

Case Review for Clinician

PURPOSE

1. Provide patients with a Report of Findings.
2. Prescribe any necessary supplements or medications.
3. Order any additional necessary 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(s).

PROCEDURE

1. Greet patient and establish a warm and welcoming connection.
2. Provide overview of what the appointment will entail: reviewing the Report of Findings, discussing the treatment plan, and answering any questions they may have.
3. Review the Report of Findings.
4. Ask the patient if they have any questions about the Report or any other questions they would like to ask.
5. Provide instructions for how, and when, the patient should schedule their first follow-up appointment.
6. Explain what the patient can expect in terms of follow-up from you and the admin staff: the Report of Findings, detailed instructions on all treatment recommendations, and an estimate of services, additional labs, and recommended supplements that must be approved or modified before moving forward.
7. Inform the patient that we can provide the recommended supplements as a convenience but that they are not required to purchase them through us. Remind them that if they do choose to purchase the supplements elsewhere, it is important to obtain the exact brands/products we recommended to ensure that they receive the best treatment.
8. Let the patient know that a member of our staff will be calling them within 48 hours to answer any questions they may have.
9. Tell the patient that you are looking forward to working with them and that you will speak to them or see them in six to 12 weeks, depending on your assessment for when follow-up is necessary and their preference.