

Initial Consult for Clinician

PURPOSE

1. Establish human connection and inspire confidence and excitement about working with our clinic.
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.

PROCEDURE

1. Clinician calls patient or joins Chiron video at appointed time.
2. Greet patient and establish a warm, welcoming connection.
3. Ask patient what their main concerns are, what they have tried so far for those concerns, and what their relevant medical history is.
4. Listen and reflect with empathy and compassion.
5. Explain how a functional medicine approach can effectively address the patient's primary concerns, and share any relevant success stories reflecting our work with other patients with similar concerns.
6. Explain which lab tests we would like to order, and why they are relevant to the patient's concerns.
7. Explain the Case Review process and the important timing of completing labs and paperwork. Invite the patient to review the detailed instructions for the labs, available in their portal, as soon as possible and begin planning accordingly.
8. Inform patient that an invoice for the Initial Consult, labs, and recommended supplements will be delivered via the portal and that they must approve or modify this before moving forward.
9. Remind patient that the Case Review appointment with clinician must take place in person.
10. Tell patient that you are looking forward to working with them, and let them know that a staff member will follow-up with a phone call in the next 48 hours to answer any questions they may have.
11. Add recommended testing and SOAP notes to patient chart.
12. Proceed to **NP Onboarding Case Review Clinician**.