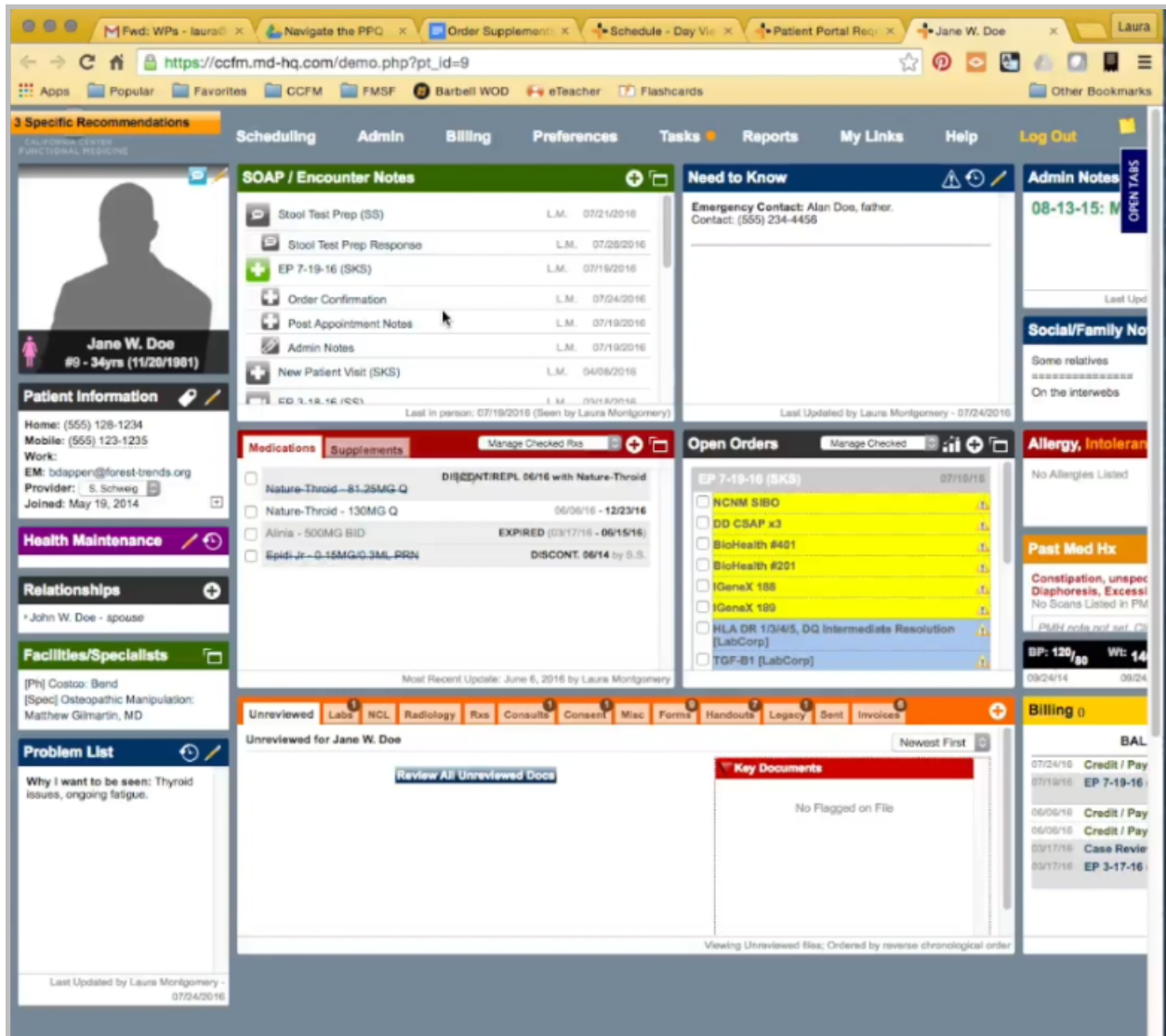# Back-end Systems: Using the EHR: Part Three - Ordering Supplements

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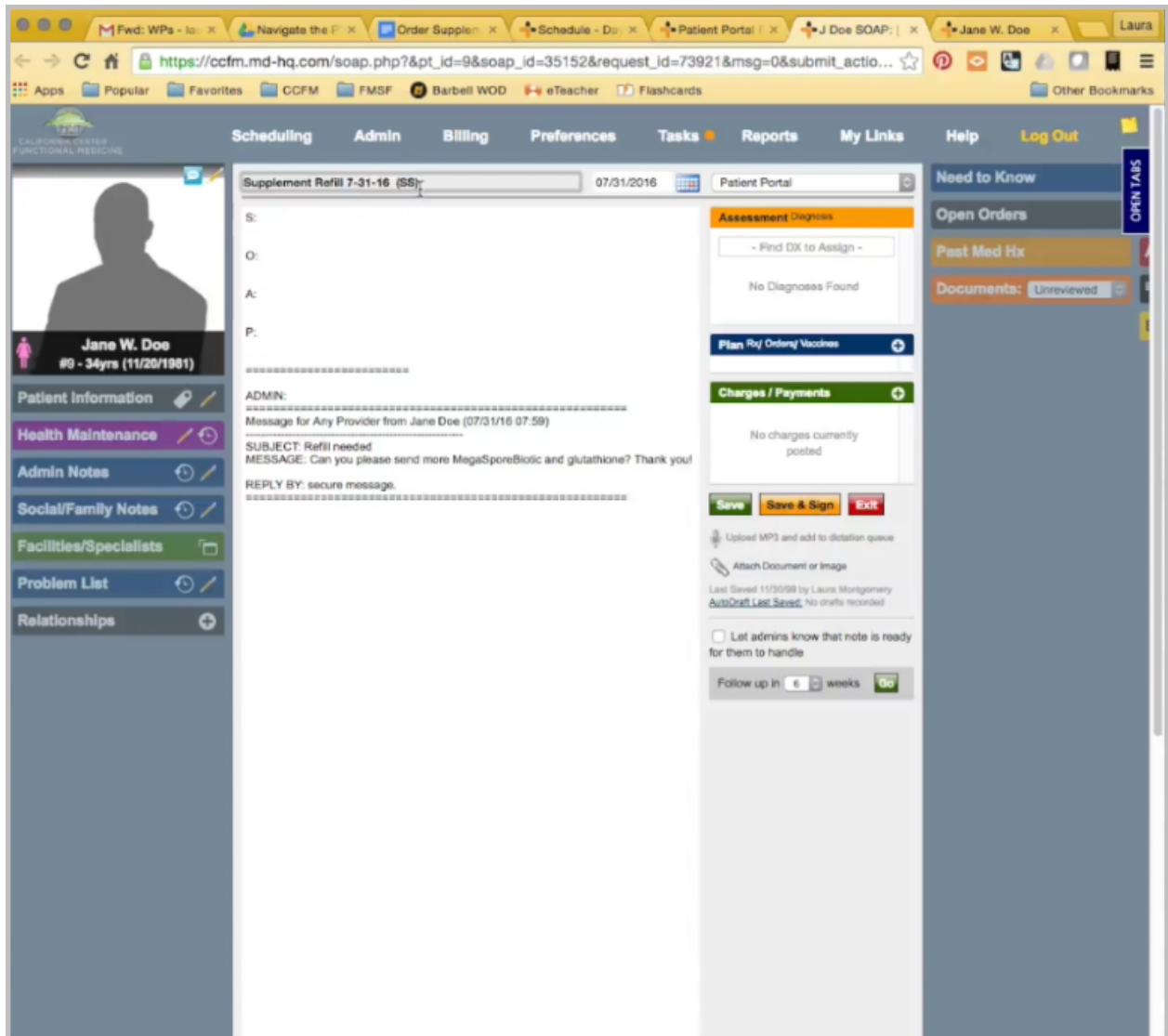
Now, from the portal, I'll start a note. Supplement refill, today's date, and the clinician of record initials. It's a supplement refill, and I delete everything above message.

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.
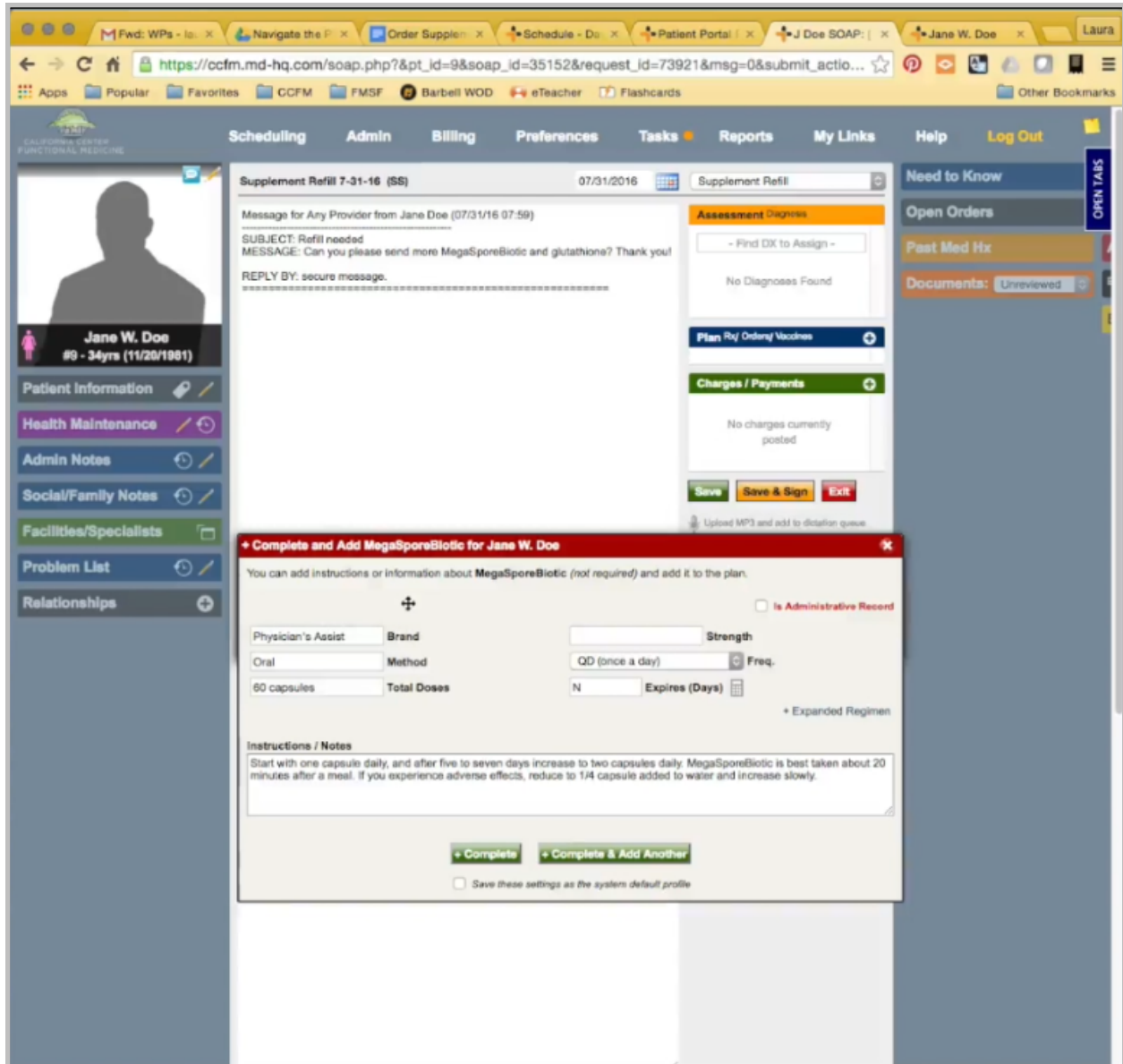
Okay, back to the chart. In the Plan Box, I want to add supplement. Type it in. Here, I want to check two things. First, I look at the dosing instructions to make sure they match. The dosing instructions when I add to the Plan Box here will always pull from the default system profile that is set up for 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.
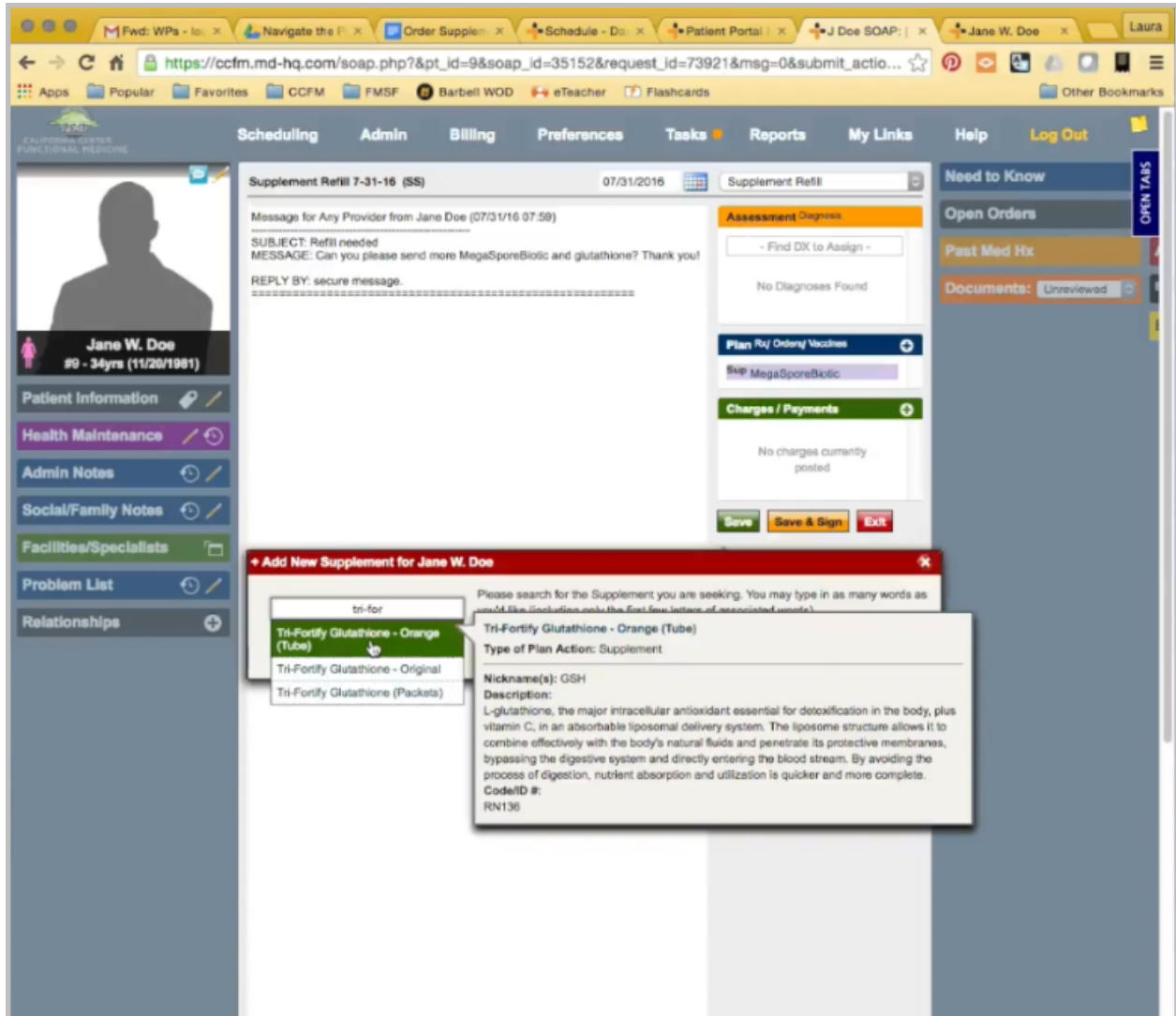

Here, I can do Complete and add another. Next, she is asking for glutathione. There are many glutathiones in our system, so when I come here, I'm just going to check and see which one I find. Here's a Tri-Fortify, and that is the only one. If the patient had two glutathiones, I would need to check with 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.
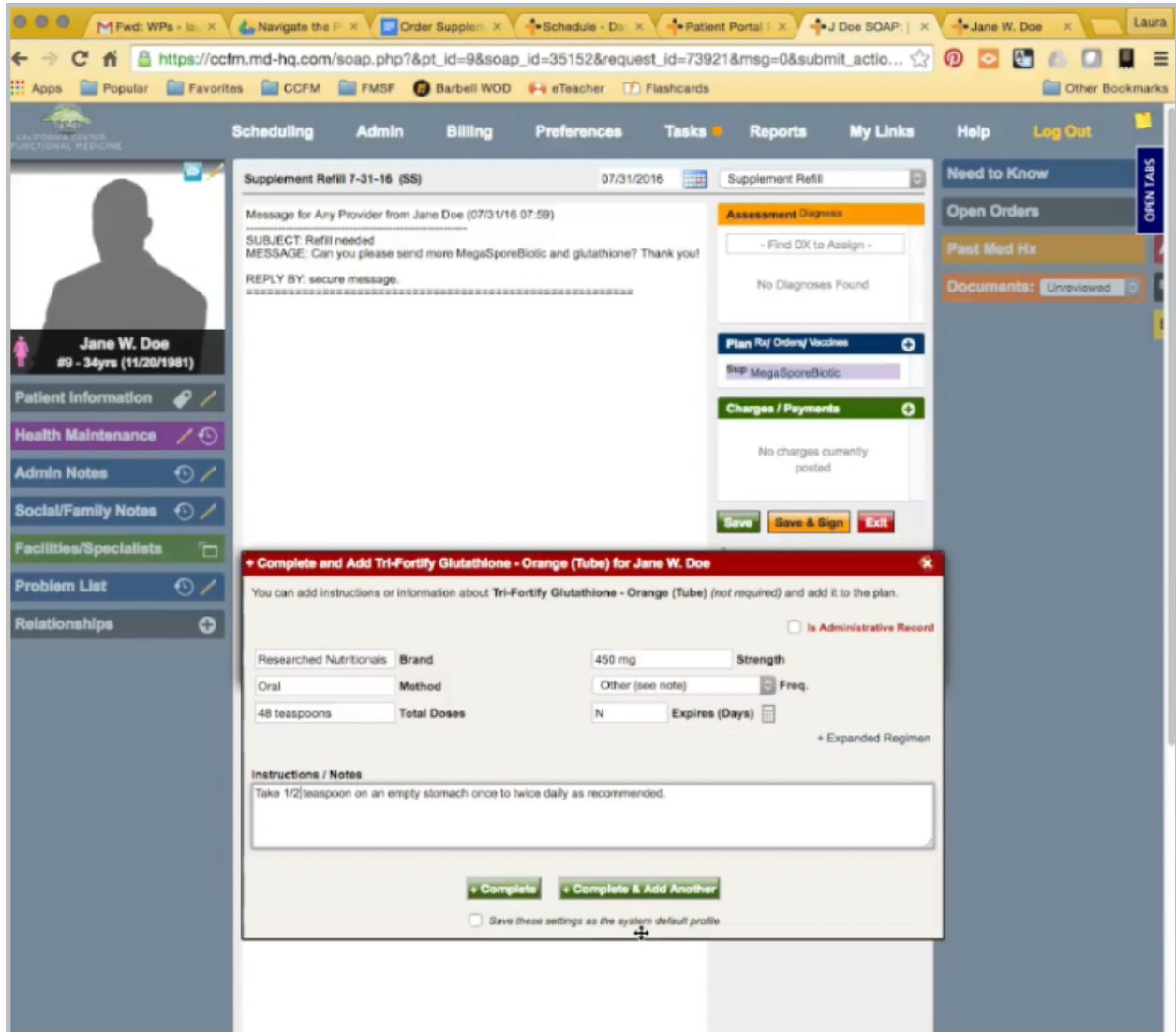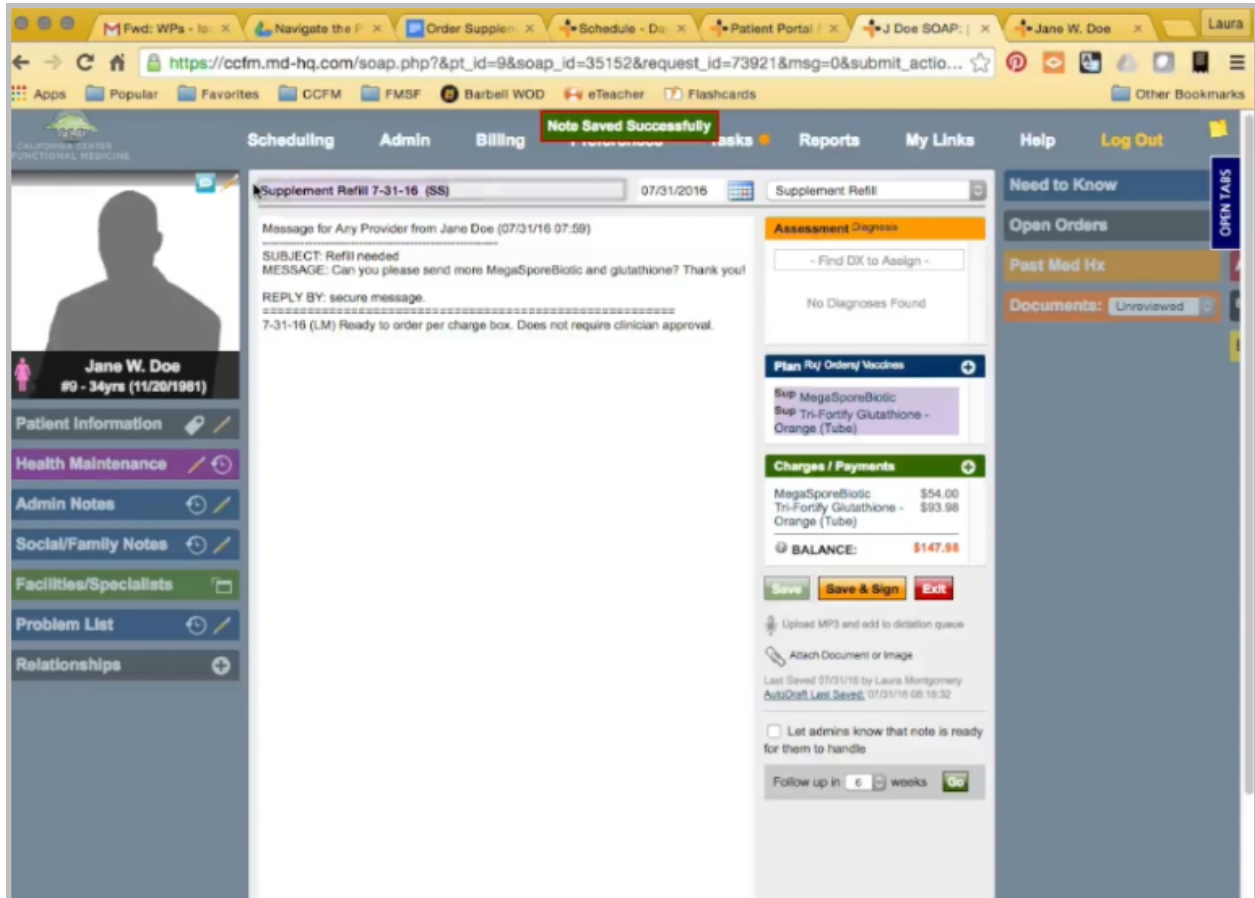
I just want to be careful not to checkmark this box here. If I checkmark the box, the system default profile is changed for everyone in the system, and I don't want to do that. I only want to change her instructions.

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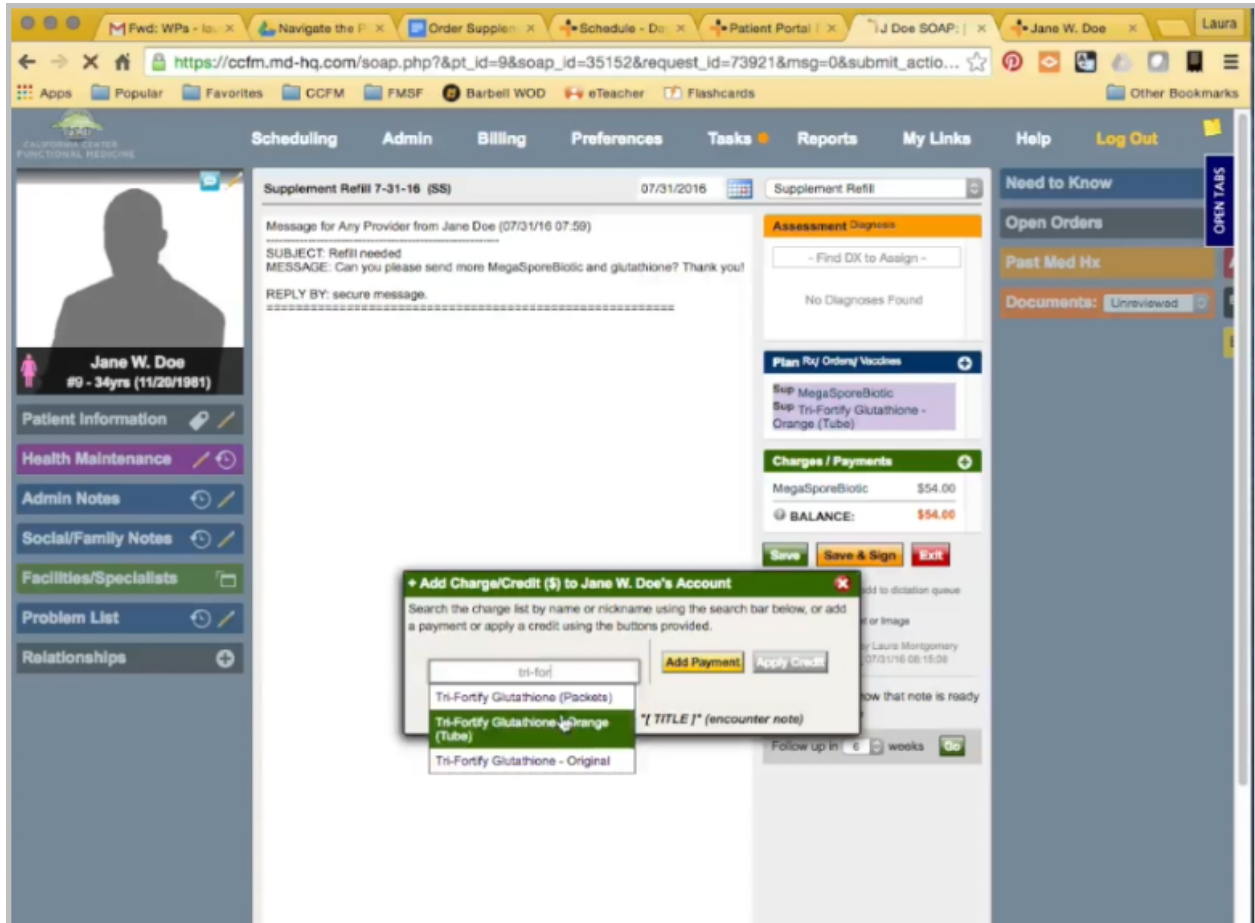
Then, I want to add to the Charge Box. The supplements added here, the name should match exactly to the Plan Box name. You can always change the quantity if the patient is requesting more than one. That's it.

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.
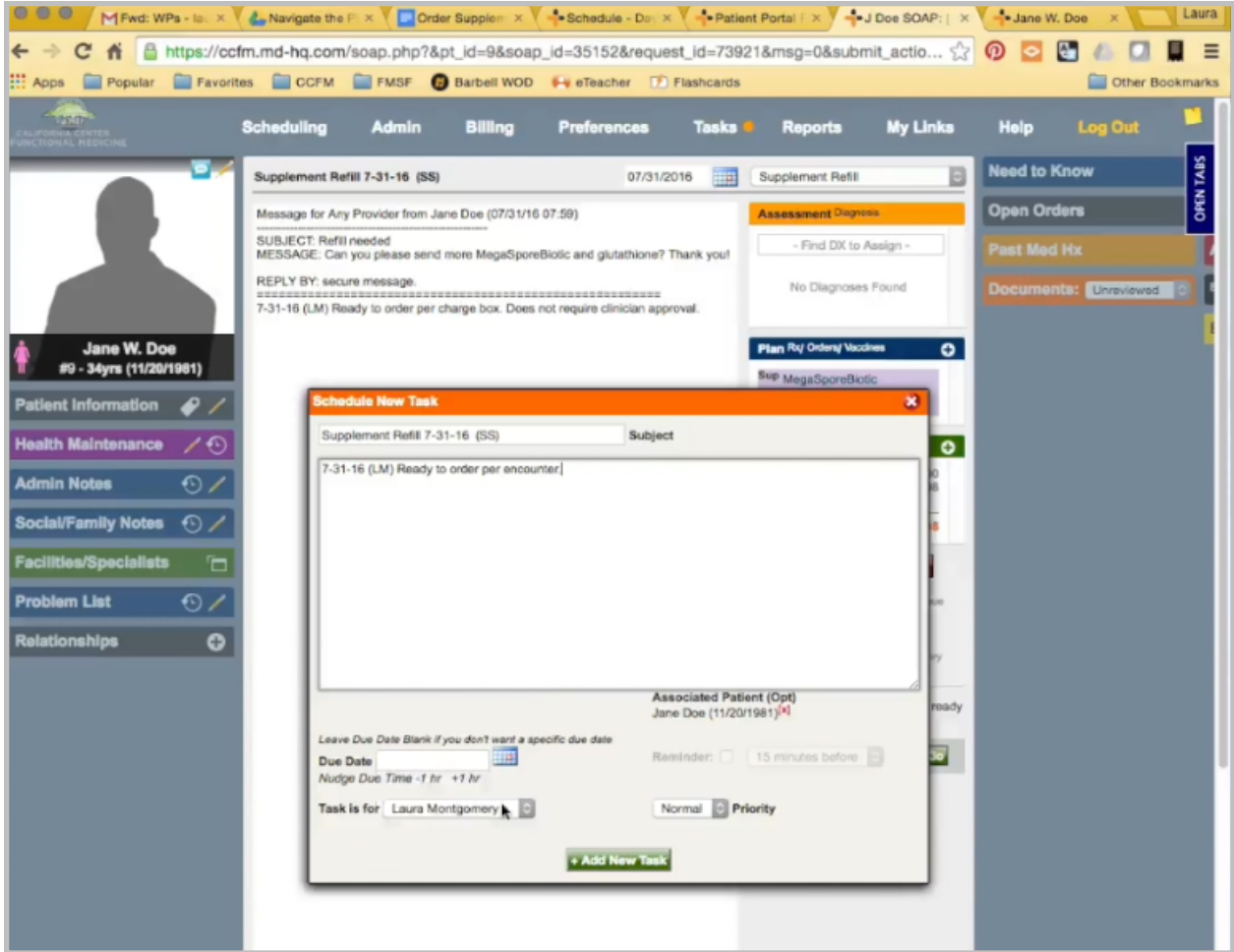
You need to create a task for this. With my stamp, ready to order per encounter, and send it on to be charged.
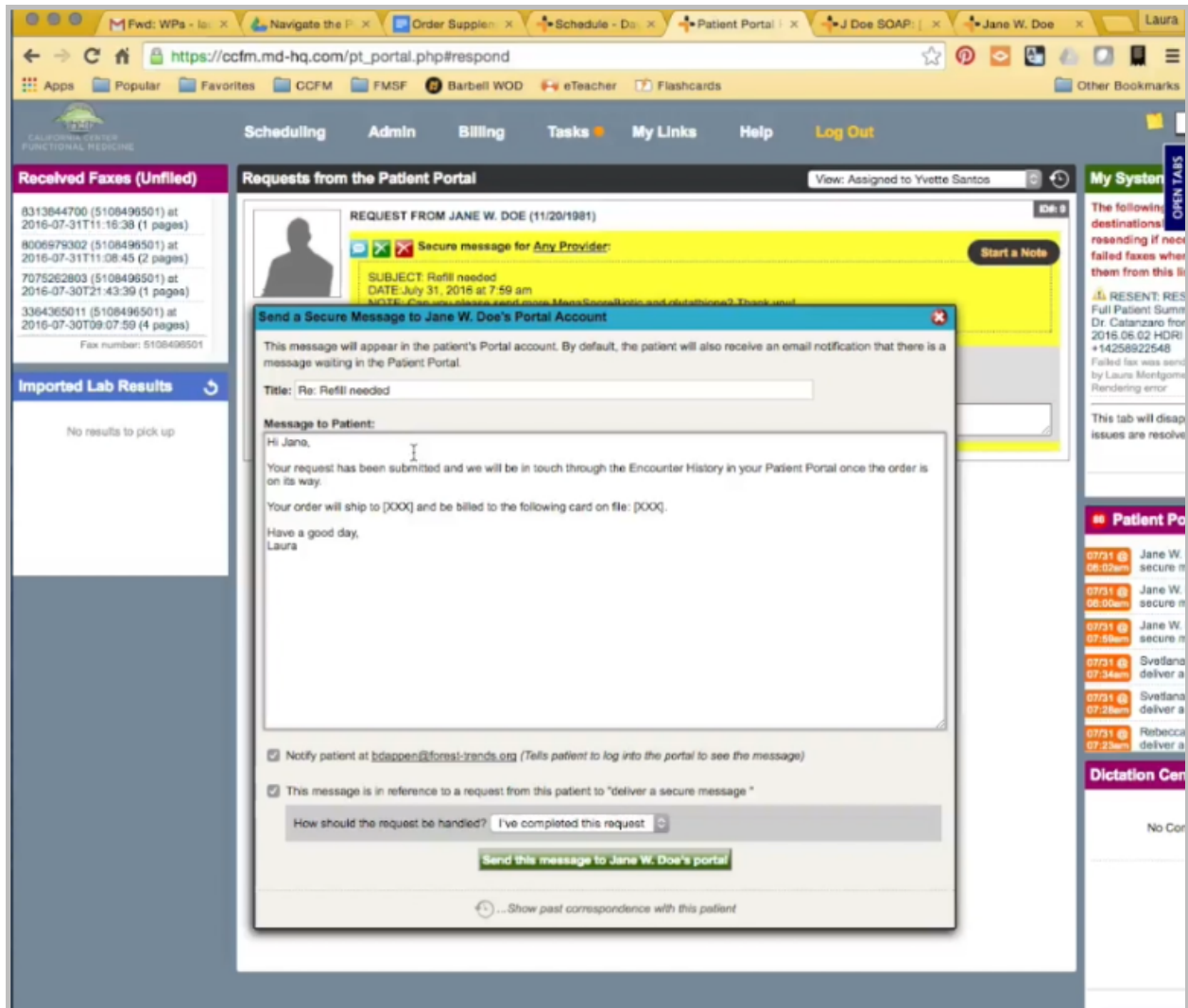
Now, from the patient's chart, I'm going to copy just the street name, not their full address. Go back to her message in the portal, and let her know that we received her request. Once everything has been ordered, she will get a message in her encounter history.

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.
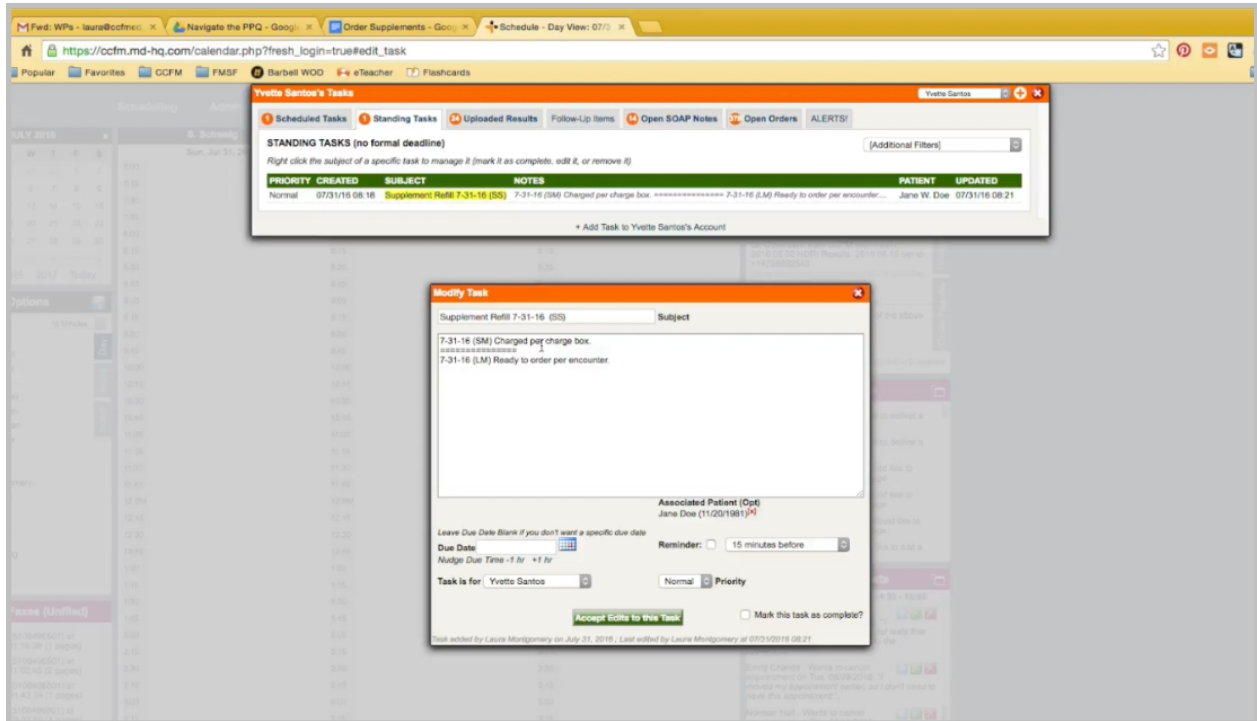
Once admin staff gets the task back from Billing, it will indicate that everything was charged and ordered. Click on the patient's name to open the chart, and click to open the encounter.

Just verify there were no other notes here. Everything was ordered.
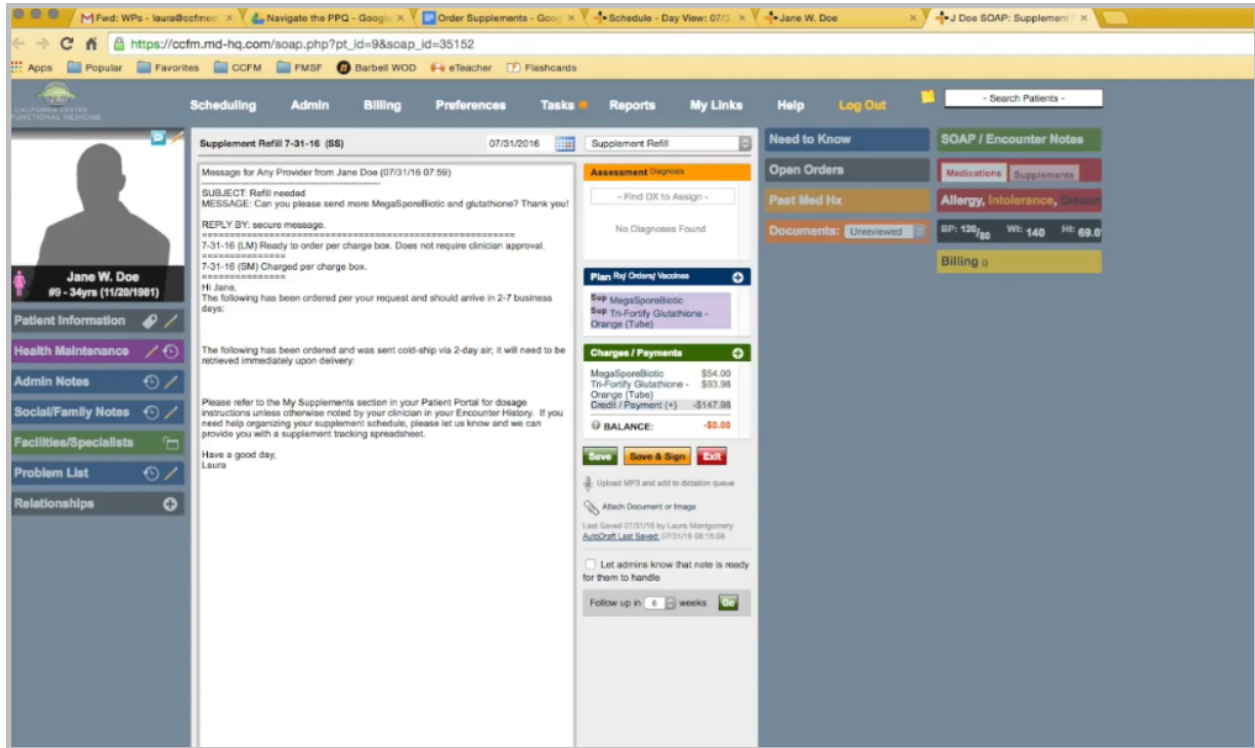
I'm going to draw a line, and I'm just going to write a message here confirming to the patient. I'll copy what was ordered, paste that here, and remove the prices.

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.
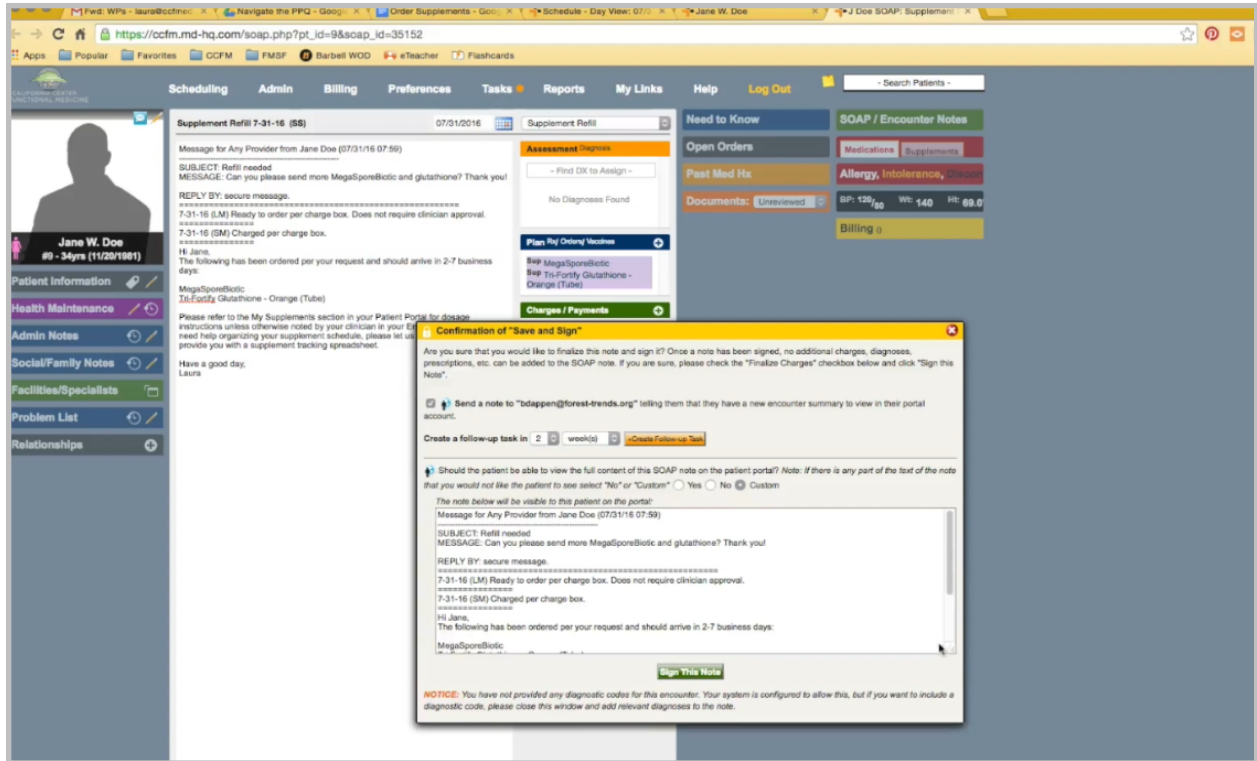
Here, I basically want to remove her notes and all the admin notes so that what she will see is only the confirmation message here. Sign the note.
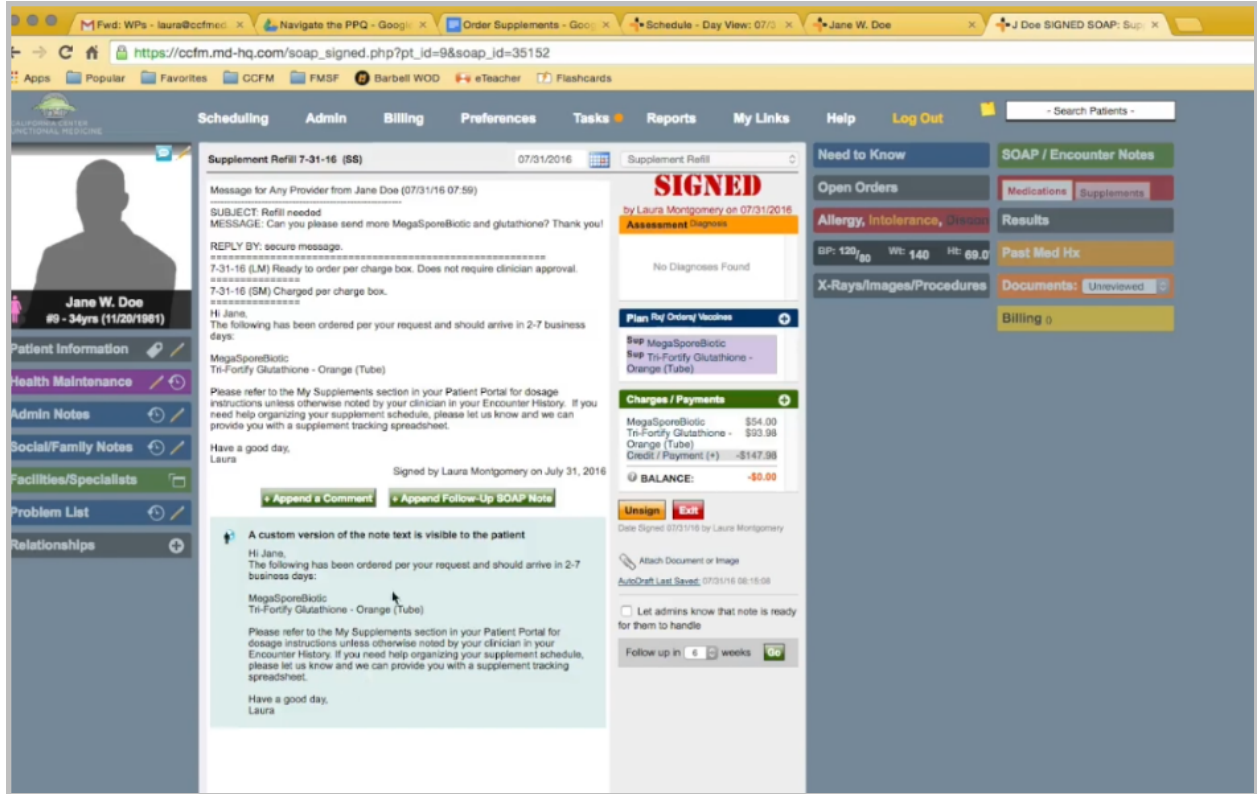
You'll see here, this is the only part of the note that she will see when she goes to her encounter history. I can close the chart and mark the task as complete.
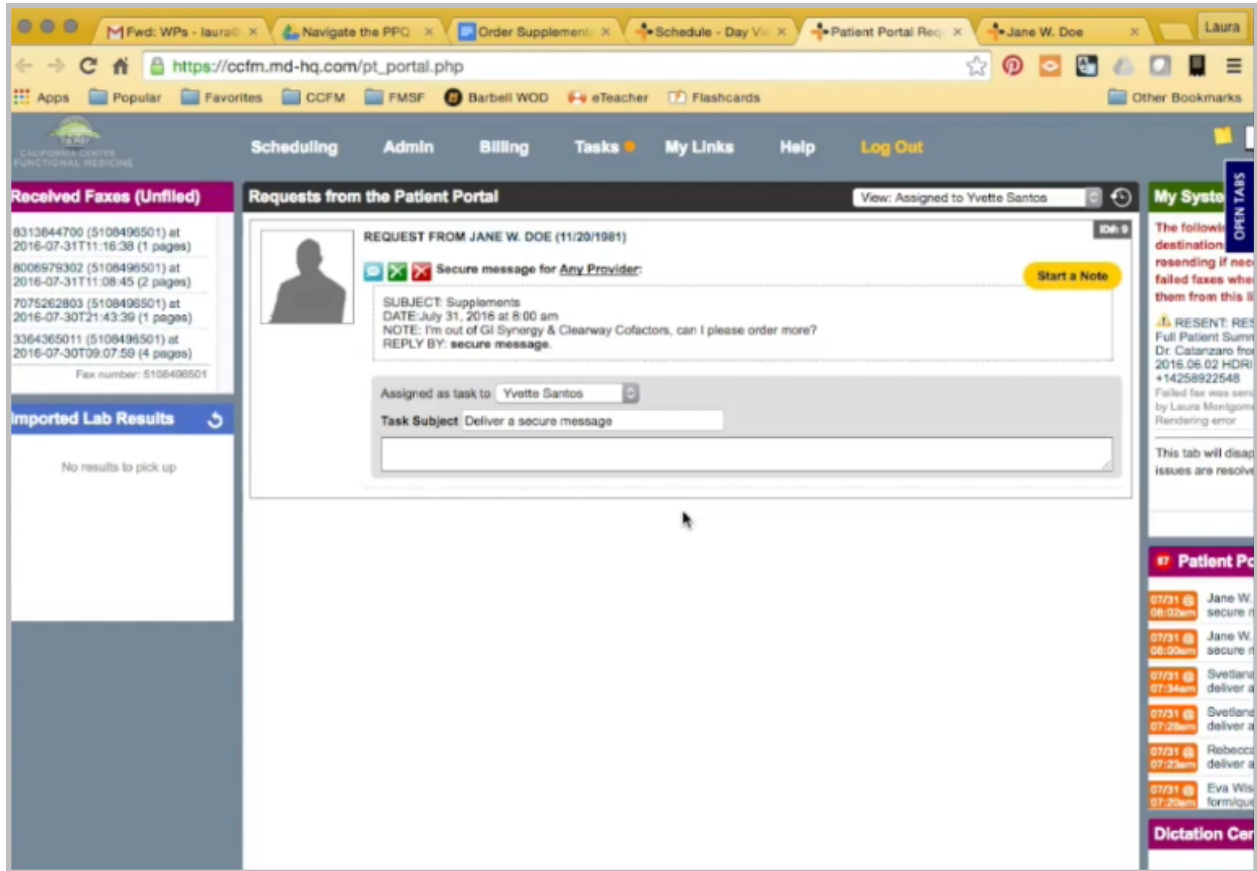
In our next example, we'll look at ordering supplements that do require clinician approval. First, I want to click to open the pati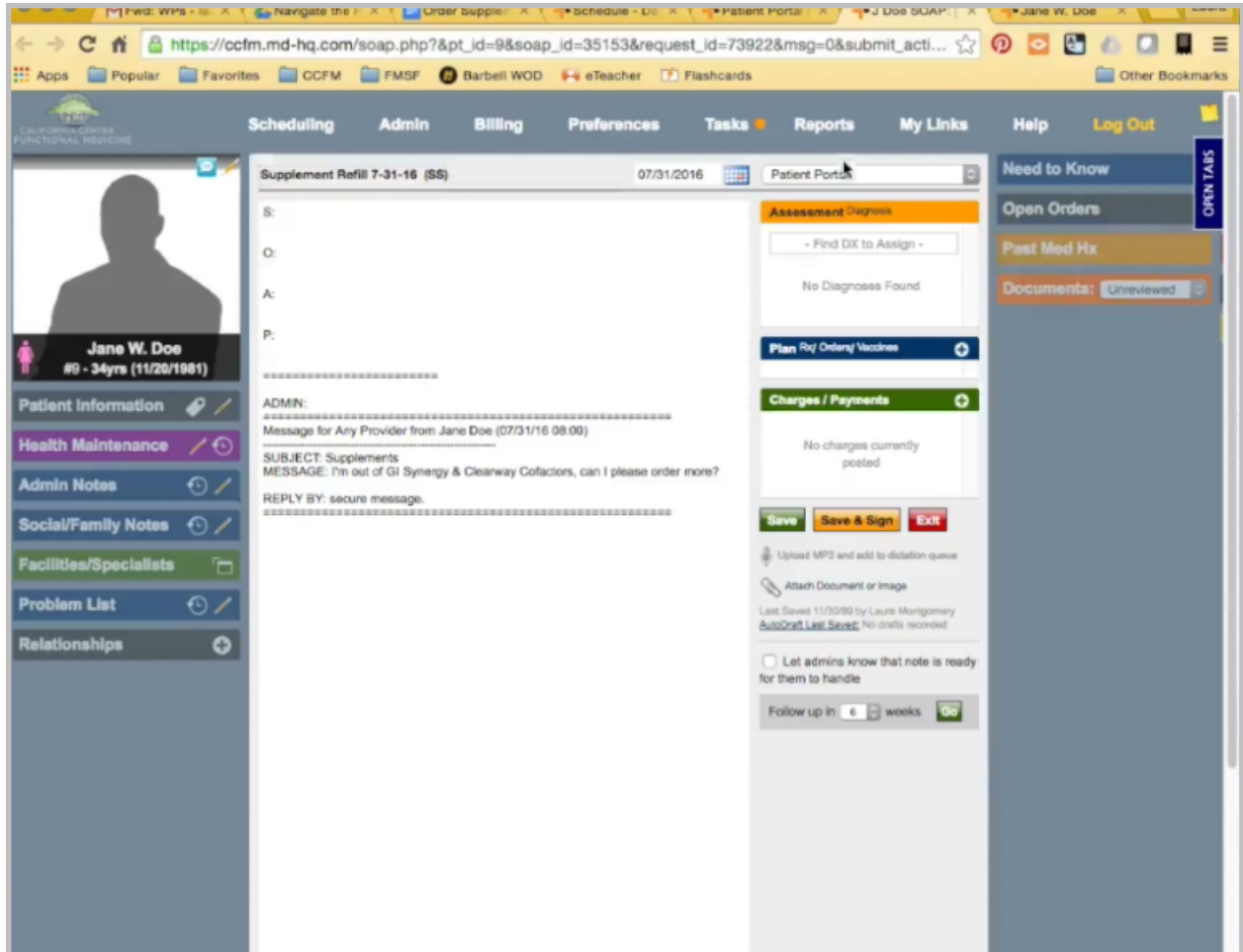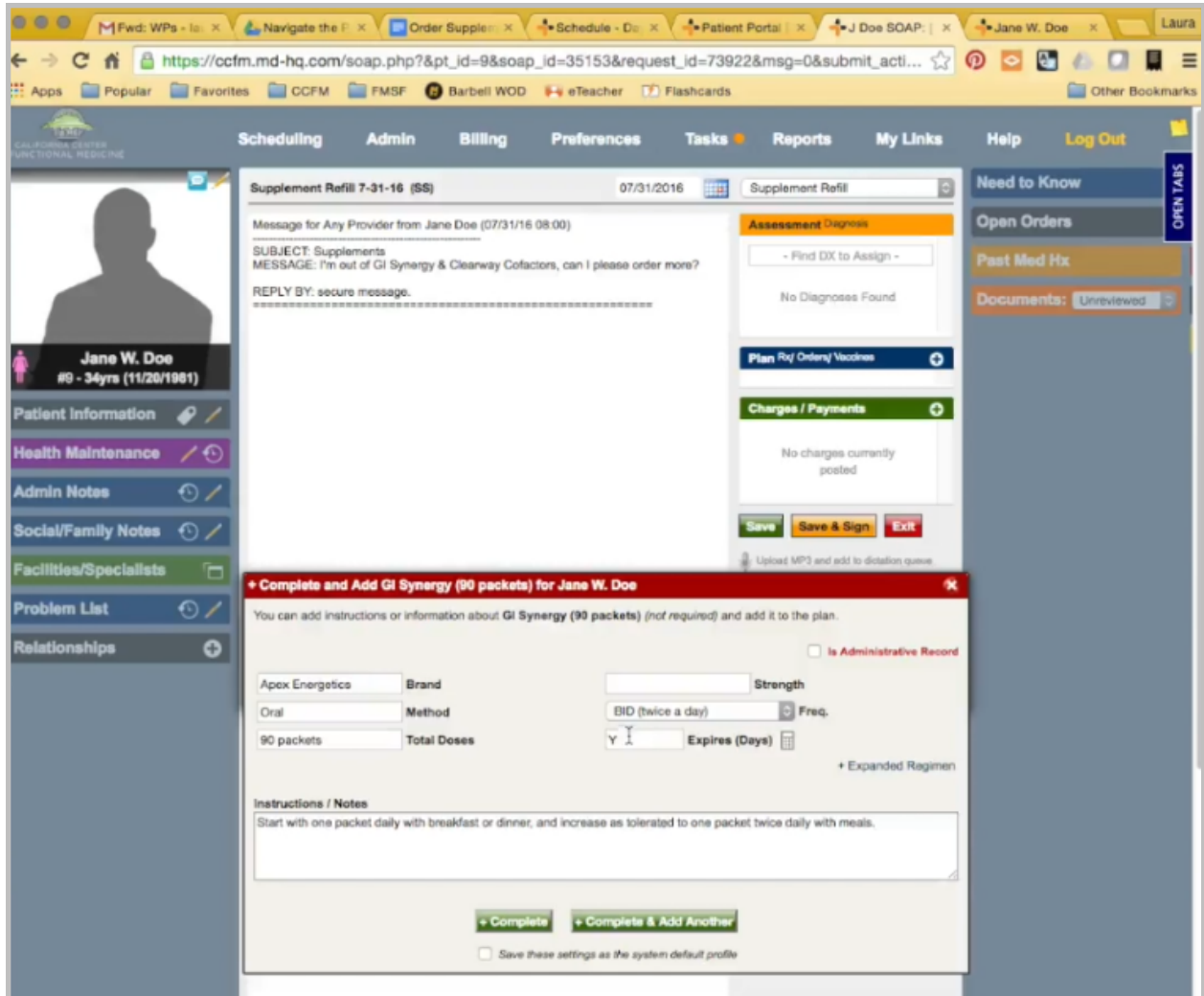ent's chart, do all my checks. There are no open encounters that have supplements that haven't been ordered. Credit card on file has not expired.

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.

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.
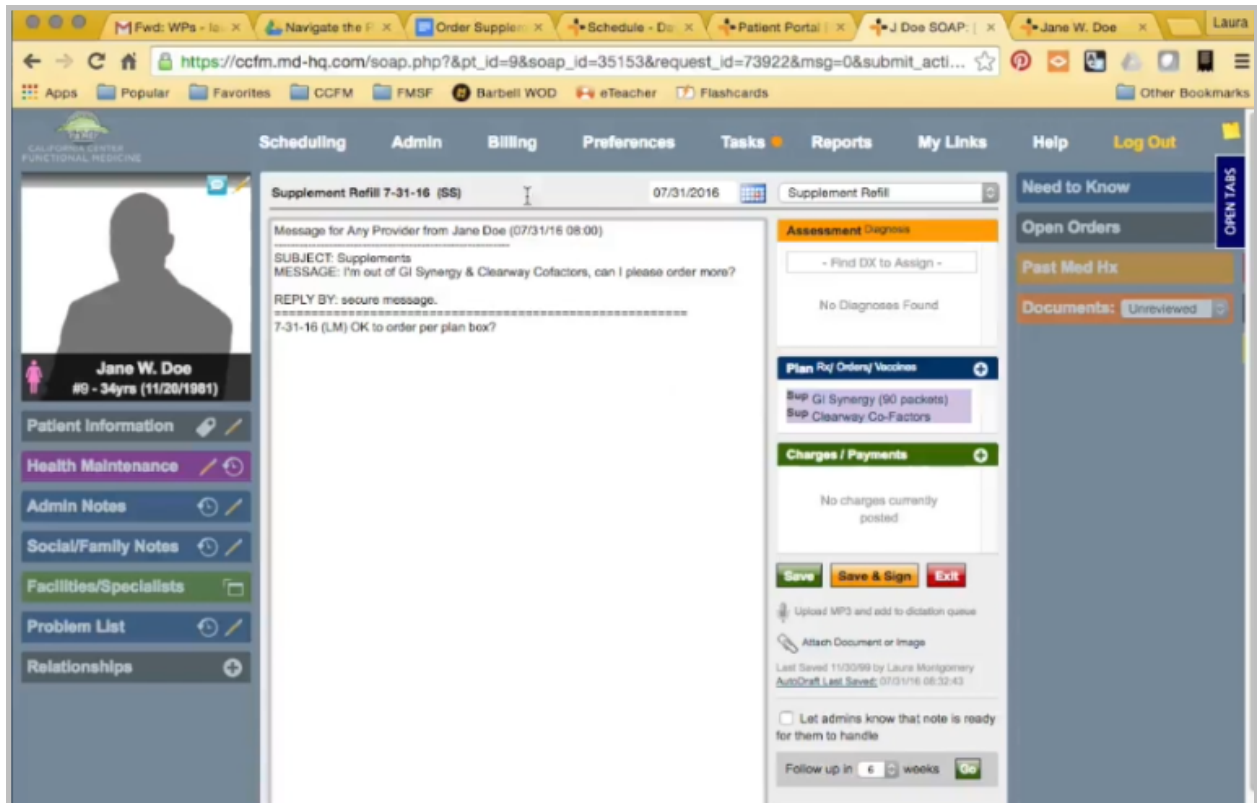
Because we have this one that requires approval, we need to send it to a clinician. This time, I'm going to put a message here if it is okay to order. I won't add any charges yet in case the clinician doesn't want the patient to continue.
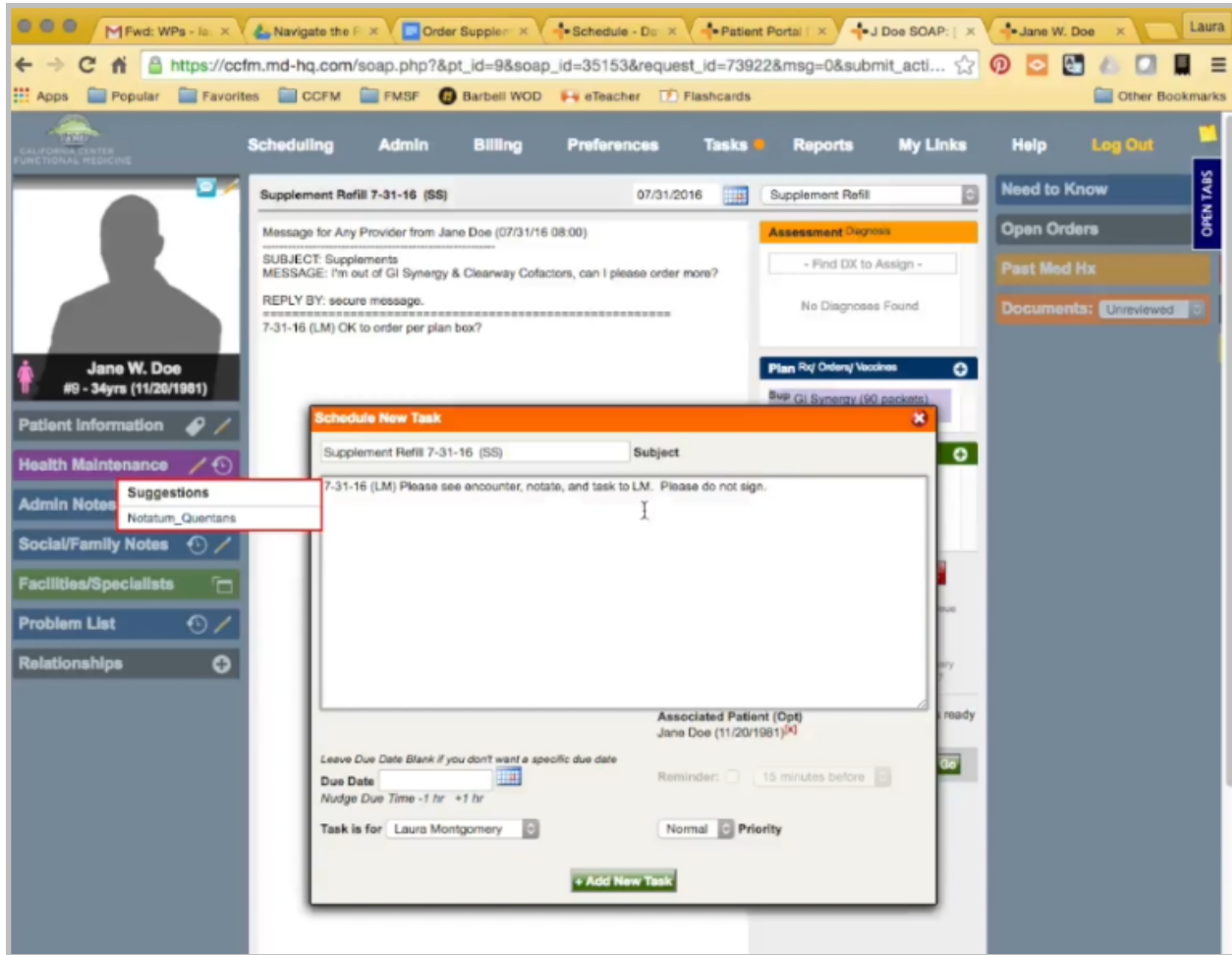
I need to copy the title and add a task. Then, I'm going to send it to the clinician asking them to review the encounter, notate, and task back to me but do not sign. Save. Close the encounter.
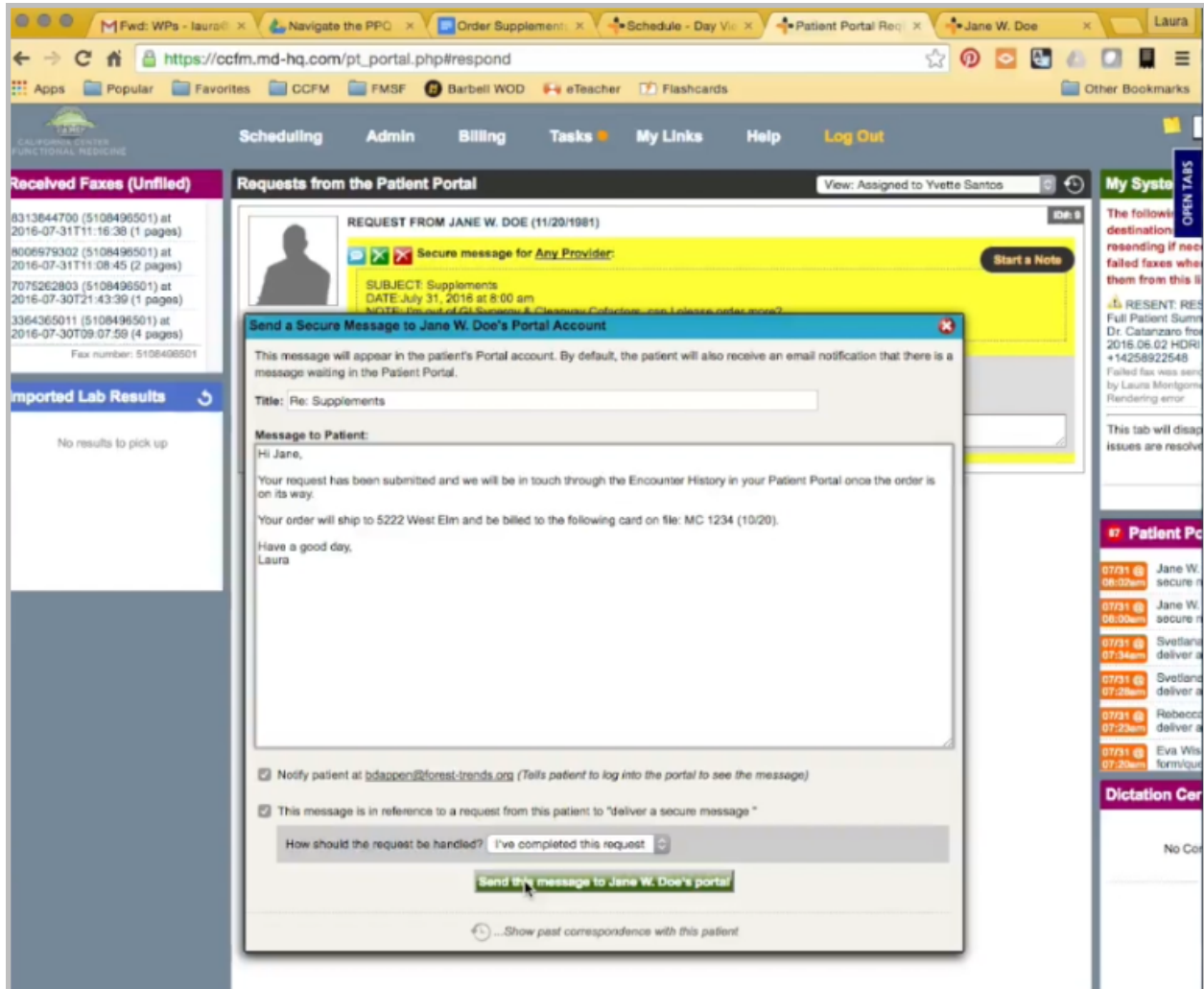
The next step is the same. I'm going to come back to the portal. Let her know the same message. I don't need to tell her that we have to wait on clinician approval. Copy her address and her credit card information, and that's it.

Once admin staff receives the task back from the clinician, click to open the chart. Go to the encounter. Refills have been approved.
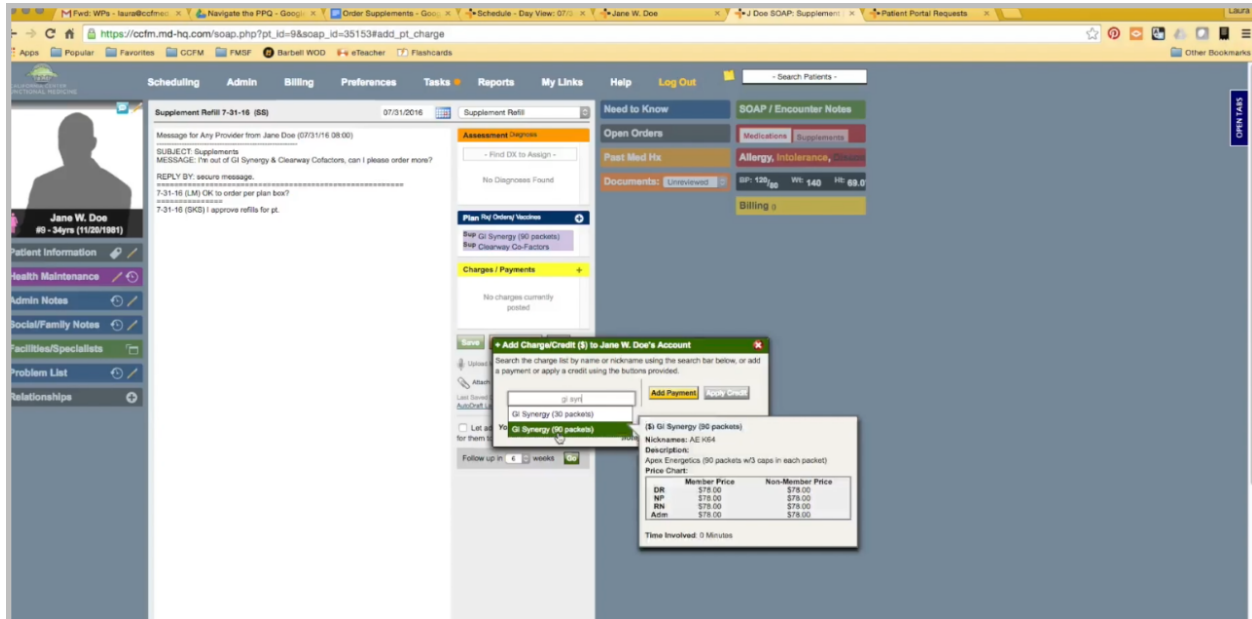
Now, I want to add the charges. Again, the name should match exactly how it is in the Plan Box, and I can change the quantity here.

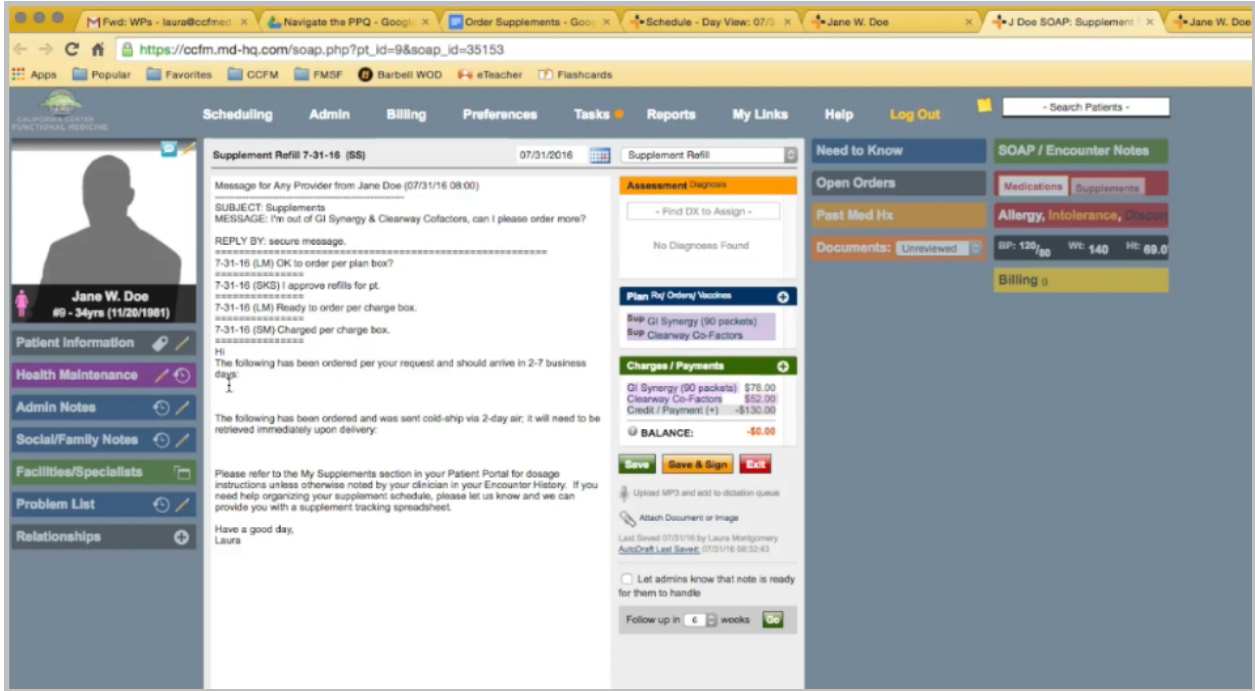From here, the steps are going to be the same. I'll send a note on that it is ready to be billed. Send it to Billing, and wait for it to come back.

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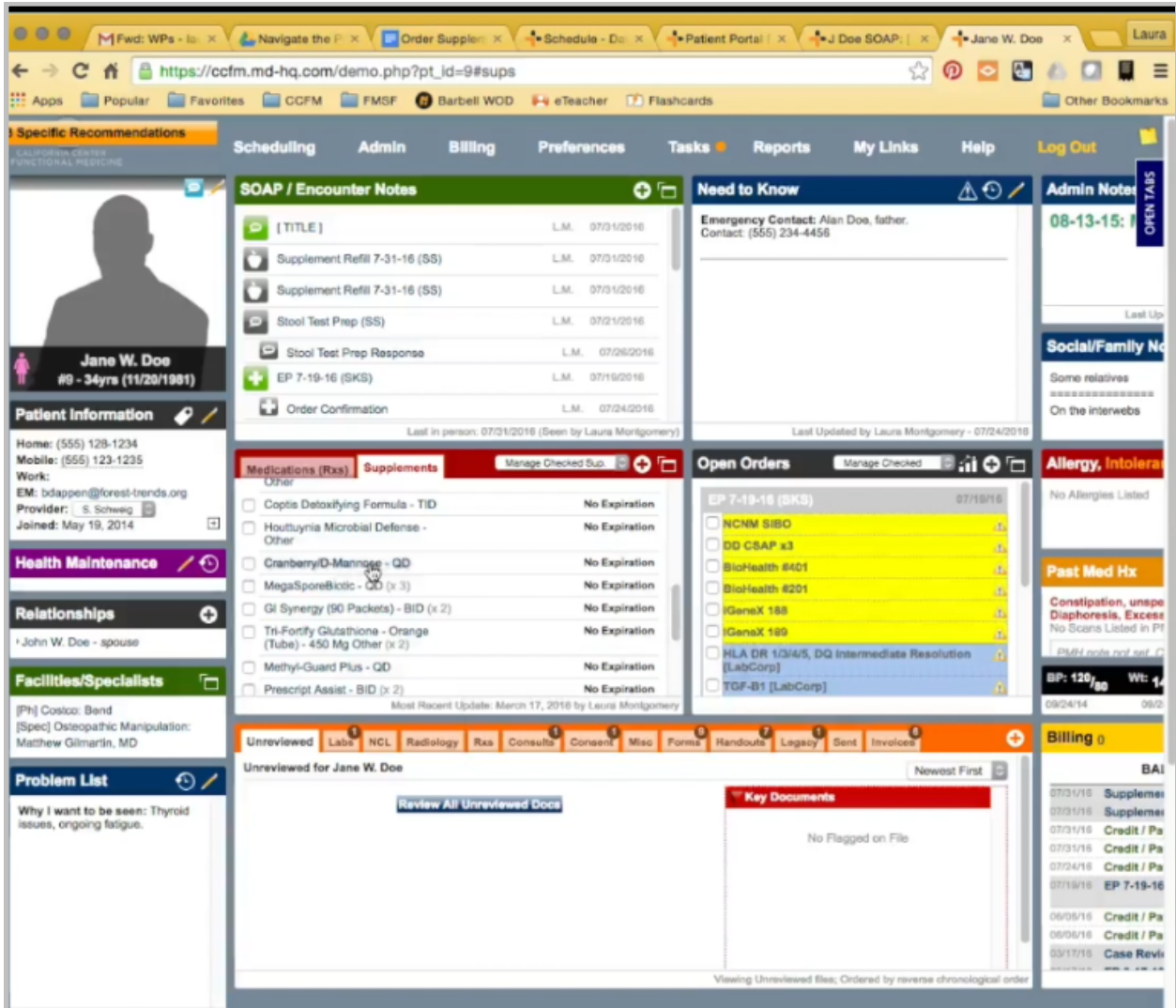
Highlight what was ordered.
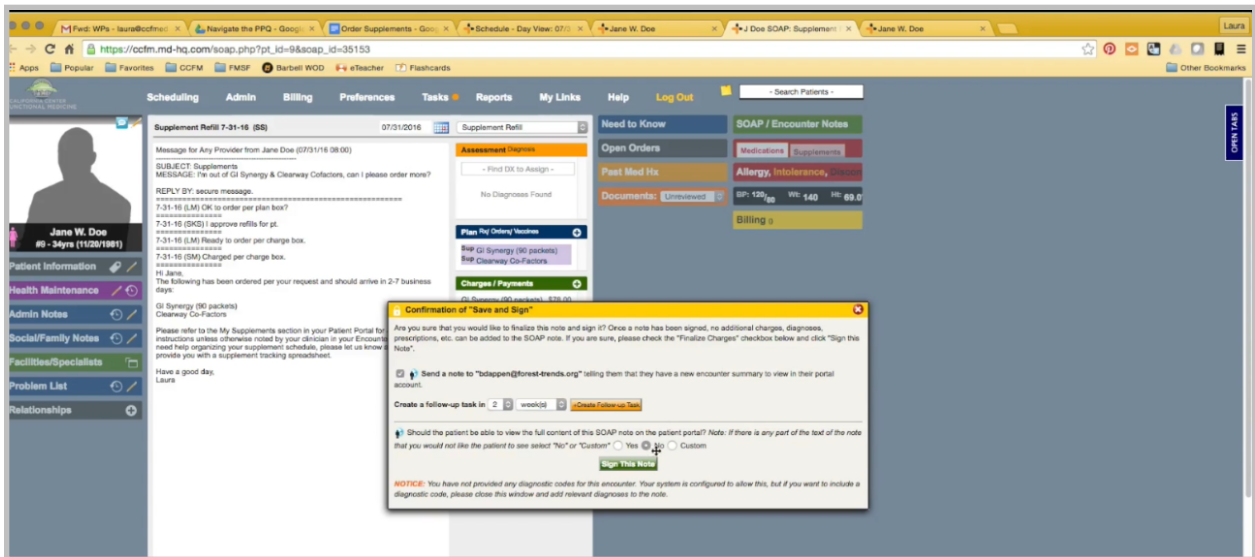
Save and Sign. Yes, send her notification. It is a custom message because, again, I want to get rid of all the messages except the actual order confirmation. I can close her chart and mark the task as complete.

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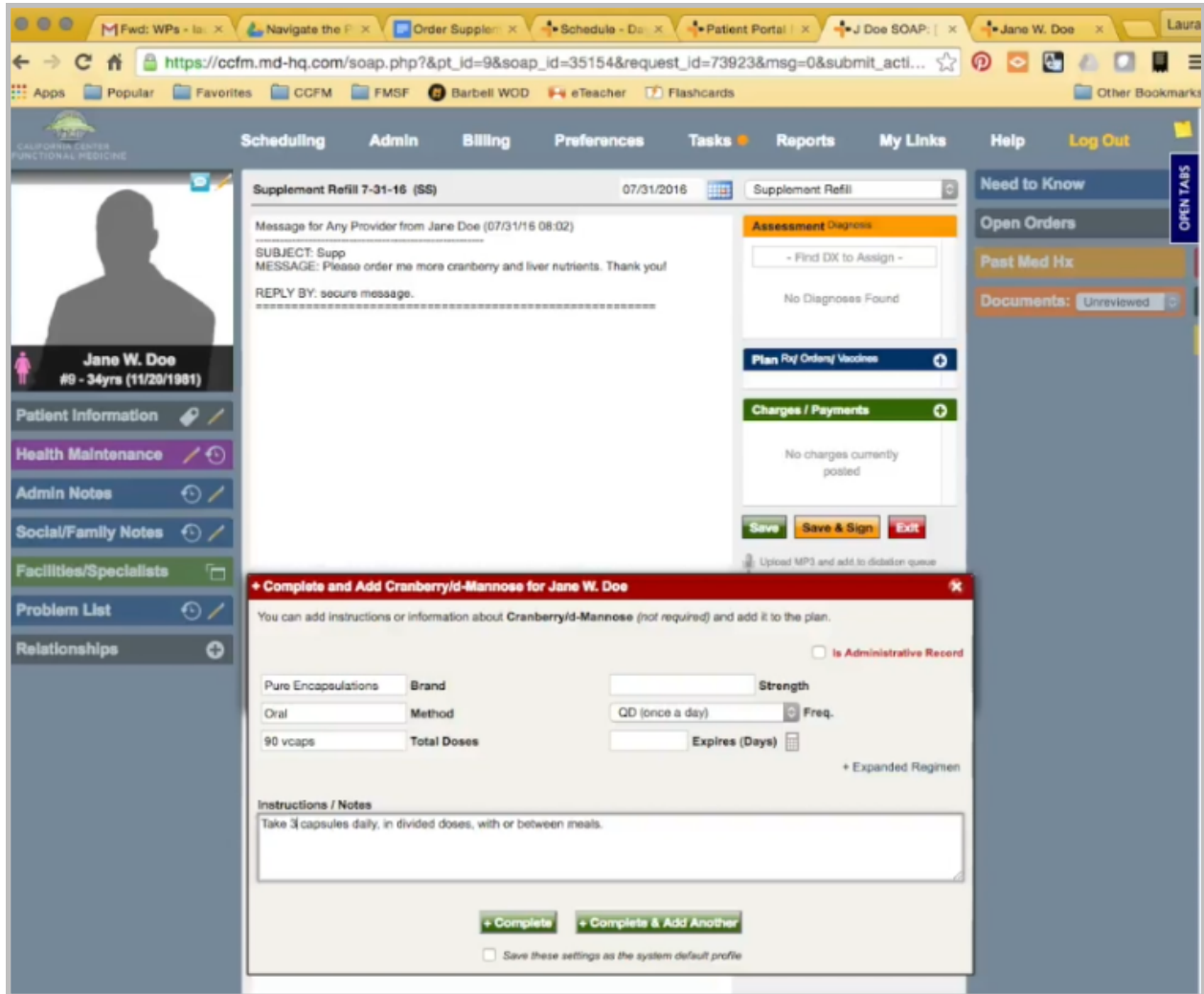
Start a note. Put my title and make it a supplement refill. Delete all of this.

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

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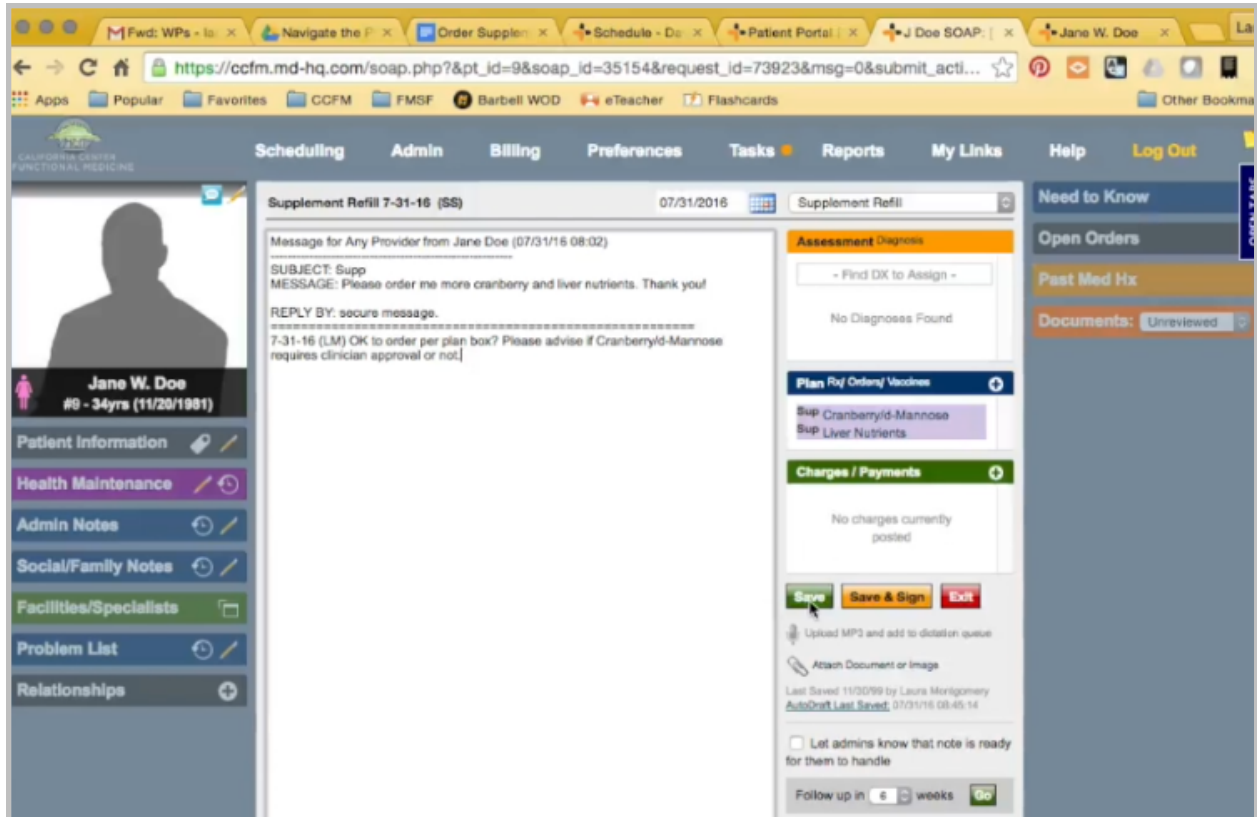
In this case, I do need to check with the clinician, but I also want to know if this supplement requires approval in the future or not. Save.

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.
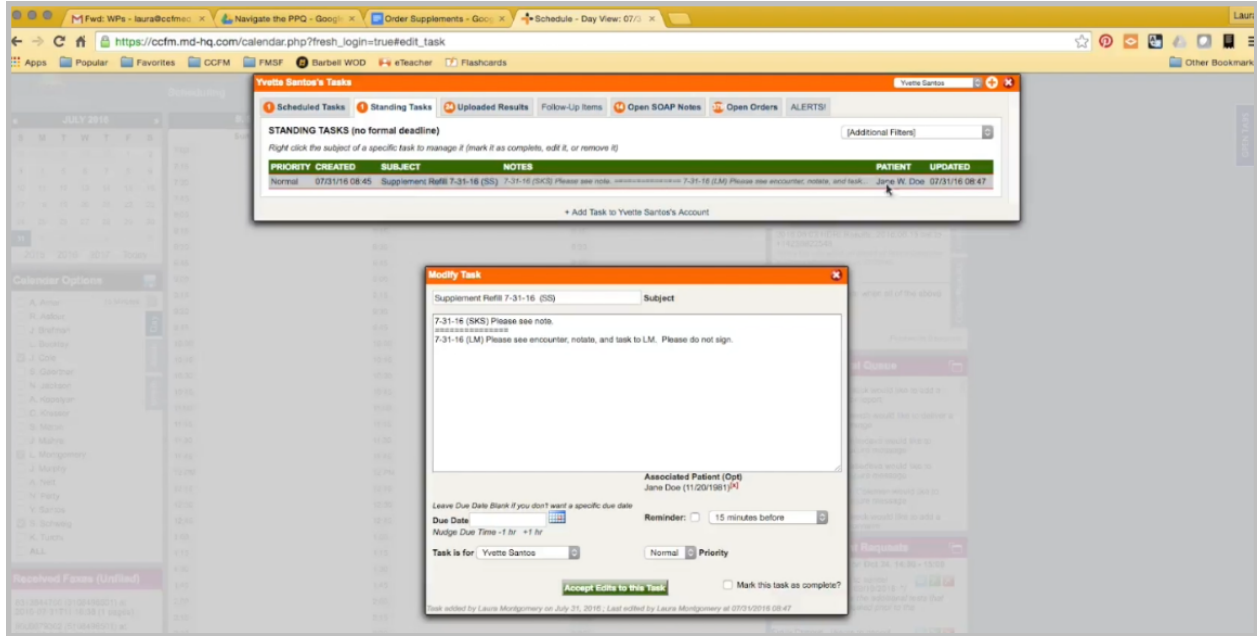
Once the task comes back from the clinician, click to open the chart. Click to open the encounter. This is okay to order, and it does not require approval.
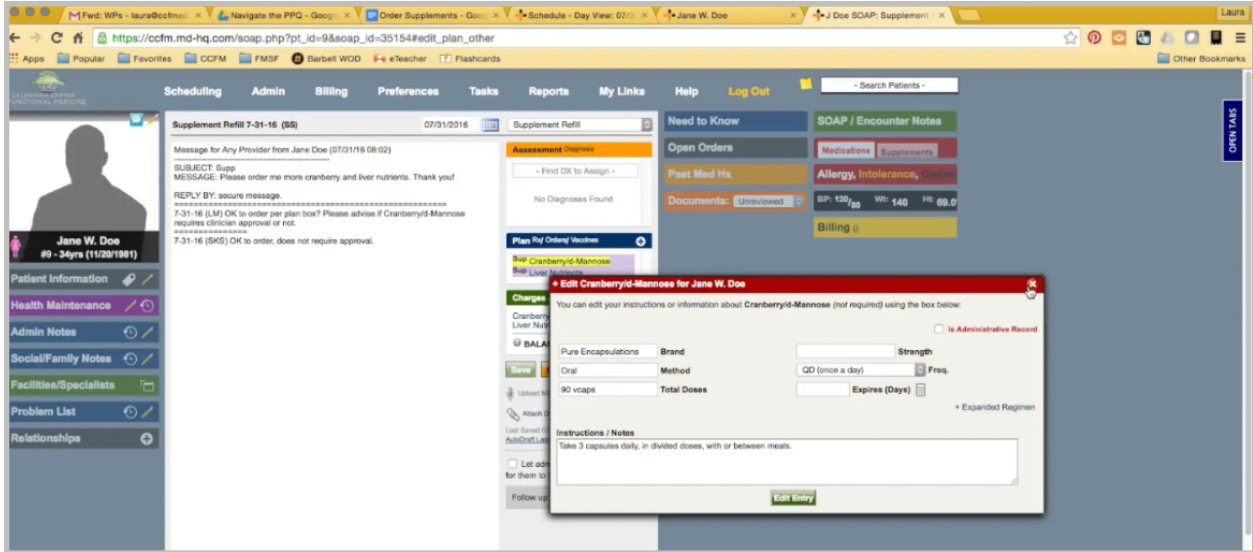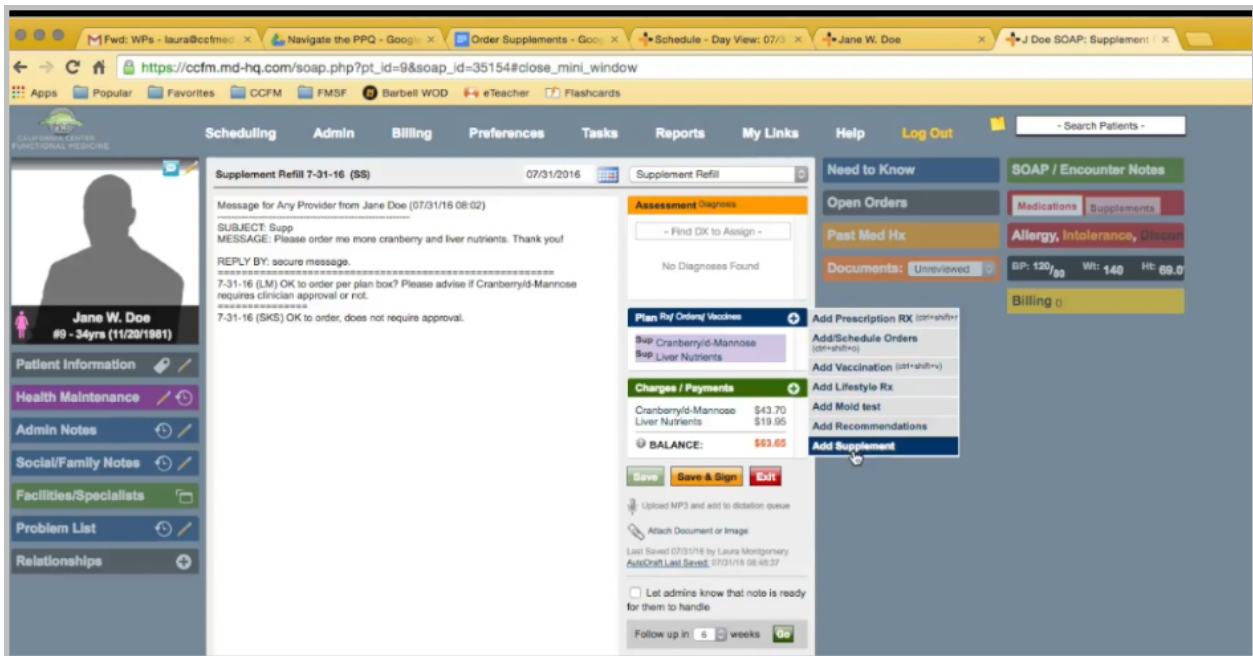
I'm going to put this in the Charge Box. Again, the name needs to match exactly, and I can change the quantity here if the patient wanted more than one.

Now, we need to update the system so that everyone knows in the future this does not require approval.
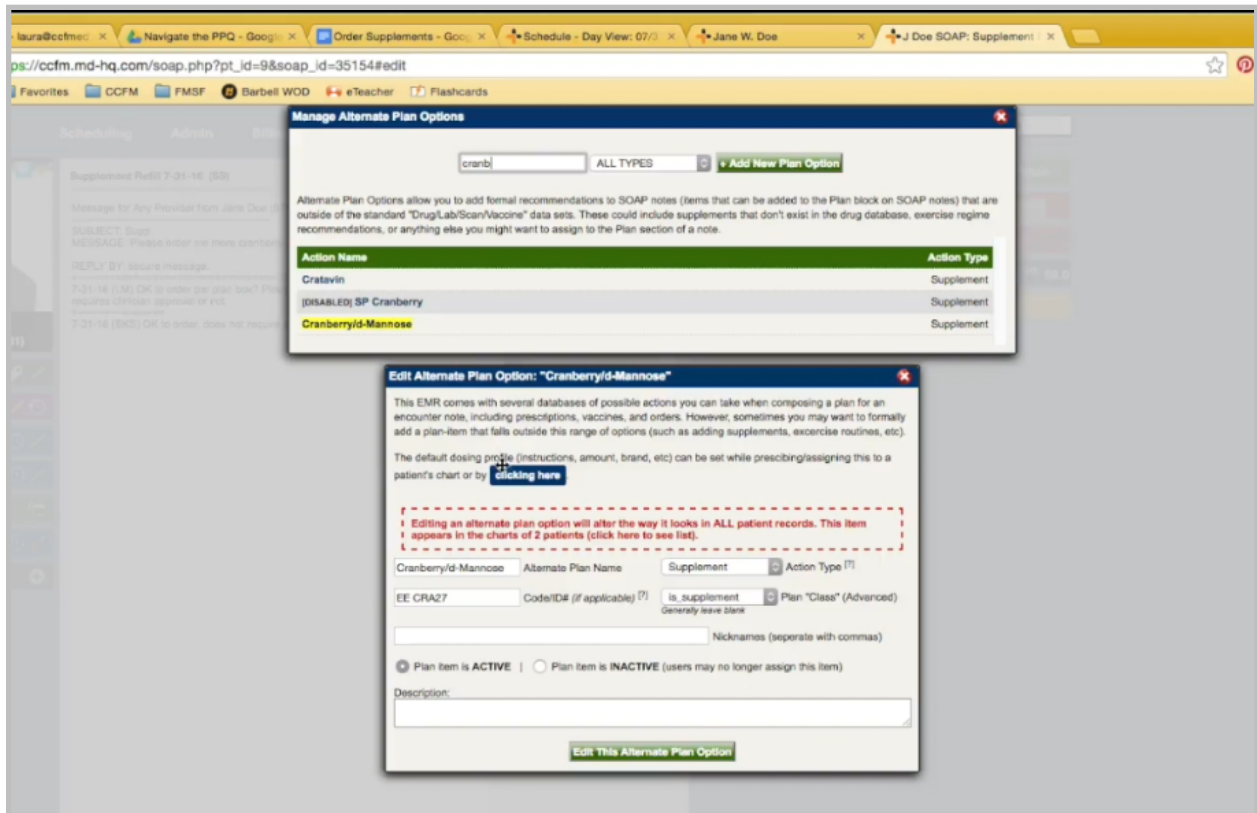
Because we already changed the dosage here from the default profile, we cannot do it in this Plan Box as is.

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.
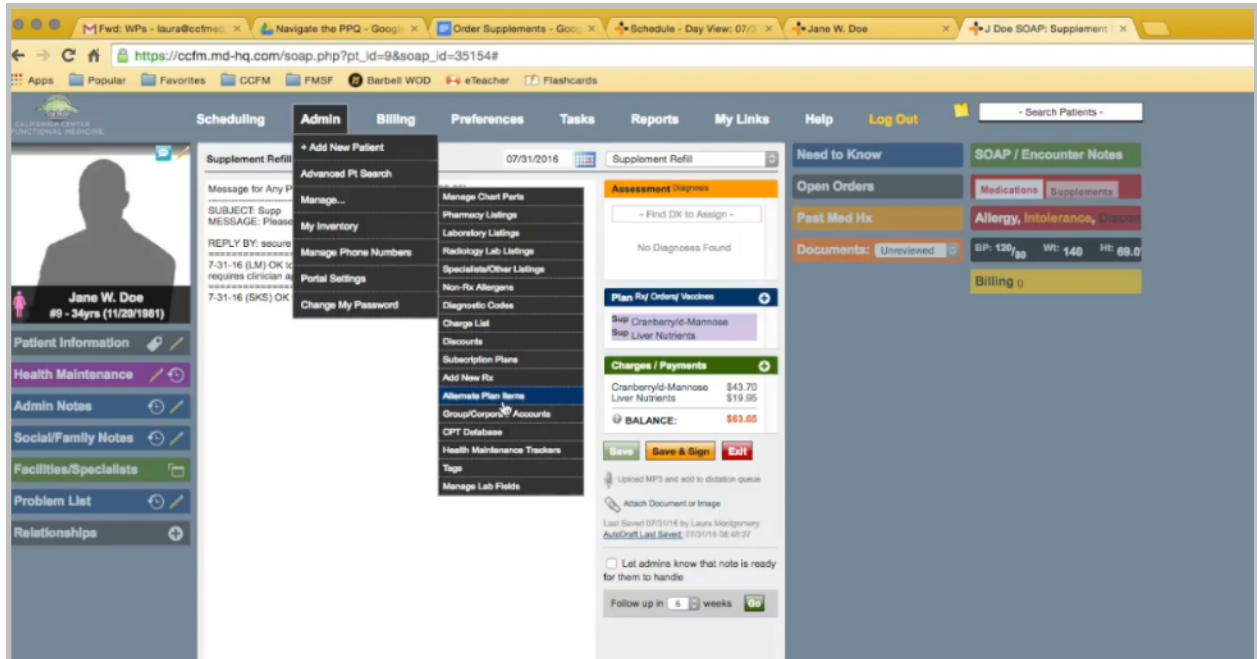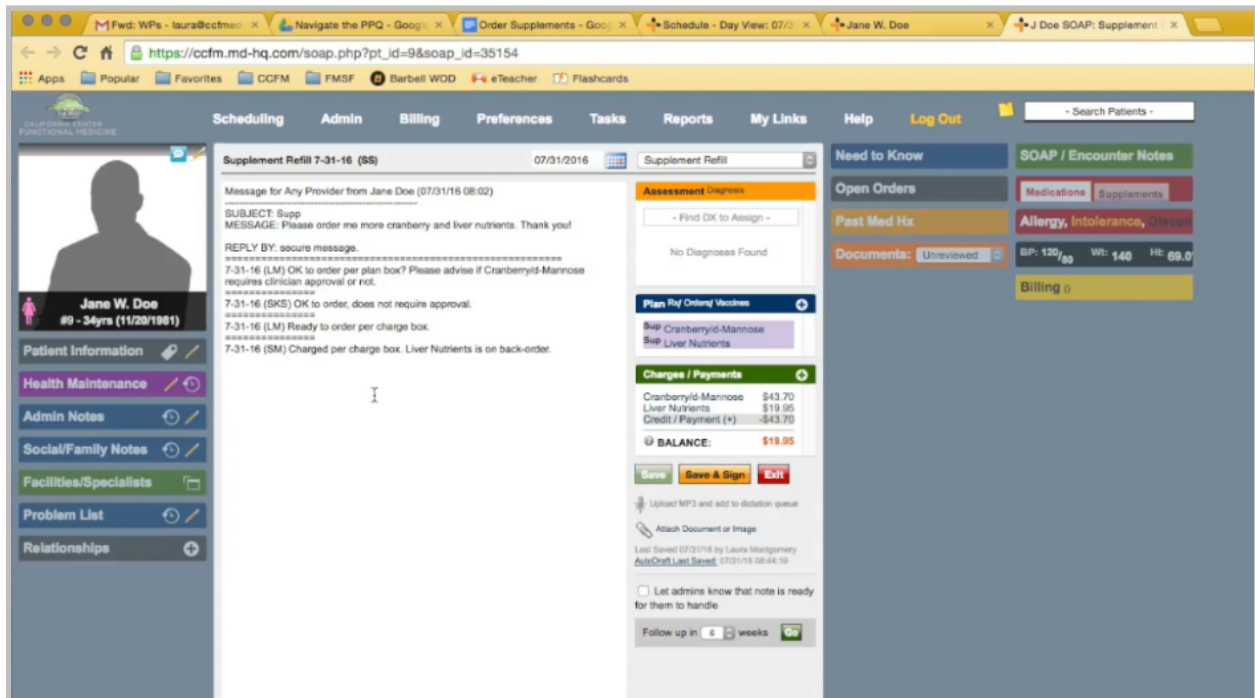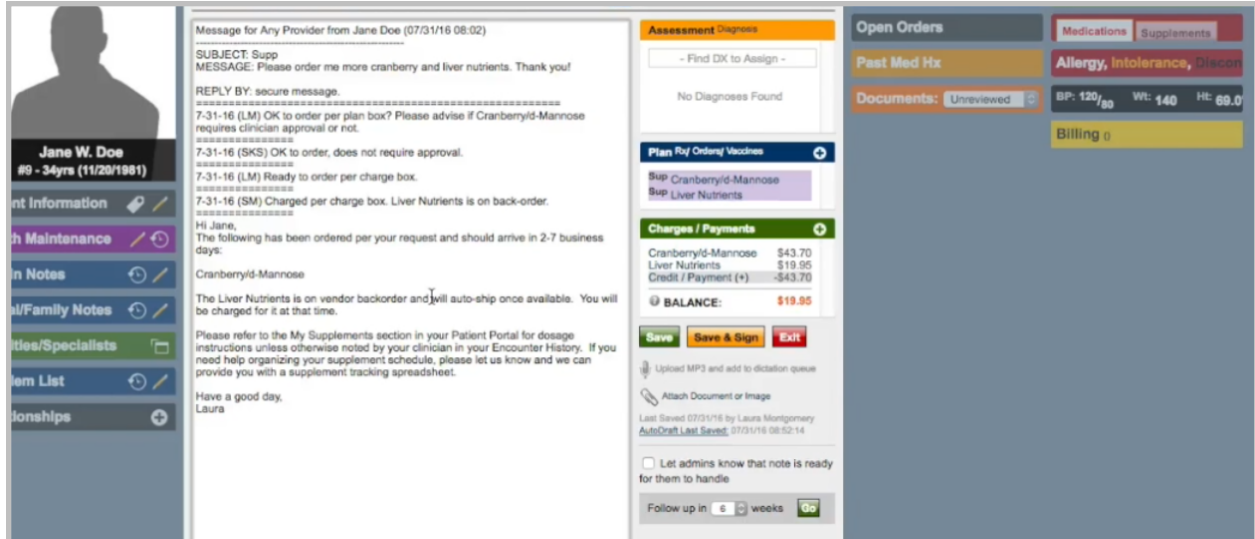
You can go into the Alternate Plan Items menu.

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.

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.