

What Is a Case Review?

The Case Review is the first step for all new patients. This process is designed to save money and time in the long term by performing the appropriate diagnostic testing and evaluation before treatment begins. A cornerstone of this approach is “test, don’t guess.” Identifying the underlying patterns contributing to disease is the key to a successful and lasting outcome.

The Case Review serves several purposes. It enables the clinician to more accurately estimate how long your treatment program will last, what it will include, and how much it will cost. It provides the chance for you to ask any questions about your condition and what you should expect. And it provides an opportunity for us to get to know each other and determine if our clinic is a good fit for you.

The Case Review includes:

- An initial 30-minute phone consult to determine which labs to order
- A thorough review of your medical history (obtained both during the initial consult and through the Case Review documents) and previous pertinent lab work
- A review of your current diet and nutritional supplements
- A detailed body systems assessment
- A 60- or 75-minute in-person consultation to review your lab results and discuss a treatment plan
- A treatment plan including diet, supplements, and lifestyle therapies
- Recommendations for further testing (if necessary)

There are two steps in the Case Review process.

STEP ONE: INITIAL PHONE CONSULT

During this 30-minute **phone appointment**, we will review your primary concerns to determine which lab tests to order.

The exact lab testing ordered after the Initial Consult depends on your individual circumstances, but may include:

- A comprehensive blood chemistry panel
- Additional blood tests for specific conditions
- Advanced stool testing
- Urine organic acids testing
- Urine hormone testing including an advanced adrenal assessment

Next you will complete a comprehensive health history. This Case Review paperwork includes:

- A detailed health and medical history questionnaire
- A survey of your health concerns and health goals
- An assessment of your most troubling and frequently experienced symptoms
- A diet survey and questionnaire
- A list of your current supplements and medications, along with a list of treatments you've previously tried that caused unfavorable reactions

Finally, you may be provided with dietary guidelines to follow after the Initial Consultation. These will include detailed instructions on how to perform either a 14-day or 30-day Paleo elimination diet, depending on what your practitioner decides is appropriate for your situation.

We strongly recommend you follow these dietary guidelines to the best of your ability. Your experience with this diet will be as important as any lab findings in guiding the next steps in your care plan.

Once lab results and completed Case Review paperwork are received, you will move on to Step 2, the Case Review Consultation. This typically occurs between 45 and 60 days after the Initial Consultation, to allow adequate time for us to receive all test results. While waiting for this appointment, you will be implementing the dietary guidelines and making forward progress.

STEP TWO: IN-PERSON CONSULTATION

The Case Review Consultation is a 60- to 75-minute in-person appointment.

Prior to your consultation, your clinician will review your test results, Case Review paperwork, and relevant prior lab work. From this information you will receive a Report of Findings, which is broken into three parts:

- A summary of the underlying patterns that are contributing to the patient's symptoms
- An outline of the suggested treatment plan, including dietary, supplement, and lifestyle recommendations
- Recommendations for further testing (this will typically be minimal, if necessary at all, because of the completeness of the Case Review process)

During the consultation, your clinician will discuss each component of the Report of Findings, including your specific treatment plan, and address any questions or concerns you may have about the findings or treatment plan.

Once the Case Review process is complete, you will transition to follow-up care and continue to implement your treatment plan with your clinician.