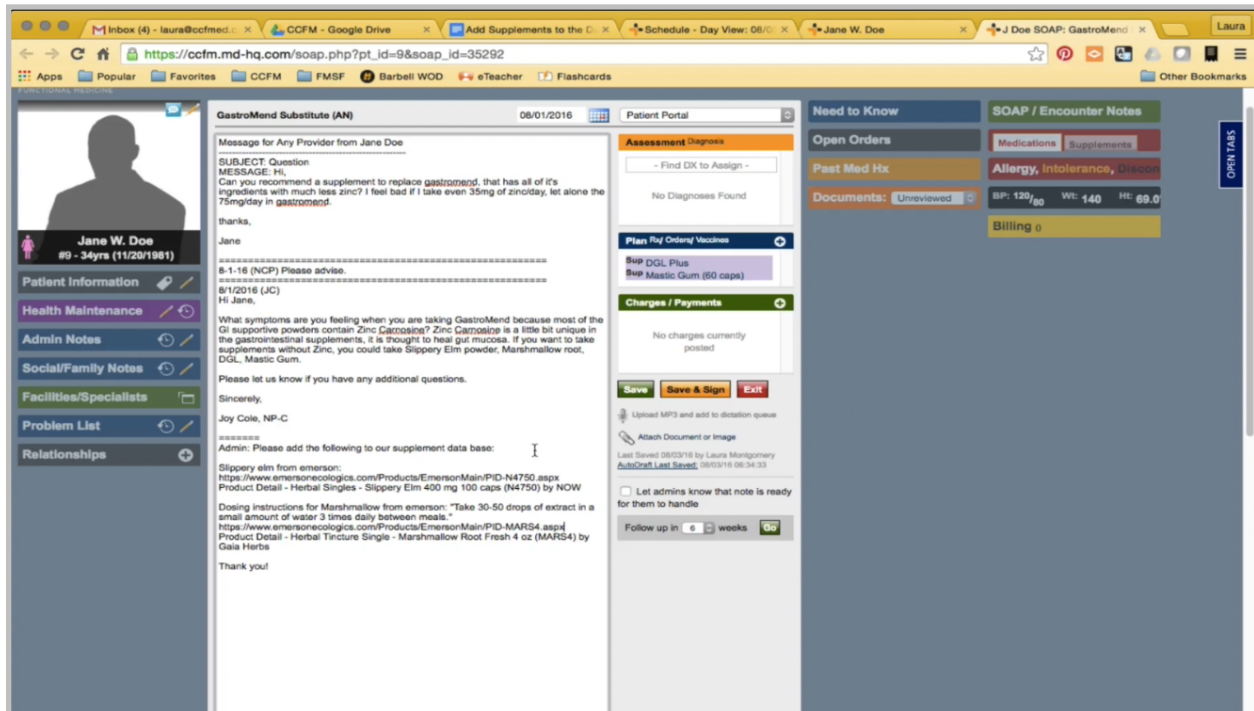
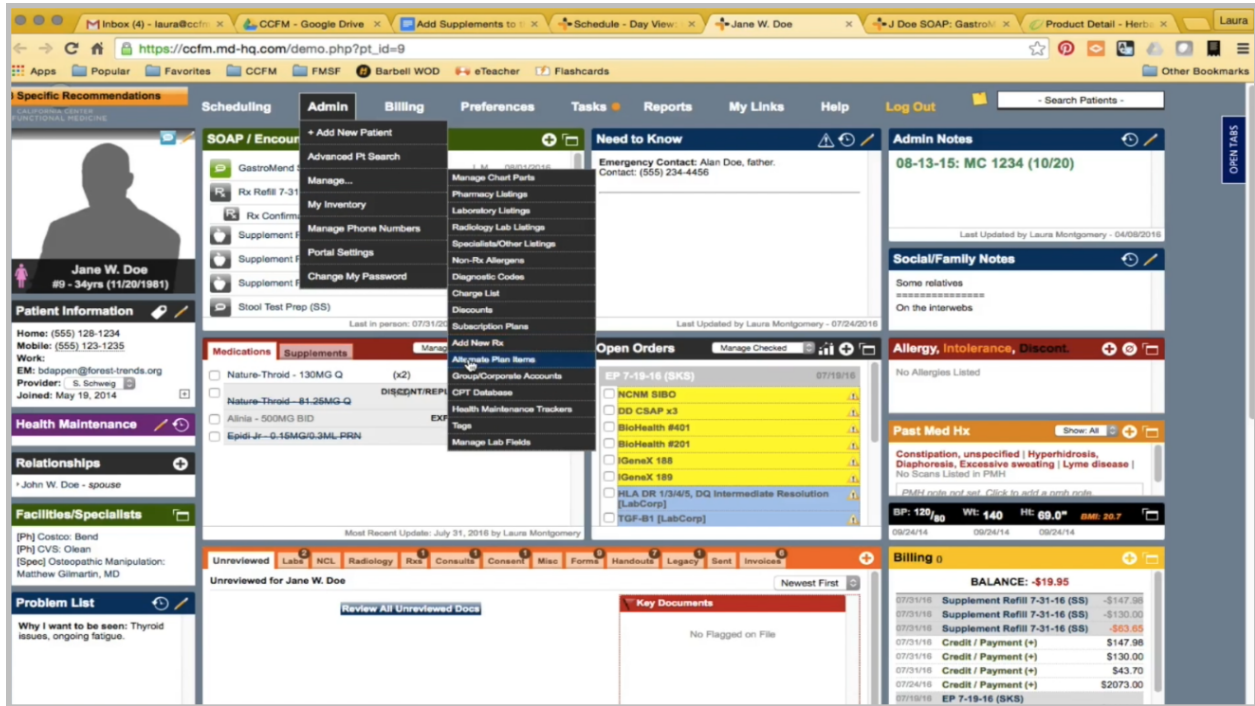


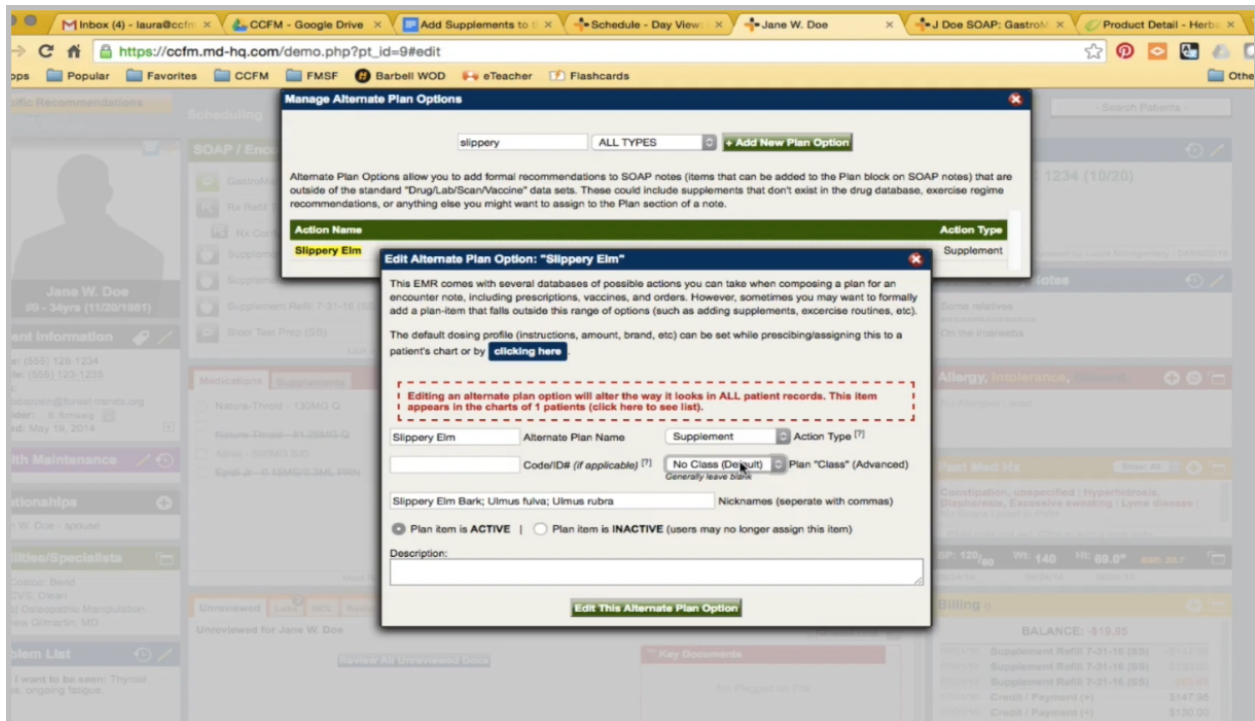
Back-end Systems: Using the EHR: Part Five - Add Supplements



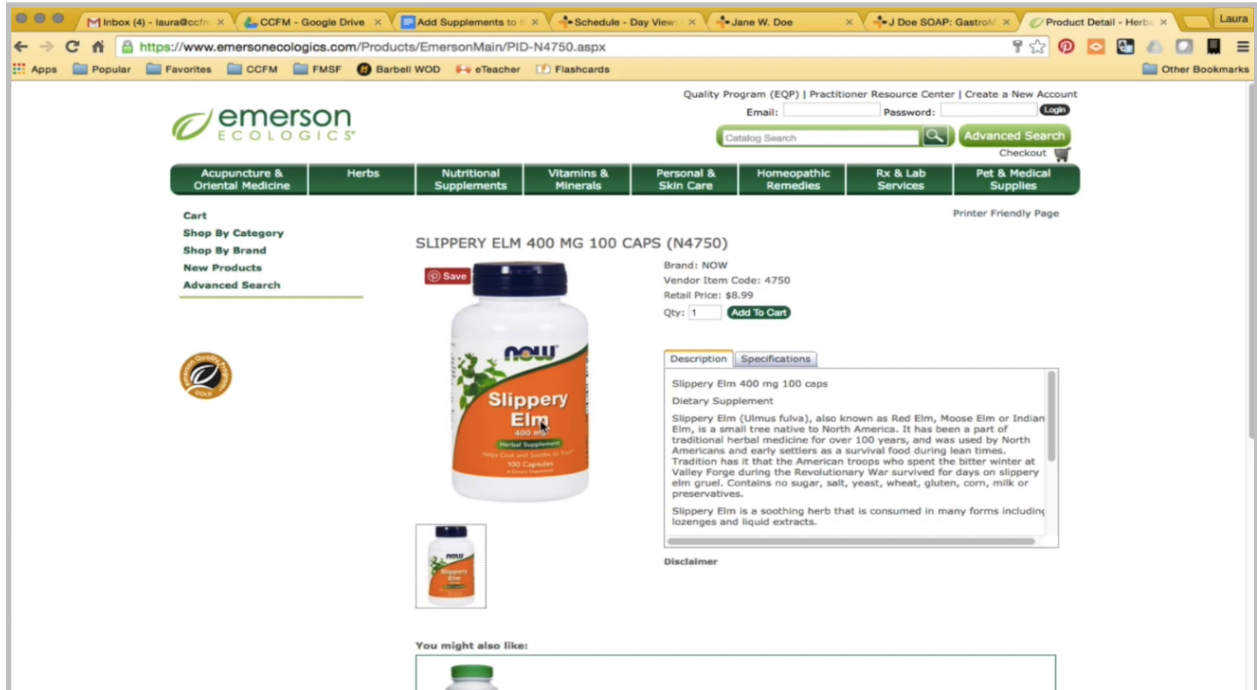
I received this encounter from the clinician, and in the admin notes, there are two supplements to add. First, I'm going to pull up the product using the link. Slippery elm.



From the patient's chart, I go into Manage, Alternate Plan Items. I'm first going to look and see if we have anything.



There is a slippery elm, but since there is no plan class set up, this means it was one of the supplements that came loaded by default with MD HQ, so it hasn't been used before. I can change this; however, I need to match the current one.



It's a really good idea to make all your supplement names match exactly how it is on the product bottle, so this one will just be slippery elm. It is a supplement.

slippery ALL TYPES + Add New Plan Option

Alternate Plan Options allow you to add formal recommendations to SOAP notes (items that can be added to the Plan block on SOAP notes) that are outside of the standard "Drug/Lab/Scan/Vaccine" data sets. These could include supplements that don't exist in the drug database, exercise regime recommendations, or anything else you might want to assign to the Plan section of a note.

Action Name	Action Type
Slippery Elm	Supplement

Edit Alternate Plan Option: "Slippery Elm"

This EMR comes with several databases of possible actions you can take when composing a plan for an encounter note, including prescriptions, vaccines, and orders. However, sometimes you may want to formally add a plan-item that falls outside this range of options (such as adding supplements, exercise routines, etc).

The default dosing profile (instructions, amount, brand, etc) can be set while prescribing/assigning this to a patient's chart or by [clicking here](#).

Editing an alternate plan option will alter the way it looks in ALL patient records. This item appears in the charts of 1 patients (click here to see list).

Slippery Elm Alternate Plan Name Supplement Action Type (?)

EE N4750 Code/ID# (if applicable) (?) No Class (Default) Plan "Class" (Advanced)

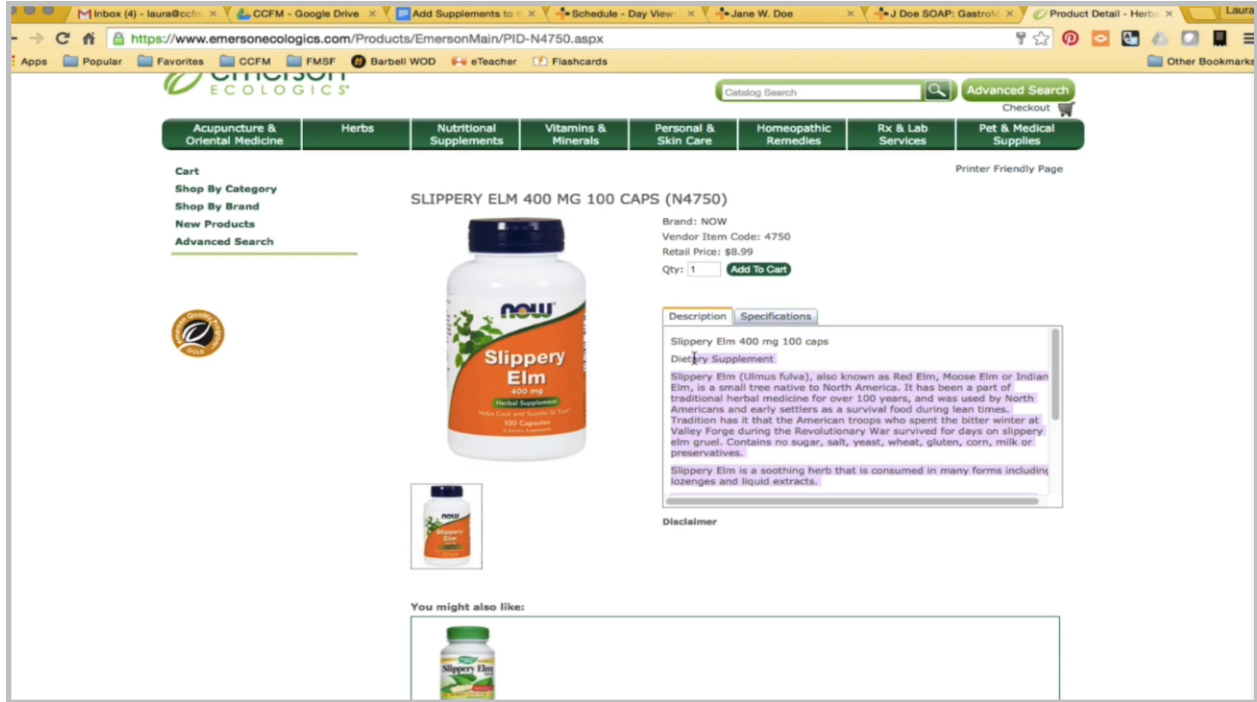
Slippery Elm Bark; Ulmus fulva; Ulmus rubra is_kit is_supplement self-order [New Class]

Plan item is ACTIVE | Plan item is INACTIVE

Description:

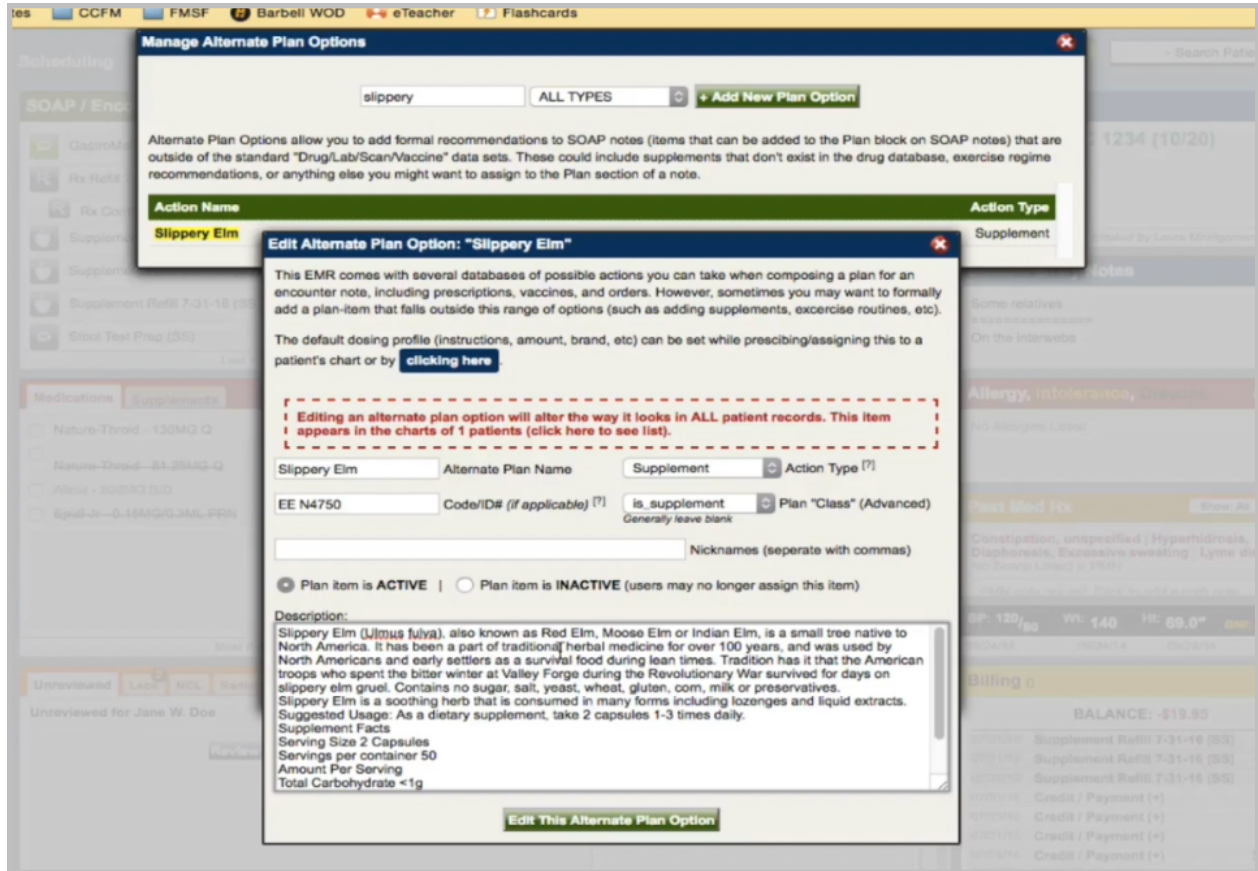
Edit This Alternate Plan Option

Code is where the product ID from the website goes. In this case, it is from Emerson, so first EE, the product code. It is a supplement. Delete the nicknames.



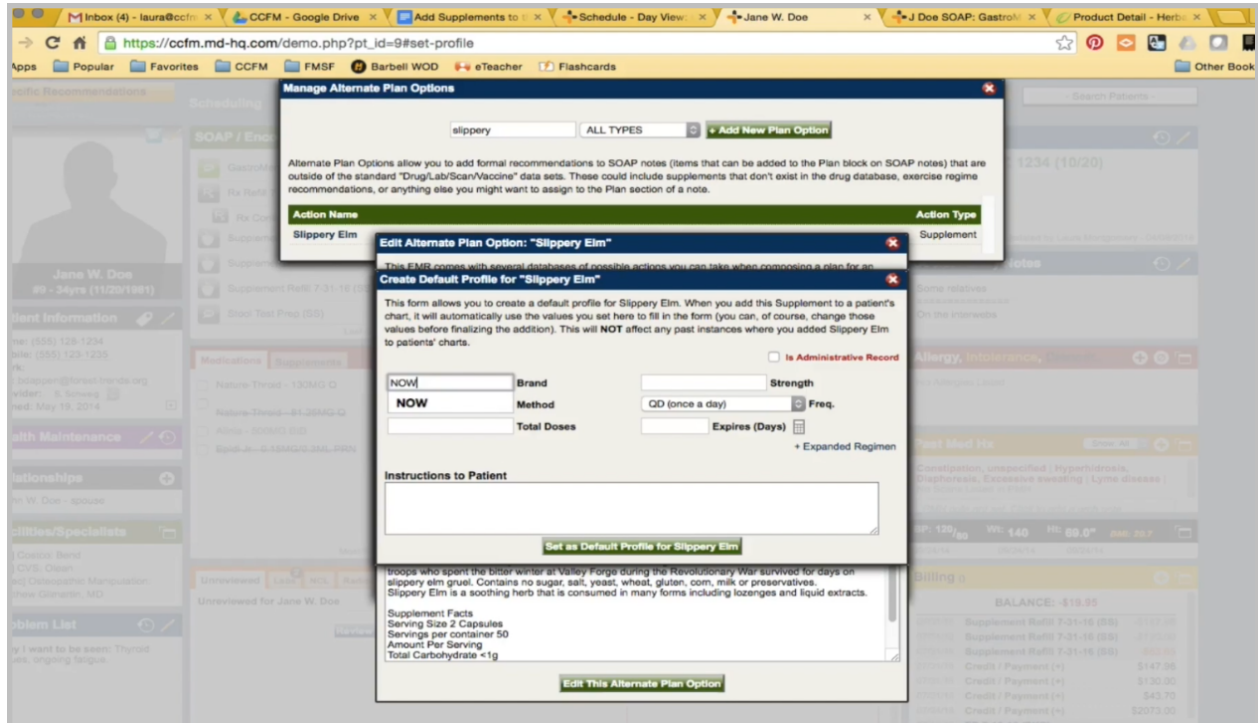
The screenshot shows a web browser window displaying the product page for Slippery Elm 400 mg 100 Caps (N4750) on the Emerson Ecologics website. The browser's address bar shows the URL: <https://www.emersonecologics.com/Products/EmersonMain/PID-N4750.aspx>. The website header includes a search bar and a navigation menu with categories: Acupuncture & Oriental Medicine, Herbs, Nutritional Supplements, Vitamins & Minerals, Personal & Skin Care, Homeopathic Remedies, Rx & Lab Services, and Pet & Medical Supplies. The product title is "SLIPPERY ELM 400 MG 100 CAPS (N4750)". The product image shows a white bottle with a blue cap and a label that reads "now Slippery Elm 400 mg Herbal Supplement High-Cost and Super-Strength 100 Capsules". To the right of the image, the brand is listed as "NOW", the vendor item code is "4750", and the retail price is "\$8.99". There is a quantity selector set to "1" and an "Add to Cart" button. Below the product image is a "Description" tab with the following text: "Slippery Elm 400 mg 100 caps Dietary Supplement Slippery Elm (Ulmus fulva), also known as Red Elm, Moose Elm or Indian Elm, is a small tree native to North America. It has been a part of traditional herbal medicine for over 100 years, and was used by North Americans and early settlers as a survival food during lean times. Tradition has it that the American troops who spent the bitter winter at Valley Forge during the Revolutionary War survived for days on slippery elm gruel. Contains no sugar, salt, yeast, wheat, gluten, corn, milk or preservatives. Slippery Elm is a soothing herb that is consumed in many forms including lozenges and liquid extracts." Below the description is a "Disclaimer" section. At the bottom of the page, there is a "You might also like:" section with a small image of another product.

The description can be what is in the description in here with some modification. I don't need to put these two pieces of information.



So, generally, this is just a brief description given by the manufacturer. Take out the suggested use here, and separate down the supplement facts.

If there are any special characters that pop up, bullet points, asterisks, or anything like that, those need to be removed as well.

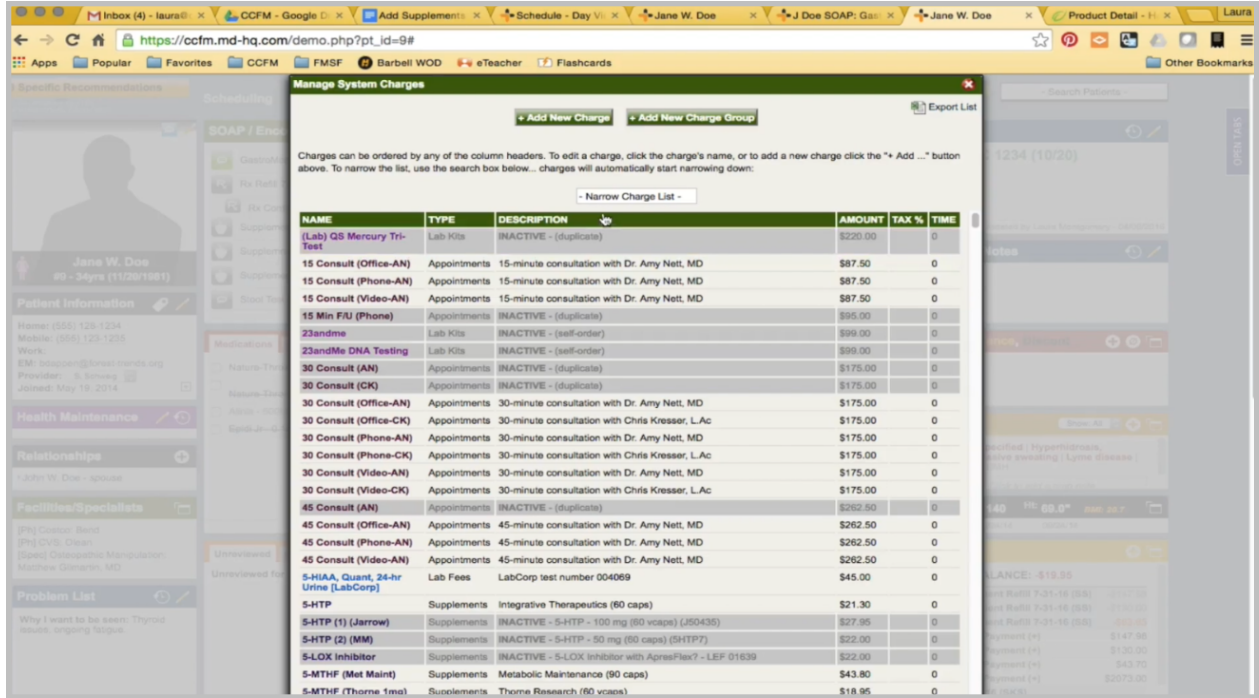


Then, I want to click here to make the default profile, so this is Now brand. It's 400 mg for one capsule. You always want to put the one-capsule strength here because sometimes our clinicians do recommend different dosing than the serving size on the bottle.

Most supplements are oral supplements. Total doses is 100 capsules.

Now, I need to go back to the admin note. Since there are no instructions here, I'll put the default ones, but if a clinician wants the default instructions to be something different, they'll make a note there.

In this case, unfortunately, the clinician didn't put if this requires future approval or not, so we just put a space for now until we find that information out. Set the profile.

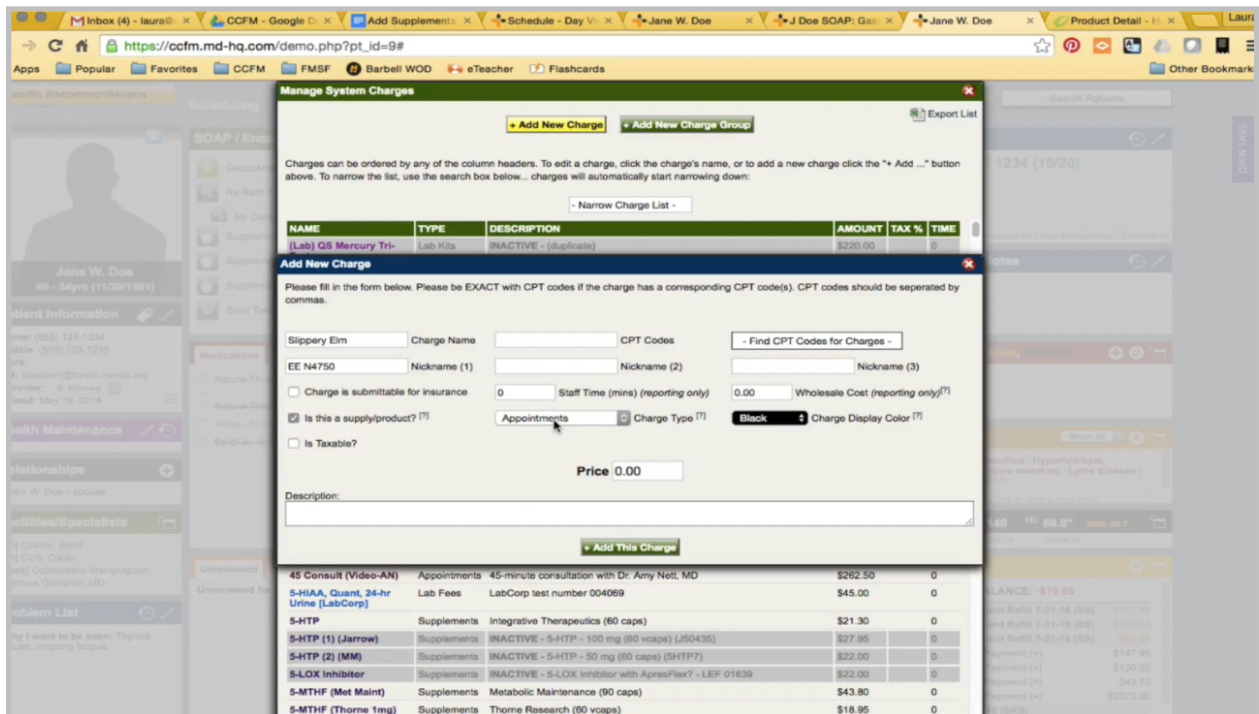


Charges can be ordered by any of the column headers. To edit a charge, click the charge's name, or to add a new charge click the "+ Add ..." button above. To narrow the list, use the search box below... charges will automatically start narrowing down.

- Narrow Charge List -

NAME	TYPE	DESCRIPTION	AMOUNT	TAX %	TIME
(Lab) QS Mercury Tri-Test	Lab Kits	INACTIVE - (duplicate)	\$220.00	0	
15 Consult (Office-AN)	Appointments	15-minute consultation with Dr. Amy Nett, MD	\$87.50	0	
15 Consult (Phone-AN)	Appointments	15-minute consultation with Dr. Amy Nett, MD	\$87.50	0	
15 Consult (Video-AN)	Appointments	15-minute consultation with Dr. Amy Nett, MD	\$87.50	0	
15 Min FIU (Phone)	Appointments	INACTIVE - (duplicate)	\$95.00	0	
23andMe	Lab Kits	INACTIVE - (self-order)	\$99.00	0	
23andMe DNA Testing	Lab Kits	INACTIVE - (self-order)	\$99.00	0	
30 Consult (AN)	Appointments	INACTIVE - (duplicate)	\$175.00	0	
30 Consult (CK)	Appointments	INACTIVE - (duplicate)	\$175.00	0	
30 Consult (Office-AN)	Appointments	30-minute consultation with Dr. Amy Nett, MD	\$175.00	0	
30 Consult (Office-CK)	Appointments	30-minute consultation with Chris Kresser, L.Ac	\$175.00	0	
30 Consult (Phone-AN)	Appointments	30-minute consultation with Dr. Amy Nett, MD	\$175.00	0	
30 Consult (Phone-CK)	Appointments	30-minute consultation with Chris Kresser, L.Ac	\$175.00	0	
30 Consult (Video-AN)	Appointments	30-minute consultation with Dr. Amy Nett, MD	\$175.00	0	
30 Consult (Video-CK)	Appointments	30-minute consultation with Chris Kresser, L.Ac	\$175.00	0	
45 Consult (AN)	Appointments	INACTIVE - (duplicate)	\$262.50	0	
45 Consult (Office-AN)	Appointments	45-minute consultation with Dr. Amy Nett, MD	\$262.50	0	
45 Consult (Office-CK)	Appointments	45-minute consultation with Dr. Amy Nett, MD	\$262.50	0	
45 Consult (Video-AN)	Appointments	45-minute consultation with Dr. Amy Nett, MD	\$262.50	0	
5-HIAA, Quant, 24-hr Urine [LabCorp]	Lab Fees	LabCorp test number 004069	\$45.00	0	
5-HTP	Supplements	Integrative Therapeutics (60 caps)	\$21.30	0	
5-HTP (1) (Jarrow)	Supplements	INACTIVE - 5-HTP - 100 mg (60 vcaps) (J50435)	\$27.95	0	
5-HTP (2) (MM)	Supplements	INACTIVE - 5-HTP - 50 mg (60 caps) (5HTP7)	\$22.00	0	
5-LOX inhibitor	Supplements	INACTIVE - 5-LOX inhibitor with ApresFlex? - LEF 01639	\$22.00	0	
5-MTHF (Met Maint)	Supplements	Metabolic Maintenance (90 caps)	\$43.80	0	
5-MTHF (Thorne 1mg)	Supplements	Thorne Research (60 vcaps)	\$18.95	0	

Before I save this, I also want to open another window so that I can have the charge box open. Again, I'm just going to search briefly to make sure there is no supplement that matches this name. I'll add a new charge. The reason I want both of these open is so that I can copy and paste information.



Please fill in the form below. Please be EXACT with CPT codes if the charge has a corresponding CPT code(s). CPT codes should be separated by commas.

- Find CPT Codes for Charges -

Slippery Elm Charge Name CPT Codes

EE N4750 Nickname (1) Nickname (2) Nickname (3)

Charge is submittable for insurance Staff Time (mins) (reporting only) Wholesale Cost (reporting only)^[?]

Is this a supply/product? ^[?] Appointments Charge Type ^[?] Black Charge Display Color ^[?]

Is Taxable?

Price 0.00

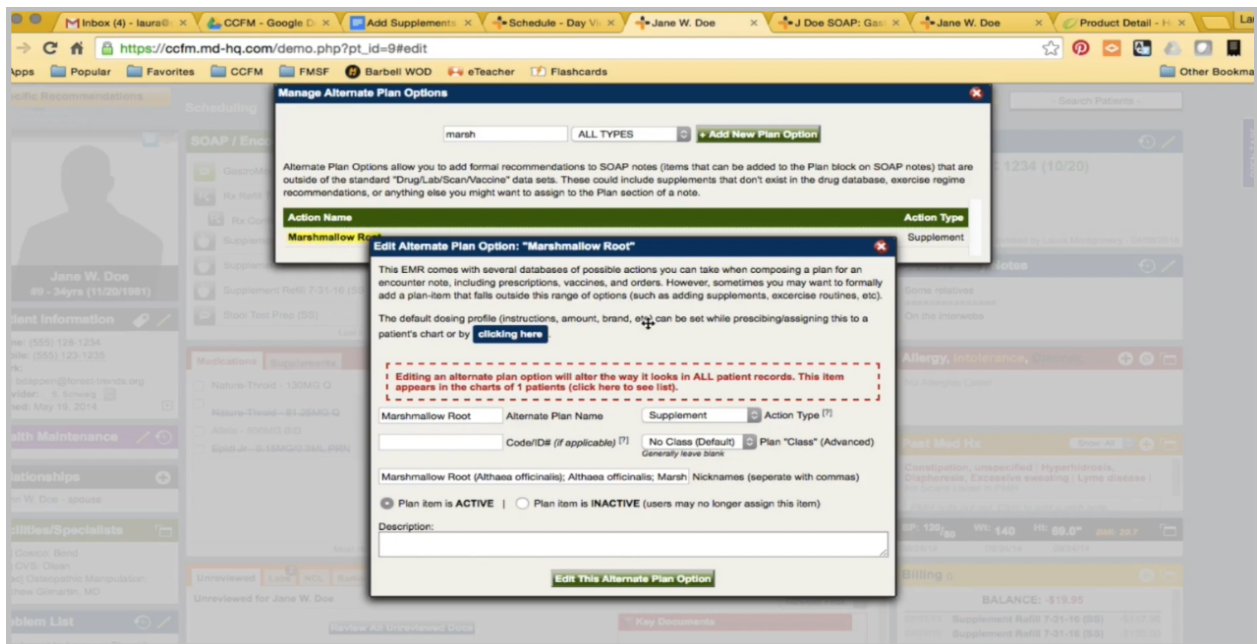
Description:

+ Add This Charge

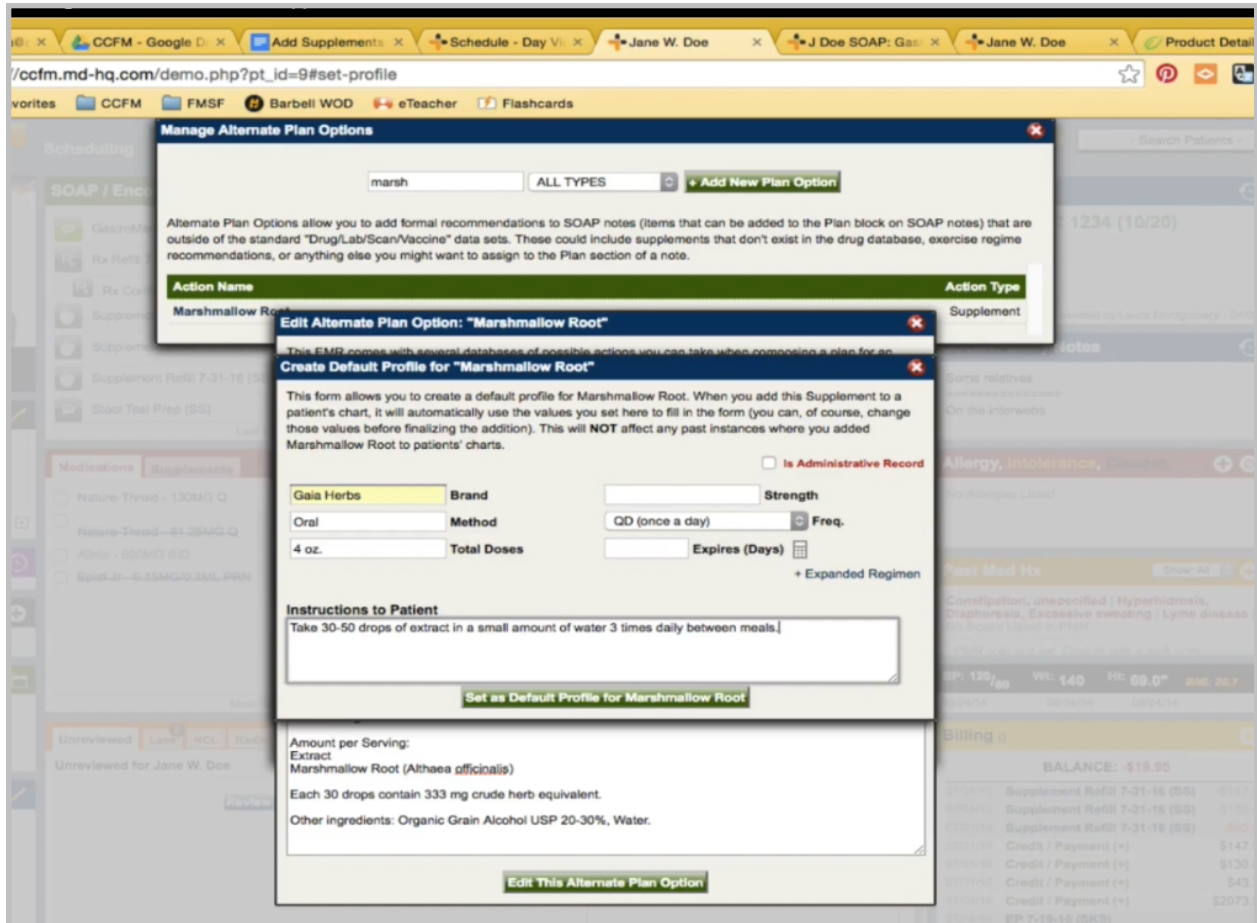
45 Consult (Video-AN)	Appointments	45-minute consultation with Dr. Amy Nett, MD	\$262.50	0	
5-HIAA, Quant, 24-hr Urine [LabCorp]	Lab Fees	LabCorp test number 004069	\$45.00	0	
5-HTP	Supplements	Integrative Therapeutics (60 caps)	\$21.30	0	
5-HTP (1) (Jarrow)	Supplements	INACTIVE - 5-HTP - 100 mg (60 vcaps) (J50435)	\$27.95	0	
5-HTP (2) (MM)	Supplements	INACTIVE - 5-HTP - 50 mg (60 caps) (5HTP7)	\$22.00	0	
5-LOX inhibitor	Supplements	INACTIVE - 5-LOX inhibitor with ApresFlex? - LEF 01639	\$22.00	0	
5-MTHF (Met Maint)	Supplements	Metabolic Maintenance (90 caps)	\$43.80	0	
5-MTHF (Thorne 1mg)	Supplements	Thorne Research (60 vcaps)	\$18.95	0	

The name needs to match exactly. The code needs to be here. It's a supplier product, a supplement that is purple. Put the retail price for Emerson, which is \$8.99. The description is what prints on the estimate, so we want it to be the brand name and then in parentheses the quantity. Add charge. Edit this. Now I can move on to the second one.

Marshmallow root. So, again, I want to search here.



There is something in the system, but it is not set up, so I can use this. The name already matches.



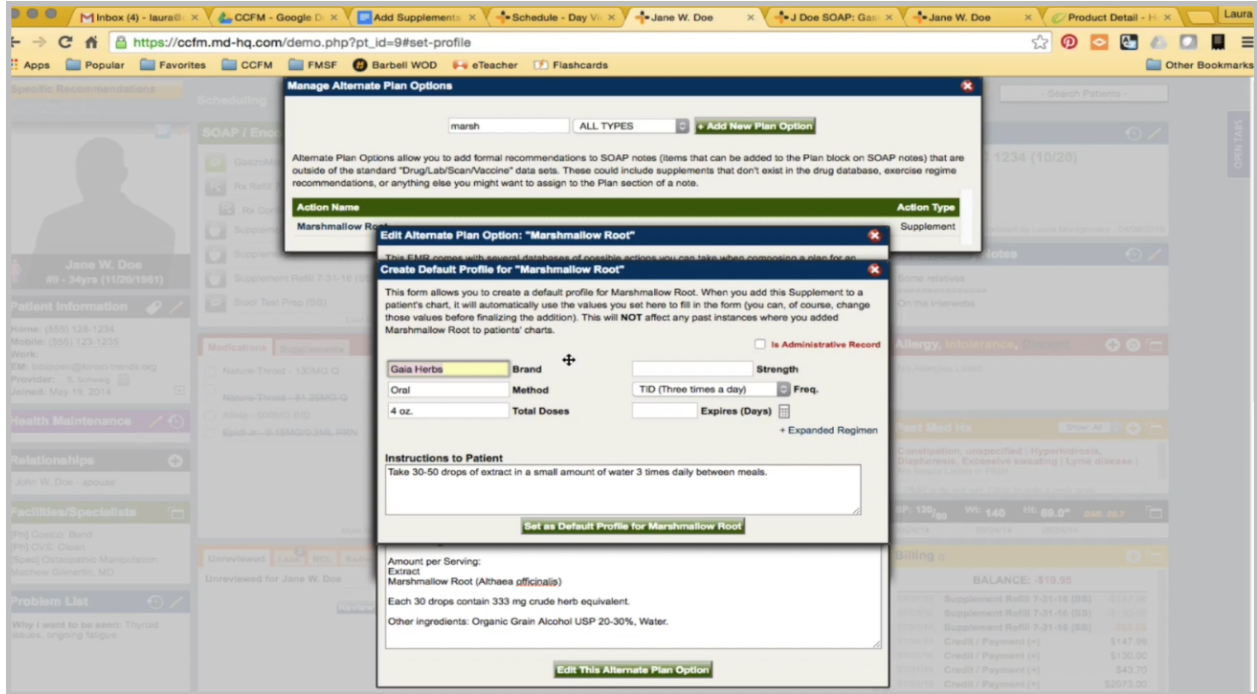
The screenshot shows a web browser window with several tabs open. The active tab is titled "Product Detail" and shows a URL: `/ccfm.md-hq.com/demo.php?pt_id=9#set-profile`. The main content area displays a "Manage Alternate Plan Options" dialog box. Inside this dialog, there is a search bar with "marsh" entered and a dropdown menu set to "ALL TYPES". A button labeled "+ Add New Plan Option" is visible. Below this, a table lists "Marshmallow Root" with an "Action Type" of "Supplement".

Overlaid on this is a "Create Default Profile for 'Marshmallow Root'" form. The form includes the following fields and sections:

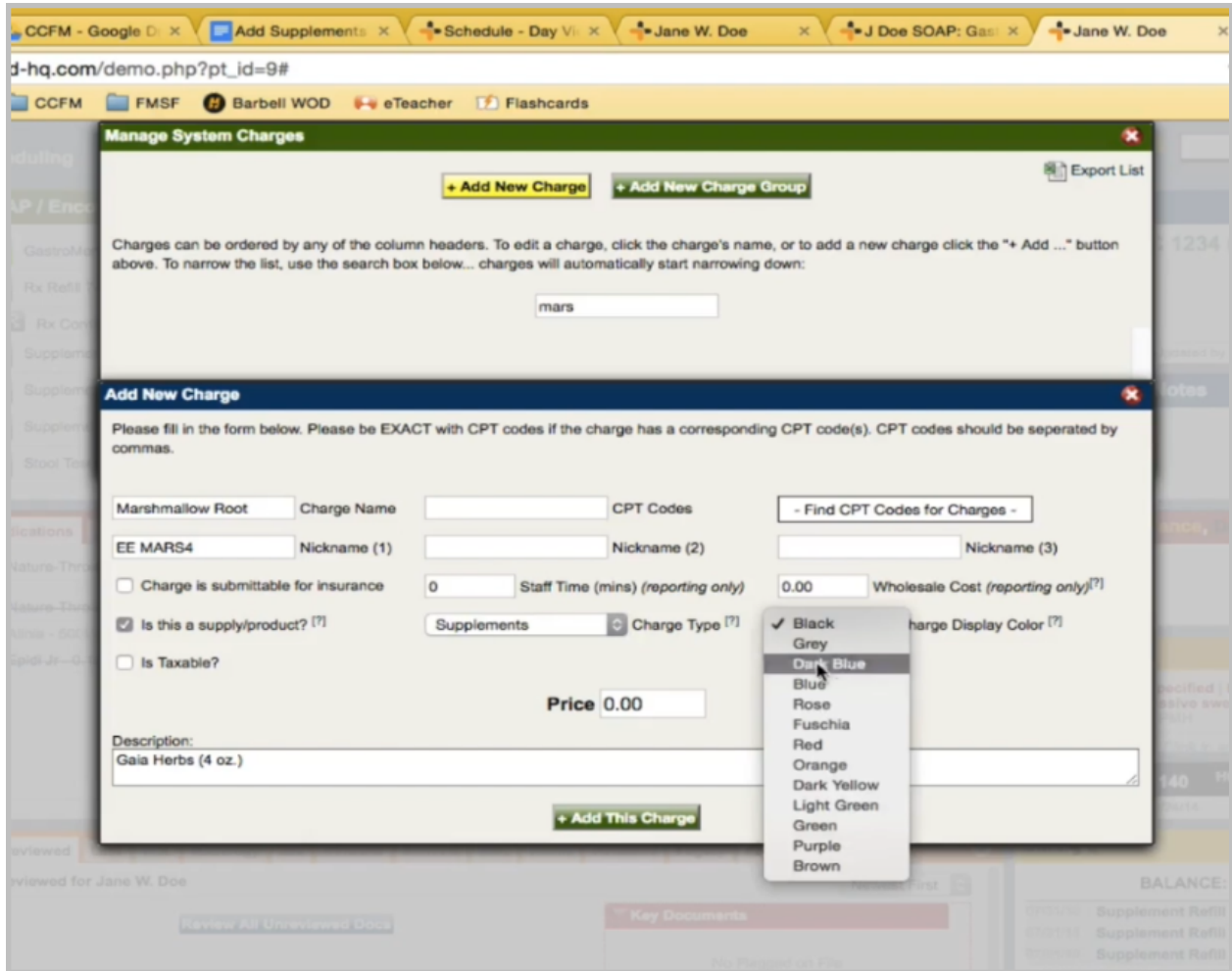
- Brand:** Gaia Herbs
- Method:** Oral
- Total Doses:** 4 oz.
- Strength:** (empty field)
- Freq.:** QD (once a day)
- Expires (Days):** (empty field)
- Is Administrative Record:**
- Instructions to Patient:** Take 30-50 drops of extract in a small amount of water 3 times daily between meals.
- Amount per Serving:**
 - Extract
 - Marshmallow Root (*Athaea officinalis*)
 - Each 30 drops contain 333 mg crude herb equivalent.
 - Other ingredients: Organic Grain Alcohol USP 20-30%, Water.

Buttons for "Set as Default Profile for Marshmallow Root" and "Edit This Alternate Plan Option" are located at the bottom of the form.

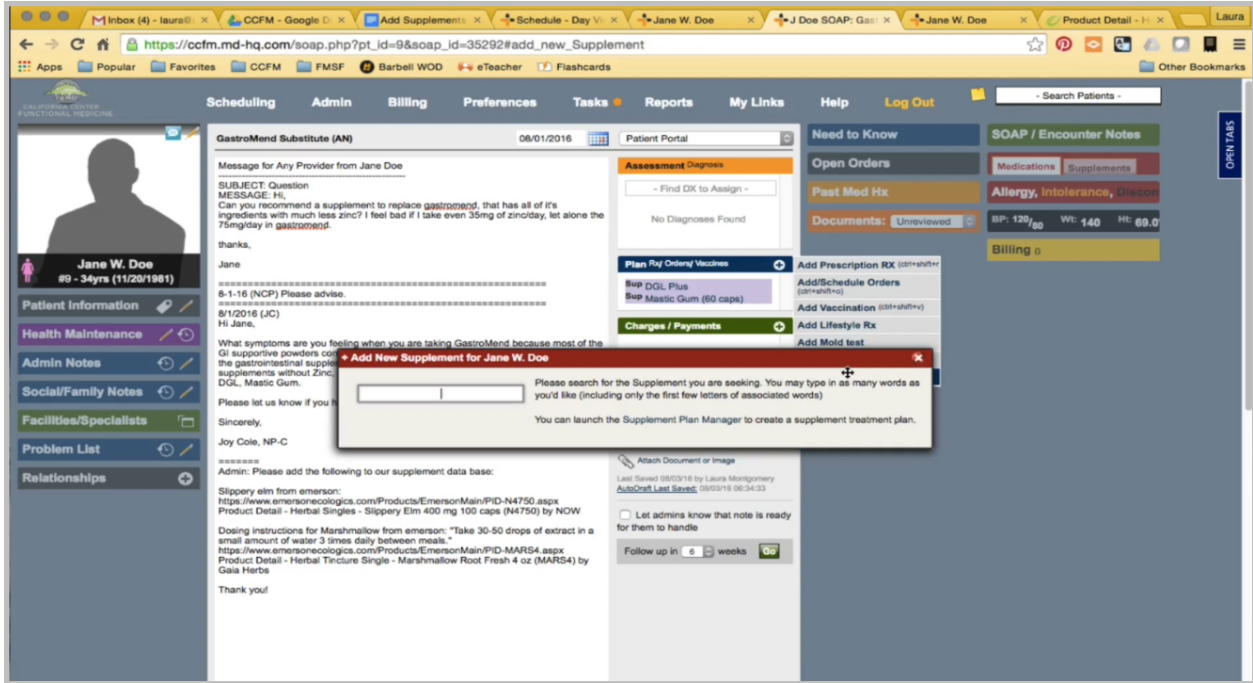
Product code. Remove the nicknames. Put the description. Remove special characters. Set the profile.



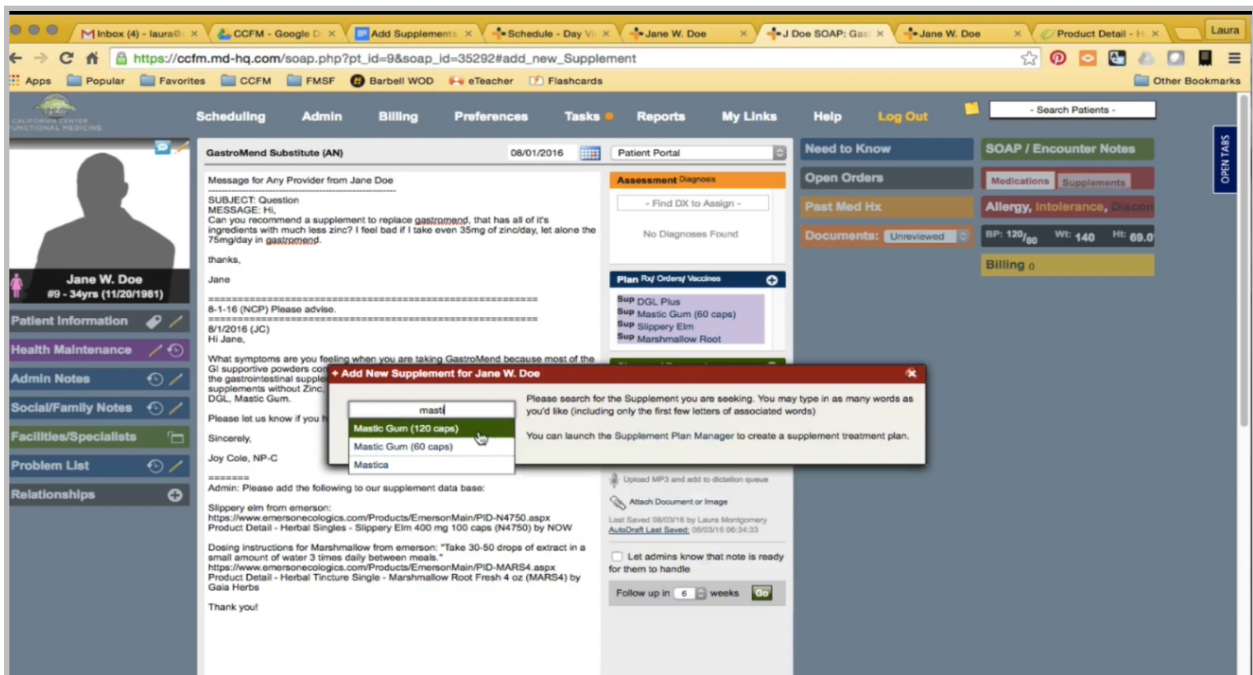
Okay. Again, I need to go here to the charge list. Add a new charge.



Copy the name exactly. It's a product, supplement, purple, and the retail price is \$38.



Since both of those are set up, the next step would be to add them to the encounter. Okay.



One other note you'll see for something such as mastic gum, once you start to get supplements that would have the same name, it is good to put a brief differentiating characteristic here so you know which one you want to select, and you would put the same in the charge database.