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	Date: _____ Employee Responding: _____
Situation	Patient number:_____ Is calling/emailing about: <u>MAIN COMPLAINT</u> Other details of the email:_____ _____ _____ _____
Background	==**THE GOAL OF THIS SECTION IS TO ANTICIPATE THE INFORMATION NEEDED TO SOLVE THE PROBLEM. Delete prompts that are not relevant and add information from treatment plans that is pertinent.**== The Last appointment was <u>DATE</u> for _____ type of visit/reason ____ The next appointment is scheduled for _____ (if not scheduled, add when patient is supposed to follow up) Outstanding labs include _____ Their ETA is _____ This has/has not been addressed in past visits <u>(when)</u> (look in recent encounter / treatment plan / initial intake) The portion of the treatment plan in question is _____ The patient IS/IS NOT pregnant The patient IS/IS NOT on Rx hormones (if yes, list) You requested to be notified when these labs came in
Assessment	❏ This appears urgent ❏ The patient is presenting with new symptoms that are highlighted as something to report in the tx plan ❏ The patient is presenting with new symptoms that are NOT highlighted to report in the treatment plan, but I am unsure if they could be the result of a medication/supplement ❏ The lab order needs diagnosis codes ❏ The patient does not understand the treatment plan ❏ The patient is escalating and a summary has been added to the grievance sheet ❏ The labs you requested STAT are now ready for review ❏ _____

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	❏ _____
	❏ _____
Response	(This is where the solution will be - Leave Blank) Person responding will initial, date, and time