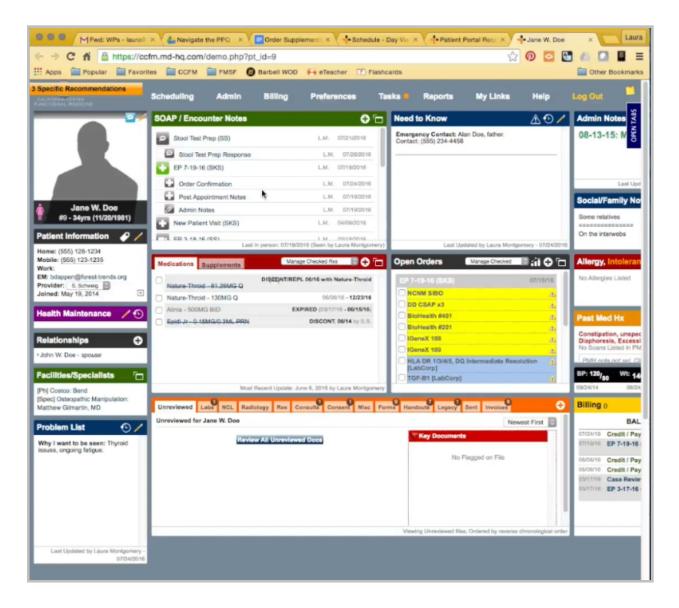


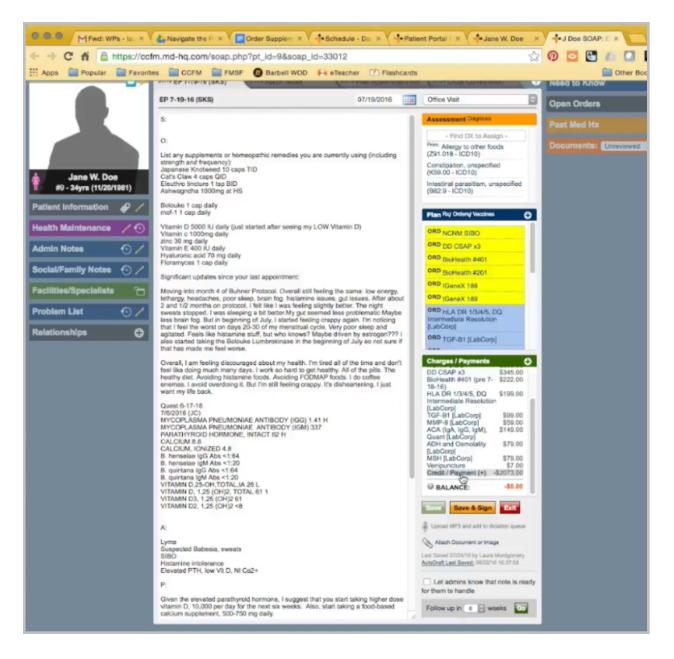
Back-end Systems: Using the EHR: Part Three - Ordering Supplements

When a message comes into the portal from a patient requesting to order supplements, click to open the chart.



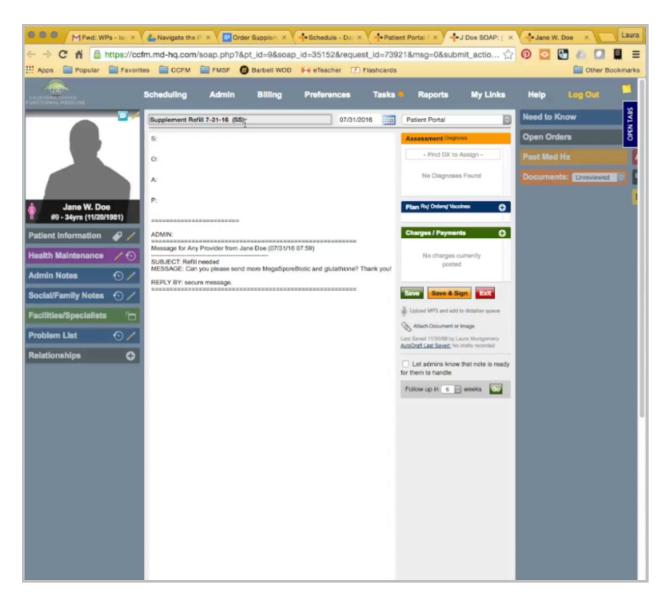
Here, we want to check on a few things. First, we want to see if there are any other open encounters. In this case, there is one. If there is an open encounter that has other supplements in it, we want to put all the supplements together in one encounter.





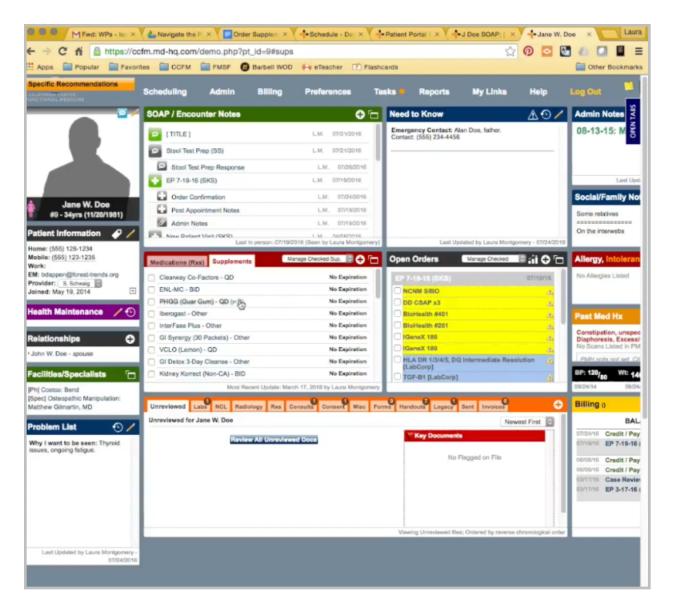
In this case, when I open here, I see that this has all actually been ordered because there is a zero balance, so this is just waiting on the clinician to sign. I also want to check and make sure the credit card is not expired, and if the patient was over 65, I would make sure there was a Medicare opt-out on file.





Now, from the portal, I'll start a note. Supplement refill, today's date, and the clinician of record initials. It's a supplement refill, and I delete everything above message.





The first supplement she is asking for is MegaSporeBiotic, so I go back to her chart, click on the Supplements tab. I'm just going to review the information here to make sure that a clinician has recommended MegaSporeBiotic for her in the past. It is listed here, so it has been recommended. I'm just going to briefly read the dosing instructions.



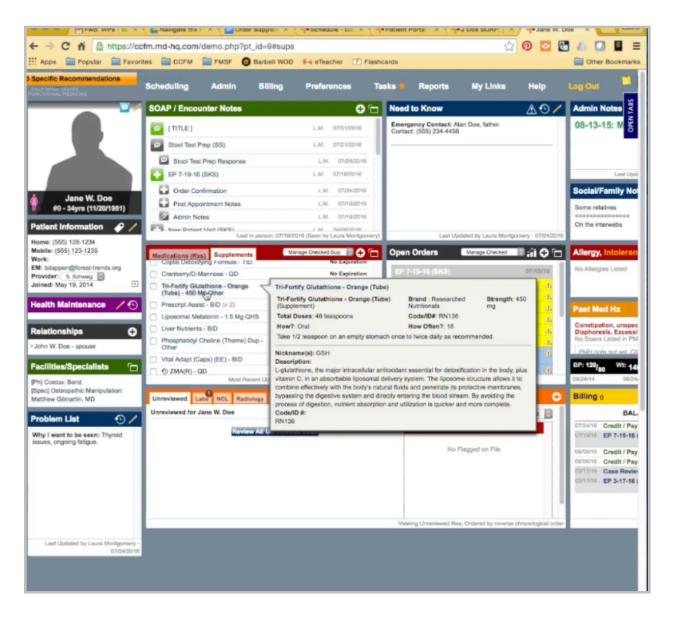
000 MFwd: WPs - Ia: X	La Navigate the P × Crder Supplem ×	edule - Do 🗙 📫 Patie	ent Portal [× - J Doe SOAP: [>	-Jane W. Doe × Laura
← → C fi 🔒 https://cct	fm.md-hq.com/soap.php?&pt_id=9&soap_id=35	152&request_id=739	21&msg=0&submit_actio	0 🖸 🛃 🥼 🛄 🗮 =
👯 Apps 📄 Popular 📄 Favorit	tes 🚞 CCFM 🚞 FMSF 🔞 Barbell WOD 🙌 eT	eacher 🗭 Flashcards		Other Bookmarks
CALIFORNIA CENTER FUNCTIONAL MEDICINE	Scheduling Admin Billing Pref	erences Tasks	Reports My Links	Help Log Out
	Supplement Refill 7-31-16 (SS)	07/31/2016	Supplement Refil	Need to Know 24 Open Orders 240
	Message for Any Provider from Jane Doe (07/31/16 07:59)		Assessment Dignosis	Open Orders 8
	SUBJECT: Rofil needed MESSAGE: Can you please send more MegaSporeBiotic and	f glutathione? Thank you!	- Find DX to Assign -	Past Med Hx
	REPLY BY: secure message.	******	No Diagnoses Found	Documents: Unreviewed
Jane W. Doe #9 - 34yrs (11/20/1981)			Plan Rv/ Orden/ Vocanes	
Patient Information 🖉 🖊			Charges / Payments	
Health Maintenance / 🕤			No charges currently posted	
Admin Notes 💿 /			Save & Sign	
Social/Family Notes 📀 /			Lipload MP3 and add to dictation gueue	
Facilities/Specialists	+ Complete and Add MegaSporeBiotic for Jane W. D	00	Chord Mut and you o octive drane	
Problem List 📀 🖊	You can add instructions or information about MegaSporeB		it to the plan.	
Relationships 🗘	÷		Is Administrative Record	d
	Physician's Assist Brand		Strength	
	Oral Method	QD (once a day)	Freq.	
	60 capsules Total Doses	N Expires	(Days)	
			+ Expanded Regime	
	Instructions / Notes Start with one capsule daily, and after five to seven days inc minutes after a meal. If you experience adverse effects, red	rease to two capsules daily. uce to 1/4 capsule added to	MegaSporeBiotic is best taken about 20 water and increase slowly.	
				é
	+ Complete	Complete & Add Another	1	
	Save these sets	ngs as the system default profil	le	

Okay, back to the chart. In the Plan Box, I want to add supplement. Type it in. Here, I want to check two things. First, I look at the dosing instructions to make sure they match. The dosing instructions when I add to the Plan Box here will always pull from the default system profile that is set up for this supplement. If the clinician has recommended the supplement with different instructions, those instructions would display here instead of the default system one.

Unfortunately, when you add to the Plan Box, the default system instructions always generate here, so every time the patient reorders the supplement, the instructions have to be changed if they are different. These are the same, so I'll leave that alone.

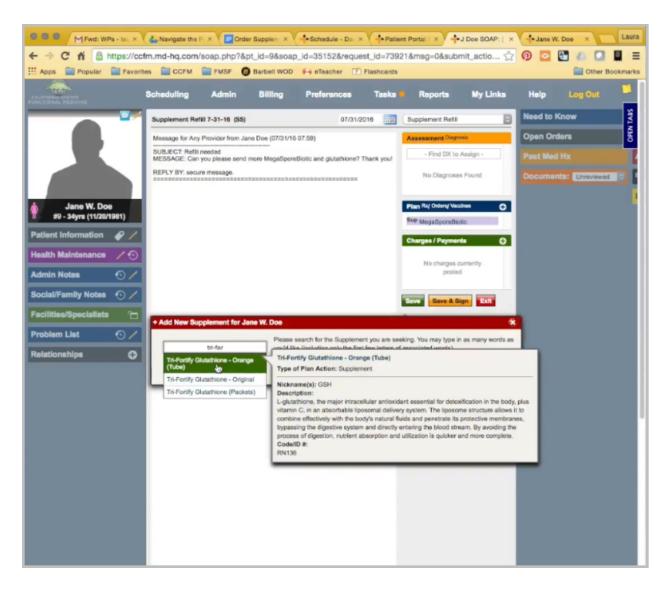


The other thing I am checking here is if there is an N or a Y. The N indicates that clinicians do not need to approve of these supplement refills, so admin staff can handle this entire encounter without the clinician ever needing to sign off on it.



Here, I can do Complete and add another. Next, she is asking for glutathione. There are many glutathiones in our system, so when I come here, I'm just going to check and see which one I find. Here's a Tri-Fortify, and that is the only one. If the patient had two glutathiones, I would need to check with her to see which one she wanted.





Again, I'm going to hover just to read the instructions. Go back to the note. I want to be careful to select the exact supplement that it says here. This was an orange tube. I want to make sure I select the orange tube. These instructions are different, so instead of one, it needs to be one-half.

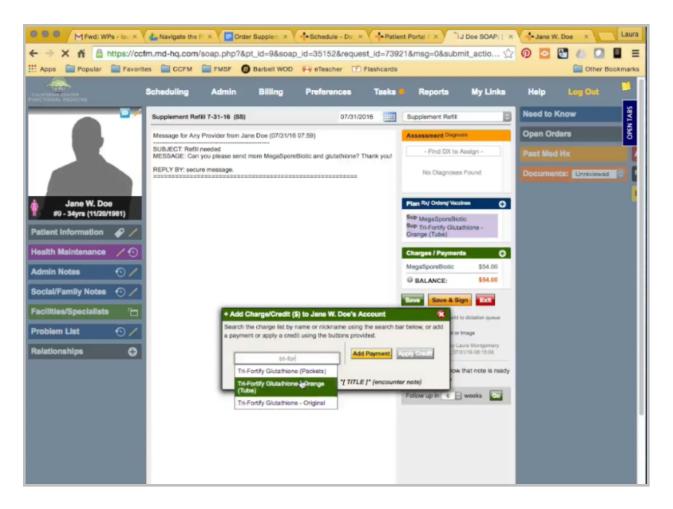


	Analyzate the P ×	Order Supplem ×	Schedule - Do ×	-Patier	nt Portal i 🗙 🕂	J Doe SOAP: ×	Jane W.	Doe ×	Laura
← → C fi 🔒 https://ccfn	n.md-hq.com/soap.ph	p?&pt_id=9&soap	_id=35152&request	id=7392	21&msg=0&subn	nit_actio 🏠	0 🖸	60	
Apps 📄 Popular 📄 Favorite	S CCFM E FMSF	Barbell WOD	🙌 eTeacher 🗹 Fi	shcards				Other B	ookmarks
	Scheduling Admi	n Billing	Preferences	Tasks	Reports	My Links	Help	Log Out	-
	Supplement Refill 7-31-16	(85)	07/31/201	3	Supplement Refill	0	Need to K	now	OPEN TABS
	Message for Any Provider fr	om Jane Doe (07/31/16	07:59)		Assessment Diagno	85	Open Ord	ers	OPEN
	SUBJECT: Refill needed MESSAGE: Can you please	send more MegaSpore	Biotic and glutathione? The	nk you!	- Find DX to /	Assign -	Past Med		ľ
	REPLY BY: secure message				No Diagnoses	s Found		ts: Unreviewed	
Jane W. Doe #9 - 34yrs (11/20/1981)					Plan Rx/ Orden/ Vecc				
Patient Information					Sup MegaSporeBiol				
Health Maintenance / 🔨					No charges of	and the			
Admin Notes 💿 🖊					No charges of posted				
Social/Family Notes 🕤 🖊					Save & Save & Sa	gn Exit			
Facilities/Specialists	+ Complete and Add Tri-	Fortiby Glutathione	Orange (Tube) for Jan	W Doe					
Problem List 🕙 🖊	You can add instructions or				not required) and add	it to the plan.	1		
Relationships 🗘					Is Ad	dministrative Record			
	Researched Nutritionals	Brand	450 mg		Strength				
	Oral	Method	Other (see	note)	Freq.				
	48 teaspoons	Total Doses	N	Expires	(Days)				
					+ 1	Expanded Regimen			1
	Instructions / Notes								
	Take 1/2[teaspoon on an e	mpty stomach once to t	wice daily as recommende	1.					
						1	1		
		+ Compl	+ Complete & Ad	d Another					
		Save	these settings as the system of	lefault profile					
			- <u>+</u> +	-					
				_					

I just want to be careful not to checkmark this box here. If I checkmark the box, the system default profile is changed for everyone in the system, and I don't want to do that. I only want to change her instructions.

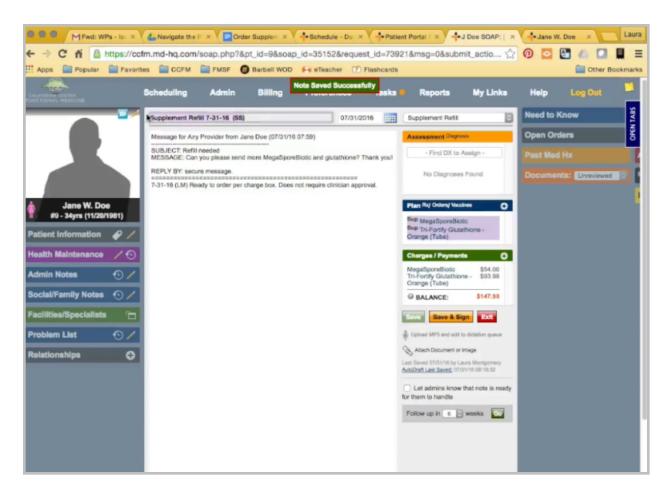
There is a note here, which also doesn't require approval, and that's the last supplement she is asking for, so I'll just complete it.





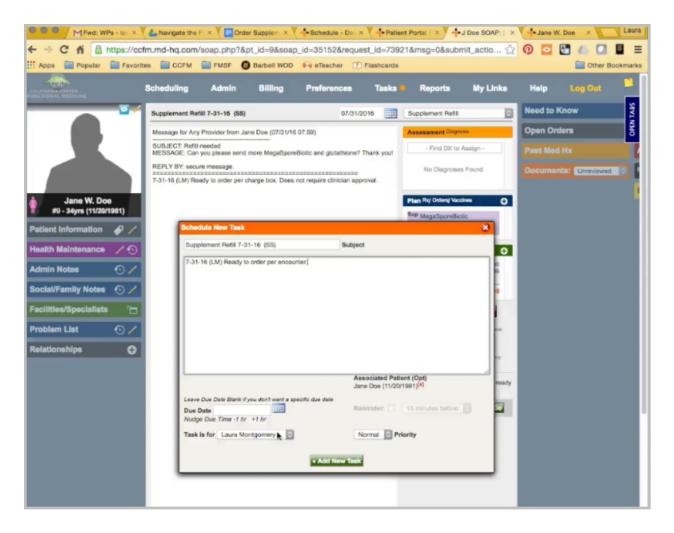
Then, I want to add to the Charge Box. The supplements added here, the name should match exactly to the Plan Box name. You can always change the quantity if the patient is requesting more than one. That's it.





Since these do not require clinician approval, I'm ready to send them on to be charged and ordered, so I'll just put my stamp, ready to order per Charge Box. It does not require clinician approval. Save the note.





You need to create a task for this. With my stamp, ready to order per encounter, and send it on to be charged.



Image: State of the image: State of the state of th
Scheduling Admin Billing Tasks My Links Help Log Out Received Faxes (Unfiled) Requests from the Patient Portal Vew: Assigned to Veste Santos V My System 2016-07.31111.162.36 (1 pages) B006978302 (5100405051) at 2016-07.3111.162.36 (1 pages) REQUEST FROM JANE W. DOE (11/20/1981) Important Lab Results Important Results
Imported Lab Results Start a Note Start a Note Fill Patients No results to pick up Ite: Refit needed Ite: Refit needed Ite: Refit needed Ite: Refit needed No results to pick up Ite: Refit needed Ite: Refit needed Ite: Refit needed Ite: Refit needed No results to pick up Ite: Refit needed Ite: Refit needed Ite: Refit needed Ite: Refit needed No results to pick up Ite: Refit needed Ite: Refit needed Ite: Refit needed Ite: Refit needed No results to pick up Ite: Refit needed Ite: Refit needed Ite: Refit needed Ite: Refit needed No results to pick up Ite: Refit needed Ite: Refit needed Ite: Refit needed Ite: Refit needed Measage to Patient: Ite: Refit needed Ite: Refit needed Ite: Refit needed Ite: Refit needed Measage to patient: Ite: Refit needed Ite: Refit needed <t< th=""></t<>
3313644700 (5100499501) at 2016-07-31T1:16:38 (1 pages) BMC BMC </th
2016-07-31T11:16:38 (1 páges) destinations 2016-07-31T11:10:38 (2 páges) destinations 2016-07-31T11:10:38 (2 páges) destinations 2016-07-30T21:43:39 (1 páges) destinations 2016-07-30T21:43:39 (1 páges) destinations 2016-07-30T29:07:59 (4 pages) destinations 2016-07-30T29:07:59 (4 pages) destinations 2016-07-30T29:07:59 (4 pages) destinations 2016-07-30T29:07:59 (4 pages) destinations Imported Lab Results Images will appear in the patient's Portal Account destinations Images point interessage to Patient: This message will appear in the patient's Portal Account destinations No results to pick up Message to Patient: This message will appear in the patient's Portal account. By default, the patient will also receive an email notification that there is a message will in the Patient's Portal account. By default, the patient will also receive an email notification that there is a message to Patient: This message to Patient: This message to Patient: Your request has been submitted and we will be in touch through the Encounter History in your Patient Portal once the order is on its way. Message to patient: Your order will ship to [XXX] and be billed to the following card on file: [XXX] Jane to the secure secure account and the secure secure secure secure secure
TOTS522803 (\$108498501) at 2016-07-30721 x8.39 (1 paga) SUBJECT: Rafil needed DATE: July 31, 2016 at 7.50 at DATE: July 31, 2016 at 7.50 at
3364065011 (\$106469501) at 2016-07-30709 07:59 (4 pages) Send a Secure Message to Jane W. Doe's Portal Account Full Patients 30 Full Patients 30 142569224 Imported Lab Results
Fax number: 5108408501 This message will appear in the patient's Portal account. By default, the patient will also receive an email notification that there is a message waiting in the Patient Portal. +14258291 Imported Lab Results Itite: Re: Refil needed Rendeting error No results to pick up Itite: Re: Refil needed Itite: Re: Refil needed Itite: Re: Refil needed Your request has been submitted and we will be in touch through the Encounter History in your Patient Portal once the order is on its way. Itite: patient: Itite: Patient: Your order will ship to (XX) and be billed to the following card on file: (XX). Itite: patient: Itite: Patient: Your order will ship to (XX) and be billed to the following card on file: (XX). Itite: Patient: Itite: Patient: Your order will ship to (XX) and be billed to the following card on file: (XX). Itite: Patient: Itite: Patient: Itite: I
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No results to pick up Hi Jane, I Your request has been submitted and we will be in touch through the Encounter History in your Patient Portal once the order is on its way. Image: Comparison of the following card on file: (pOO). Have a good day, Image: Comparison of the following card on file: (pOO). Image: Comparison of the following card on file: (pOO).
on its way. Your order will ship to (DOX) and be billed to the following card on file: (DOX). Have a good day, Laura G7751 @ Jane G7751 @ Jane G7751 @ Jane G7751 @ Jane
Have a good day, Laura 4 Good day, Control Control Con
Laura Gr711 G Gr02am Gr711 G Gr02am Jane Gr711 G Jane Gr711 G Jane
Ge course secure and an
07.50m Becu
O773 @ Svat O7734em detve
6771 @ Svei 6721 @ Svei 672 @ GP2
Notify patient at https://www.initiation.org (Tells patient to log into the portal to see the message)
This message is in reference to a request from this patient to "deliver a secure message "
How should the request be handled? I've completed this request
Send this message to Jane W. Doe's portal
Show past correspondence with this patient

Now, from the patient's chart, I'm going to copy just the street name, not their full address. Go back to her message in the portal, and let her know that we received her request. Once everything has been ordered, she will get a message in her encounter history.

Then, I'm going to put the street name here and also the credit card that is on file. That way, she does have at least a small window of opportunity to let us know if that is no longer correct information. Then, send that message to her.



aura@cofmed ×	Navigate the	PPQ - Google × Order Supple	menta - Goog × Schedule - Day View: 07/3 ×			
://ccfm.md-hg.con	n/calendar.	php?fresh_login=true#edit_tas	k			20
					Viette Santos 💿 🕂 ጰ	
		Scheduled Tasks Stand	ng Tasks Uploaded Results Follow-Up Items	Open SOAP Notes Open Orders AL	ERTS	
		STANDING TASKS (no formal	deadline)		(Additional Filters)	
		Right click the subject of a specific	task to manage it (mark it as complete, edit it, or remove	0		
					PATIENT UPDATED	
		Normal 07/31/16 08:18 Sup	piement Refill 7-31-16 (SS) 7-31-16 (SM) Charged par cha	ge box. ====================================	er per encounter Jane W. Doe 07/31/16 08:21	
			+ Add Task t	o Yvette Santos's Account		
					and the second se	
			Modify Task		8	
			Supplement Refill 7-31-16 (SS)	Subject	of the above	
			7.31.15 (SM) Charand par charan hav			
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Once admin staff gets the task back from Billing, it will indicate that everything was charged and ordered. Click on the patient's name to open the chart, and click to open the encounter.

Just verify there were no other notes here. Everything was ordered.

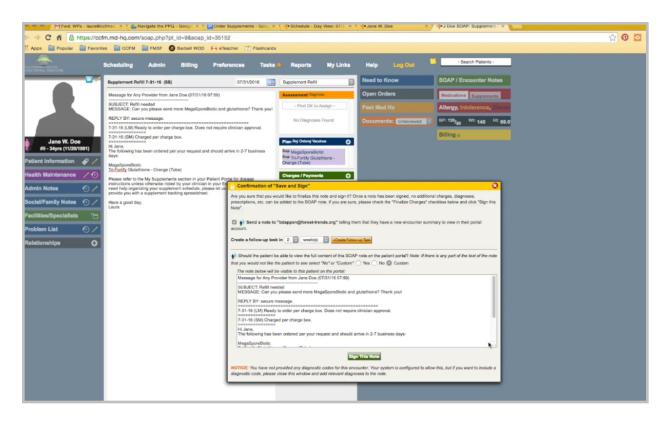


FORMA CENTER TIONAL HEDICINE		Scheduling Admin Billing Preferences Tasks	Reports My Links	Help Log Out	- Search Patients -
	-	Supplement Refill 7-31-16 (SS) 07/31/2016	Supplement Refil	Need to Know	SOAP / Encounter Notes
	- 1	Message for Any Provider from Jane Doe (07/31/16 07:59)	Assessment Disprosis	Open Orders	Medications Supplements
	- 1	SUBJECT: Refill needed MESSAGE: Can you please send more MegaSporeBiotic and glutathione? Thank you!	- Find DX to Assign -	Past Med Hx	Allergy, Intolerance, Discon
		REPLY BY: secure message. 7-31-16 (LM) Ready to order per charge box. Does not require clinician approval.	No Diagnoses Found	Documents: Unreviewed	BP: 120/80 WE 140 HE 69.0
Jane W. Doe		7-31-16 (SM) Charged per charge box. Hi Jane.	Plan Ry Ordens/ Vecsines		Dining ()
#9 - 34yrs (11/20/1961 clent Information	/	The following has been ordered per your request and should arrive in 2-7 business days:	Swp MegaSporeBiotic Swp Tri-Fortify Glutathione - Orange (Tube)		
alth Maintenance 📝	•	The following has been ordered and was sent cold-ship via 2-day air; it will need to be retrieved immediately upon delivery:	Charges / Payments		
min Notes 📀	/		MegaSporeBiotic \$54.00 Tri-Fortify Glutathione - \$93.98		
	2	Please refer to the My Supplements section in your Patient Portal for dosage instructions unless otherwise noted by your clinician in your Encounter History. If you need help organizing your supplement schedule, please let us know and we can provide you with a supplement tracking spreadsheet.	Orange (Tube) Credit / Payment (+) -\$147.98 @ BALANCE: -\$0.00		
lities/Specialists		Have a good day, Laura	Seve Save & Sign Exit		
blem List 🕐		L RUIR	Upload MP3 and add to dictation queue		
ationships	0		Atlach Document or Image		
			Last Saved 07/31/16 by Laura Montgomery AutoDraft Last Saved: 07/31/16 08:15:08		
			Let admins know that note is ready for them to handle		
			Follow up in 6 weeks		

I'm going to draw a line, and I'm just going to write a message here confirming to the patient. I'll copy what was ordered, paste that here, and remove the prices.

There are no cold-ship supplements, so I'll remove that from my message. Here, I'm going to send out a custom message, so I can Save and Sign. I do want to notify her there is a new message, and I'm going to make it custom.





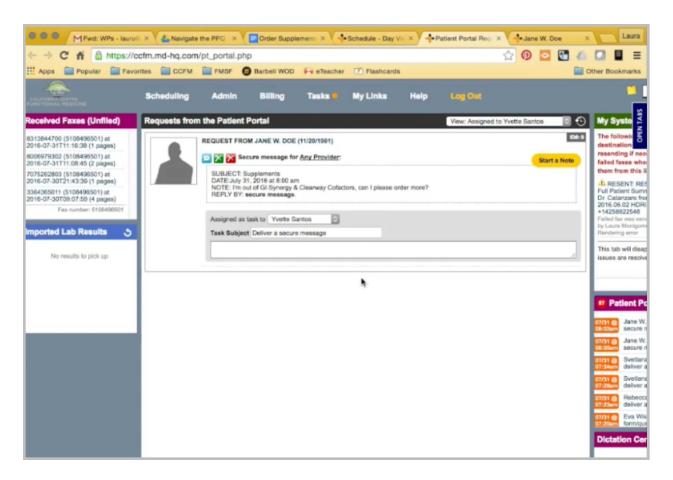
Here, I basically want to remove her notes and all the admin notes so that what she will see is only the confirmation message here. Sign the note.



B B B MFwd: WP	's - laura@c	cofmed: × 🕼 Navigate the PPQ - Google × 💭 Order Supplements - Google ×	-Schedule - Day View: 07/3 ×	Jane W. Doe X J Doe SIGNED SOAP: Sup: X
F → C fi 🔒 h	ttps://ccf	fm.md-hq.com/soap_signed.php?pt_id=9&soap_id=35152		
Apps 📄 Popular	Favorit	tes 🔚 CCFM 🔚 FMSF 🚯 Barbell WOD 🙌 eTeacher 1 Flashcards		
		Scheduling Admin Billing Preferences Tasks	Reports My Links	Help Log Out - Search Palients -
	-2/	Supplement Refill 7-31-16 (SS) 07/31/2016	Supplement Refil	Need to Know SOAP / Encounter Notes
		Message for Any Provider from Jane Doe (07/31/16 07:59)	SIGNED	Open Orders Medications Supplements
		SUBJECT: Refil needed MESSAGE: Can you please send more MegaSporeBiotic and glutathione? Thank you!	by Laura Montgomery on 07/31/2016 Assessment Diagnosis	Allergy, Intolerance, Orscon Results
		REPLY BY: secure message.	the Discourse Discourse	BP: 120/80 WE: 140 HE: 69.0 Past Med Hx
		7-31-16 (LM) Ready to order per charge box. Does not require clinician approval. 	No Diagnoses Found	X-Rays/Images/Procedures Documents: Unreviewed
Jane W. Doe #9 - 34yrs (11/20/1		Hi Jane, Hi Jane, The following has been ordered per your request and should arrive in 2-7 business	Plan Ry Ordens/ Veccines	Billing o
Patient Information	•/	days: MegaSporeBiotic	Sup MegaSporeBiotic Sup Tri-Fortify Glutathione -	
Health Maintenance	10	Tri-Fortify Glutathione - Orange (Tube) Please refer to the My Supplements section in your Patient Portal for dosage	Orange (Tube)	
Admin Notes	0/	Please reter to the My Supplements section in your Patient Portal tor obsage instructions unless otherwise noted by your clinical in your Encounter History. If you need help organizing your supplement schedule, please let us know and we can provide you with a supplement tacketing spreadheet.	Charges / Payments 🕒 MegaSporeBiotic \$54.00	
Social/Family Notes	•	provise you with a supplement tracking spreadsheet. Have a good day, Laura	Tri-Fortify Glutathione - \$93.98 Orange (Tube) Credit / Payment (+) -\$147.98	
Facilities/Specialists	6	Signed by Laura Montgomery on July 31, 2016	BALANCE: -\$0.00	
Problem List	0/	+ Append a Comment + Append Follow-Up SOAP Note	Unsign	
Relationships	0	A custom version of the note text is visible to the patient	Date Signed 07/31/16 by Laura Montgomery	
		Hi Jane. The following has been ordered per your request and should arrive in 2-7 business days:	Attach Document or Image AutoOraft Last Saved: 07/31/16 08:18:08	
		MegaSporeBiotic Tri-Fortify Glutathione - Orange (Tube)	Let admins know that note is ready	
		Please refer to the My Supplements section in your Patient Portal for dosage instructions unless otherwise noted by your clinician in your	for them to handle	
		Encounter History. If you need help organizing your supplement schedule, please let us know and we can provide you with a supplement tracking spreadsheet.	Fellow up in 6 🕤 weeks	
		Have a good day. Laura		

You'll see here, this is the only part of the note that she will see when she goes to her encounter history. I can close the chart and mark the task as complete.

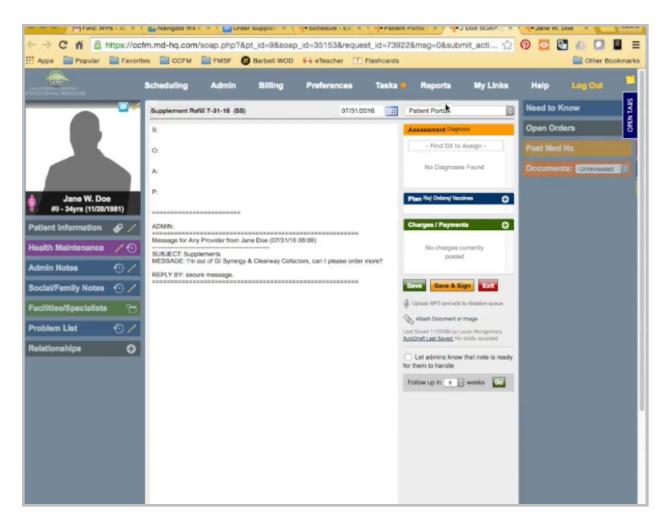




In our next example, we'll look at ordering supplements that do require clinician approval. First, I want to click to open the patient's chart, do all my checks. There are no open encounters that have supplements that haven't been ordered. Credit card on file has not expired.

Come back to the PPQ, and start a message.





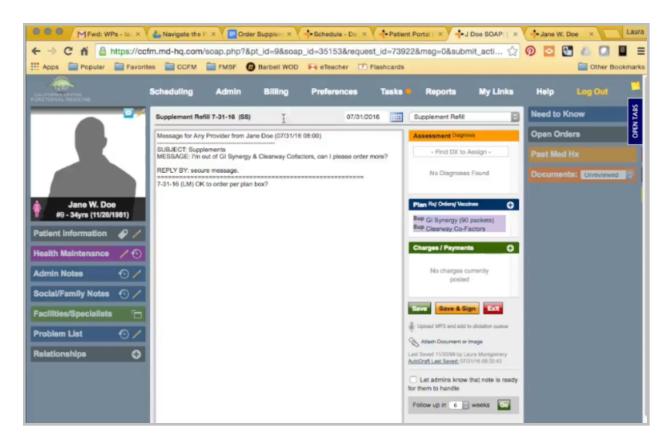
Put my title, supplement refill. Delete this. In the chart, go see if she has had GI-Synergy.



	Analigate the P ×	Order Supplem × + Schedu	e - De X Patient	Portai ×	Doe SOAP: ×		De X	Laura
← → C fi 🔒 https://ccfn	n.md-hq.com/soap.pl	np?&pt_id=9&soap_id=3515	3&request_id=73922	2&msg=0&subm	it_acti 🏠	0 🖸 🖸		=
Apps 📄 Popular 📄 Favorite	S CCFM E FMS	F 🔀 Barbell WOD 🙌 eTeac	her 🗹 Flashcards				Other Boo	kmarks
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	Supplement Refill 7-31-10	6 (SS)	07/31/2016	Supplement Refil	0	Need to Kr	ow	OPEN TABS
	Message for Any Provider	rom Jane Doe (07/31/16 08:00)		Assessment Dagros	8	Open Orde	rs	5
	SUBJECT: Supplements MESSAGE: I'm out of GI S	mergy & Cleanway Cofactors, can I pl	ease order more?	- Find DX to A	ssign -	Past Med I		
	REPLY BY: secure messag	0.		No Diagnoses	Found		Unreviewed	
Jane W. Doe #9 - 34yrs (11/20/1981)				Plan Rx/ Orden/ Veccin	•• O			
Patient Information 🛛 🖉 🖊			- P	Charges / Payments	• •			
Health Maintenance / 🔿				No charges cu posted	mendy			
Admin Notes 🕙 🖊								
Social/Family Notes 🕚 🖊				Save & Sig	Exit			
Facilities/Specialists 🗇	+ Complete and Add GI	Synergy (90 packets) for Jane W		Upload MP3 and add to	dictation gueve.			
Problem List 📀 🖊	You can add instructions of	information about GI Synergy (90 pa	eckets) (not required) and a	add it to the plan.				
Relationships 🔿				🗌 la Adm	inistrative Record			
	Apex Energetics	Brand		Strength				
	Oral	Method	BID (twice a day)	Freq.				
	90 packets	Total Doses	Y 1 Expires (D	lays)				
				+ Ex	panded Regimen			
	Instructions / Notes							
	Start with one packet daily	with breakfast or dinner, and increase	a as tolerated to one packet	t twice daily with mea	is.			
					4			
		+ Complete + Co	mplete & Add Another					
		Save these settings	a the system default profile					

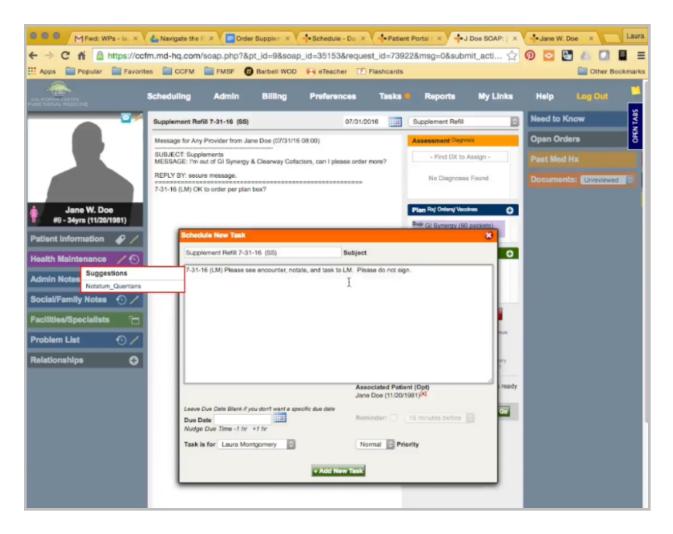
The instructions are the same, but this one does require clinician approval. I still want to add in all the other supplements she is requesting, so Clear Way Cofactors. Okay, the dose is the same. No approval required.





Because we have this one that requires approval, we need to send it to a clinician. This time, I'm going to put a message here if it is okay to order. I won't add any charges yet in case the clinician doesn't want the patient to continue.





I need to copy the title and add a task. Then, I'm going to send it to the clinician asking them to review the encounter, notate, and task back to me but do not sign. Save. Close the encounter.



🖉 🖨 🗶 M Fwd: WPs - lauro@	× 👍 Navigate the PPO 🔹 📴 Order Supplement: × 🗣 Schedule - Day Vic × 🗣 Patient Portal Regi × 🗣 Jane W. Doe	× Laura
← → C fi 🔒 https://co	cfm.md-hq.com/pt_portal.php#respond 🔂 🙆 💆	
Apps 📄 Popular 📄 Favor	ites 🧰 CCFM 🚞 FMSF 👩 Barbell WOD 🙌 eTeacher 📝 Flashcards	Other Bookmarks
CALIFORMIN CINTER FUNCTIONAL MEDICINE	Scheduling Admin Billing Tasks My Links Help Log Out	× .
Received Faxes (Unfiled)	Requests from the Patient Portal View: Assigned to Yvette Santos	a 💿 My Syste 💈
8313844700 (5108496501) at 2016-07-31T11:16:38 (1 pages)	REQUEST FROM JANE W. DOE (11/20/1981)	IDE 9 The followin & destination
8006979302 (5108496501) at 2016-07-31T11:08:45 (2 pages)	Starts N	ote failed faxes when
7075262803 (5108496501) at 2016-07-30T21:43:39 (1 pages)	SUBJECT: Supplements DATEJuly 31, 2016 at 8:00 am	them from this li
3364365011 (5108496501) at 2016-07-30T09:07:59 (4 pages)	Send a Secure Message to Jane W. Doe's Portal Account	Full Patient Sumn Dr. Catanzaro fro
Fax number: 5108498501	This message will appear in the patient's Portal account. By default, the patient will also receive an email notification that there is a message waiting in the Patient Portal.	2016.06.02 HDRI +14258922548 Foiled fax was send
mported Lab Results 5	Title: Re: Supplements	by Launa Montgome Rendering error
No results to pick up	Message to Patient:	This tab will disap issues are resolve
	Your request has been submitted and we will be in touch through the Encounter History in your Patient Portal once the order is on its way.	
	Your order will ship to 5222 West Elm and be billed to the following card on file: MC 1234 (10/20).	Di Datiant Da
	Have a good day, Laura	Patient Pc
		07/31 @ Jane W. 08:02em secure n
		07/31 B Jane W. 08:00em secure n
		07/31 B Svetlana 07:34em deliver a
		07/31 (G) Svetland 07:28em deliver a
		07/31 (a) 07:23cm Rebecca deliver a
	Notify patient at <u>bdappen@forest-trends.org</u> (Teils patient to log into the portal to see the message)	07/31 C Eva Wis 07/20em form/que
	This message is in reference to a request from this patient to "deliver a secure message "	Dictation Cer
	How should the request be handled? I've completed this request	No Cor
	Send this message to Jene Wit Doe's portal	
	Show past correspondence with this patient.	

The next step is the same. I'm going to come back to the portal. Let her know the same message. I don't need to tell her that we have to wait on clinician approval. Copy her address and her credit card information, and that's it.

Once admin staff receives the task back from the clinician, click to open the chart. Go to the encounter. Refills have been approved.



	Scheduling	Admin	Billing	Preferences	Tasks	Report	s My Links	Help		-	- Search Patients -		
	Supplement Re	fill 7-31-16 (SS)		07/31/	016	Supplement F	Rofill	Need to 1	Know	80	AP / Encounter Noter		
		y Provider from Jan	e Doe (07/31/16 0	8.00)		Assessment	Dagross	Open On	ders	Mo	dications Supplements		
K.	SUBJECT: Supp MESSAGE: I'm	out of GI Synergy 8	Clearway Cofact	ors, can I please orde	more?	- Find D	IX to Assign -	Past Med		Alle	ergy, Intolerance, Dis	28	
		re message. K to order per plan l		*****		No Ding	noses Found	Documer		ed o BP:	120/80 WE 140 HE	9.0	
	*********					Plan Ry Orden				Bill	ling o		
N. Doe (11/20/1981)							V Veccines C	•					
tion 🕜 /						Sup Clearway							
ance / 🕥						Charges / Pa	yments +						
•							ges currently osted						
lotes 🕙 🖊							(Johns						
alists 🗀							dd Charge/Credit (8		
0/						a pa	of the charge list by yment or apply a cred			bar below, or ac	bid		
0						Attach	gi syn		Add Payment	Apply Credit			
Ŭ							Gi Synergy (30 pack	936)					
						Let ad Yo for them to	Gi Synergy (90 pack	prove a	(\$) Gi Synergy Nicknames: AE				
						Follow up in	6 🔄 weeks 🚺			(90 packets w/3	caps in each packet)		
									DR	nber Price 578.00	Non-Member Price \$78.00		
									NP RN	\$78.00 \$78.00 \$78.00	\$78.00 \$78.00 \$78.00		
									Time Involved		310.00		
								100					

Now, I want to add the charges. Again, the name should match exactly how it is in the Plan Box, and I can change the quantity here.

From here, the steps are going to be the same. I'll send a note on that it is ready to be billed. Send it to Billing, and wait for it to come back.

Once I receive the task back from Billing that everything has been charged, I'll click to open her chart. Go to the encounter. Review and make sure there are no notes, and then I want to send the same custom message.



O O MFwd: WPs - laura@c	cfmed 🗙 🔧 Navigate the PPQ - Google 🗙 💭 Order Supplements - Google	Schedule - Day View: 07/3 ×		P: Supplement ×			
← → C fi https://ccf	fm.md-hq.com/soap.php?pt_id=9&soap_id=35153						
🔛 Apps 📄 Popular 📄 Favorit	es 🚞 CCFM 🚞 FMSF 🚯 Barbell WOD 🙌 eTeacher 📝 Flashcards						
CALIFORNIA CENTER PUNCTIONAL HEDICINE	Scheduling Admin Billing Preferences Tasks	Reports My Links	Help Log Out 🕌 -See	uch Patients -			
	Supplement Refill 7-31-16 (SS) 07/31/2016	Supplement Refil	Need to Know SOAP / En	counter Notes			
	Message for Any Provider from Jane Doe (07/31/16 08:00)	Assessment Degrosis	Open Orders Medications	Supplements			
	SUBJECT: Supplements MESSAGE: I'm out of GI Synergy & Clearway Cofactors, can I please order more?	- Find DX to Assign -	Past Med Hx Allergy, Int	olerance, Discon			
	REPLY BY: secure message.	No Diagnoses Found	Documents: Unreviewed C BP: 120/80	WE 140 HE 69.0			
Jane W. Doe #9 - 34yrs (11/20/1981)	7-31-16 (LM) CK to order per plan box? 7-31-16 (SKS) l approve relits for pt. 7-31-16 (LM) Ready to order per charge box.	Plan Ry Orden/Vaccines	Billing a				
Patient Information 🛛 🖌	7-31-16 (SM) Charged per charge box.	Sup Cleanway Co-Factors					
Health Maintenance / 🕥 Admin Notes 💿 /	The following has been ordered per your request and should arrive in 2-7 business days:	Charges / Payments GI Synergy (90 packets) \$78.00 Clearway Co-Factors \$52.00 Credit / Payment (+) -\$130.00					
Social/Family Notes 🕙 🖊	The following has been ordered and was sent cold-ship via 2-day air; it will need to be retrieved immediately upon delivery:	@ BALANCE: -\$0.00					
Facilities/Specialists	Please refer to the My Supplements section in your Patient Portal for dosage	Save & Sign					
Problem List 📀 🖊	instructions unless otherwise noted by your clinician in your Encounter History. If you need help organizing your supplement schedule, please let us know and we can provide you with a supplement tracking spreadsheet.	Upload MP3 and add to dictation queue					
Relationships 🔿	Have a good day, Laura	Attach Document or Image Last, Saved 07/31/16 by Laura Montgomery					
		AutoDraft Last Saved; 07/31/16 08:32:43					
		Let admins know that note is ready for them to handle					
		Follow up in 6 🕞 weeks					

Highlight what was ordered.

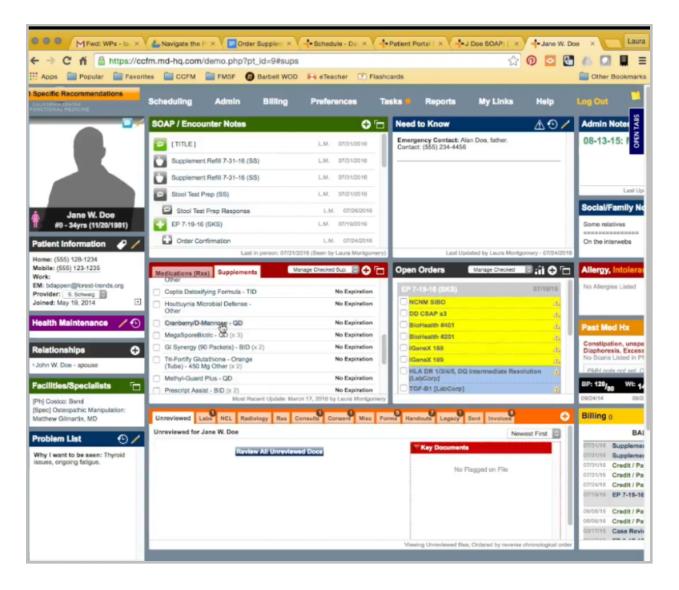
Ped: WPs - laura@ccfmed	× La Navigate the PPQ - Google × Corder Suppler	ments - Goog × Schedule - Day View: 07/3 ×			ine W. Doe ×	Laura		
← → C n A https://ccfm.md-	d-hq.com/soap.php?pt_id=9&soap_id=35153					☆ 💿 🖸 🚰 🦾 🔲 📕 ≡		
🗄 Apps 🔛 Popular 🔛 Favorites 🔛	CCFM 📄 FMSF 👩 Barbell WOD 🙌 eTeacher	Plashcards				Cther Bookmarks		
CALIFORNIA CHITES	duling Admin Billing Preferences	s Tasks 🕯 Reports My Links	Help Log Out	- Search Patients -		_		
Suppl	plement Refill 7-31-16 (SS) 07/	/31/2016 Supplement Refil	Need to Know	SOAP / Encounter Notes		1 ABS		
Moss.	sage for Any Provider from Jane Doe (07/31/16 08:00)	Assessment Damos	Open Orders	Medications Supplements		5		
SUBJ	UECT: Supplements SSAGE: I'm out of GI Synergy & Cleanway Cofactors, can I please o	order more? - Find DX to Assign -		Allergy, Intolerance, Discon				
7.31./	PLY BY: secure message.	No Disgnoses Found		BP: 120 _{/60} WE 140 HE 69.0				
Jane W. Doe 7-31-	I-16 (SKS) I approve refils for pt.	Plan Rv(Orders/ Vaccines		Billing o				
Patient Information	2 Section case of the other participation of the other participation of the other participation of the other participation of the other section of the other participation of the other participation of the other participation of the other participation of the section of the other participation of the other particip							
The fi	H Jane, The blowing has been ordered per your request and should arrive in 2-7 busitiess days: Charges (Description - 20 do							
Admin Notes 🕙 🖊 Gi Sy Clean	lynergy (90 packets) arway Co-Flactors	Confirmation of "Save and Sign"		0				
Social/Family Notes • / instru need	ructions unless otherwise noted by your clinician in your Encounte	prescriptions, etc. can be added to the SOAP note. If you an	n it? Once a note has been signed, no ad e sure, please check the "Finalize Charg	ditional charges, diagnoses, es" checkbox below and click "Sign this				
Facilities/Specialists Have	e a good day.	Send a note to "bdappen@forest-trends.org" tell	ing them that they have a new encounter	r summary to view in their portal				
Problem List 💿 🖊		account.						
Relationships 🗘		Create a follow-up task in 2 3 wook(s) 3 const	a Follow-up Task					
		Should the patient be able to view the full content of this		If there is any part of the text of the note				
		that you would not like the patient to see select "No" or "Cus	Sign This Note					
		NOTICE: You have not provided any diagnostic codes for th		to allow this, but if you want to include a				
		diagnostic code, please close this window and add relevant				•		
	,							

Save and Sign. Yes, send her notification. It is a custom message because, again, I want to get rid of all the messages except the actual order confirmation. I can close her chart and mark the task as complete.

The final example of a supplement order is when it is unknown if clinician approval is required or not. I'll click to open the patient's chart. There is no open encounter with unordered supplements. Credit card is not expired.



Start a note. Put my title and make it a supplement refill. Delete all of this.



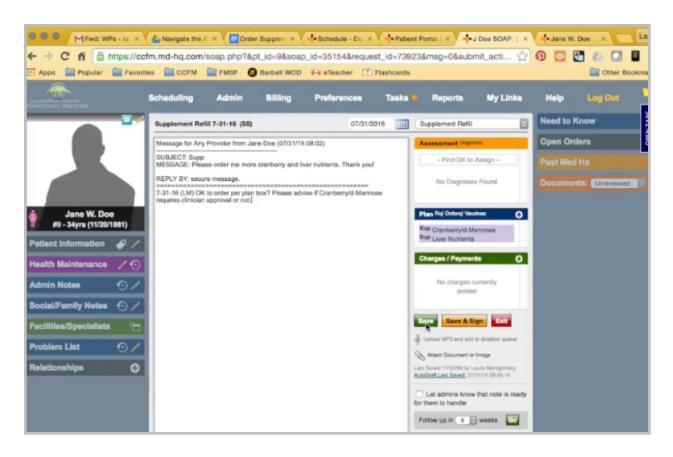
She is asking for cranberry and Liver Nutrients, so Cranberry D-Mannose and the dosage, three capsules daily.



MFwd: WPs + In: ×	L Navigate the P ×	- Schedule - Da ×	t Portal ×	Jane W. Doe × Laura
← → C fi 🔒 https://ccfr	m.md-hq.com/soap.php?&pt_id=9&so	ap_id=35154&request_id=7392	3&msg=0&submit_acti 🏠	0 🖸 🔄 🧥 🗖 🛢 =
Apps 📄 Popular 📄 Favorite	es 📋 CCFM 🚞 FMSF 👩 Barbell WO	D Flashcards		Other Bookmarks
CALIFORNIA CENTER FUNCTIONAL MEDICINE	Scheduling Admin Billing	Preferences Tasks	Reports My Links	Help Log Out 🔛
	Supplement Refill 7-31-16 (SS)	07/31/2016	Supplement Refil	Need to Know
	Message for Any Provider from Jane Doe (07/31	/16 08:02)	Assessment Diagnosis	Open Orders 8
	SUBJECT: Supp MESSAGE: Please order me more cranberry and	d liver nutrients. Thank you!	- Find DX to Assign -	Past Med Hx
	REPLY BY: secure message.		No Diagnoses Found	Documents: Unreviewed
Jane W. Doe #9 - 34yrs (11/20/1981)			Plan Rx/ Orden/ Veccines	
Patient Information 🛛 🖌 🖊			Charges / Payments	
Health Maintenance 🛛 🖊 🕙			No charges currently posted	
Admin Notes 💿 🖊				
Social/Family Notes 💿 🖊			Save & Sign Exit	
Facilities/Specialists	+ Complete and Add Cranberry/d-Mannos	e for Jane W. Doe	Upload MP3 and add to dictation gueve	
Problem List 💿 🖊	You can add instructions or information about Cr	ranberry/d-Mannose (not required) and a	dd it to the plan.	
Relationships 🗘			Is Administrative Record	
	Pure Encapsulations Brand		Strength	
	Oral Method	QD (once a day)	Freq.	
	90 vcaps Total Doses	Expires (Days)	
			+ Expanded Regimen	
	Instructions / Notes			
	Take 3 capsules daily, in divided doses, with or	between meals.		
			1	
	+ Con	+ Complete & Add Another		
	Sa	ve these settings as the system default profile		

Okay, so two things here. I need to change this to three capsules daily, and it is not noted here about clinician approval being required or not. Liver Nutrients, here, one capsule. Okay.





In this case, I do need to check with the clinician, but I also want to know if this supplement requires approval in the future or not. Save.

From here, I'll follow the same steps as the previous encounter. Create a task. Send to the clinician. Close.

Copy her address. Again, the message to the patient here is the same regardless of the clinician approval. Send. Close the chart, and wait for it to come back.



Verter Standard Tasks	Laura
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2010 of infth Mag(Engy) 20 20 20 20 20 20 20 20 20 20 20 20 20	

Once the task comes back from the clinician, click to open the chart. Click to open the encounter. This is okay to order, and it does not require approval.

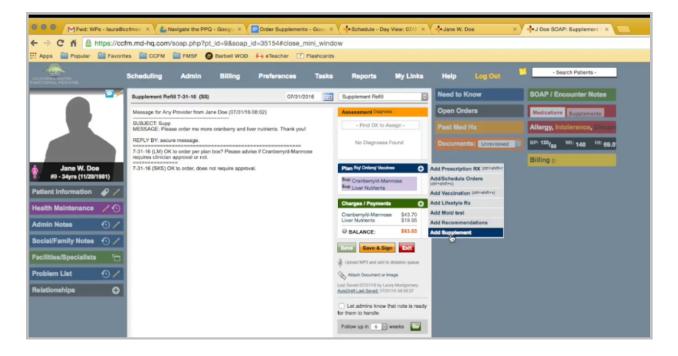
I'm going to put this in the Charge Box. Again, the name needs to match exactly, and I can change the quantity here if the patient wanted more than one.

Now, we need to update the system so that everyone knows in the future this does not require approval.



Fwd: WPs - laura@co	istmes: x 🔨 🛃 Navigate the PPQ - Googn X 🔨 Dider Supplements - Goog X 💙 💠 Schedule - Day View; 67/3 X 💙 🚽 Jane W. Doe 🛛 X 💙 🗣 J Doe SOAP: Supplement I X 📃	Laura
← → C fi 🚔 https://ccfi	fm.md-hq.com/soap.php?pt_id=9&soap_id=35154#edit_plan_other	☆ 💿 🖸 👪 🗖 📕 =
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	Supplement Refill 7-31-16 (SS) 07/31/2016 📰 Supplement Refill of Need to Know SOAP / Encounter Notes	N TABS
	Message for Any Provider from Jane Doe (07/31/16 08:02) Assessment Overview Open Orders Medications Supplements	S.
	SUBJECT Supp MESSAGE Plase order me more cranberry and liver nutrients. Thank you! - Find DK to Assign - Past Med Hx Allergy, Intolerance, Cracce	_
	REPLY PY: secure message. No Diagnoses Found Documents: Uneviewed D BP: 120/20 Wit: 140 Hit: 69.0	
Jane W. Doe	requires clinician approval or not. Billing Billing Billing Billing Billing Billing Billing Billing Billing Bi	
#9 - 34yrs (11/20/1981)	But Cranberry/GMannes	
atient Information 🛛 🥜 🦯	Bull Cranberry/id-Mannose for Jane W. Doe	
ealth Maintenance 🛛 🖊 🕙	Charges You can edit your instructions or information about Cranberry/d-Mannose (not required) using the box below: Carborn	<u> </u>
dmin Notes 🕙 🖊	Liver Naff	lecord
ocial/Family Notes 🕥 🖊	BALA Pure Encapsulations Brand Strength	
	Crai Mathed OD (once a day)	
	Libbert M 90 vcaps Total Doses Expires (Days) + Exanded Rec	
oblem List 💿 🖊	Altern a	pimen
elationships 🖸	Astronation / Notes Astronation / Notes Take 3 capsules daily, in divided doses, with or between meals.	
	Ect adm	
	Follow up	

Because we already changed the dosage here from the default profile, we cannot do it in this Plan Box as is.



You can do one of two things to update the instructions. You can either click here, Add Supplement. Put "no." Mark it to Save the Settings as Default, and then just close the box. Notice it doesn't add it to the plan again.



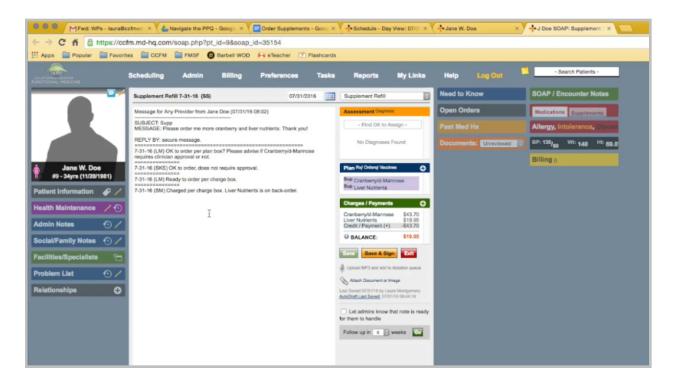
OOO MFwd: WPs - laura@c	cofmed X 👍 Navigate the PPQ - Google X	Order Supplements - Goog ×	- Schedule - Day View: 07/3 ×		-J Doe SOAP: Supplement ×			
← → C fi 🔒 https://cc	fm.md-hq.com/soap.php?pt_id=9&soap	_id=35154#						
👯 Apps 🔛 Popular 🔛 Povorites 🔛 CCFM 🔛 FMSF. 😨 Barbell WOD 📭 eTeacher 🕂 Flashcards								
	Scheduling Admin Billing	Preferences Tasks	Reports My Links	Help Log Out	- Search Patients -			
	Supplement Refill Advanced Pt Search	07/31/2016	Supplement Refil	Need to Know	SOAP / Encounter Notes			
	Message for Any P Manage	Manage Chart Parts	Assessment Diagnosis	Open Orders	Medications Supplements			
	SUBJECT: Supp MESSAGE: Please My Inventory	Pharmacy Listings	- Find DX to Assign -		Allergy, Intolerance, Discon			
	REPLY BY: secure Manage Phone Numbers	Radiology Lab Listings	No Diagnoses Found	Documents: Unreviewed	BP: 120/80 WI: 140 Ht: 69.0			
	7-31-16 (LM) OK to requires clinician al Portal Settings	Specialists/Other Listings Non-Rx Allergens			Billing 0			
Jane W. Doe #9 - 34yrs (11/20/1981)	7-31-16 (SKS) OK Change My Password	Diagnostic Codes	Plan Ry Ordens/ Vaccines					
Patient Information		Charge List Discounts	Sup Cranberry/d-Mannose Sup Liver Nutrients					
Health Maintenance / ①		Subscription Plane	Charges / Payments					
		Add New Rx Alternate Plan Items	Cranberry/d-Mannose \$43.70 Liver Nutrients \$19.95					
Admin Notes 💿 🖊		Group/Corport Accounts	@ BALANCE: \$63.65					
Social/Family Notes • /		Health Maintenance Trackers	Save & Sign Edit					
Facilities/Specialists		Taga Managa Lab Fields	Upload NP3 and add to dictation queue					
Problem List 📀 🖊			Attach Document or Image					
Relationships 🕒			Last Saved 07/31/16 by Laura Montgomery AutoDraft Last Saved: 07/31/16 08:46:37					
			Let admine know that note is ready for them to handle					
			Follow up in 6 - weeks					

You can go into the Alternate Plan Items menu.

Pull it up, and you would edit here. I'm going to put it back to blank, since I'm not sure about this one.



Okay, now the rest is the same as the other ones. I need to put my line that it is ready to go. Save that. Now, I'll send it to Billing to be charged and ordered, and wait for the task to come back.



Once the task comes back that it has been charged and ordered, click to open the chart. Click to open the encounter. Here you're going to see it was charged and ordered except Liver Nutrients is on backorder.

We're going to follow the same type of procedure. Put the line. Put my message to the patient. Copy the supplements. Remove the price.



	Message for Any Provider from Jane Doe (07/31/16 08:02)	Assessment Diagnosis	Open Orders	Medications Supplements
	SUBJECT: Supp MESSAGE: Please order me more cranberry and liver nutrients. Thank you!	- Find DX to Assign -		Allergy, Intolerance, Discon
	REPLY BY: socure message. 7-31-16 (LM) OK to order per plan box? Please advise if Cranberryld-Mannose	No Diagnoses Found	Documents: Unreviewed	BP: 120/80 Wt: 140 Ht: 69.0
	requires clinician approval or not.			Billing 0
Jane W. Doe	7-31-16 (SKS) OK to order, does not require approval.	Plan Rx/ Orders/ Vaccines		
#9 - 34yrs (11/20/1981)	7-31-16 (LM) Ready to order per charge box.	Sup Cranberry/d-Mannose		
nt Information 🛛 🥜 🖊	7-31-16 (SM) Charged per charge box. Liver Nutrients is on back-order.	Sup Liver Nutrients		
h Maintenance 🛛 🖊 🕚	Hi Jane, The following has been ordered per your request and should arrive in 2-7 business	Charges / Payments		
	days:	Cranberry/d-Mannose \$43.70		
In Notes 🛛 🔨 🖊	Cranberry/d-Mannose	Liver Nutrients \$19.95 Credit / Payment (+) -\$43.70		
al/Family Notes 🔹 🖊	The Liver Nutrients is on vendor backorder and will auto-ship once available. You will be charged for it at that time.	@ BALANCE: \$19.95		
itles/Specialists 🗀	Please refer to the My Supplements section in your Patient Portal for dosage instructions unless otherwise noted by your clinician in your Encounter History. If you need help organizing your supplement schedule, please let us know and we can	Save & Sign Exit		
lem List 🔹 🧹	provide you with a supplement tracking spreadsheet.	Upload MP3 and add to dictation queue		
	Have a good day,	Atlach Document or Image		
ionships 🗘	Laura	Last Saved 07/31/16 by Laura Montgomery AutoDraft Last Saved: 07/31/16 08:52:14		
		Let admins know that note is ready for them to handle		
		Follow up in 6 💿 weeks 🔯		
	11			

There is no cold ship, but I do need to make a note about the Liver Nutrients, so instead of listing them here that they will arrive in two to seven days, I have a separate message here to let her know they are on backorder. They'll automatically ship to her when they are ready again, and that's when they will be charged. Save and Sign.

Send her a notice. Make it custom. Remove all the messages except her order confirmation.

Billing has a separate way that they track all the backordered supplements, so I'm okay to complete the encounter and to mark the task as complete.