

# Established Patient Appointment Algorithm

## THE PURPOSE OF THE ESTABLISHED PATIENT APPOINTMENT IS TO:

- Make sure that the patient is progressing through the protocol established during the case review
- Answer patient questions about the protocol (working with side effects or reactions to supplements, diet, etc.)
- Review additional lab testing that was ordered during the case review and prescribe new protocols or order new testing as a result
- Help patient to stay on track and make changes if necessary
- Identify any new symptoms or concerns that may have arisen since the previous visit

## PROCEDURE FOR APPOINTMENT:

- I. Greet patient and establish rapport and expectations for appointment
  - A. Greet the patient warmly, and introduce yourself if you haven't yet had contact with the patient
  - B. Establish expectations for the call; let the patient know that you will be reviewing his or her progress with the protocol so far, reviewing lab results (if applicable), and answering any questions that he or she may have
- II. Review of progress with protocol
  - A. If patient has recently had a Case Review, open the "ROF" document in the "Consults" tab for the patient to determine his or her underlying patterns and protocol
  - B. Open the "CR" document in the "Forms" tab to determine his or her top five complaints
  - C. Open encounter notes for any two-week check-ins or emergency appointments that the patient may have had prior to this visit
  - D. Ask the patient how he or she is doing with the protocol
    1. Has the patient been able to build up to the full doses?
    2. Has the patient had any reactions to any of the supplements in the protocol?
    3. Is the patient having any trouble with the diet?
  - E. Empathize with any difficulties he or she is having and inspire confidence in moving forward

- III. Address any issues the patient is having with the protocol
  - A. If reacting to supplements, advise patient to stop the supplement until reaction subsides, then add back in at a lower dose and/or lower frequency as necessary
  - B. If having trouble with diet, advise patient on appropriate response
  - C. If possible, ensure that the patient continues to increase the doses of supplements he or she is tolerating and continue moving forward with the protocol
  - D. If the patient needs additional support, consider referring to health coach
- IV. Review of additional testing ordered
  - A. Look at previous SOAP note to determine additional testing ordered
  - B. Review any available test results and make treatment recommendations accordingly
  - C. If the patient has not completed additional testing, ask if you can answer any questions and support him or her in doing that
- V. Determine if new testing or treatment is required
  - A. If the patient has completed or is nearing completion of a protocol, make sure that he or she has the necessary kits for retesting
  - B. If follow-up test results are back and the original issue has been addressed, move on to any other issues that were identified, but not addressed, during the CR
  - C. If all issues from the CR have been addressed, but the patient is still symptomatic, determine what additional testing or treatment may be required
    1. Consider the following pathologies and mechanisms:
      - a) Gut
      - b) HPA axis
      - c) Nutrient balance
      - d) Metabolic health
      - e) Methylation
      - f) Toxic burden / detox (metals, CIRS, etc.)
      - g) Infection
      - h) Immune dysregulation
      - i) Hormone imbalance (thyroid, sex hormones, etc.)
      - j) Mitochondrial dysfunction

VI. Review plan for moving forward with the patient

- A. Restate plan for moving forward
  - 1. Summarize plan for continuing with protocol (i.e., stopping or restarting any supplements he or she reacted to, changes to diet, etc.)
  - 2. Summarize plan for completing the additional testing
  - 3. Summarize any other action items discussed during appointment
- B. Invite the patient to schedule the next two-week check-in
  - 1. Remind the patient that while these appointments aren't mandatory, they're strongly recommended, and we've noticed that patients that do them are much more successful with the protocols
- C. Ask the patient if he or she has any final questions and close the call