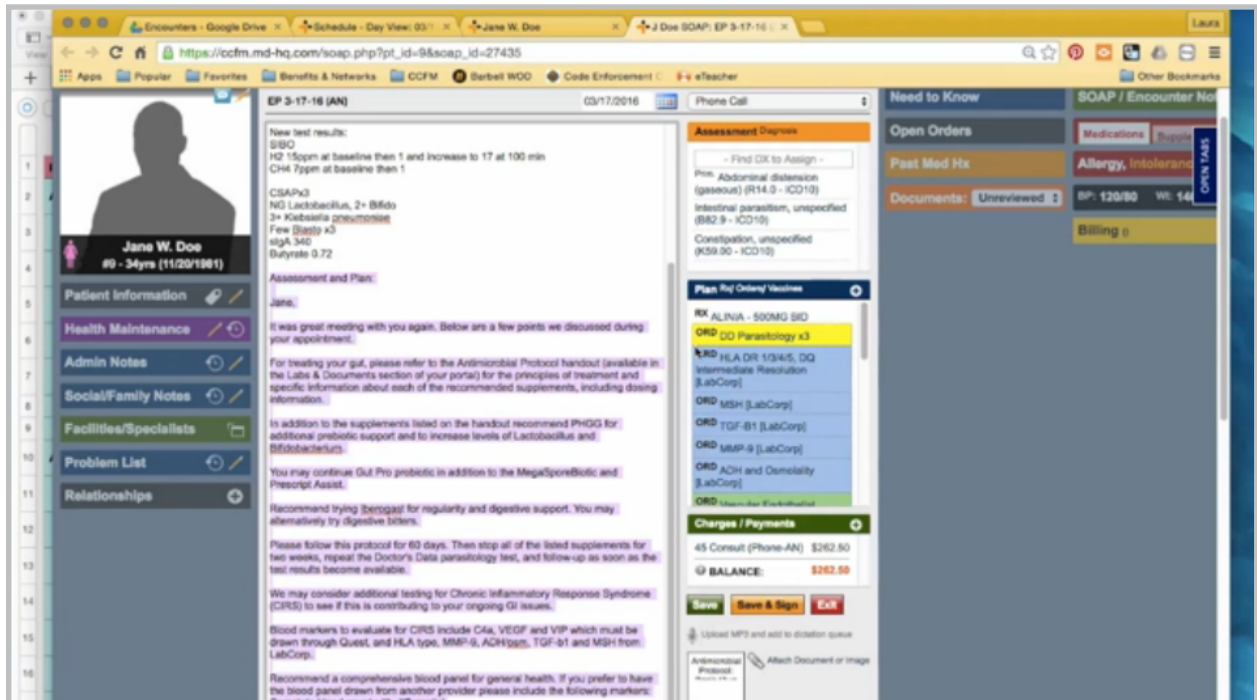


There is a prescription, but the admin note said the patient needs to upload a pharmacy still, so I'm going to take off this message that it was sent in. There will be an estimate. There are a few self-order supplements. Then I want to make sure that I note to the patient to add a pharmacy so we can fax in the prescription. I also need to let her know there will be a Quest requisition.

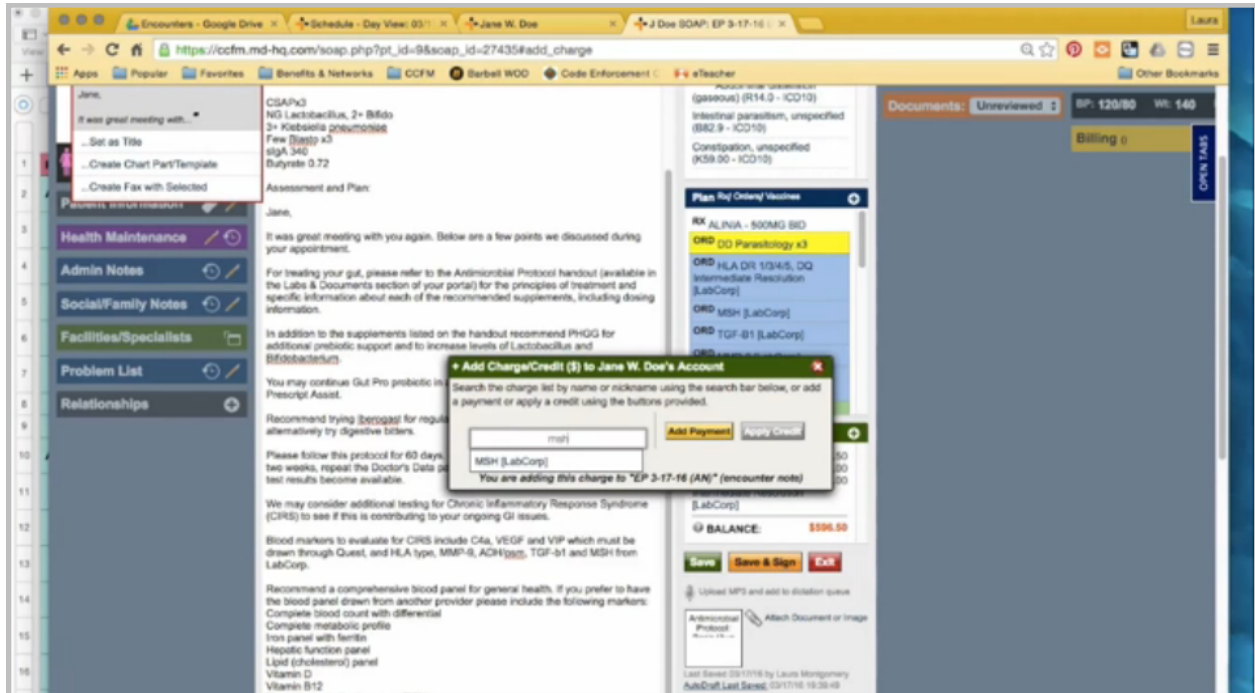
If I go to scheduling, I can see here she has no future appointment scheduled, so I want to make sure to remind her to schedule her next appointment. At the bottom of the encounter, there is also a handout, so I want to put that in my note as well.



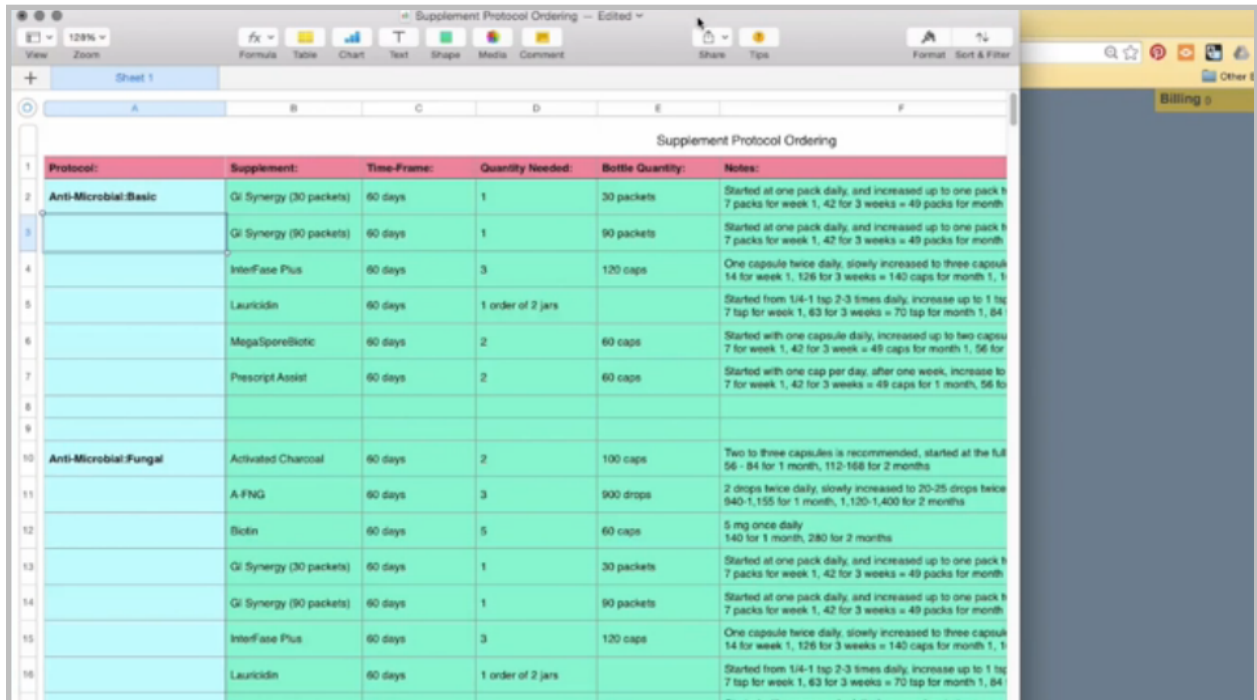
Then I will save and sign. I want to mark this to send her an email there is a message ready, and yes, I want it to be viewable to the portal. You can close that.



Then I need to start going through the note here and make sure everything that is discussed by the clinician is in the plan box.



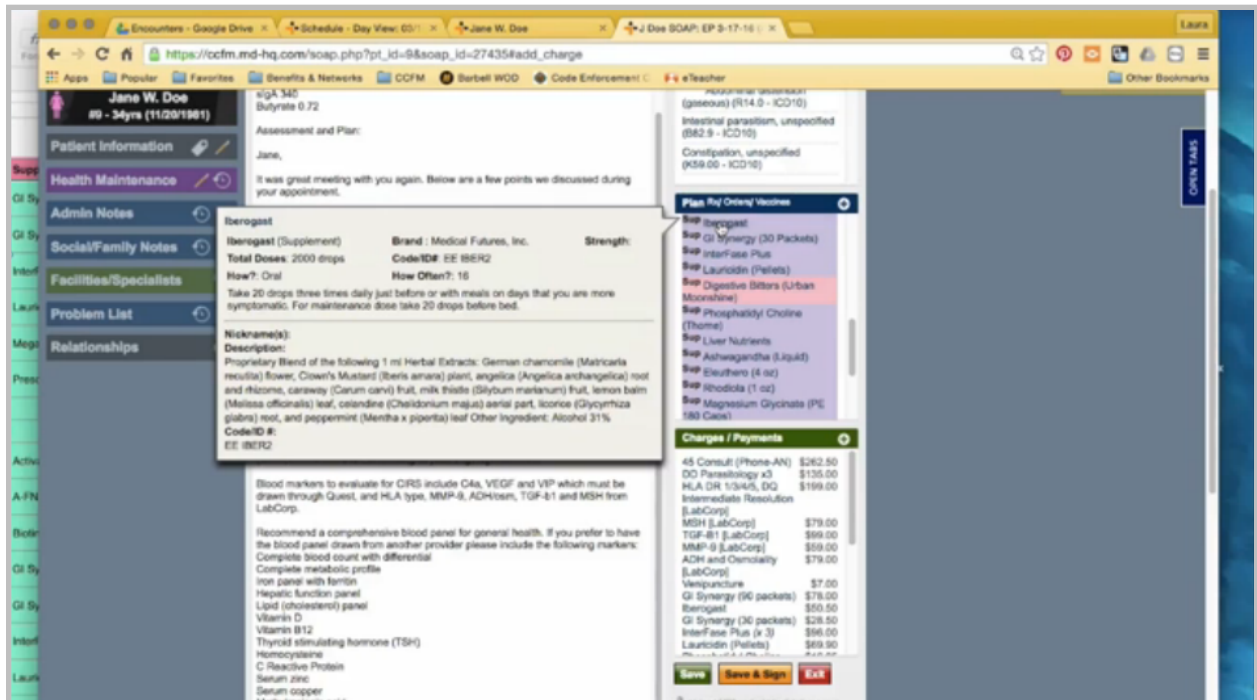
Now I want to start adding everything from the plan box into the charge box in the order that it is listed. I need to make sure to add a venipuncture charge to all LabCorp testing that doesn't have the CR blood panel ordered. We never charge the patient for Quest testing, so that doesn't go in the plan box. Any items in gray are also not paid directly to us by the patient, so they do not go in the charge box. Again, you can add each supplement individually, or you can use chart parts.



Protocol:	Supplement:	Time-Frame:	Quantity Needed:	Bottle Quantity:	Notes:	
Anti-Microbial Basic	GI Synergy (30 packets)	60 days	1	30 packets	Started at one pack daily, and increased up to one pack 7 packs for week 1, 42 for 3 weeks = 49 packs for month	
	GI Synergy (90 packets)	60 days	1	90 packets	Started at one pack daily, and increased up to one pack 7 packs for week 1, 42 for 3 weeks = 49 packs for month	
	Interfase Plus	60 days	3	120 caps	One capsule twice daily, slowly increased to three capsules 14 for week 1, 126 for 3 weeks = 140 caps for month 1, 1	
	Lauricidin	60 days	1 order of 2 jars		Started from 1/4-1 tsp 2-3 times daily, increase up to 1 tsp 7 tsp for week 1, 63 for 3 weeks = 70 tsp for month 1, 84	
	MegaSporeBiotic	60 days	2	60 caps	Started with one capsule daily, increased up to two capsules 7 for week 1, 42 for 3 weeks = 49 caps for month 1, 56 for	
	Prescript Assist	60 days	2	60 caps	Started with one cap per day, after one week, increase to 7 for week 1, 42 for 3 weeks = 49 caps for 1 month, 56 for	
Anti-Microbial Fungal	Activated Charcoal	60 days	2	100 caps	Two to three capsules is recommended, started at the full 56 - 84 for 1 month, 112-168 for 2 months	
	A-FNG	60 days	3	900 drops	2 drops twice daily, slowly increased to 20-25 drops twice 940-1,155 for 1 month, 1,120-1,400 for 2 months	
	Biotin	60 days	5	60 caps	5 mg once daily 140 for 1 month, 280 for 2 months	
	GI Synergy (30 packets)	60 days	1	30 packets	Started at one pack daily, and increased up to one pack 7 packs for week 1, 42 for 3 weeks = 49 packs for month	
	GI Synergy (90 packets)	60 days	1	90 packets	Started at one pack daily, and increased up to one pack 7 packs for week 1, 42 for 3 weeks = 49 packs for month	
	Interfase Plus	60 days	3	120 caps	One capsule twice daily, slowly increased to three capsules 14 for week 1, 126 for 3 weeks = 140 caps for month 1, 1	
	Lauricidin	60 days	1 order of 2 jars		Started from 1/4-1 tsp 2-3 times daily, increase up to 1 tsp 7 tsp for week 1, 63 for 3 weeks = 70 tsp for month 1, 84	

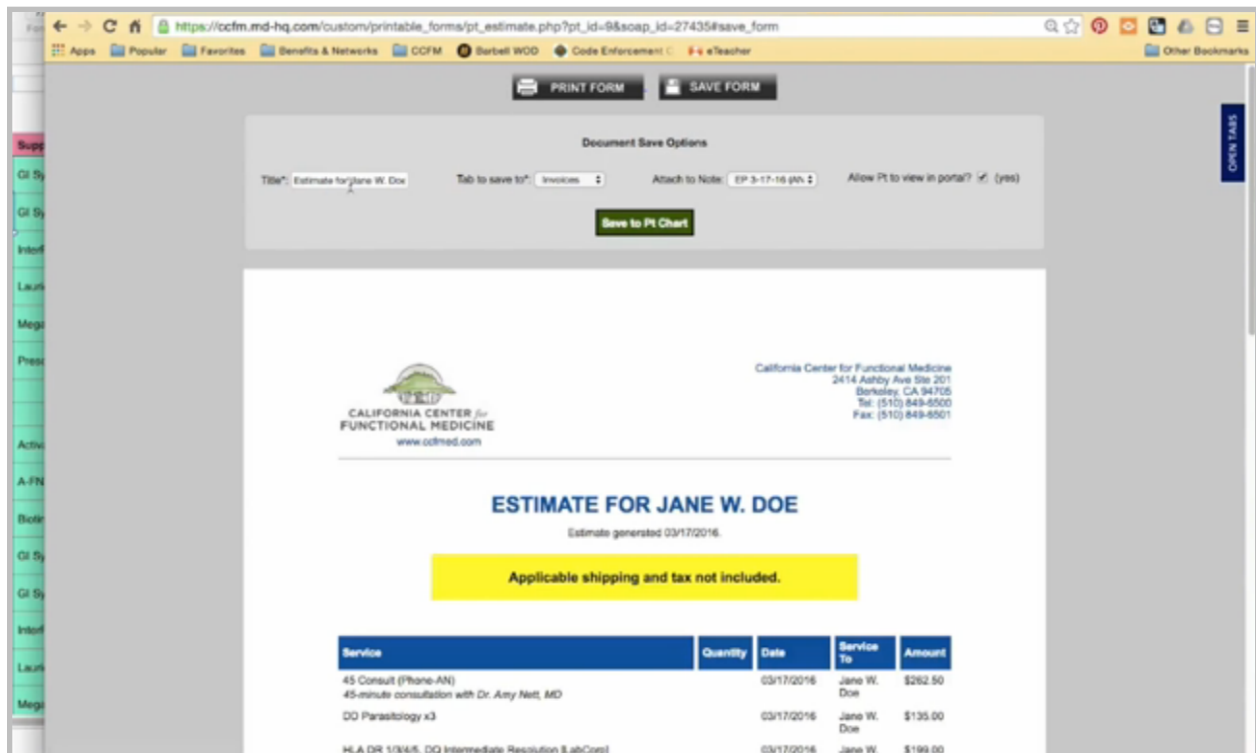
I also want to come over here to my sheet that tells me how many of each supplements are needed for the 60 days on the protocol. Then I'm just going to add in the other supplements as well.

The final thing to do is to go through the list of supplements. Just double check if any of the supplements not included on the protocol need additional quantities ordered in order to equal a one-month supply.



So, you can hover on the supplements and see where it lists the total dose as well as the instructions. Typically any of the liquid supplements we only order one bottle because their dosage varies so much from patient to patient. Okay, so for the Vital Adapt, the patient would need two bottles in order to have a one-month supply. I have everything done here, so I'll save it and generate my estimate.






Document Save Options

Title: Estimate for Jane W. Doe    Tab to save to: Invoices    Attach to Note: EP 3-17-16 ph.    Allow PT to view in portal?  (yes)

**Save to PT Chart**

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www.ccfmed.com

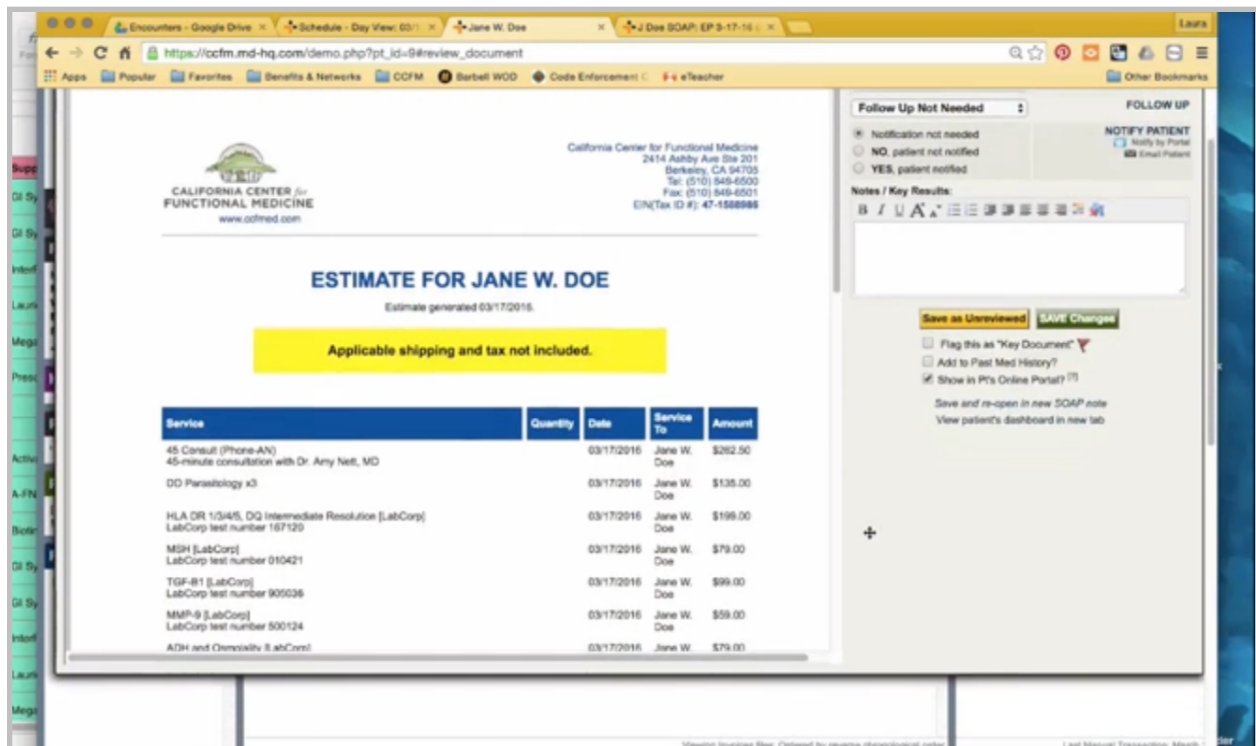
California Center for Functional Medicine  
2414 Ashby Ave Ste 201  
Berkeley, CA 94705  
Tel: (510) 849-8500  
Fax: (510) 849-8501

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

**Applicable shipping and tax not included.**

Service	Quantity	Date	Service To	Amount
45 Consult (Phone-AN)		03/17/2016	Jane W. Doe	\$262.50
45-minute consultation with Dr. Amy Nell, MD				
DD Parasitology x3		03/17/2016	Jane W. Doe	\$135.00
H.A. DR. 1/3/4/5, DQ Intermediate Resolution Lab/Cont		03/17/2016	Jane W.	\$199.00

I'm going to save it to the patient's chart with a default title, no note attached. Yes, it's viewable in the portal. Save to chart. Click to the chart.



California Center for Functional Medicine  
2414 Ashby Ave Ste 201  
Berkeley, CA 94705  
Tel: (510) 849-6500  
Fax: (510) 849-6501  
CIN(Tax ID #): 47-1588988

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### ESTIMATE FOR JANE W. DOE

Estimate generated 03/17/2016.

**Applicable shipping and tax not included.**

Service	Quantity	Date	Service To	Amount
45 Consult (Phone-AN)		03/17/2016	Jane W. Doe	\$262.50
45-minute consultation with Dr. Arny Nett, MD				
DD Parasitology x3		03/17/2016	Jane W. Doe	\$135.00
HLA DR 13/4/5, DQ Intermediate Resolution [LabCorp] LabCorp test number 187120		03/17/2016	Jane W. Doe	\$199.00
MSH [LabCorp] LabCorp test number 010421		03/17/2016	Jane W. Doe	\$79.00
TGF-B1 [LabCorp] LabCorp test number 905036		03/17/2016	Jane W. Doe	\$99.00
MMP-9 [LabCorp] LabCorp test number 500124		03/17/2016	Jane W. Doe	\$59.00
ADH and Osmolality [LabCorp]		03/17/2016	Jane W. Doe	\$79.00

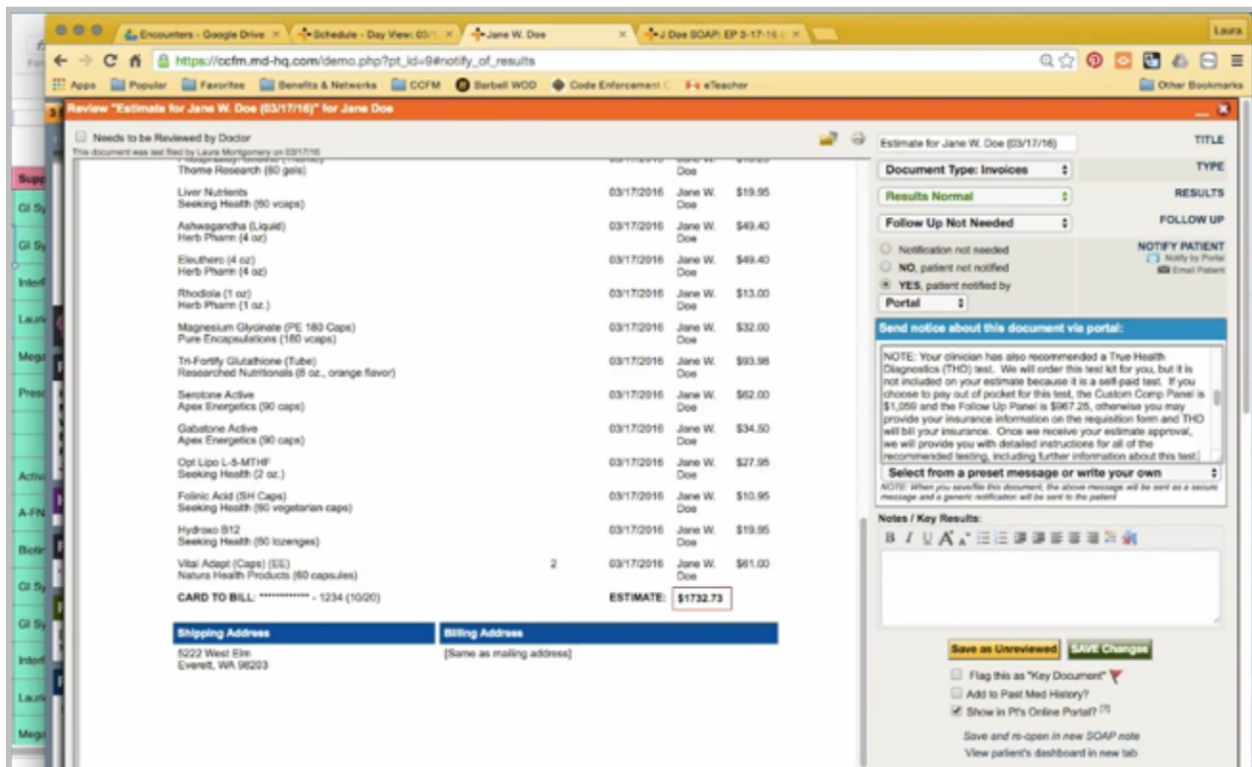
Follow Up Not Needed:  notification not needed,  NO, patient not notified,  YES, patient notified

NOTIFY PATIENT:

Notes / Key Results:

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

Go to Invoices and pull up my estimate. Just kind of review it and make sure everything is lined up. Credit card is not expired. There is a good shipping address. I'm going to send my message to the patient. I want to make sure to point out that I did add multiple bottles of the supplements for her protocol. I also added multiple bottles of the Vital Adapt to equal a one-month supply and let her know that Dr. Nett ordered LabCorp testing, but if she would like to use her insurance instead of paying us, she can do that.



**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

Item	Date	Provider	Amount
Liver Nutrients Seeking Health (90 vcaps)	03/17/2016	Jane W. Doe	\$19.95
Ashwagandha (Liquid) Herb Pharm (4 oz)	03/17/2016	Jane W. Doe	\$49.40
Eleuthero (4 oz) Herb Pharm (4 oz)	03/17/2016	Jane W. Doe	\$49.40
Rhodiola (1 oz) Herb Pharm (1 oz)	03/17/2016	Jane W. Doe	\$13.00
Magnesium Glycinate (PE) 180 Caps Pure Encapsulations (180 vcaps)	03/17/2016	Jane W. Doe	\$32.00
TN-Fortly Glutathione (Tube) Researched Nutritionals (8 oz., orange flavor)	03/17/2016	Jane W. Doe	\$93.98
Sensitone Active Apex Energetics (90 caps)	03/17/2016	Jane W. Doe	\$62.00
Galatone Active Apex Energetics (90 caps)	03/17/2016	Jane W. Doe	\$34.50
Opt Lipo L-5-MTHF Seeking Health (2 oz.)	03/17/2016	Jane W. Doe	\$27.95
Folic Acid (5H Caps) Seeking Health (90 vegetarian caps)	03/17/2016	Jane W. Doe	\$10.95
Hydroxo B12 Seeking Health (90 lozenges)	03/17/2016	Jane W. Doe	\$19.95
Vital Adapt (Caps) (60) Nature Health Products (60 capsules)	03/17/2016	Jane W. Doe	\$61.00
<b>CARD TO BILL: ***** - 1234 (1020)</b>			
<b>ESTIMATE: \$1732.73</b>			

Shipping Address: 1222 West Elm, Everett, WA 98203  
Billing Address: [Same as mailing address]

**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: Your clinician has also recommended a True Health Diagnostics (THD) test. We will order this test kit for you, but it is not included on your estimate because it is a self-paid test. If you choose to pay out of pocket for this test, the Custom Comp Panel is \$1,050 and the Follow Up Panel is \$967.25, otherwise you may provide your insurance information on the requisition form and THD will bill your insurance. Once we receive your estimate approval, we will provide you with detailed instructions for all of the recommended testing, including further information about this test!

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

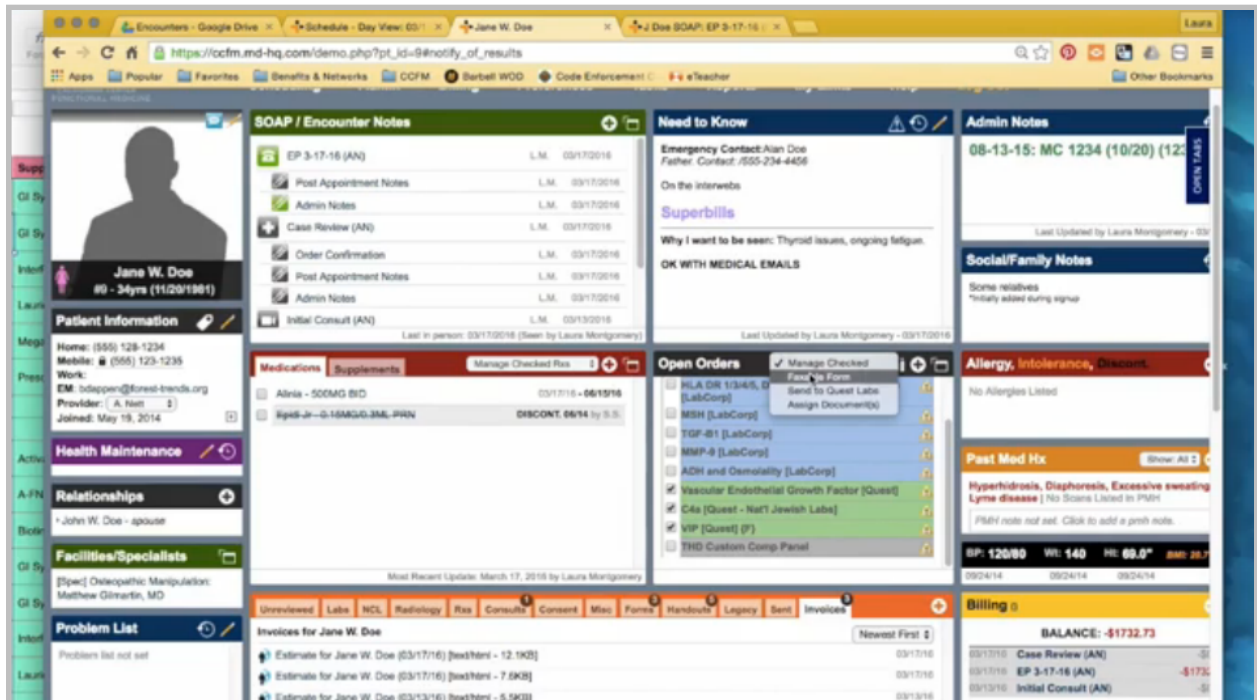
Notes / Key Results:

Save as Unreviewed | SAVE Changes

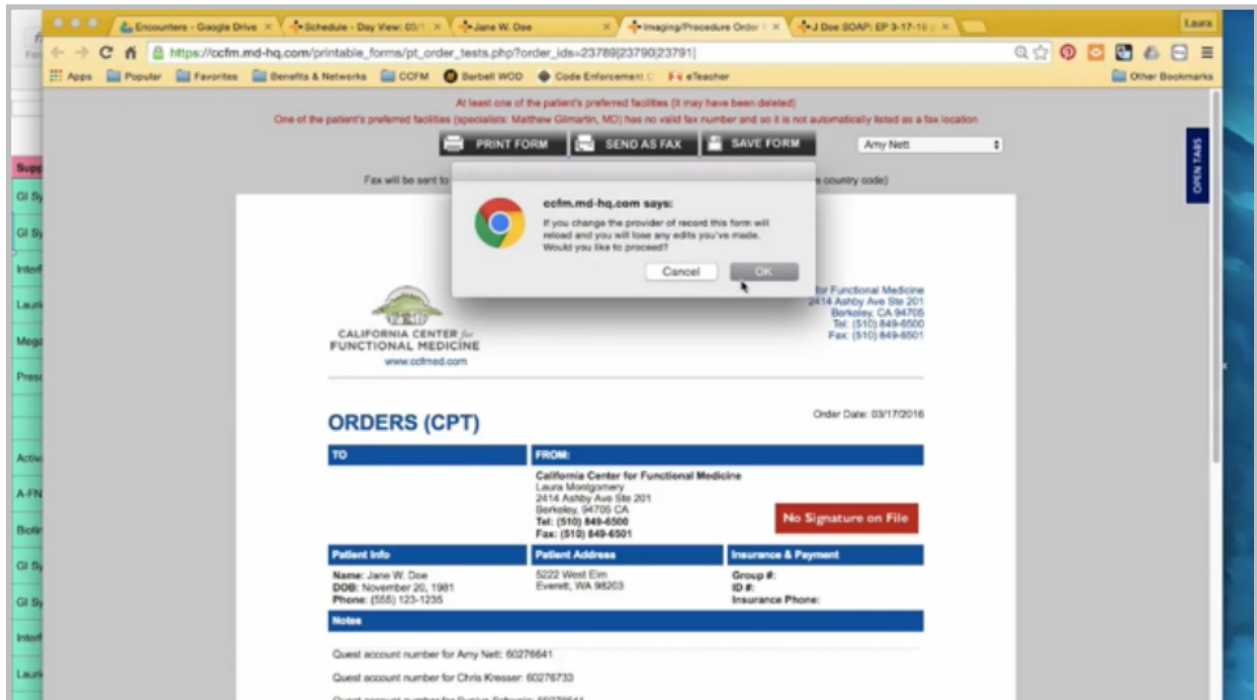
Flag this as "Key Document"  
 Add to Past Med History?  
 Show in PT's Online Portal?

Save and re-open in new SOAP note  
View patient's dashboard in new tab

Then I also want to make a note here about the THD test that is not on the estimate. Oftentimes patients will read the clinician's notes and see that Amy ordered the THD test for her, but it's not on the estimate, so they'll send messages asking how they get that test. Putting a note here explains to the patient the process and cuts down on those messages. Then I can send that to the patient.

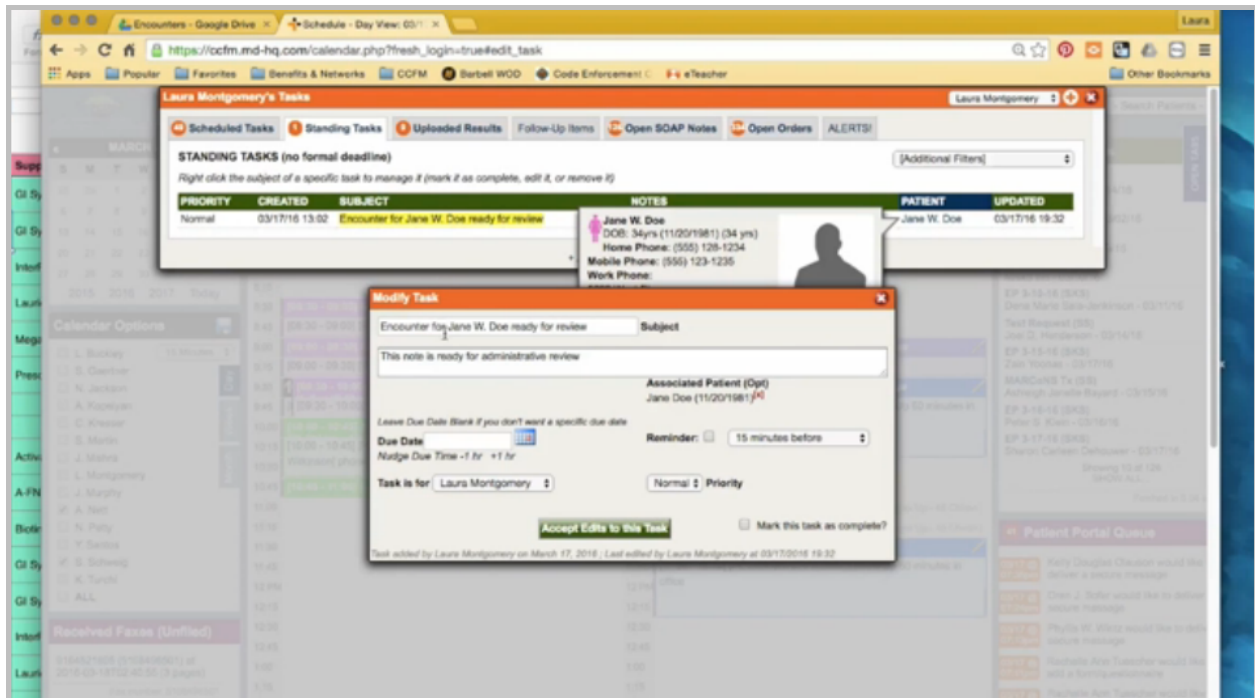


The final thing here will be to create the Quest requisition.



You need to sign it with Amy's name. Put notes here for the patient and for Quest. Then I'll save it with the patient's name. It's a Quest order, the date of the encounter to a form. Make it viewable in the portal.

Back in the note, I'm going to copy the title. You can close the note and close the chart. Pull up the task.



Make the patient's name first. Paste the title of the task, and note that I generated an estimate and sent it to the patient. My due date will be two weeks. I'll assign this to myself. In two weeks, if we haven't heard back from the patient, I'll send a follow-up message in the portal. I'll give it another week on the due date. If we still haven't heard back from the patient at that point, I would make a phone call and put another due date of one week. At that point, we'd be a month away from the appointment, and if we still haven't heard back, we would send the message warning the patient that she might go to bad debt status.