KRESSER INSTITUTE
FOR FUNCTIONAL AND EVOLUTIONARY MEDICINE

Case Review Follow-Up

PURPOSE

1. Help patient to feel supported and welcomed.
2. Provide clear instructions to patient for taking the next step in the process.
3. Provide necessary paperwork including lab requisitions.
4. Send dietary recommendations, if any.
5. Request approval for invoice and then bill for consult and labs.
6. Answer any questions that the patient may have.

PROCEDURE

1. Admin staff sends patient message through portal with estimate of charges including Case Review fee, recommended labs, and supplements, while reminding them that it needs to be approved before moving forward. (Reference **Process Appointment Encounter: Case Reviews**)
2. Once estimate has been approved, bill patient to card on file. (Reference **Estimate Additions**, **Estimate Approvals**, and **Estimate Modifications**)
3. Send patient lab requisitions with explanation of where to find instructions and lab FAQ. Remind patient to review these instructions ASAP to ensure timely completion of lab tests, since many tests require dietary changes or abstaining from certain supplements and medications for a period of time before the test. (Reference **Process Appointment Encounter: Case Reviews**)
4. Add document with protocol guidelines suggested by clinician, if applicable, to the Handouts tab in the patient's Portal. (Reference **Add Handouts**)
5. Patient is sent receipt automatically from QBO for the Case Review charges.
6. Proceed to **NP Onboarding Case Review Follow-up Call**.