The Case Review Process

In this video, I'm going to introduce the Case Review process that I use with all new patients.

The Case Review serves several purposes.

First, it leads to fantastic treatment results and patient satisfaction. By the time you first see the patient in person, you will already have a full report of findings to present, including the underlying patterns contributing to your patient's health problems, recommendations for further testing, and an outline of the treatment plan.

Many patients who come to see you will have been looking for answers—without finding them—for years. When you present them with a thorough understanding of what's going on as well as a clear plan for action, they're often impressed, relieved, and excited to get started.

Second, the Case Review gives you the confidence you need to integrate functional medicine into your practice. Because you prepare the report of findings prior to your first in-person visit with the patient, you can take as much time as you need to do it. Sometimes this means doing a little extra research in an area you're not familiar with or asking a colleague for help. This way, when you present the report of findings to the patient, you'll be able to do it with confidence and authority.

This was incredibly helpful to me when I was first starting out. Early on, it took me a while to do a report of findings because I was still relatively unfamiliar with the process. But as I saw more patients and learned more, I was able to complete the reports faster and faster. And since the learning happened on my own time and outside of the appointment, I was able to feel more confident and certain about presenting my diagnosis and treatment plan than I would have if I had been interpreting the labs and creating the plan in real time in front of the patient.

Third, the Case Review allows you to better manage patient expectations. When you've identified the underlying patterns that are contributing to your patient's complaints, you'll have a much better sense of how long the treatment will last, and what will be involved. It allows the patient to ask questions about this up front, so there's less chance of misunderstanding. When you address all of these questions at the beginning of treatment, you'll have a far greater chance of success.

The Case Review is broken into two steps. I'm going to go into more detail on each of these steps and give you additional options in the next video. But the following is how we're currently doing it in my practice.

The first step is the Initial Consult. This is a 30-minute phone or video conference appointment where you meet and greet the patient, collect their main complaints, what they've tried so far, and some basic background and history related to their complaints. You'll determine what labs you need to order for the Case Review, explain the purpose of those labs to the patient, and tell them all about the Case Review process and what to expect. In some cases, you may provide basic diet and lifestyle recommendations for them to follow between the Initial Consult and the Case Review appointment. After the Initial Consult is finished, you or your staff will send the lab requisitions to the patient, as well as the new patient intake forms and questionnaires.

The second step is the Case Review consultation. This is a 60- to 75-minute in-office appointment where you present your Report of Findings to the patient, outline the treatment plan, and answer any questions they have. You will also tell your patient when they should schedule their first follow-up appointment. Following this appointment, your staff will order the necessary follow-up tests and treatments and send any related documentation (like handouts or instructions) to the patient.

Once the Case Review is completed, you would then move into standard follow-up appointments. But this isn't just random, based on how the patient feels. You are both following a treatment plan that was based on lab results and a thorough initial intake and report. Because of this, the patient will have a better understanding of why they're doing what they're doing and a clearer idea of what to expect from the process. This makes it far more likely that they'll follow through with the treatment, get great results, and become an evangelist for you.

In the next videos, I'll go into more detail on patient flow—how a patient moves through the practice from start to finish. I'll give you some different options for each stage in the process, depending on your needs and where you are in your functional medicine career.

In the meantime, make sure to check out the patient handout for this section called "What is a Case Review?" You can share this with prospective patients or use the material it contains for a description of the process on your website, as we have on ours.

Okay, that's it for now. See you next week!