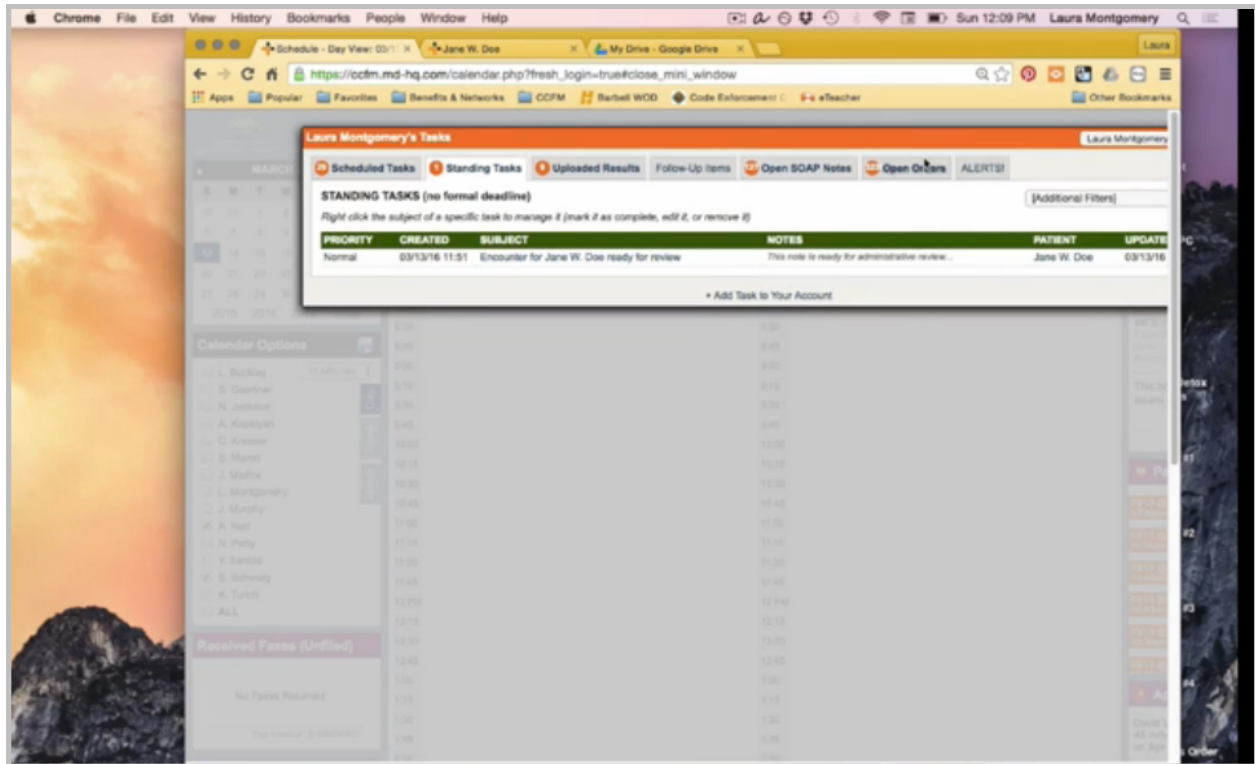
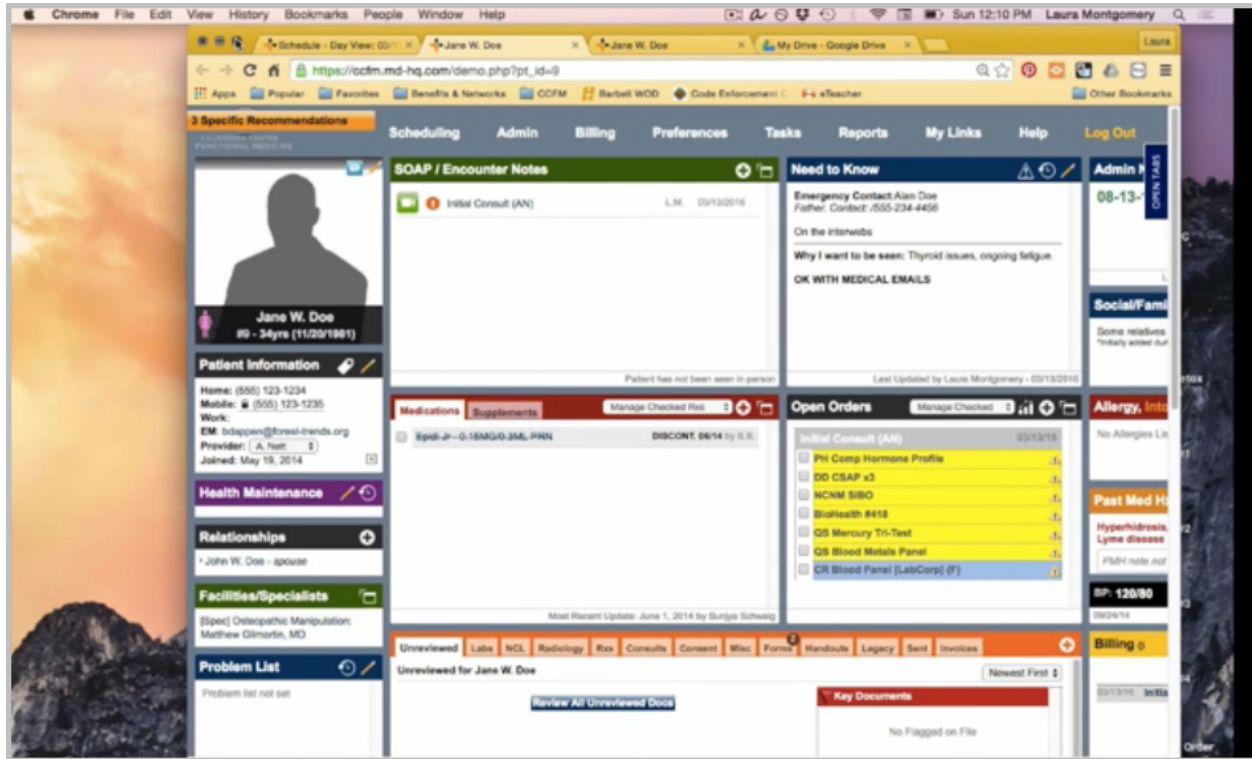


Processing Charts: Initial Consult Appointments - Part 1

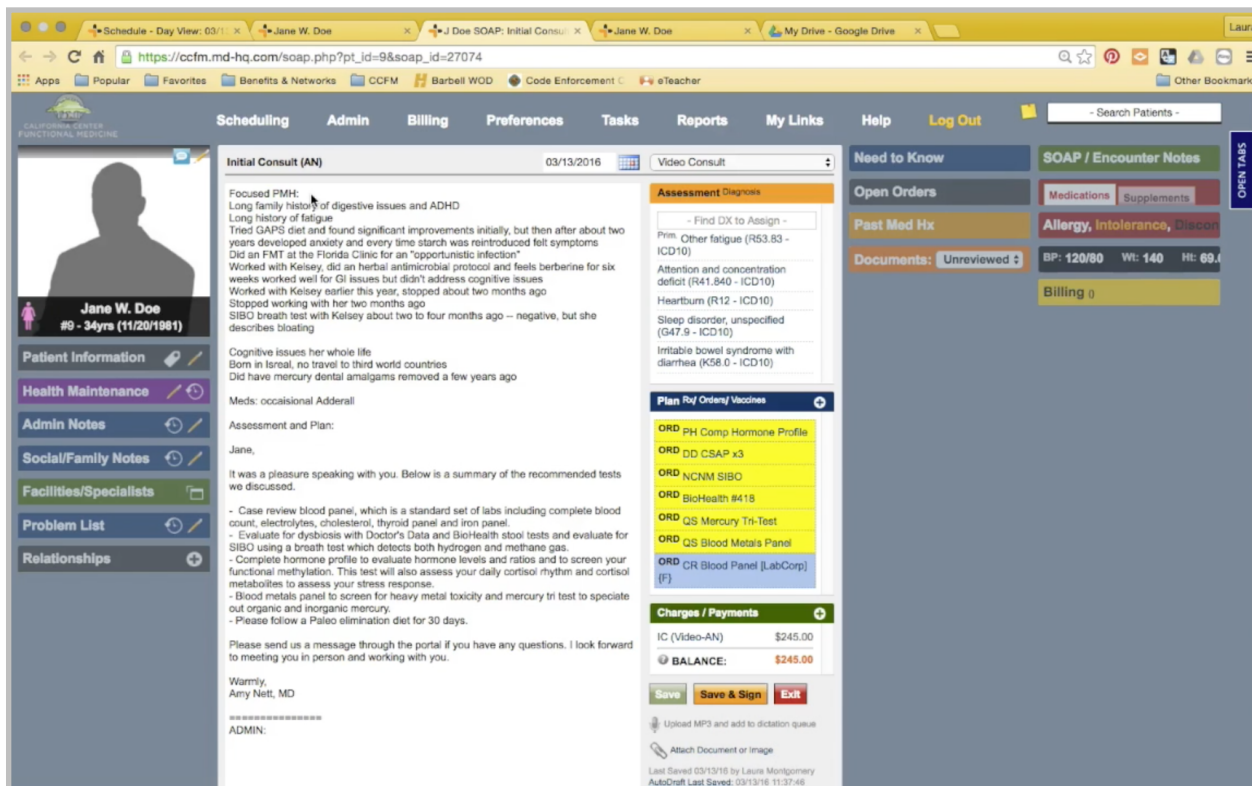
This is how to process appointment encounters for initial consults.



Once admin staff receives a standing task with a title that an encounter is ready for review, clicking on the patient name will open the patient's chart, and the encounter will be listed here.

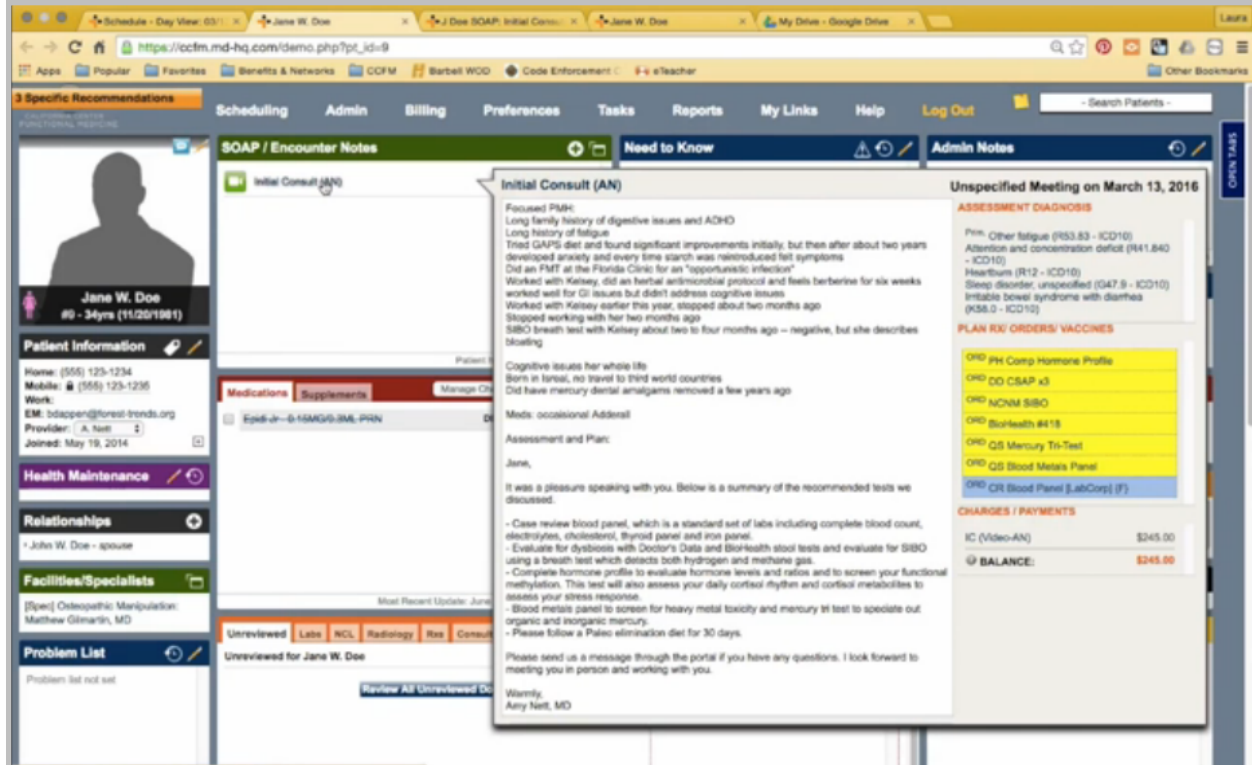


If you click on the title, it opens the encounter.



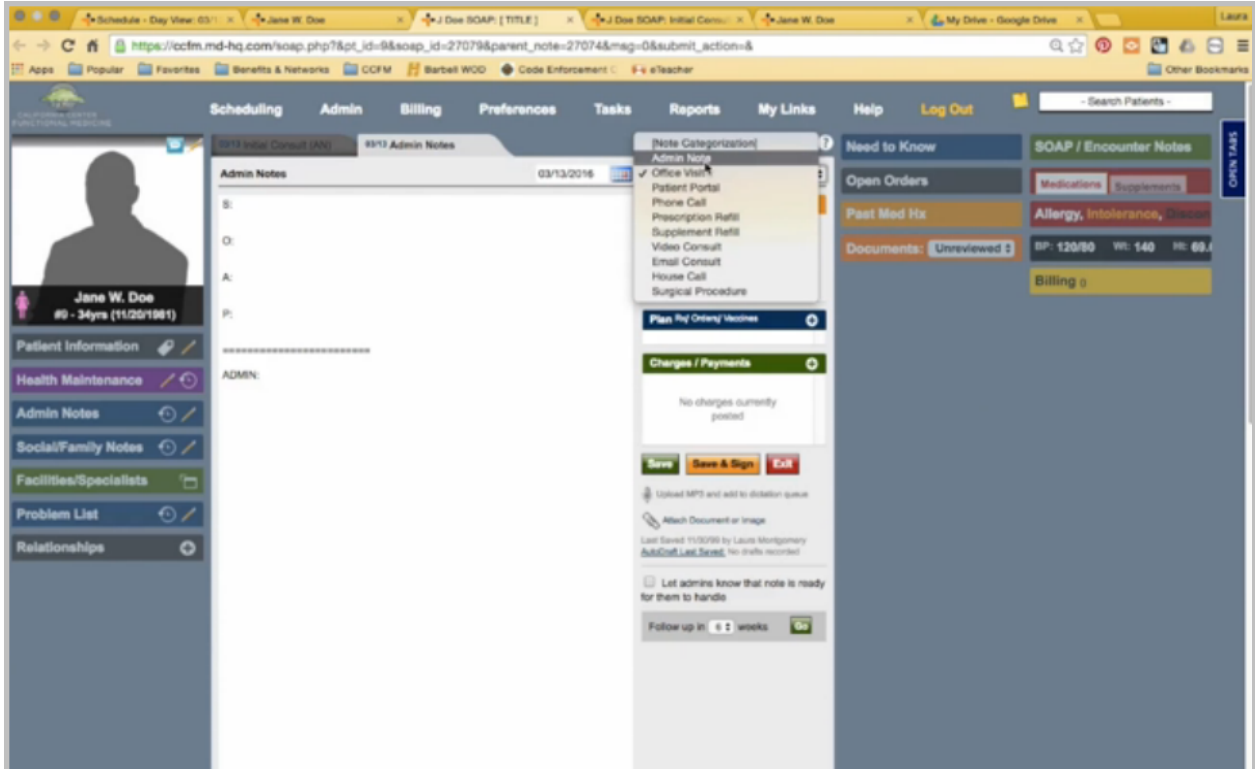
The first thing I want to do is look down here to see if there are any notes from the clinician to admin staff. In this case, there are none, so I just delete this and save the changes. I also want to make a note if there have been any Quest tests ordered here in the plan box, and there have not been any in this case.

I'm going to go back to the chart, and the first thing that I want to do is create a subnote with the admin notes.



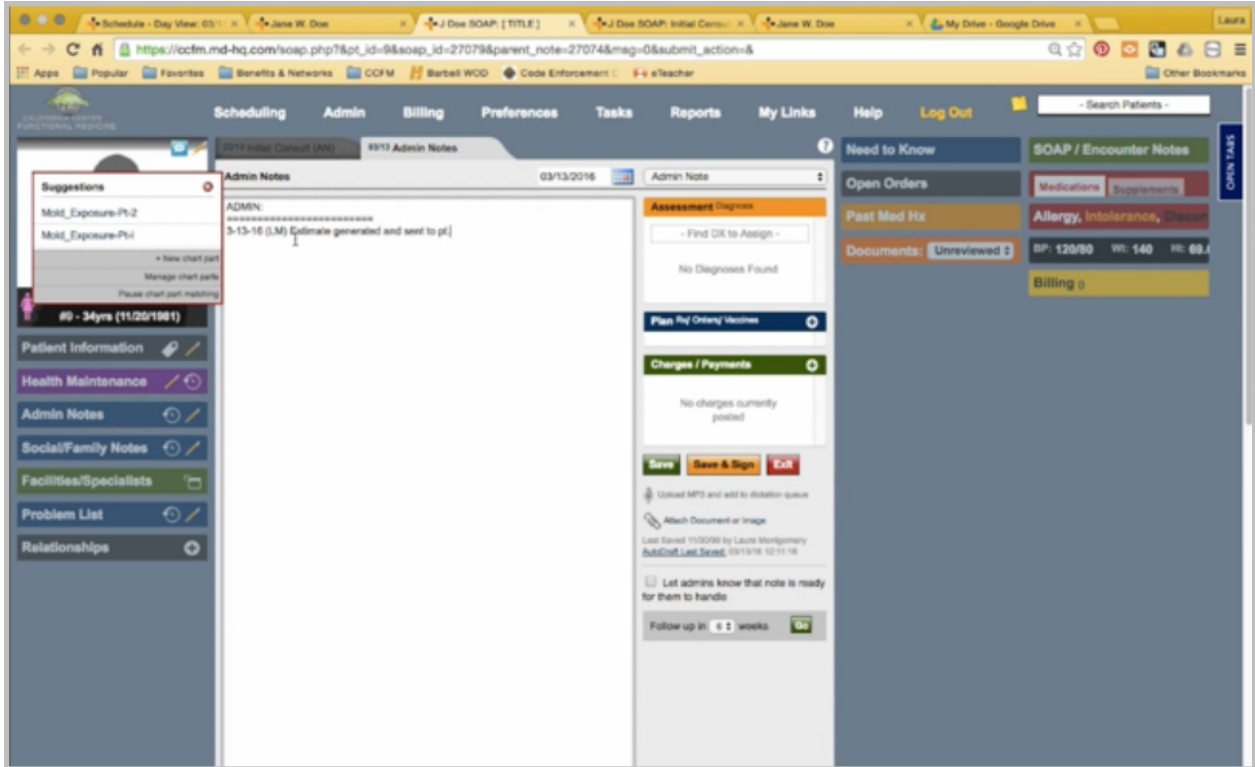
The screenshot shows the Kresser Institute patient chart interface. The sidebar on the left contains patient information for Jane W. Doe, including her name, age (34 years), date of birth (11/20/1981), and contact details. The main content area is titled 'SOAP / Encounter Notes' and shows a list of notes. A pop-up window displays the 'Initial Consult (AN)' note, which includes a focused PMH, a long family history of digestive issues and ADHD, and a detailed assessment and plan. The right-hand panel shows a list of tests and charges, including 'Pain Other Fatigue (R53.83 - ICD10)', 'Attention and concentration deficit (R41.840 - ICD10)', and 'Hypertension (R12 - ICD10)'. The 'PLAN RX/ORDERS/VACCINES' section lists several tests, including 'Pain Comp Hormone Profile', 'CD CSAP v3', 'NOM SIBO', 'BioHealth #418', 'QS Mercury Tri-Test', 'QS Blood Metals Panel', and 'CR Blood Panel (LabCorp) (F)'. The 'CHARGES / PAYMENTS' section shows a balance of \$245.00.

So I'll right-click and create a subnote.

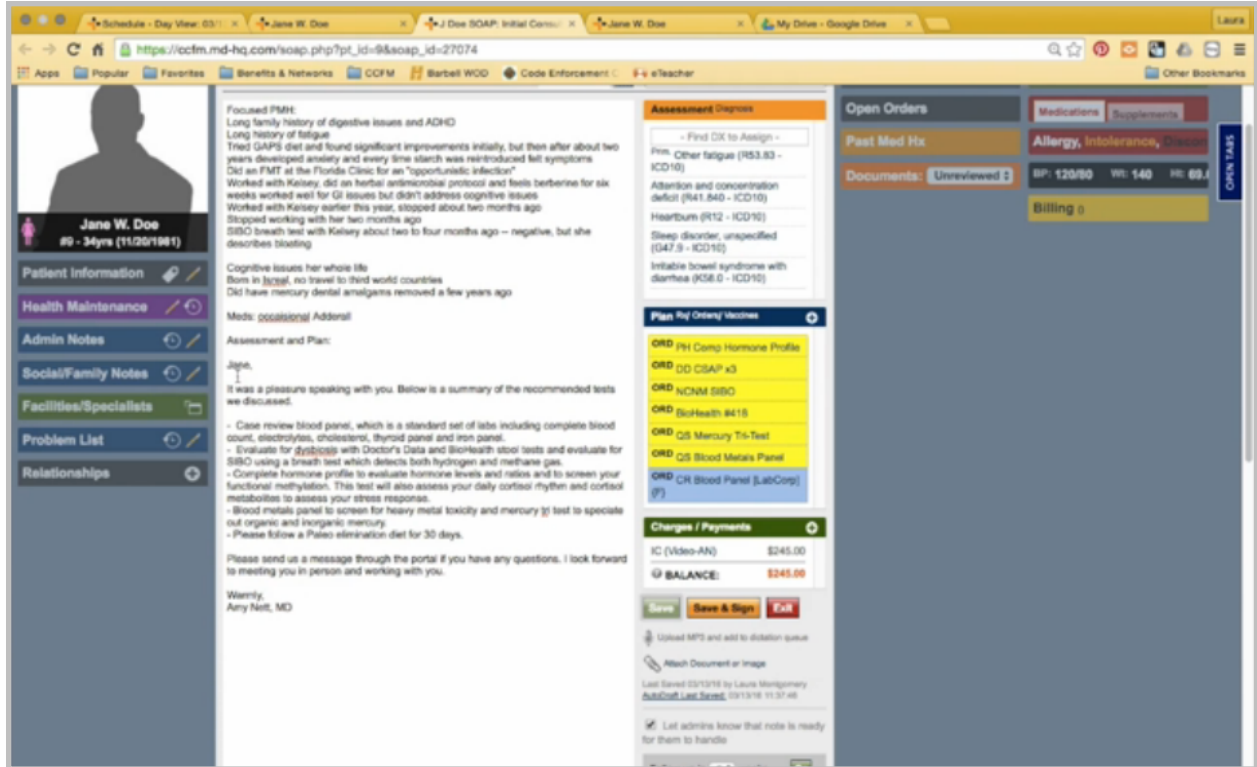


The screenshot shows a web-based medical application. The top navigation bar includes tabs for Scheduling, Admin, Billing, Preferences, Tasks, Reports, My Links, Help, and Log Out. The main content area is divided into several sections. On the left, there's a patient profile for Jane W. Doe, #6 - 34yrs (11/20/1981), with links for Patient Information, Health Maintenance, Admin Notes, Social/Family Notes, Facilities/Specialists, Problem List, and Relationships. The central 'Admin Notes' section shows a date of 03/13/2016 and a dropdown menu for 'Note Categorization' with options like Office Visit, Patient Portal, Phone Call, Prescription Refill, Supplement Refill, Video Consult, Email Consult, House Call, and Surgical Procedure. The right sidebar contains various clinical and administrative tools, including 'Need to Know', 'Open Orders', 'Past Med Hx', 'Documents' (Unreviewed 1), 'SOAP / Encounter Notes', 'Medications', 'Supplements', 'Allergy, Intolerance, Sensitivity', 'BP: 120/80', 'HR: 140', 'HT: 65.1', and 'Billing'.

Then I'm going to title it as "Admin Notes" and categorize it as an admin note. You want to remove all the default text here and put a message. If there had been notes from the clinician to admin staff, we would move them here. However, we'll just leave it blank, since there weren't. I'm going to take off this part of the message, since there is no Quest testing that has been ordered.



That leaves me with just the date, my initials, and a documentation of what happened. You generated an estimate and sent it to the patient. You can save it and close that note.



Patient Information
Jane W. Doe
34 - 34yrs (11/25/1981)

Health Maintenance
Admin Notes
Social/Family Notes
Facilities/Specialists
Problem List
Relationships

Focused PMH:
Long family history of digestive issues and ADHD
Long history of fatigue
Tried GAPS diet and found significant improvements initially, but then after about two years developed anxiety and every time starch was reintroduced felt symptoms
Did an FMT at the Florida Clinic for an "opportunistic infection"
Worked with Kelsey, did an herbal antimicrobial protocol and feels better for six weeks worked well for GI issues but didn't address cognitive issues
Worked with Kelsey earlier this year, stopped about two months ago
Stopped working with her two months ago
SIBO breath test with Kelsey about two to four months ago -- negative, but she describes bloating
Cognitive issues her whole life
Born in Israel, no travel to third world countries
Did have mercury dental amalgams removed a few years ago
Med: occasional Adderall
Assessment and Plan:
Jeph,
It was a pleasure speaking with you. Below is a summary of the recommended tests we discussed.
- Case review blood panel, which is a standard set of labs including complete blood count, electrolytes, cholesterol, thyroid panel and iron panel.
- Evaluate for dysbiosis with Doctor's Data and BioHealth stool tests and evaluate for SIBO using a breath test which detects both hydrogen and methane gas.
- Complete hormone profile to evaluate hormone levels and ratios and to screen your functional methylation. This test will also assess your daily cortisol rhythm and cortisol metabolites to assess your stress response.
- Blood metals panel to screen for heavy metal toxicity and mercury in test to speculate out organic and inorganic mercury.
- Please follow a Paleo elimination diet for 30 days.
Please send us a message through the portal if you have any questions. I look forward to meeting you in person and working with you.
Warmly,
Amy Nell, MD

Assessment/Diagnosis
- Find ICD to Assign -
Prim: Other fatigue (R53.83 - ICD10)
Attention and concentration deficit (R41.840 - ICD10)
Heartburn (R12 - ICD10)
Sleep disorder, unspecified (I047.9 - ICD10)
Inflammatory bowel syndrome with diarrhea (K56.0 - ICD10)

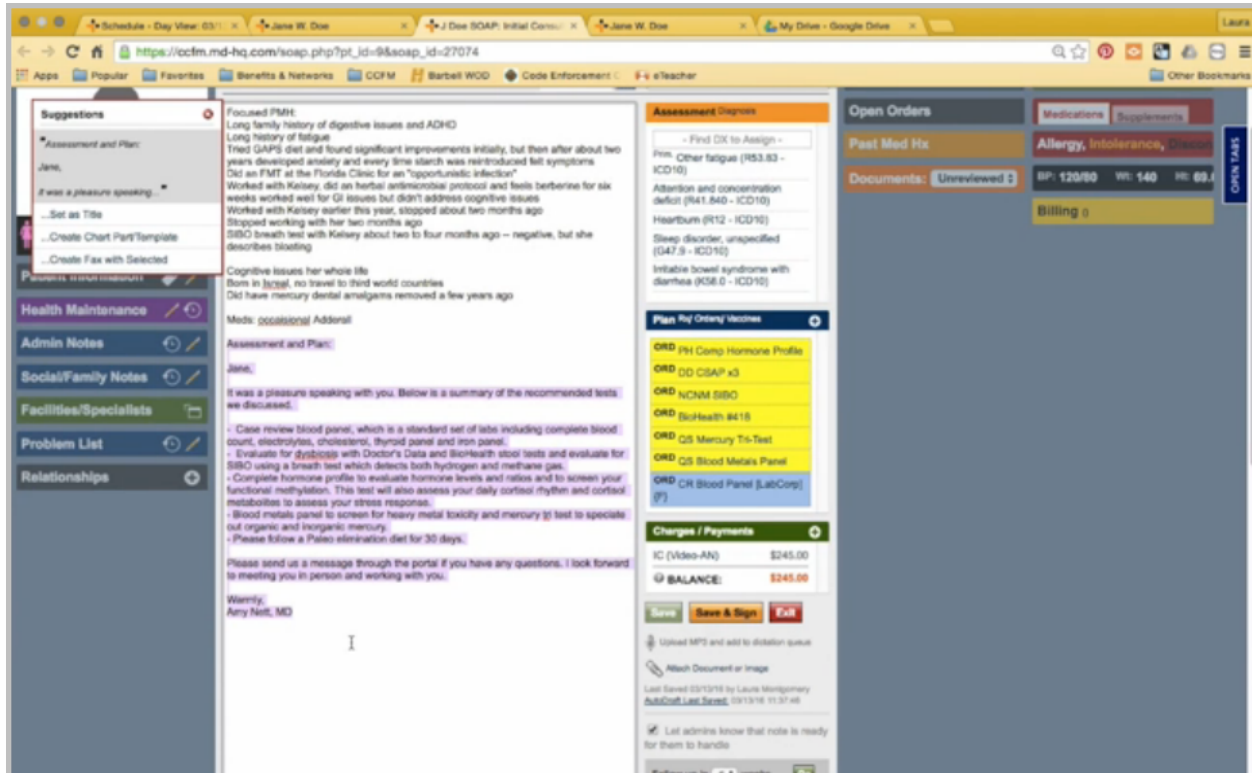
Plan/Ref/Orders/Notes
ORD /H Comp Hormone Profile
ORD OD C5AP x3
ORD NONM SIBO
ORD BioHealth #415
ORD Q5 Mercury T5-Test
ORD Q5 Blood Metals Panel
ORD CR Blood Panel [LabCorp]

Charges / Payments
IC (Video-AN) \$245.00
BALANCE: \$245.00
Save Save & Sign Exit
Upload MP3 and add to dictation queue
Attach Document or Image
Last Saved 12/13/18 by Luke Montgomery
AutoSave Last Saved: 12/13/18 11:37 AM
Let admins know that note is ready for them to handle

Open Orders
Past Med Hx
Documents: Unreviewed
BP: 120/90 Wt: 140 Ht: 69.4
Billing

Medications
Allergy, Intolerance, Reaction
OPEN TABS

Back in the encounter note, I'm going to highlight everything from assessment and plan down to the clinician's name and copy it.



The screenshot displays a medical software interface with a central text area for a SOAP note and several side panels for clinical data.

Left Sidebar (Navigation):

- Suggestions
- Assessment and Plan: Jane
- Health Maintenance
- Admin Notes
- Social/Family Notes
- Facilities/Specialists
- Problem List
- Relationships

Central Text Area (SOAP Note):

Assessment and Plan:
Jane,
It was a pleasure speaking with you. Below is a summary of the recommended tests we discussed:

- Case review blood panel, which is a standard set of labs including complete blood count, electrolytes, cholesterol, thyroid panel and iron panel.
- Evaluate for dysbiosis with Doctor's Data and BioHealth stool tests and evaluate for SIBO using a breath test which detects both hydrogen and methane gas.
- Complete hormone profile to evaluate hormone levels and ratios and to screen your functional methylation. This test will also assess your daily cortisol rhythm and cortisol metabolites to assess your stress responses.
- Blood metals panel to screen for heavy metal toxicity and mercury (to test to specialists out organic and inorganic mercury).
- Please follow a Paleo elimination diet for 30 days.

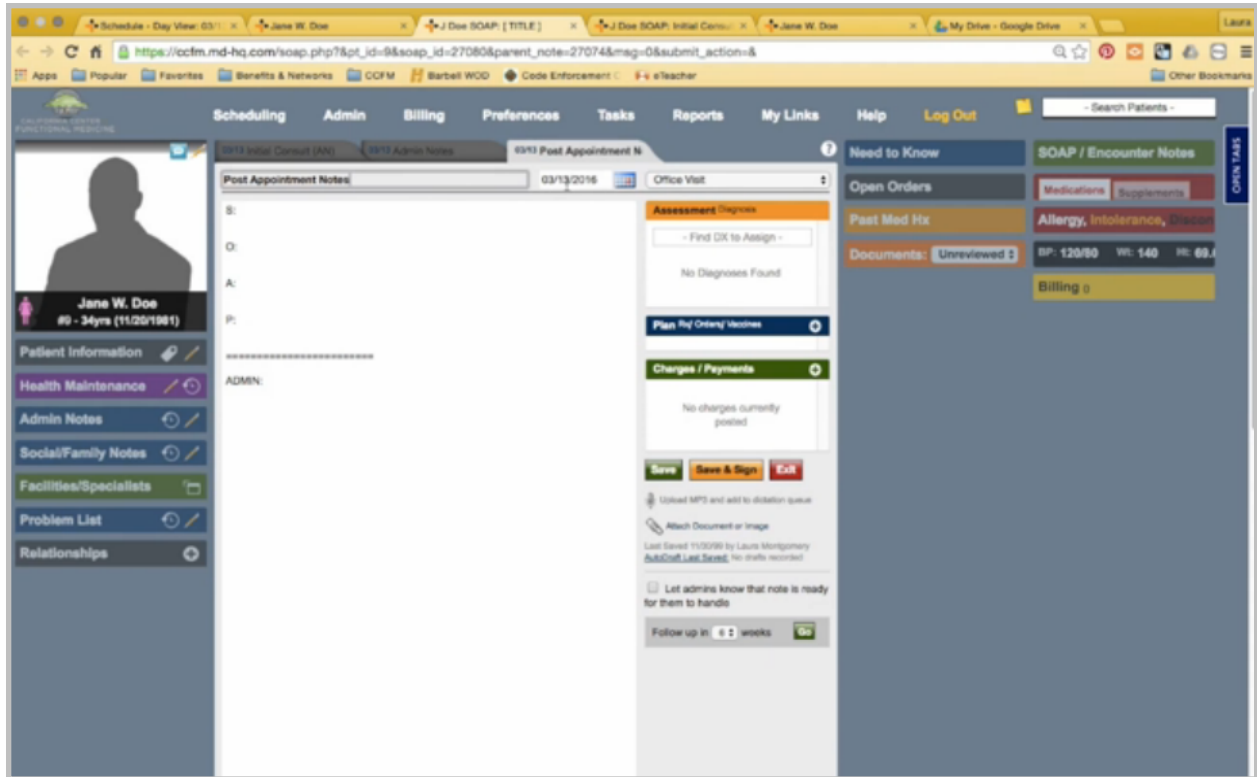
Please send us a message through the portal if you have any questions. I look forward to meeting you in person and working with you.

Warmly,
Amy Nell, MD

Right Panels:

- Assessment/Diagnosis:**
 - Find ICD to Assign
 - Prim. Other fatigue (R53.83 - ICD10)
 - Attention and concentration deficit (R41.840 - ICD10)
 - Heartburn (R12 - ICD10)
 - Sleep disorder, unspecified (Z47.9 - ICD10)
 - Inflammatory bowel syndrome with diarrhea (K58.0 - ICD10)
- Plan Rx/Order/Notes:**
 - ORD PH Comp Hormone Profile
 - ORD DD GIAP x3
 - ORD NCHM SIBO
 - ORD BioHealth 8415
 - ORD QS Mercury Tox-Test
 - ORD QS Blood Metals Panel
 - ORD CR Blood Panel [LabCorp]
- Charges / Payments:**
 - IC (Video-AN) \$245.00
 - BALANCE: \$245.00
- Open Orders:** Past Med Hx, Documents: Unreviewed
- Medications:** Allergy, Intolerance, Disorder
- Supplements:** BP: 120/80, WT: 140, HC: 69.4
- Billing:**

I'm going to go back to the chart and recreate one more subnote of this encounter, which is the post-appointment notes, also categorized as an admin note.

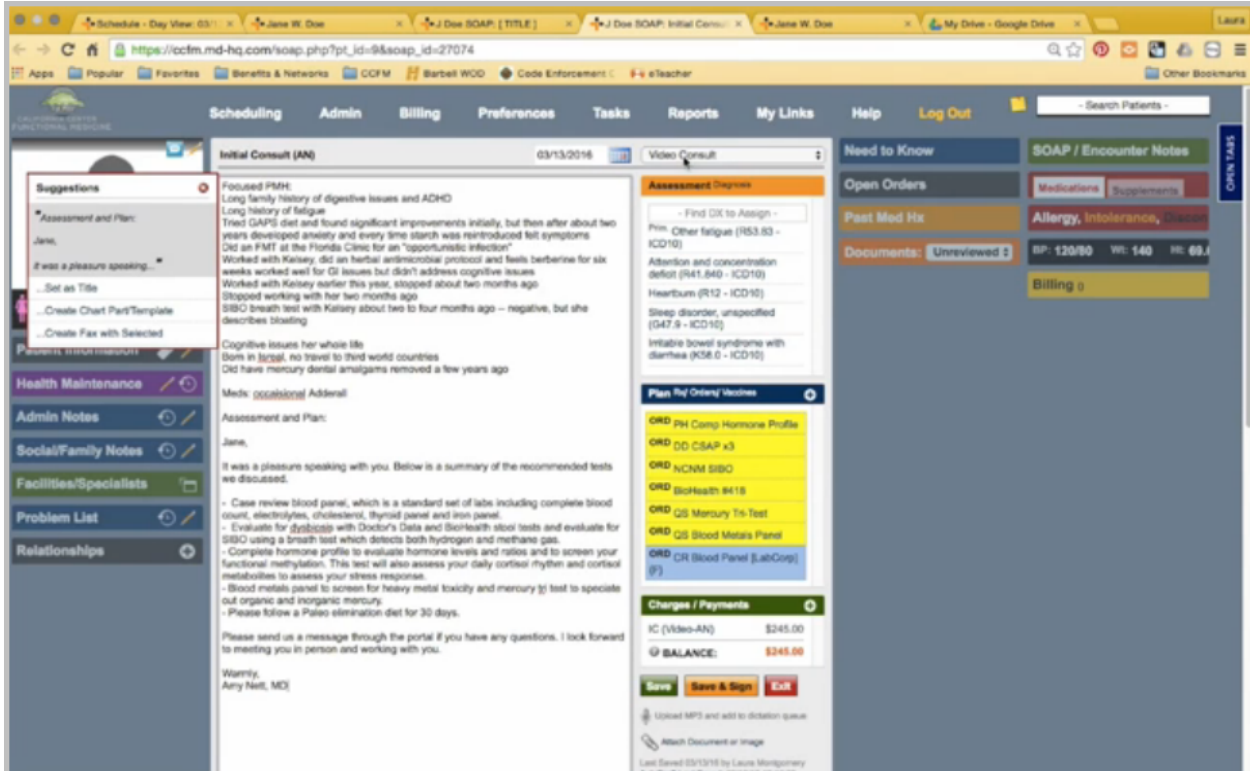


The screenshot displays a web browser window with multiple tabs. The active tab shows a patient portal for Jane W. Doe. The interface includes a top navigation bar with links like 'Scheduling', 'Admin', 'Billing', 'Preferences', 'Tasks', 'Reports', 'My Links', 'Help', and 'Log Out'. A search bar is present on the right. The main content area is divided into several sections:

- Left Sidebar:** Contains a patient profile for Jane W. Doe (49 - 34yrs, 11/25/1981) and a list of tabs: Patient Information, Health Maintenance, Admin Notes, Social/Family Notes, Facilities/Specialists, Problem List, and Relationships.
- Top Section:** Shows 'Post Appointment Notes' for a date of 03/13/2016. It includes fields for S:, O:, A:, and P:, followed by an 'ADMIN:' section.
- Right Section:** Contains a 'SOAP / Encounter Notes' section with buttons for 'Medications', 'Supplements', 'Allergy, Intolerance, Diet', and 'Billing'. It also displays 'BP: 120/80', 'Wt: 140', and 'Ht: 69.4'. Below this is a 'Need to Know' section with 'Open Orders', 'Past Med Hx', and 'Documents: Unreviewed 3'. A 'Plan Rx Orders/ Medicines' section is also visible.
- Bottom Section:** Includes a 'Charges / Payments' section with a 'Save' button and a 'Save & Sign' button. There is also a 'Follow up in 6 weeks' button.

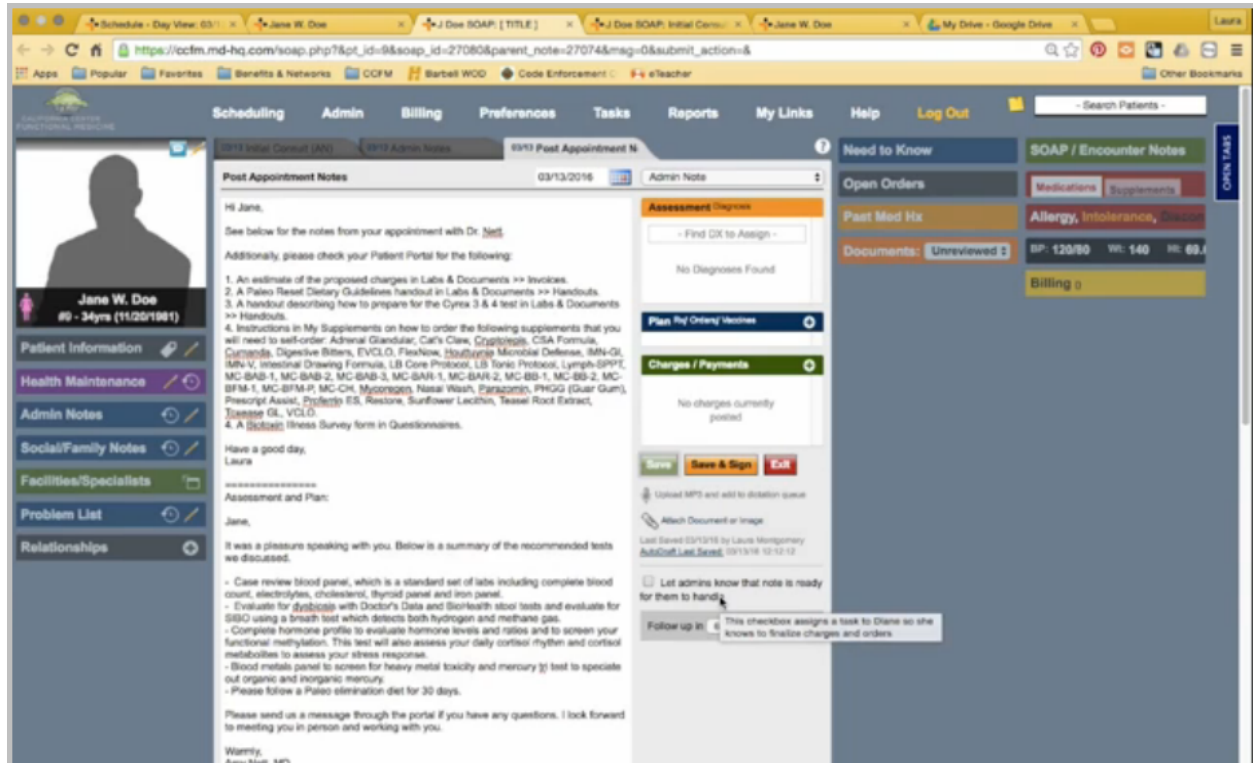
The message here will be addressed to the patient, and this list will basically be instructions to the patient outlining the next steps of the process and where they can find everything that they'll need in their portal.

The next thing that I want to do is read the clinician's note to make sure that it matches everything that is in the plan box.



The screenshot displays a medical software interface for a video consult. The top navigation bar includes options like 'Scheduling', 'Admin', 'Billing', 'Preferences', 'Tasks', 'Reports', 'My Links', 'Help', and 'Log Out'. The main content area is titled 'Initial Consult (AN)' and shows patient information for Jane W. Doe. A sidebar on the left contains navigation links such as 'Health Maintenance', 'Admin Notes', 'Social/Family Notes', 'Facilities/Specialists', 'Problem List', and 'Relationships'. The central text area contains a detailed medical history and a list of suggested tests, including a case review blood panel, SIBO test, hormone profile, and metal testing. A 'Charges / Payments' section at the bottom right shows a balance of \$245.00.

So here you can see this is a video consult. There's a video charge here. She's ordering a case review blood panel, which is listed; Doctor's Data and BioHealth stool tests, which are listed; a SIBO test, which is listed; a hormone profile test, listed; and metal testing, which is listed. The last item is that she would like the patient to follow an elimination diet for 30 days, and if she had put the handout here, it would be listed here, so I want to make sure that I send that to the patient.

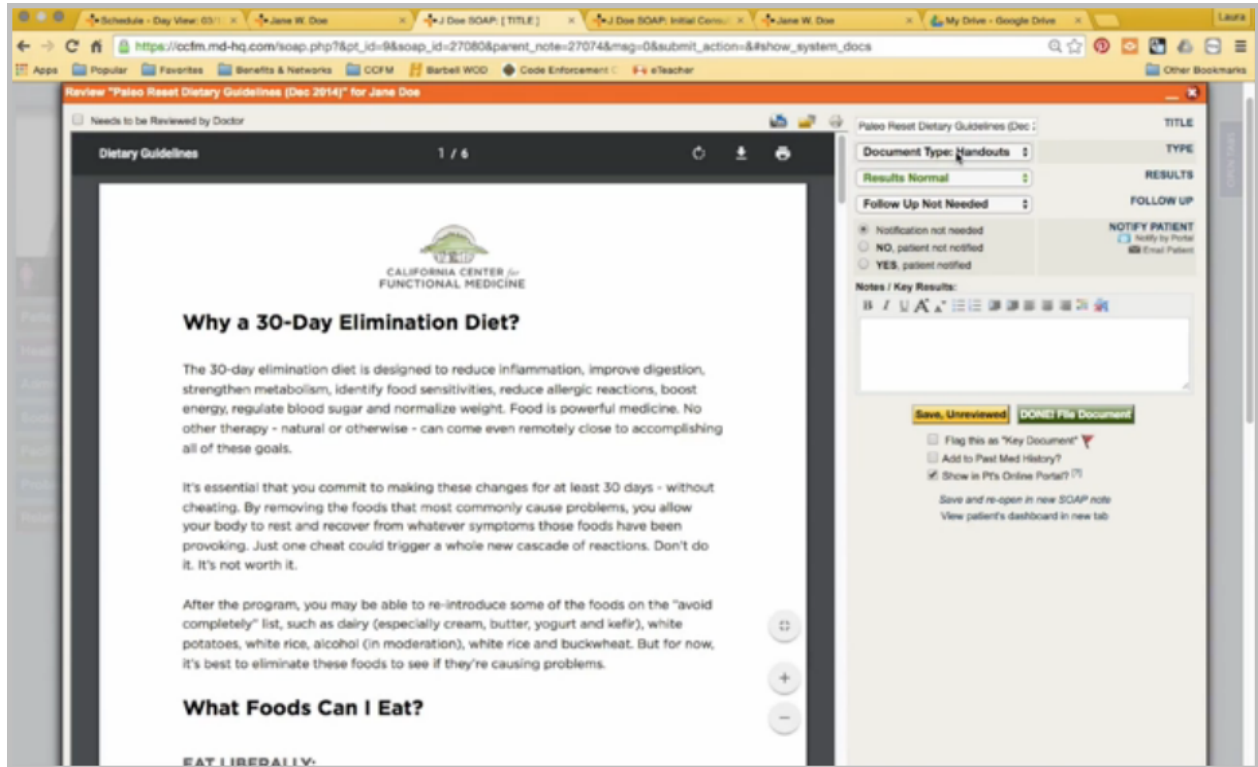


The screenshot displays the Kresser Institute patient portal interface. The top navigation bar includes links for Scheduling, Admin, Billing, Preferences, Tasks, Reports, My Links, Help, and Log Out. The left sidebar shows patient information for Jane W. Doe, including her name, age (34 years), and various note categories like Patient Information, Health Maintenance, Admin Notes, Social/Family Notes, Facilities/Specialists, Problem List, and Relationships.

The main content area is titled "Post Appointment Notes" and shows a note dated 03/13/2016. The note text includes instructions for the patient to check their Patient Portal for various items, such as an estimate of proposed charges, a Paleo Reset Dietary Guidelines handout, a handout describing how to prepare for the Cytex 3 & 4 test, and instructions on how to order supplements. It also lists several supplements and their dosages, including Adrenal Glandular, Cal's Claw, Cryptolepis, CSA Formula, Curcuma, Digestive Bitters, EVCLD, FlexNow, Houttuynia, Microbial Defense, SMN-GI, Bile V, Intestinal Drying Formula, LB Core Protocol, LB Tonic Protocol, Lymph-SPHF, MC-BAB-1, MC-BAB-2, MC-BAB-3, MC-BAB-4, MC-BAB-5, MC-BAB-6, MC-BAB-7, MC-BAB-8, MC-BAB-9, MC-BAB-10, MC-BAB-11, MC-BAB-12, MC-BAB-13, MC-BAB-14, MC-BAB-15, MC-BAB-16, MC-BAB-17, MC-BAB-18, MC-BAB-19, MC-BAB-20, MC-BAB-21, MC-BAB-22, MC-BAB-23, MC-BAB-24, MC-BAB-25, MC-BAB-26, MC-BAB-27, MC-BAB-28, MC-BAB-29, MC-BAB-30, MC-BAB-31, MC-BAB-32, MC-BAB-33, MC-BAB-34, MC-BAB-35, MC-BAB-36, MC-BAB-37, MC-BAB-38, MC-BAB-39, MC-BAB-40, MC-BAB-41, MC-BAB-42, MC-BAB-43, MC-BAB-44, MC-BAB-45, MC-BAB-46, MC-BAB-47, MC-BAB-48, MC-BAB-49, MC-BAB-50, MC-BAB-51, MC-BAB-52, MC-BAB-53, MC-BAB-54, MC-BAB-55, MC-BAB-56, MC-BAB-57, MC-BAB-58, MC-BAB-59, MC-BAB-60, MC-BAB-61, MC-BAB-62, MC-BAB-63, MC-BAB-64, MC-BAB-65, MC-BAB-66, MC-BAB-67, MC-BAB-68, MC-BAB-69, MC-BAB-70, MC-BAB-71, MC-BAB-72, MC-BAB-73, MC-BAB-74, MC-BAB-75, MC-BAB-76, MC-BAB-77, MC-BAB-78, MC-BAB-79, MC-BAB-80, MC-BAB-81, MC-BAB-82, MC-BAB-83, MC-BAB-84, MC-BAB-85, MC-BAB-86, MC-BAB-87, MC-BAB-88, MC-BAB-89, MC-BAB-90, MC-BAB-91, MC-BAB-92, MC-BAB-93, MC-BAB-94, MC-BAB-95, MC-BAB-96, MC-BAB-97, MC-BAB-98, MC-BAB-99, MC-BAB-100.

On the right side of the portal, there are sections for "Need to Know", "SOAP / Encounter Notes", "Open Orders", "Past Med Hx", "Documents", "BP: 120/80", "Wt: 140", "Ht: 60.4", and "Billing".

I'll go back to my post-appointment notes. I go here to My Links, browse My Documents and handouts. I'm going to find our Paleo Reset Dietary Guidelines. Right-click and copy to the chart.



Review "Paleo Reset Dietary Guidelines (Dec 2014)" for Jane Doe

Needs to be Reviewed by Doctor

Dietary Guidelines 1 / 4

Why a 30-Day Elimination Diet?

The 30-day elimination diet is designed to reduce inflammation, improve digestion, strengthen metabolism, identify food sensitivities, reduce allergic reactions, boost energy, regulate blood sugar and normalize weight. Food is powerful medicine. No other therapy - natural or otherwise - can come even remotely close to accomplishing all of these goals.

It's essential that you commit to making these changes for at least 30 days - without cheating. By removing the foods that most commonly cause problems, you allow your body to rest and recover from whatever symptoms those foods have been provoking. Just one cheat could trigger a whole new cascade of reactions. Don't do it. It's not worth it.

After the program, you may be able to re-introduce some of the foods on the "avoid completely" list, such as dairy (especially cream, butter, yogurt and kefir), white potatoes, white rice, alcohol (in moderation), white rice and buckwheat. But for now, it's best to eliminate these foods to see if they're causing problems.

What Foods Can I Eat?

EAT LIBERALLY.

Paleo Reset Dietary Guidelines (Dec 2014)

Document Type: Handouts

Results: Normal

Follow Up: Not Needed

Notification not needed
☐ NO, patient not notified
☐ YES, patient notified

NOTIFY PATIENT

Notes / Key Results:

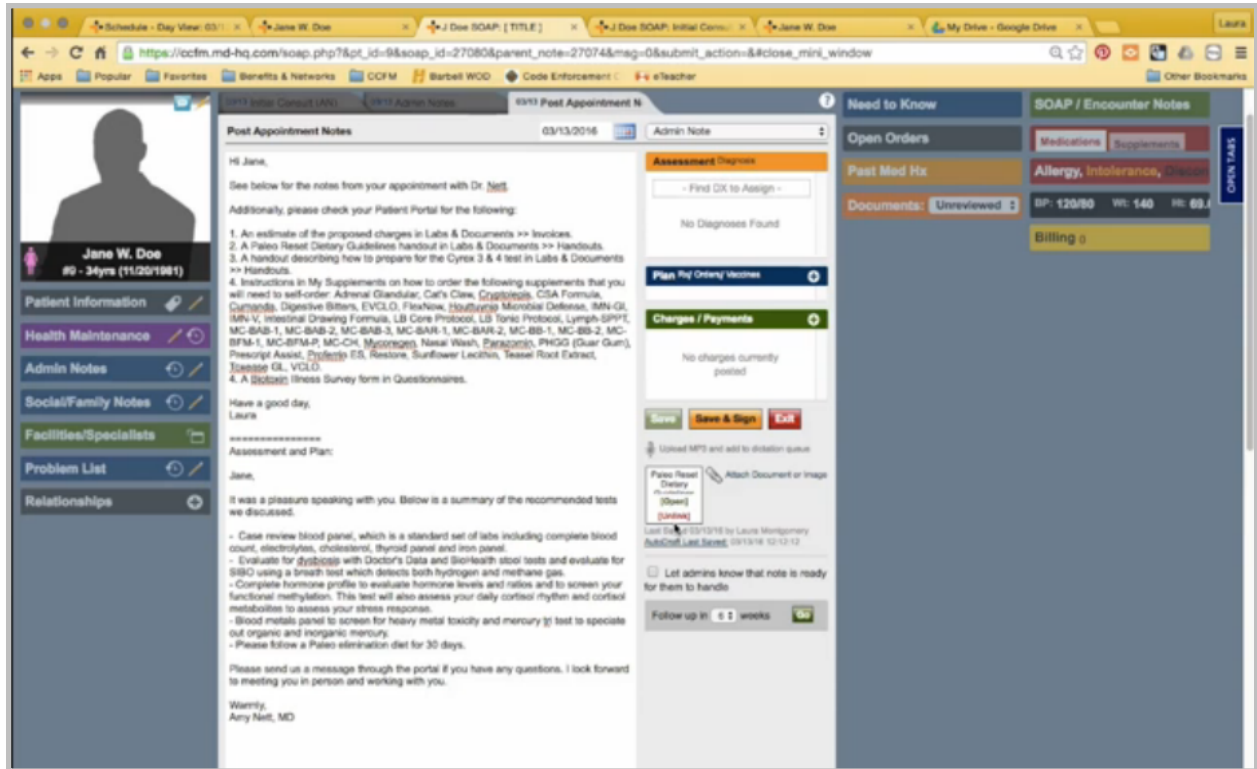
☐ Flag this as "Key Document"

☐ Add to Past Med History?

☒ Show in Pts Online Portal?

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

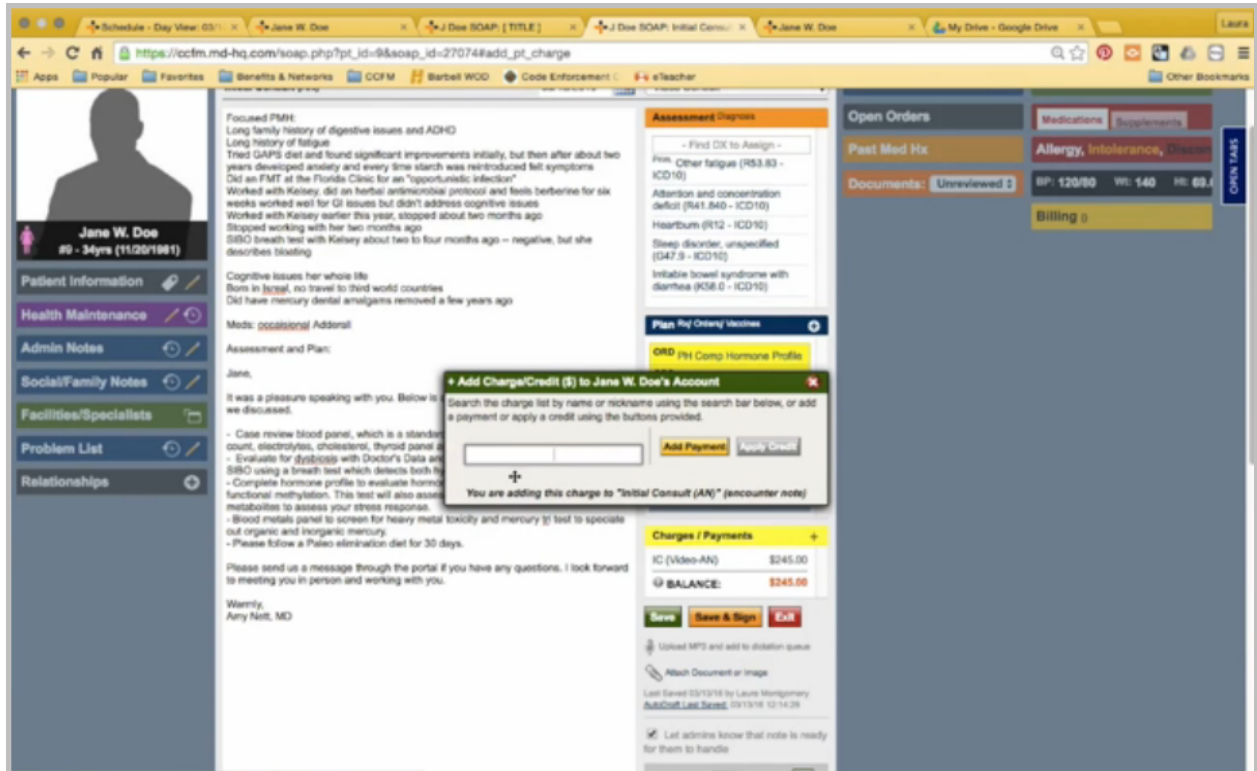
We leave the title and the document listed as handout, leave it default to show in the patient's online portal, and click Done.



The screenshot shows a web browser window displaying a patient portal. The URL is https://ccfm.md-hq.com/soap.php?pt_id=9&soap_id=27080&parent_note=27074&mag=0&submit_action=&close_mini_window. The page is titled "Post Appointment Notes" for patient Jane W. Doe, dated 03/13/2016. The notes section contains a message from Dr. Nett and a list of instructions for the patient. To the right, there is an "Assessment Charges" section with a "Find CX to Assign" button and a "Plan for Orders/Notes" button. Below this is a "Charges / Payments" section. At the bottom, there is a "Plan" box with a document titled "Paleo Reset Dietary Guidelines Handout" attached. The document is dated 03/13/2016 and is for Laura Montgomery. The plan box also includes a "Follow up in 6 weeks" button.

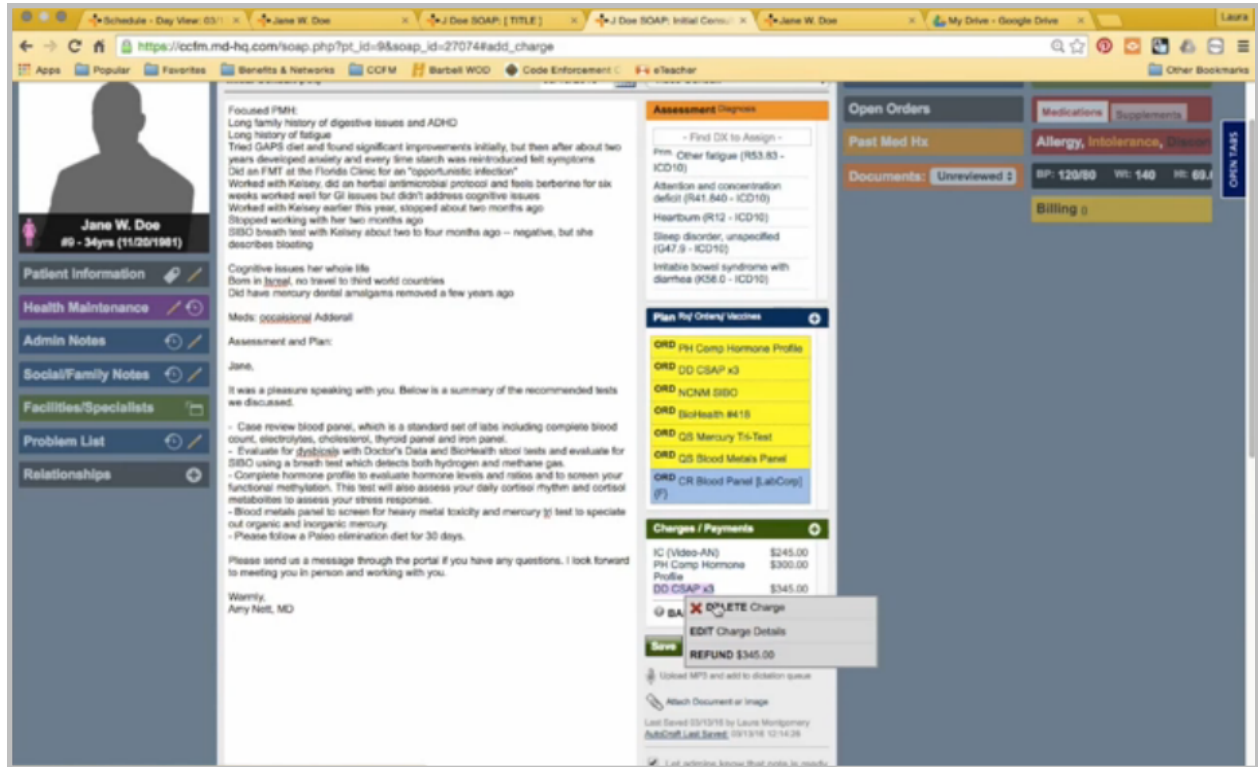
You can see now that the document is attached, and when you go to the patient's chart and handouts, the handout is now available to them.

The next thing I want to do is add each item from the plan box to the charge box. You can do this one of two ways.



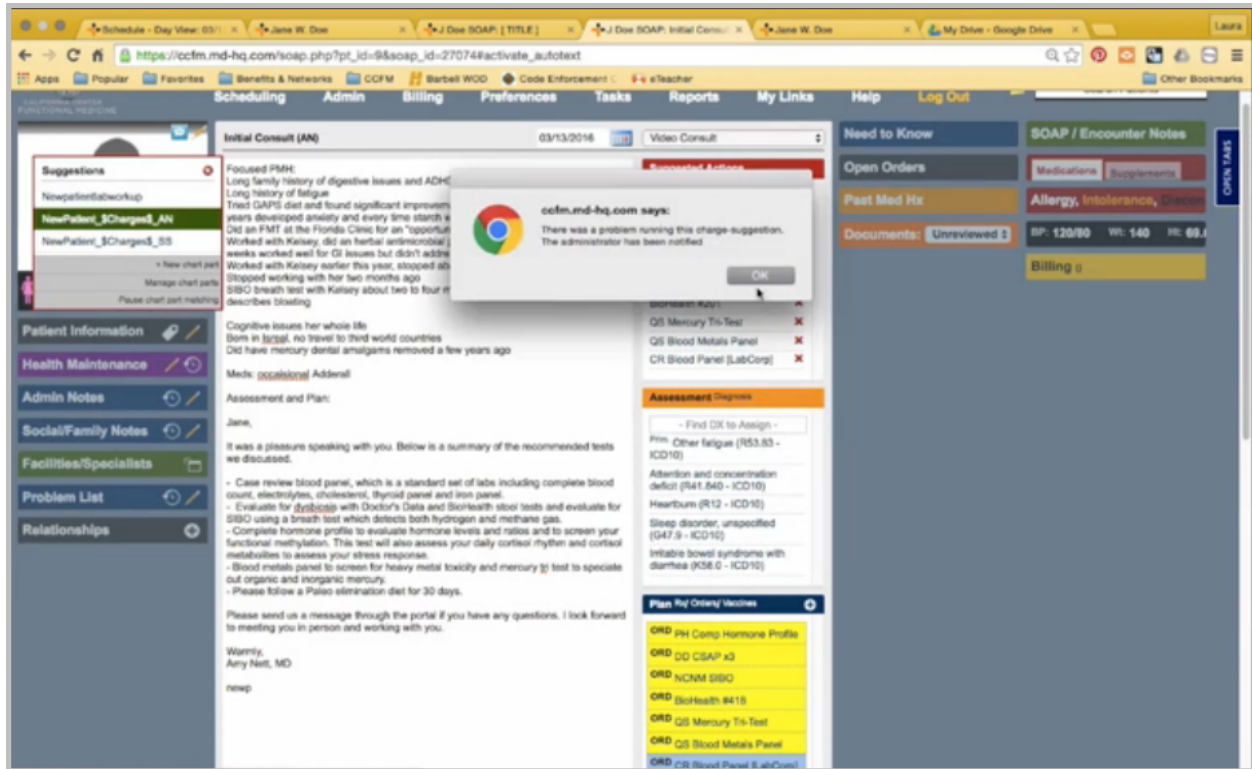
The screenshot shows a web browser window displaying a patient's SOAP note. The patient is Jane W. Doe, 49 years old, born 11/22/1981. The left sidebar contains navigation links: Patient Information, Health Maintenance, Admin Notes, Social/Family Notes, Facilities/Specialists, Problem List, and Relationships. The main content area shows a SOAP note with sections for Focused PMH, Cognitive Issues, Meds, Assessment and Plan, and a closing message from Dr. Amy Nell, MD. A modal window titled "Add Charge/Credit (\$\$) to Jane W. Doe's Account" is open, allowing the user to search for charges or add a payment/credit. The modal includes a search bar, a list of charges with "Add Payment" and "Apply Credit" buttons, and a "BALANCE: \$245.00" section. The right sidebar shows "Open Orders", "Past Med Hx", "Documents", and "Medications".

You can either click on the plus sign and add each item individually. Look it up, click on it, add this charge and add another one, and continue down the list until you have them all, at which point you would just hit Add Charge, and it will end.



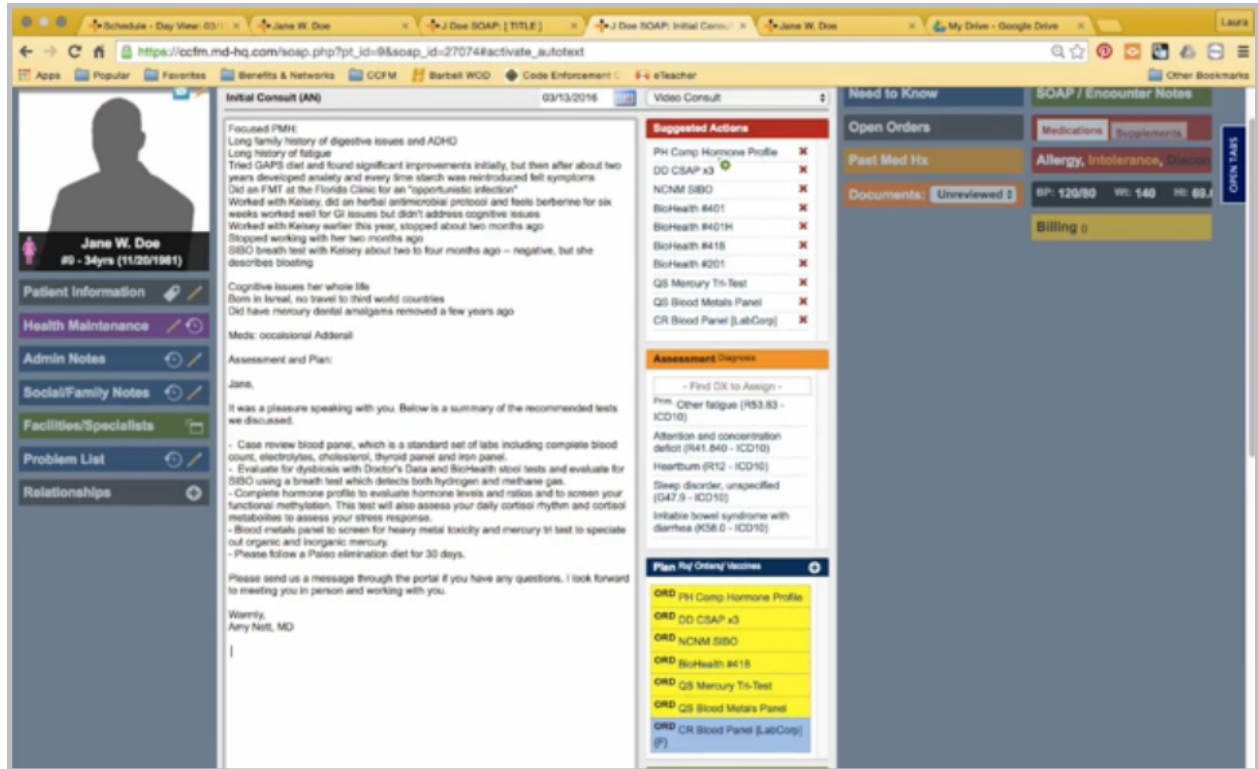
If you need to remove or edit the charge here, you can simply right-click, edit it to edit the cost, or delete it to remove it completely. You do need to list a reason here, and then you can confirm the deletion.

In encounters where there is frequently similar testing ordered, you can also create chart parts that will allow you to easily add everything at once. I have one here for Amy's ICs.



The screenshot displays the ccfm.md-hq.com web application interface. The main content area shows a patient's medical history and suggested actions. A modal dialog box is open in the center, displaying a message from ccfm.md-hq.com: "There was a problem running this charge suggestion. The administrator has been notified." The interface includes a sidebar with navigation links such as "Patient Information", "Health Maintenance", "Admin Notes", "Social/Family Notes", "Facilities/Specialists", "Problem List", and "Relationships". The main content area is divided into sections for "Initial Consult (AN)", "Focused PMH", "Cognitive Issues her whole life", "Medication", "Assessment and Plan", and "Plan for Ongoing Medicine". The "Assessment and Plan" section lists various tests and conditions, including "Case review blood panel", "Evaluate for dysbiosis", "Complete hormone profile", "Blood metals panel", and "Please follow a Paleo elimination diet for 30 days". The "Plan for Ongoing Medicine" section lists several tests and conditions, including "ORD pH Comp Hormone Profile", "ORD CG CSAP x3", "ORD NCMN SIBO", "ORD Schleich 8415", "ORD QS Mercury Tri-Test", "ORD QS Blood Metals Panel", and "ORD CR Blood Panel (LabCorp)".

You'll see when I use it, it brings up suggested actions.



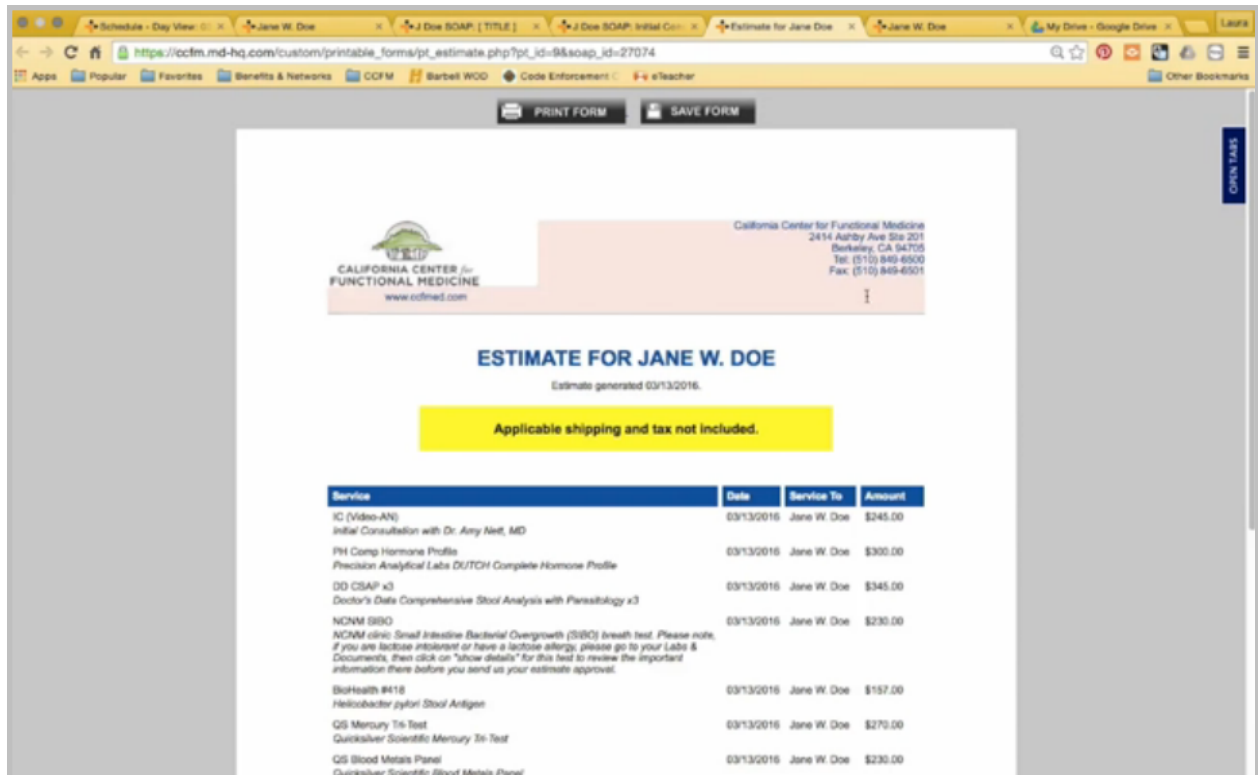
The screenshot shows a medical software interface for a patient named Jane W. Doe. The interface is divided into several sections:

- Left Sidebar:** Contains navigation links for Patient Information, Health Maintenance, Admin Notes, Social/Family Notes, Facilities/Specialists, Problem List, and Relationships.
- Top Section:** Displays the patient's name, age (40 - 34yrs), and date of birth (11/25/1981). It also includes a "Patient Information" tab.
- SOAP Note:** The main content area displays a SOAP note for an initial consult. The "Subjective" section includes a focused PMH, long history of fatigue, and a history of anxiety. The "Objective" section includes a physical exam and a cognitive exam. The "Assessment and Plan" section includes a summary of the recommended tests and a list of suggested actions.
- Right Sidebar:** Contains a "Need to Know" section with links to Open Orders, Past Med Hx, and Documents. It also includes a "SOAP / Encounter Notes" section with tabs for Medications, Supplements, Allergy, Intolerance, and Billing.

The "Assessment and Plan" section includes a summary of the recommended tests and a list of suggested actions:

- Assessment:**
 - Other fatigue (R53.83 - ICD10)
 - Attention and concentration deficit (R41.840 - ICD10)
 - Heartburn (R12 - ICD10)
 - Sleep disorder, unspecified (G47.9 - ICD10)
 - Irritable bowel syndrome with diarrhea (K58.0 - ICD10)
- Plan:**
 - PH Comp Hormone Profile
 - DD CSAP x3
 - NCNM SIBO
 - BioHealth 8401H
 - BioHealth 8415
 - QS Mercury Tri-Test
 - QS Blood Metals Panel
 - CR Blood Panel [LabCorp]

I've created the chart part so that the tests Amy frequently orders in her ICs are listed here. So now I can very easily go through and match up what I add to the charge box with what is in the plan box. So I'm going to add the pH comprehensive, the CSAP, the SIBO. Here she has ordered the 418 for the BioHealth, the Mercury Tri-Test, the blood metals panel, and the CR blood panel. I can leave these unordered tests here. As soon as I save the note, those will disappear, and now I have all my charges in the charge box.



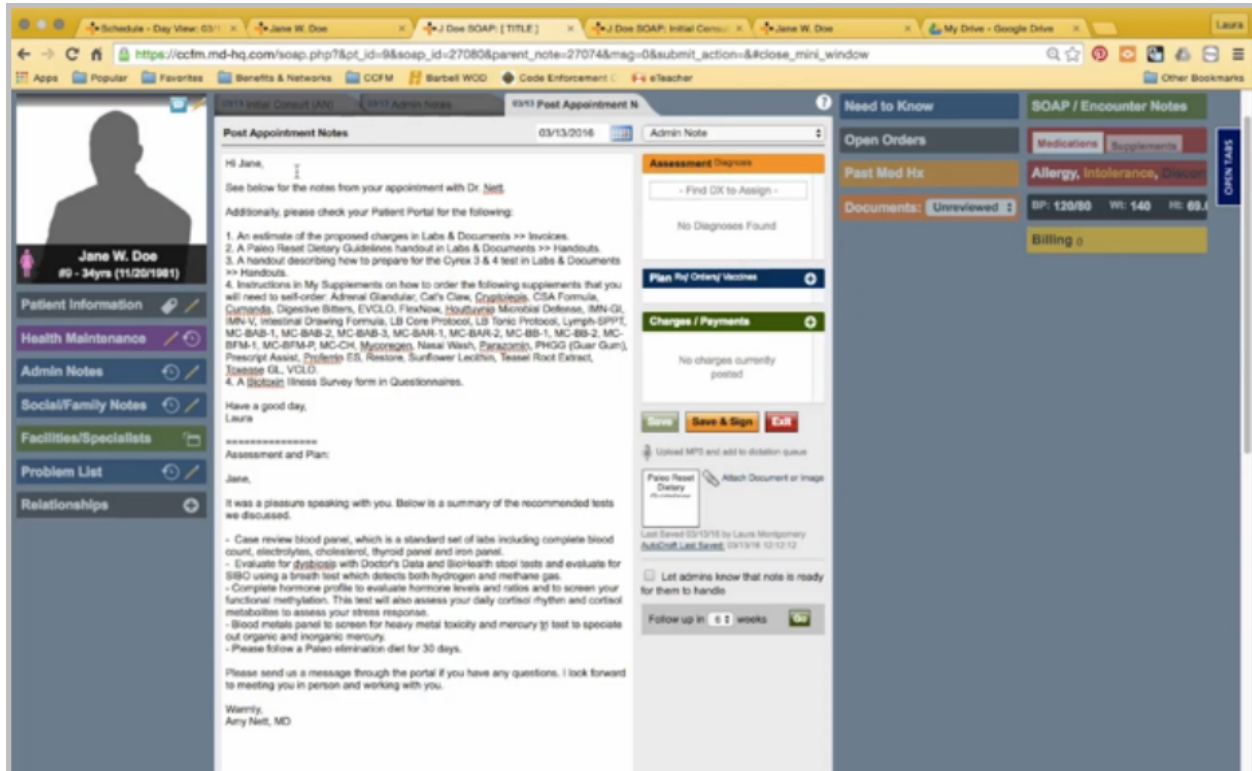
California Center for Functional Medicine
2414 Ashby Ave Ste 201
Berkeley, CA 94705
Tel: (510) 849-6500
Fax: (510) 849-6501

ESTIMATE FOR JANE W. DOE
Estimate generated 03/13/2016.

Applicable shipping and tax not included.

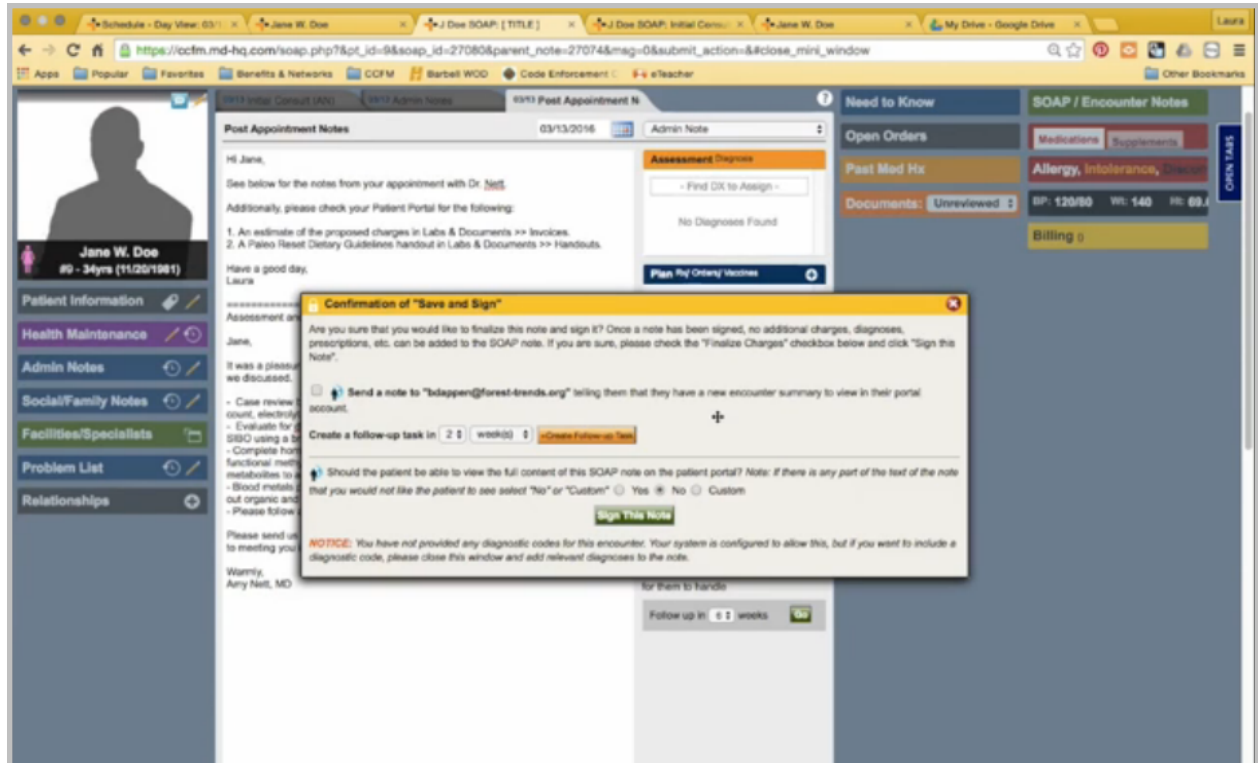
Service	Date	Service To	Amount
IC (Video-AN)	03/13/2016	Jane W. Doe	\$245.00
Initial Consultation with Dr. Amy Nett, MD			
PH Comp Hormone Profile	03/13/2016	Jane W. Doe	\$300.00
Precision Analytical Labs DUTCH Complete Hormone Profile			
DD CSAP x3	03/13/2016	Jane W. Doe	\$345.00
Doctor's Data Comprehensive Stool Analysis with Parasitology x3			
NCNM SSO	03/13/2016	Jane W. Doe	\$230.00
NCNM clinic: Small Intestine Bacterial Overgrowth (SIBO) breath test. Please note, if you are lactose intolerant or have a lactose allergy, please go to your Labs & Documents, then click on "show details" for this test to review the important information there before you send us your estimate approval.			
Biotoxins #418	03/13/2016	Jane W. Doe	\$157.00
Helicobacter pylori Stool Antigen			
GS Mercury T6 Test	03/13/2016	Jane W. Doe	\$270.00
QuickSilver Scientific Mercury T6 Test			
GS Blood Metals Panel	03/13/2016	Jane W. Doe	\$230.00
QuickSilver Scientific Blood Metals Panel			

The next step will be to click on My Links and generate the estimate. The items listed here should be good as they are listed, since it's just testing. It is a good idea to make a note here if the credit card on file has expired or not. This one is fine, so I can simply hit Save the Form. You can leave the title as it defaults, save it to Invoices. However, we do not want to attach to the SOAP note. We do want the patient to view it in the portal, and then you can save to chart. You can close the estimate.

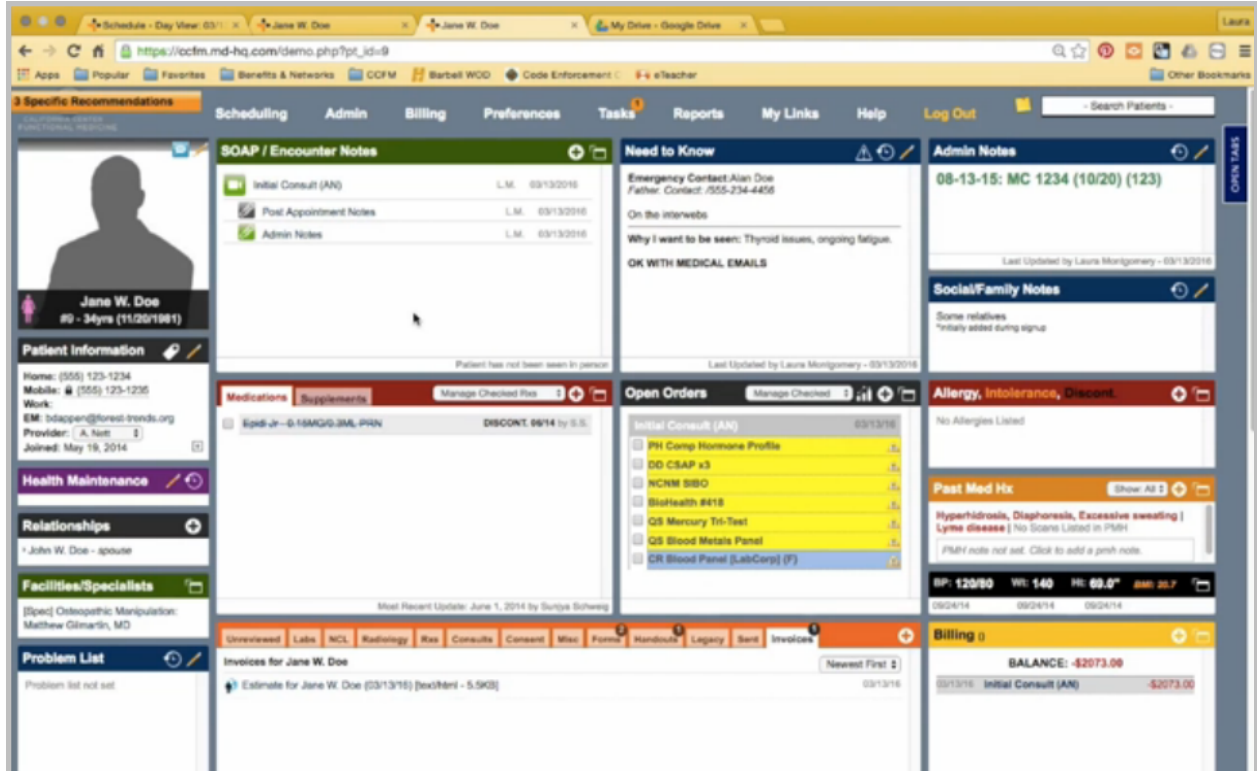


The screenshot shows a web browser window with multiple tabs. The active tab is titled "J Doe SOAP: Initial Consult...". The URL is "https://ccfm.md-hq.com/soap.php?of_id=9&soap_id=27080&parent_note=27074&mag=0&submit_action=&close_mini_window". The page displays a patient portal for Jane W. Doe, #9 - 34yrs (11/25/1981). The main content area is titled "Post Appointment Notes" and contains a message from Dr. Nett, dated 03/13/2016. The message includes instructions for lab tests, dietary guidelines, and a list of recommended tests. The right-hand panel shows various medical notes and orders, including "Need to Know", "Open Orders", "Past Med Hx", "Documents", "Billing", and "SOAP / Encounter Notes".

I want to go back to my post-appointment notes and make sure everything listed here matches the encounter. So here I've told the patient to make sure they view their estimate in labs and documents, to make sure they view the Paleo Reset Dietary Guidelines handouts. There was no Cyrex testing ordered here, so I can delete that step. There are also no supplements that were ordered in the encounter, so I'll remove that. Amy did not request the patient to have a biotoxin illness survey, so I'll remove that. My note matches what has been ordered and what the patient needs to do next, so now I can save and sign the note.



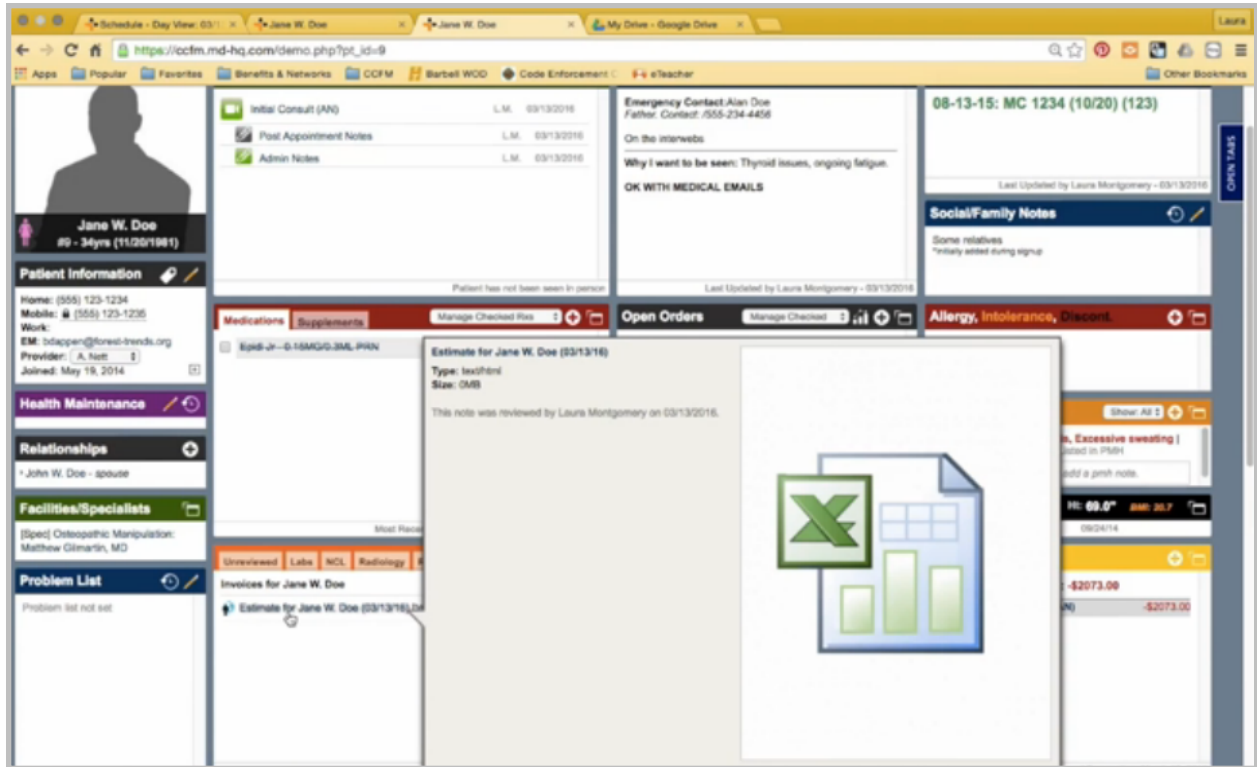
Here, I want to make sure that, yes, I send a note to the patient's email to let them know that they have a new encounter summary that is ready for them to look at in their portal. I also want to make sure that, yes, the patient can view this note in their portal and then sign this note. I can close this now. I'm also done with this encounter, so I'll save the note and close it.



The screenshot displays a web-based medical chart interface for a patient named Jane W. Doe. The interface is organized into several sections:

- Top Navigation:** Includes tabs for Scheduling, Admin, Billing, Preferences, Tasks, Reports, My Links, Help, and Log Out. A search bar for patients is also present.
- Left Sidebar:** Contains patient information (Jane W. Doe, #9 - 34yrs (11/20/1981)), Patient Information (Home, Mobile, Work, EM, Provider), Health Maintenance, Relationships, Facilities/Specialists, and Problem List.
- Main Content Area:**
 - SOAP / Encounter Notes:** Lists notes such as Initial Consult (AM), Post Appointment Notes, and Admin Notes.
 - Medications:** Shows a list of medications, including Eye Drops and DISCONT.
 - Open Orders:** Lists various lab tests and procedures, such as PH Comp Hormone Profile, DD CSAP x3, NCMN SIBO, BioHealth #418, Q8 Mercury Tri-Test, Q8 Blood Metals Panel, and CR Blood Panel (LabCorp) (P).
 - Billing:** Displays the current balance of \$2073.00 and a list of bills, including an Initial Consult (AM) for \$2073.00.
- Right Sidebar:** Contains sections for Admin Notes, Social/Family Notes, Allergy, Intolerance, Discomfort, and Past Med Hx.

Now we're back in the patient's chart. Clicking on the invoices tab here shows the estimate that we created.



You want to open that up. You can scroll down and view it and make sure everything is lined up. Everything looks okay.

Review "Estimate for Jane W. Doe (03/13/16)" for Jane Doe

Needs to be Reviewed by Doctor
This document was last filed by Laura Montgomery on 03/13/16

CALIFORNIA CENTER for FUNCTIONAL MEDICINE
www.ccfmed.com

2414 30th St, Suite 201
Berkeley, CA 94705
Tel: (510) 849-6500
Fax: (510) 849-6501
EIN/Tax ID #: 47-1588996

ESTIMATE FOR JANE W. DOE

Estimate generated 03/13/2016.

Applicable shipping and tax not included.

Service	Date	Service To	Amount
IC (Video-AN)	03/13/2016	Jane W. Doe	\$245.00
Initial Consultation with Dr. Amy Nett, MD			
PH Comp Hormone Profile	03/13/2016	Jane W. Doe	\$300.00
Precision Analytical Labs DU/CH Complete Hormone Profile			
DD CSAP x3	03/13/2016	Jane W. Doe	\$345.00
Doctor's Data Comprehensive Stool Analysis with Parasitology x3			
NCNM SIBO	03/13/2016	Jane W. Doe	\$230.00
NCNM cino Small Intestine Bacterial Overgrowth (SIBO) breath test. Please note, if you are lactose intolerant or have a lactose allergy, please go to your Lab & Documents, then click on "show details" for this test to review the important information there before you send us your estimate approval.			
Biokeath #418	03/13/2016	Jane W. Doe	\$157.00
Helicobacter pylori Stool Antigen			
QS Mercury Tri-Test	03/13/2016	Jane W. Doe	\$270.00
Quicksilver Scientific Mercury Tri-Test			
QS Blood Metals Panel	03/13/2016	Jane W. Doe	\$230.00
Quicksilver Scientific Blood Metals Panel			
CR Blood Panel (LabCorp)	03/13/2016	Jane W. Doe	\$296.00
LabCorp test number 386015 (specialized panel)			
CARD TO BILL: ***** - 1234 (10/20)			
		ESTIMATE:	\$2873.00

Shipping Address Billing Address

Document Type: Invoices
Results Normal
Follow Up Not Needed

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

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

Here I want to notify the patient about the estimate and what they'll need to do. So I'm going to address the patient. This message lets them know that the estimate is ready.

Review "Estimate for Jane W. Doe (03/13/16)" for Jane Doe

Needs to be Reviewed by Doctor
This document was last filed by Laura Montgomery on 03/13/16

2414 KOSBY AVE STE 201
Berkeley, CA 94705
Tel: (510) 849-6500
Fax: (510) 849-6501
EIN/Tax ID #: 47-1588966

CALIFORNIA CENTER for FUNCTIONAL MEDICINE
www.ccfmed.com

ESTIMATE FOR JANE W. DOE

Estimate generated 03/13/2016.

Applicable shipping and tax not included.

Service	Date	Service To	Amount
IC (Video-AN)	03/13/2016	Jane W. Doe	\$245.00
Initial Consultation with Dr. Amy Nelt, MD			
PH Corp Hormone Profile	03/13/2016	Jane W. Doe	\$300.00
Precision Analytical Labs DUTCH Complete Hormone Profile			
DO CSAP x3	03/13/2016	Jane W. Doe	\$345.00
Doctor's Data Comprehensive Stool Analysis with Parasitology x3			
NONM SIBO	03/13/2016	Jane W. Doe	\$230.00
NONM clinic Small Intestine Bacterial Overgrowth (SIBO) breath test. Please note, if you are lactose intolerant or have a lactose allergy, please go to your Labs & Documents, then click on "show details" for this test to review the important information there before you send us your estimate approval.			
BioHealth #418	03/13/2016	Jane W. Doe	\$157.00
Helicobacter pylori Stool Antigen			
GS Mercury Tri-Test	03/13/2016	Jane W. Doe	\$270.00
Quicksilver Scientific Mercury Tri-Test			
GS Blood Metals Panel	03/13/2016	Jane W. Doe	\$230.00
Quicksilver Scientific Blood Metals Panel			
OR Blood Panel (LabCorp)	03/13/2016	Jane W. Doe	\$296.00
LabCorp test number 386015 (specialized panel)			
CARD TO BILL: ***** - 1234 (1/9/20)			
		ESTIMATE:	\$2872.00

Shipping Address Billing Address

Estimate for Jane W. Doe (03/13/16)

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:

Present a portal, then select the invoices tab in the top box on the bottom left.

Your clinician has ordered testing through LabCorp, which is included in your estimate at a discounted self-pay price. If you prefer to use your insurance for this testing, please let us know and we will remove it from the estimate and provide you with a requisition.

Click on how to respond to your estimate, please send us a Secure Message.

Select from a preset message or write your own

NOTE: When you receive 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?

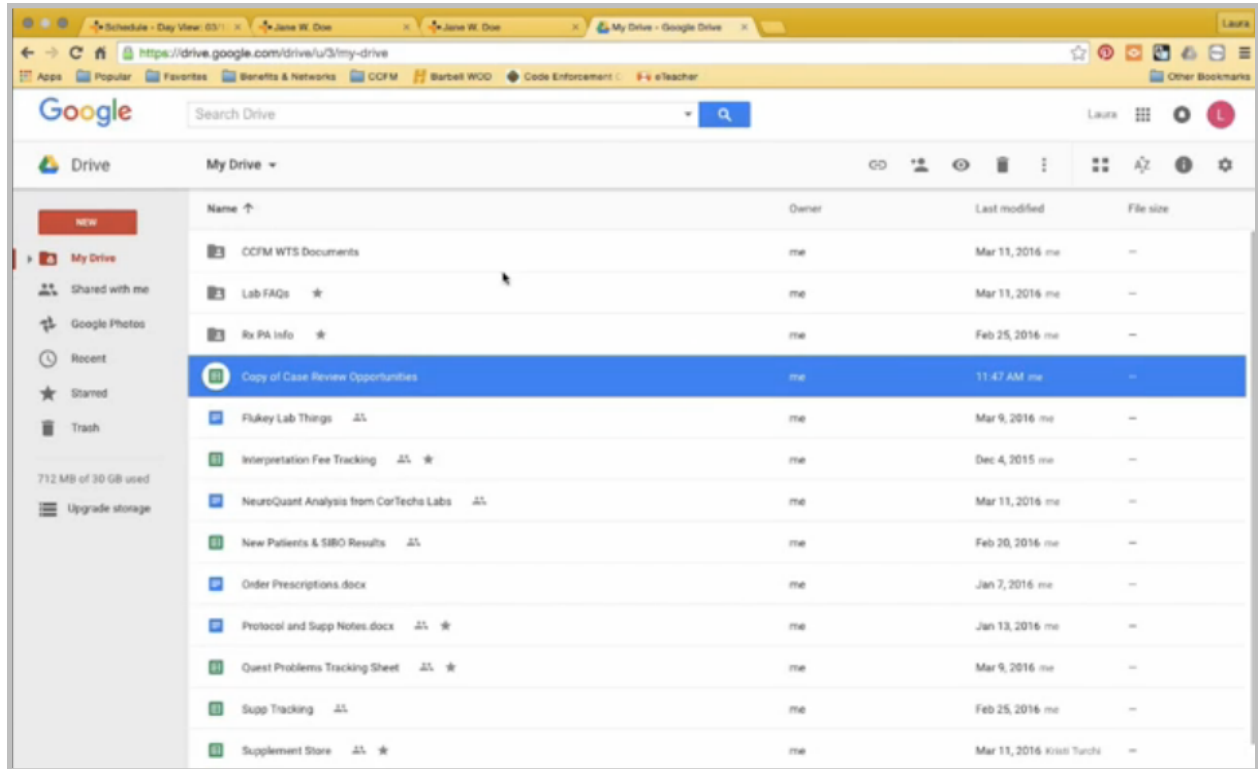
Show in Pts Online Portal?

Save and re-open in new SOAP note

View patient's dashboard in new tab

We also have an optional message here to let them know that Amy did order testing through LabCorp, which is on the estimate at a discounted rate, but if they would like to use their insurance, all they need to do is let us know, and we'll provide them with a requisition instead, and they can use their insurance at the lab.

The next parts of the message instruct the patient on how to make changes to their estimate, how to respond to their estimate using secure messaging, let them know that they need to make a note of the credit card that is on file, and let us know if they want that charged on a different card, and about our declination fees. This is an IC encounter, so I also need to tell the patient that we need to schedule the case review appointment, and then I need to put dates here for them.



I'm going to open up our case review opportunity spreadsheet that the clinic uses.

Copy of Case Review Opportunities

	A	B	C	D	E	F	G	H	I	J
1	Date	Date	Time	Phone	Office	Name	EHR	Schedules Checked:		
2	2015									
129	Tuesday	7/7/2015	2:00 p.m.	x	x	John Doe	x	6/26/15 8:08 AM (JM)	PENDING Case Reviews to Schedule	
130	Tuesday	7/7/2015	3:00 p.m.	x	x	John Doe	x	6/26/15 8:08 AM (JM)		
131	Tuesday	7/7/2015	4:00 p.m.	x	x				John Doe	Wants June dates
132	Thursday	7/9/2015	2:00 p.m.	x	x	Released to EP's			John Doe	Wants June dates
133	Thursday	7/9/2015	3:00 p.m.	x	x	John Doe	x	6/26/15 8:10 AM (JM)	John Doe	Wait for Mom to contact us
134	Thursday	7/9/2015	4:00 p.m.	x	x	John Doe	x	6/26/15 8:10 AM (JM)	John Doe	Wait for him to contact us
135	Tuesday	7/14/2015	2:00 p.m.	x	x	John Doe	x	6/26/15 8:13 AM (JM)	John Doe	Wait for him to contact us
136	Tuesday	7/14/2015	3:00 p.m.	x	x	Released to EP's			John Doe	Contact with September dates (sm)
137	Tuesday	7/14/2015	4:00 p.m.	x	x	John Doe	x	6/26/15 8:13 AM (JM)		
138	Tuesday	7/21/2015	2:00 p.m.	x	x	John Doe	x	6/26/15 8:15 AM (JM)		
139	Tuesday	7/21/2015	3:00 p.m.	x	x	John Doe	x	6/26/15 8:15 AM (JM)		
140	Tuesday	7/21/2015	4:00 p.m.	x	x	John Doe	x	6/26/15 8:15 AM (JM)		
141	Thursday	7/23/2015	2:00 p.m.	x	x	John Doe	x	6/26/15 8:16 AM (JM)		
142	Thursday	7/23/2015	3:00 p.m.	x	x	John Doe	x	6/26/15 8:16 AM (JM)		
143	Thursday	7/23/2015	4:00 p.m.	x	x					
144	Tuesday	7/28/2015	2:00 p.m.	x	x	John Doe	x	6/26/15 8:17 AM (JM)		
145	Tuesday	7/28/2015	3:00 p.m.	x	x	John Doe	x	6/26/15 8:17 AM (JM)		
146	Tuesday	7/28/2015	4:00 p.m.	x	x	John Doe	x	6/26/15 8:17 AM (JM)		
147	Tuesday	8/4/2015	2:00 p.m.	x	x	John Doe	x	6/26/15 9:53 PM (JM)		
148	Tuesday	8/4/2015	3:00 p.m.	x	x	John Doe	x	6/26/15 9:53 PM (JM)		
149	Tuesday	8/4/2015	4:00 p.m.	x	x	John Doe	x	6/26/15 9:54 PM (JM)		
150	Tuesday	8/11/2015	2:00 p.m.	x	x	John Doe	x	7-10-15 3:00 PM (JM)		
151	Tuesday	8/11/2015	3:00 p.m.	x	x	John Doe	x	7-10-15 3:00 PM (JM)		
152	Tuesday	8/11/2015	4:00 p.m.	x	x	John Doe	x	7-11-15 2:19 PM (JM)		

I'm going to click on Amy's case review schedule.

Review "Estimate for Jane W. Doe (03/13/16)" for Jane Doe

Needs to be Reviewed by Doctor
This document was last filed by Laura Montgomery on 03/13/16

ESTIMATE FOR JANE W. DOE

Estimate generated 03/13/2016

Applicable shipping and tax not included.

Service	Date	Service To	Amount
IC (Video-AN)	03/13/2016	Jane W. Doe	\$245.00
Initial Consultation with Dr. Amy Nett, MD			
PH Comp Hormone Profile: Precision Analytical Labs DUTCH Complete Hormone Profile	03/13/2016	Jane W. Doe	\$300.00
DD CSAP x3 Doctor's Data Comprehensive Stool Analysis with Parasitology x3	03/13/2016	Jane W. Doe	\$345.00
NCNM SIBO NCNM clinic Small Intestine Bacterial Overgrowth (SIBO) breath test. Please note, if you are lactose intolerant or have a lactose allergy, please go to your Lab & Documents, then click on "show details" for this test to review the important information there before you send us your estimate approval.	03/13/2016	Jane W. Doe	\$230.00
BioHealth 8418 Helicobacter pylori Stool Antigen	03/13/2016	Jane W. Doe	\$157.00
QS Mercury Tri-Test Quickaliver Scientific Mercury Tri-Test	03/13/2016	Jane W. Doe	\$270.00
QS Blood Metals Panel Quickaliver Scientific Blood Metals Panel	03/13/2016	Jane W. Doe	\$230.00
CR Blood Panel [LabCorp] LabCorp test number 086015 (specialized panel)	03/13/2016	Jane W. Doe	\$296.00
CARD TO BILL: ***** - 1234 (10/20)		ESTIMATE:	\$2873.00

Shipping Address

5222 West Elm
Everett, WA 98203

Billing Address

(Same as mailing address)

Estimate for Jane W. Doe (03/13/16)

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:

your appointment from the below list of next available appointment dates and times (Pacific time zone):

Wednesday 5/18/2016 10:45 a.m.

Wednesday 5/18/2016 12:00 p.m.

Monday 5/23/2016 10:30 a.m.

Monday 5/23/2016 11:45 a.m.

If you did not already do so, please also see the Post Appointment

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:

☐ Flag this as "Key Document"

☐ Add to Past Med History?

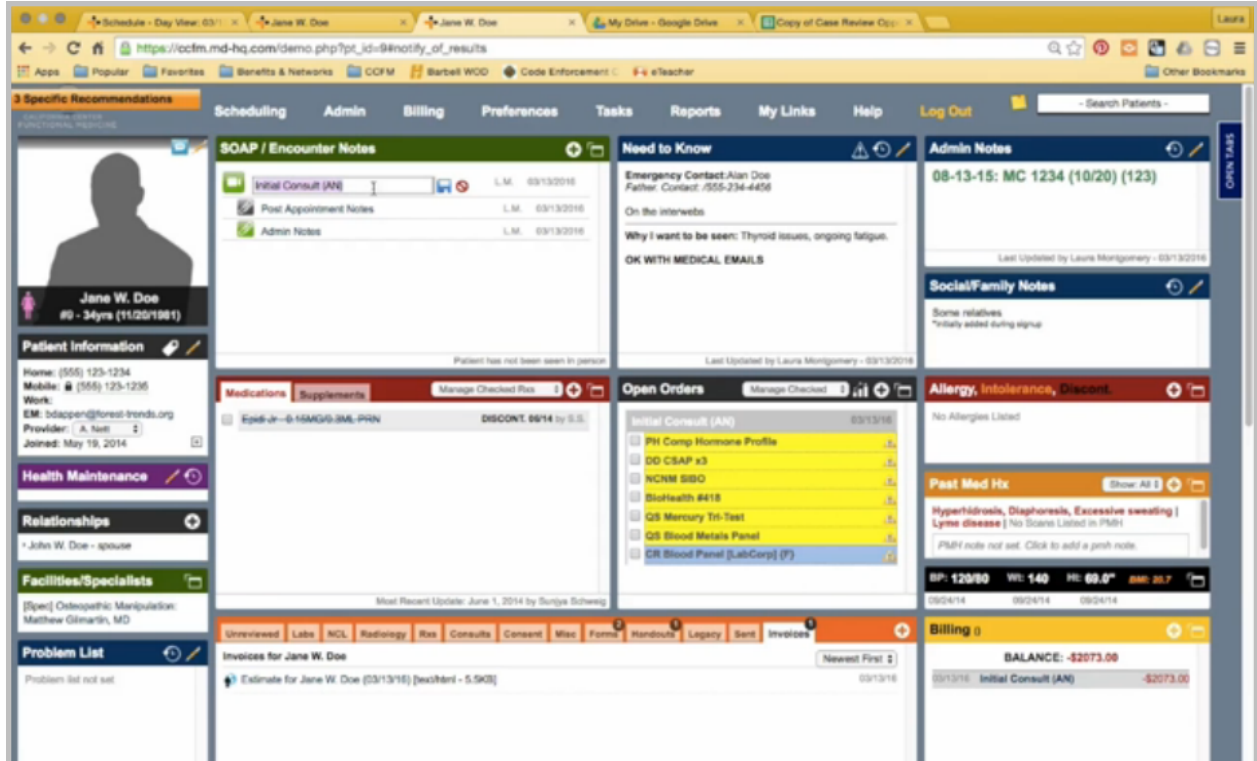
☒ Show in PT's Online Portal?

Save and re-open in new SOAP note

View patient's dashboard in new tab

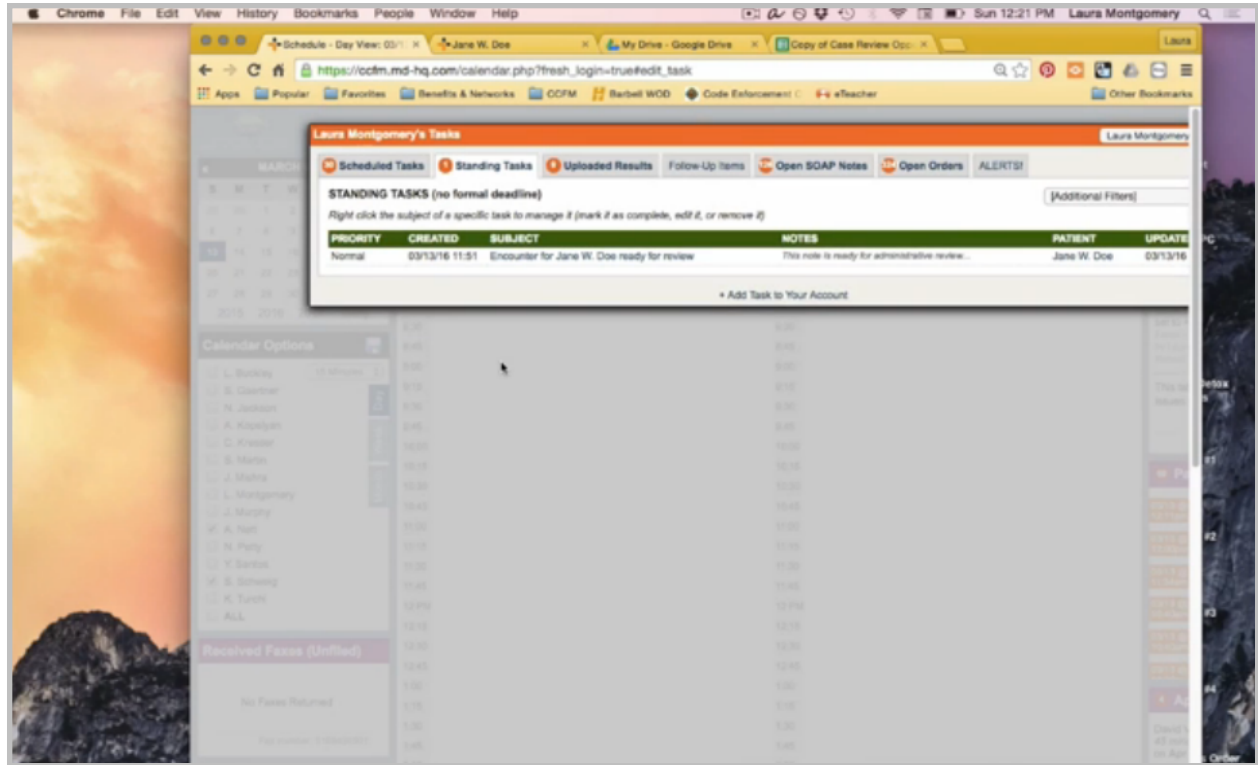
Buttons: Save as Unreviewed, Save Changes

I don't have to worry about lining this up when the message is sent. It will move everything over. Then I'm going to sign my name and save changes.

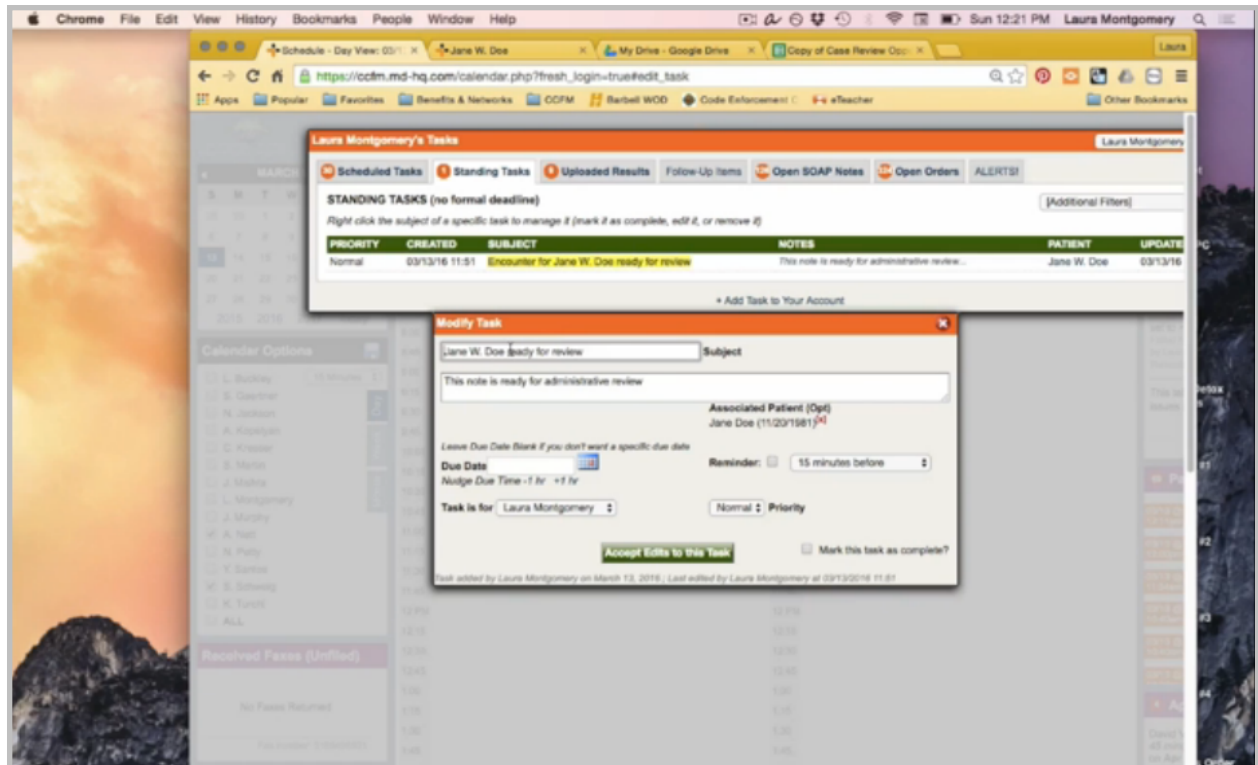


The last thing to do is you can either edit the title here and copy it, or you can open the note again, copy the title, and close it.

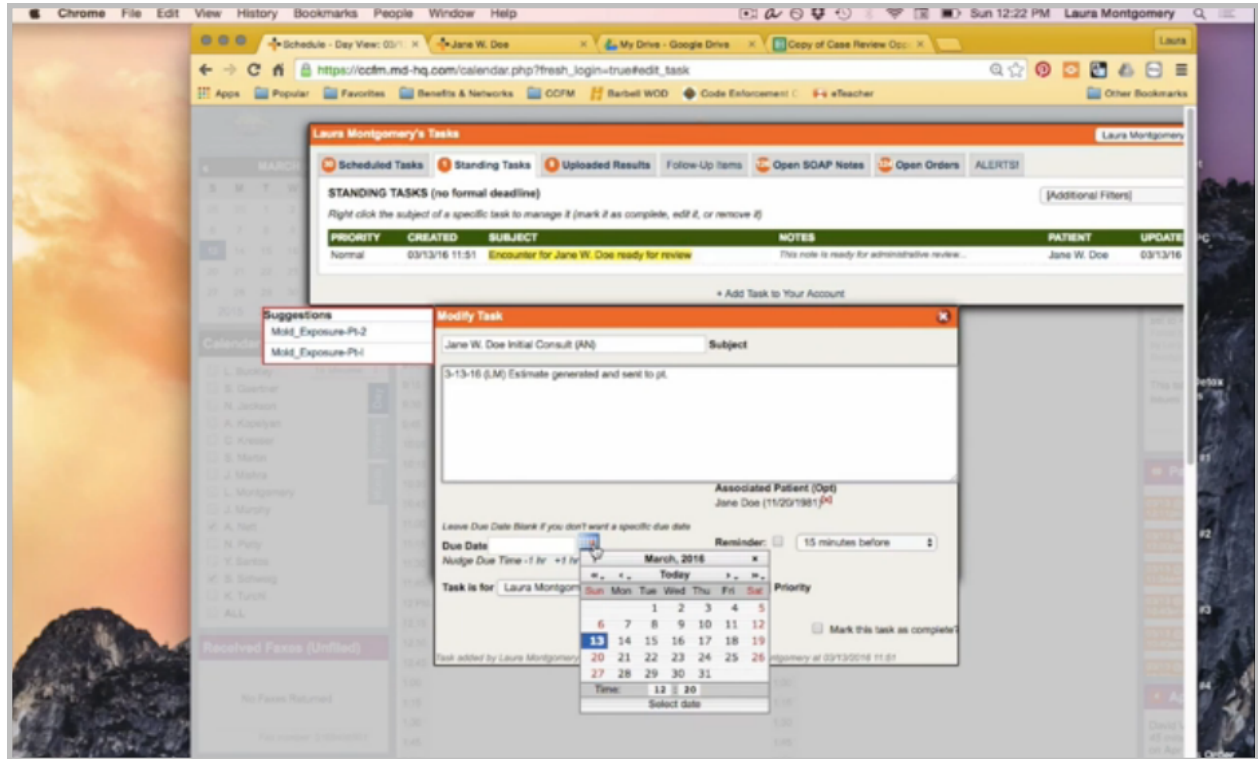
Then I need to go back to my task list and open the encounter.



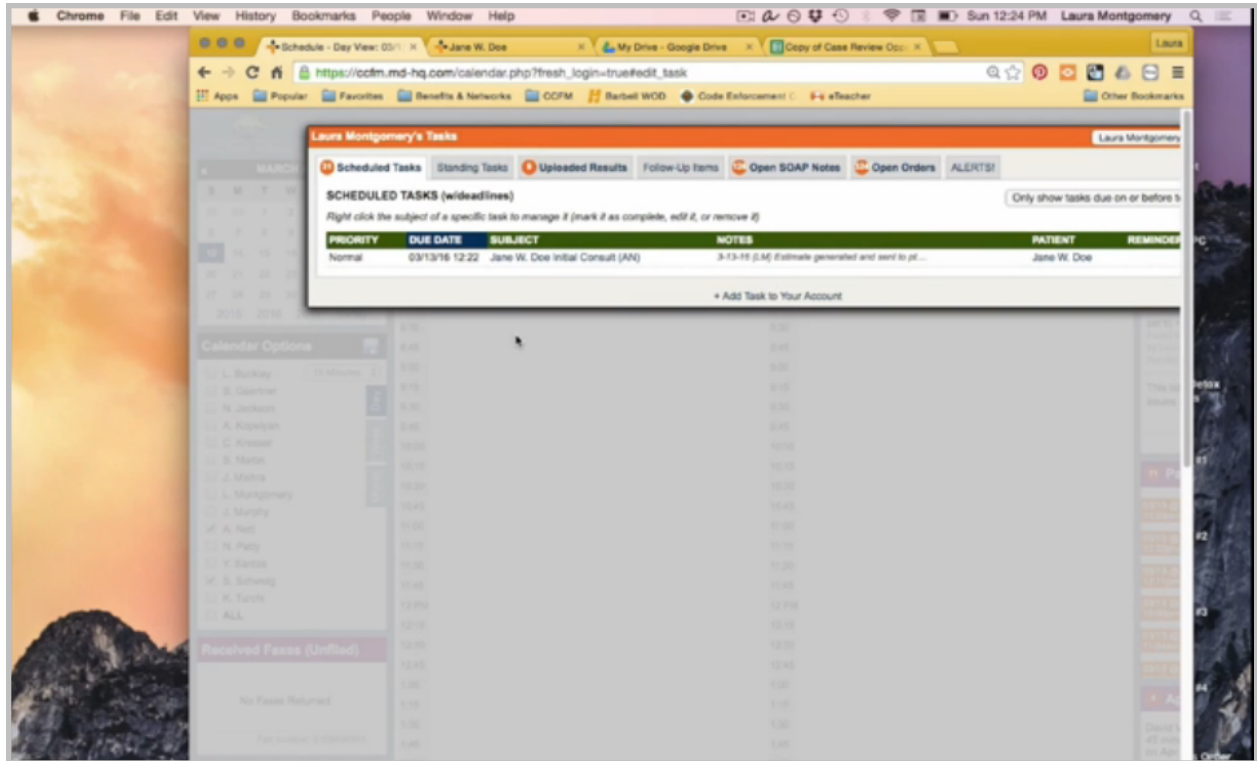
The patient's name should be first, and then I'm going to paste the encounter title with the clinician initials here.



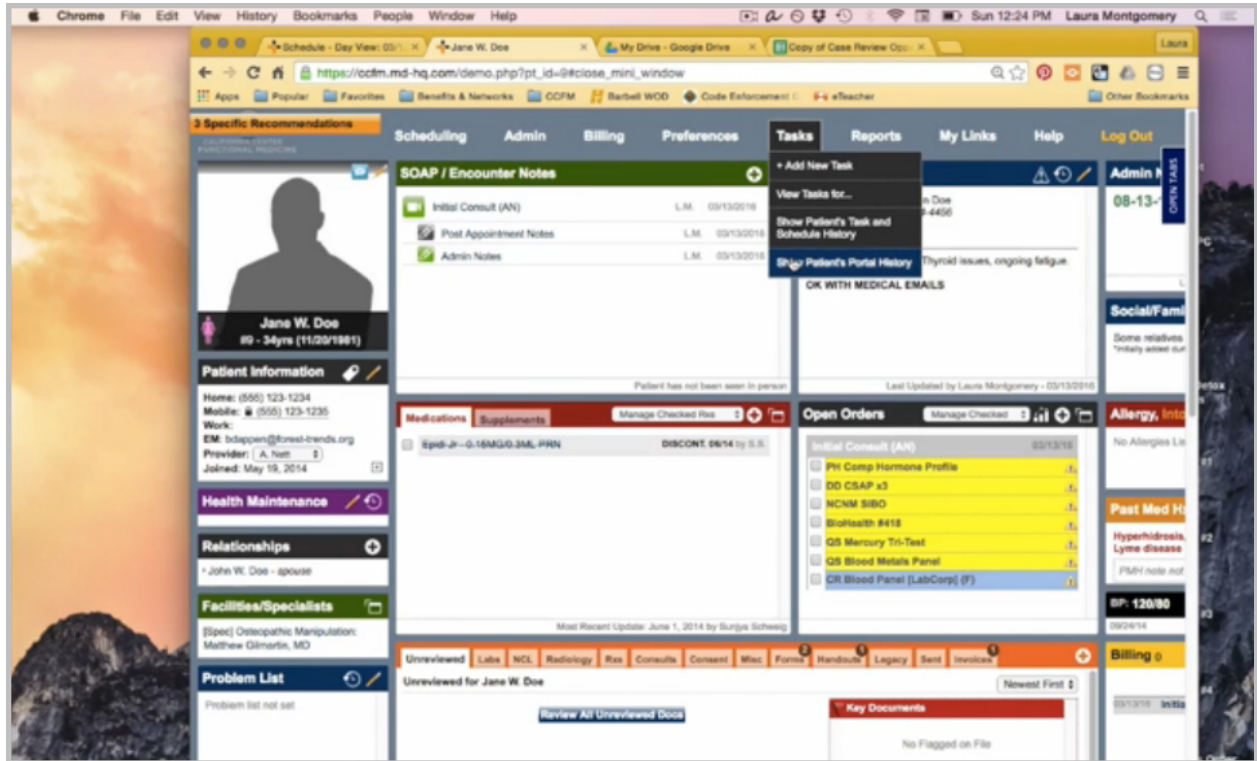
Again, I'm going to document what was done. I generated the estimate, and I sent it to the patient.



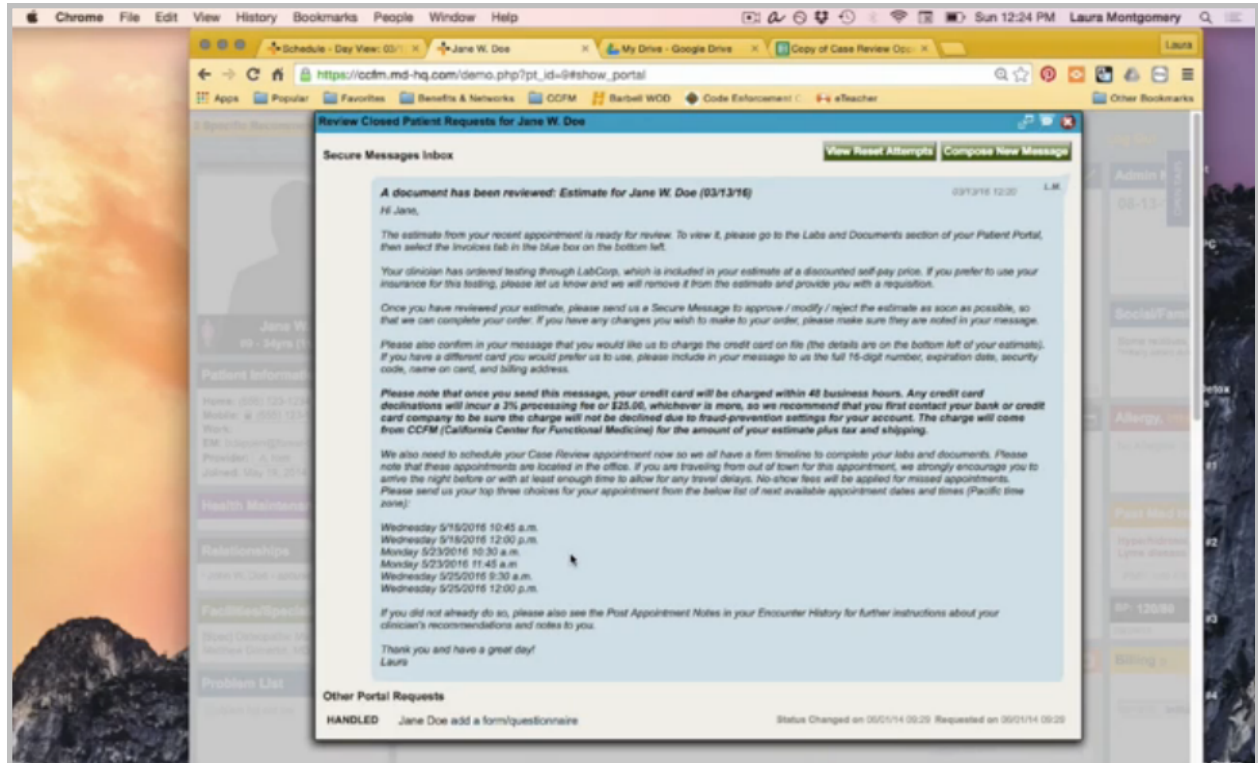
Here, I'm going to mark a due date of two weeks for myself. I want to leave the task assigned to me and then accept the edits to the task. This way, if the patient doesn't respond to their estimate within the two-week time frame, I'll remember to follow up on it. Accept edits, and the encounter has been processed.



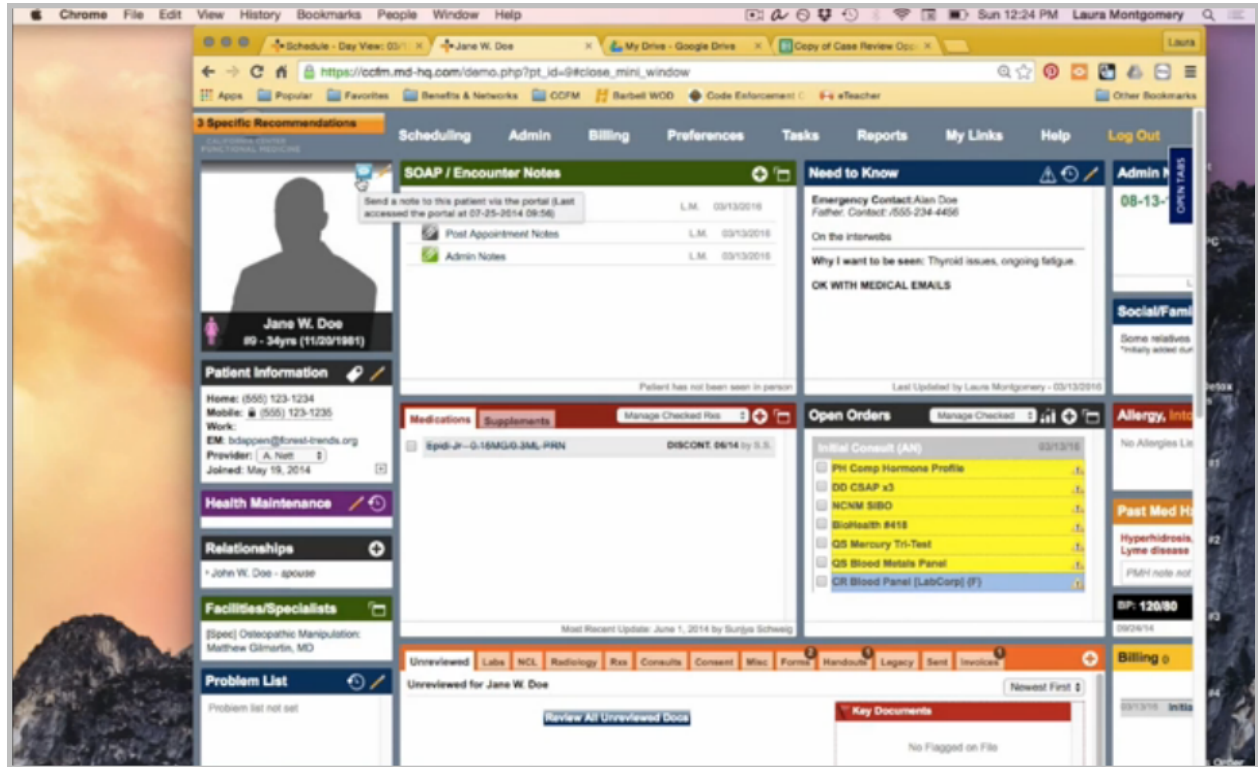
If you get a scheduled task for an estimate that you generated with that two-week timeframe, and the patient has not yet responded to the estimate, you can go to their chart, click on Tasks, Show Patient's Portal History.



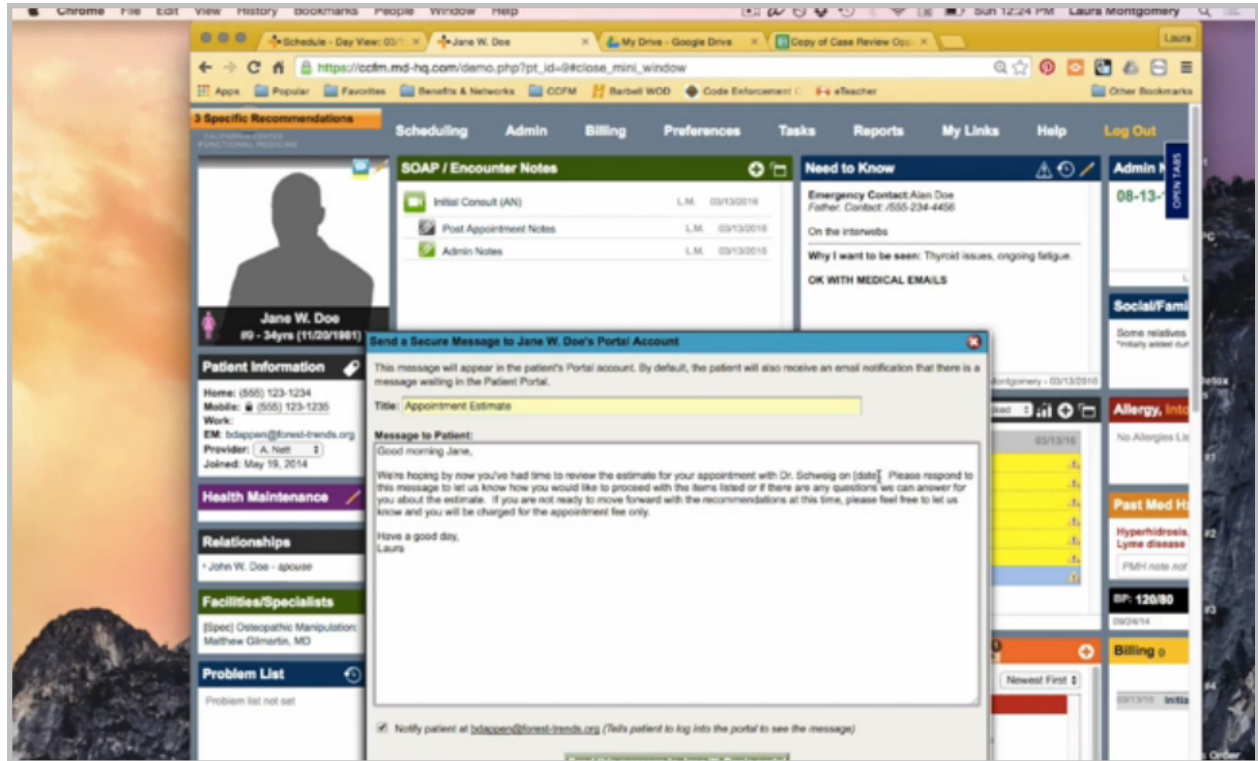
If you want, you can review this message that was sent out with your estimate.



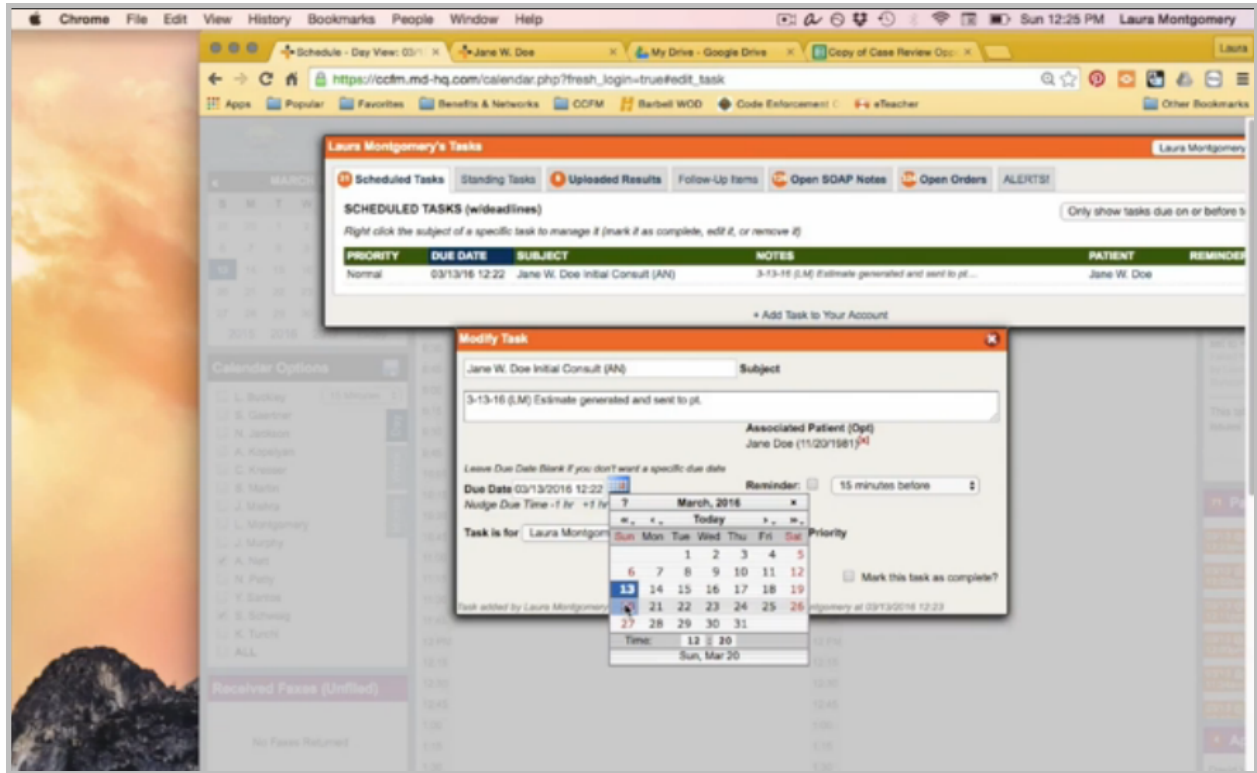
If it's listed in italics, as it is here, that means that the patient has not read it yet. Either way, if they haven't responded to the estimate, you can click on the blue note here to send them a message.



I'm going to address the patient, and I'm going to let her know that I hope that she has reviewed the estimate.



If she has any questions we can answer, we'd be happy to do so, or if she only wants to be charged for the appointment fee and none of the testing at this time, we can do that as well. This is more of a gentle reminder to the patient that they need to give us an answer soon, and then I'm going to send the message to the patient.



I'm going to open my task here, and I'm going to give the patient one more week. If they still haven't responded in a week, I'll give them a phone call, and it's done.