Outline of New Patient Onboarding Procedure

I. INITIAL INQUIRY: WUFOO FORM

A. Purpose

1. Inspire confidence in and excitement about working with our clinic.
2. Provide a human/personal touch to an automated process.
3. Establish credibility and qualifications of our staff physicians.
4. Establish minimum requirements for working with our clinic.
5. Collect basic patient information necessary for establishing them as a new patient.

B. Process

1. Patient watches Video on the Wufoo Application, which covers #1-3 above.
2. Patient checks boxes confirming that they meet minimum requirements.
3. Patient fills out basic information.
4. Patient submits form.
5. Patient is added to Patient Tool (prospective patients segment) in Mailchimp, as well as Prospective Patient AR (Email autoresponder) in Mailchimp.

II. INITIAL INQUIRY FOLLOW-UP

A. Purpose

1. Welcome patient to our clinic and continue to inspire confidence and excitement.
2. Inform patient of next steps in the process: registering for the EHR, and signing up for the Initial Consult.
3. Guide patient to complete EHR registration and schedule their Initial Consult (IC).
4. Start AR sequence that guides patient to schedule Initial Consult and gets them excited about working with our clinic.

B. Process

1. Thank you page
    a) Patient is directed to thank you page after submitting Wufoo application form.
    b) Patient watches Initial Inquiry Follow-up Video on thank you page. Video reiterates welcome/excitement, and explains next steps in the process.
    c) Text underneath the video on thank you page clearly lists the next steps in the process—registering for the EHR, and scheduling an initial consult—and links to the EHR.
    d) Patient clicks on link to the EHR.
2. Autoresponder (AR)

a) Patient receives email #1 in **Prospective Patient AR** after submitting Wufoo application and being added to AR.
b) Email #1 thanks patient for their submission, and advises patient to click link to take next step in the new patient application process.
c) Patient clicks link, which takes them to thank you page above.
d) Patient clicks on link to the EHR.

III. EHR REGISTRATION

A. Purpose

1. Secure patient consent to legal forms and privacy policy.
2. Inform patient of the fee for the Initial Consult.
3. Inform patient of the cancellation policy.
4. Collect patient demographic and payment information.
5. Guide patient to next step (scheduling the initial consult).

B. Process

1. Patient fills out EHR registration form
2. Patient is directed to thank you page
   a) Thank you page informs that the next step is to schedule an IC, provides basic info about what the IC is, and explains the fee for the IC ($245, billed at end of appointment). Thank you page contains link to MDHQ scheduling system.
   b) Patient clicks link to schedule IC
3. Patient receives confirmation email
   a) Confirmation email has identical information to the thank you page
   b) Patient clicks link to schedule IC

IV. SCHEDULE INITIAL CONSULT

A. Purpose

1. Schedule patient's IC

B. Process

1. Patient chooses appointment type (only two offered: phone, Chiron)
2. Patient selects appointment time
3. Patient confirms appointment
4. Initial Consult Preparation AR begins

V. SCHEDULE INITIAL CONSULT FOLLOW-UP

A. Purpose

1. Inform patient of what to expect at IC
2. Maintain high level of confidence and excitement about working with our clinic
3. Provide another personal touch in process that is highly automated
4. Provide link to video of Chris explaining how to prepare for the Initial Consult

B. Process

1. Patient receives confirmation email from MDHQ
2. Confirmation email contains screen grab of video of Chris, as well as text below advising patient to click link for important information about IC. Clicking on screen grab and link both lead to page on our clinic website
3. Page on our clinic website has video of Chris explaining how to prepare for the IC, as well as text below with similar information
4. Text below video also provides phone number of the clinic with offer for patients to call if they have any questions

VI. INITIAL CONSULT

A. Purpose

1. Establish human connection and inspire confidence and excitement.
2. Collect chief complaints and relevant history; listen with empathy and compassion.
3. Explain how we address their complaints in functional medicine and share relevant success stories.
4. Determine what labs to order, and explain why we recommend them to the patient.
5. Explain the case review process and critical timing for completion of labs and case review paperwork.
6. Answer any questions the patient has about working with us.

B. Process

1. Clinician calls patient or joins Chiron video conference at appointed time.
2. Clinician conducts Initial Consult according to working procedure outline.

VII. INITIAL CONSULT FOLLOW-UP

A. Purpose

1. Send Case Review (CR) intake forms.
2. Send lab kits and requisition, with links to FAQ about completing lab tests.
3. Send dietary recommendations (if any).
4. Answer any questions patient may have.

B. Process

1. Admin staff processes appointment encounter.
2. Admin staff makes follow up phone call within 48 hours to address any additional questions or concerns, including where to find FAQ for labs
3. Add patient to “NP—Initial Consult Follow-up” segment in Mailchimp
4. Initial Consult Follow-up AR begins
5. Remove patient from “Prospective Patients” segment in Mailchimp

VIII. CASE REVIEW

A. Purpose

1. Provide patients with a Report of Findings.
2. Prescribe any necessary supplements or medications.
3. Order any necessary additional lab tests.

4. Answer any questions the patient has about their diagnosis and treatment plan, or any other aspect of their care.
5. Provide clear instructions to patient for scheduling their first (and subsequent) follow-up appointment.

B. Process

1. Admin staff processes appointment encounter.
2. Admin staff makes follow up phone call within 48 hours to address any additional questions or concerns.
3. Add patient to NP—Case Review Follow-up segment in Mailchimp
4. Case Review Follow-up AR begins
5. Remove from NP—Initial Consult Follow-up segment in Mailchimp

REVISED POLICIES AND PROCEDURES:

- Initial consult is $245. This covers time for appointment and admin cost of establishing new patient.
- Case Review is $750 or $950 depending on the clinician.