

Initial Consult Through Case Review

1. Continue to inspire confidence in and excitement about working with our clinic.
2. Establish human connection at the IC.
3. Follow up with patient after the IC to answer questions.
4. Provide clear steps for scheduling and preparing for the Case Review.
5. Human interaction for the Case Review.
6. Follow up with patient after the CR to answer questions.

Continue to establish a positive connection and provide assistance throughout the Case Review process.

1. One week prior to Initial Consult, admin staff preps the chart. (Reference **Chart Prep: Initial Consults**)
2. Patient has their IC, establishing human connection and inspiring confidence and excitement. (Reference **NP Onboarding Initial Consult Clinician**)
3. Admin staff creates estimate and sends to patient within 24 hours of appointment along with clinician notes from the appointment and available dates for Case Review appointment. (Reference **Process Appointment Encounter: Initial Consults**)
4. Admin makes follow-up call within 48 hours of the appointment to answer any questions patient may have. (Reference **NP Onboarding Initial Consult Follow-up Call**)
5. Patient approves estimate or makes changes and approves it and provides their preferences for Case Review appointment. (Reference **Estimate Approvals and Estimate Modifications**)
6. Admin staff that receives estimate response sends estimate to billing for patient's credit card to be charged and schedules Case Review appointment, sending an appointment confirmation to the patient.
7. Once credit card has been charged, admin staff orders lab kits. Patient receives Case Review prep: forms, a confirmation of the ordered lab kits and requisitions, and dietary recommendations. (Reference **NP Onboarding Initial Consult Follow-up**)
8. One week prior to the Case Review, admin staff preps the chart. (Reference **Chart Prep: Case Reviews**)
9. Patient has in-office Case Review eight to 10 weeks after IC, establishing an even stronger human connection and inspiring confidence and excitement. (Reference **NP Onboarding Case Review Clinician**)
10. Patient receives Review of Findings (ROF), which includes supplement and/or medication recommendations, info on any additional lab tests.

11. Admin staff creates estimate and sends to patient within 24 hours of appointment along with clinician notes from the appointment and instructions on how to schedule follow-up appointments. (Reference **NP Onboarding Case Review Follow-up and Process Appointment Encounter: Case Review**)
12. Admin makes follow-up call within 48 hours of the appointment to answer any questions patient may have. (Reference **NP Onboarding Case Review Follow-up Call**)
13. Patient approves estimate or makes changes and approves it. (Reference **Estimate Approvals and Estimate Modifications**)
14. Admin staff that receives estimate response sends tasker to billing for patient's credit card to be charged and supplements to be ordered.
15. Once credit card has been charged, admin staff orders lab kits. Patient receives a confirmation of the ordered supplements and lab kits, requisitions, and applicable handouts. (Reference **Process Appointment Encounter: Case Review**)