Patients on Programs - All Patients At a Glance

Listed By Date Purchased: Date: _____

(To Be Updated Daily by Office Manager and Given to Patient Coach)

Number of Patients Purchasing New Programs Today	+
Number of Patients Already on Programs	+
Number of Patients Finished with Programs Today	-
TOTAL NUMBER OF PATIENTS ON PROGRAMS	=

# of Patients	Date Purchased	Name of Patient	Program Purchased	✓ new to add or ✓ finished to remove
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
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16				
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21				
22				
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28				
29				
30				
31				
32				
33				
34				
35				

Patients on Programs - All Patients At a Glance

Listed Alphabetically: Date: _____

(To Be Updated Daily by Office Manager and Given to Patient Coach)

Number of Patients Purchasing New Programs Today	+
Number of Patients Already on Programs	+
Number of Patients Finished with Programs Today	-
TOTAL NUMBER OF PATIENTS ON PROGRAMS	=

# of Patients	Date Purchased	Name of Patient	Program Purchased
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
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30			
31			
32			
33			
34			
35			

Patients on Programs – Scheduled Personal Contact Times

(Write with Pencil so Names Can Constantly be Added or Subtracted)

Patients Currently on Program: _____ # Patient on This List: _____

	Monday	Tuesday	Wednesday	Thursday
9:00				
9:15				
9:30				
9:45				
10:00				
10:15				
10:30				
10:45				
11:00				
11:15				
11:30				
11:45				
12:00				
12:15				
12:30				
12:45				
1:00				
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1:30				
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4:15				
4:30				
4:45				
5:00				
5:15				
5:30				
5:45				
6:00				
6:15				
6:30				
6:45				
7:00				
7:15				
7:30				
7:45				

(Ask Patients Best Times to Call Them, But Explain You Might be with Another Patient; and/or
Put Patient in During a Time and Date You Have Been Able to Contact Them in the Past.)

Patients on Programs – Patient Follow Up Sheet

Patient Name: _____ Program Type: _____

Date Purchased: _____ Anticipated/Actual Start Date: _____ Anticipated/Actual End Date: _____

Date Explained Hawthorne Effect & Purpose of Weekly Calls to Patient: _____ Best Time to Call: _____

Best Date to Call: _____ Best Numbers to Call : Home Phone # _____

Cell Phone # _____ Work Phone # (OK to call at wk? Y/N)_____

Special Reminders: _____

Date	Tracking Calories? Writing in Binder? Drinking Water? Emotional Eating? EFT? Taking Supplements? Exercising: Type, Minutes, When? Visualization? Sleep: When & Hours? Eating Every 2 to 3 Hours? Commitment Level 1 - 10?	Red Flags?	Date Review w/ Doc	Next follow up date	Transfer to Tickler

Patients on Programs – Daily Follow Up Time Log: Date: M   T   W   H _____ Page ____ of _____

Time Started	Time Finished	Total Time	Name of Patient (Make a PERSONAL PHONE CONTACT each week in between visits)	Personal Contact	Left Message	No Answer or Busy	Next Date Follow Up	Transferred To Tickler
Total Time:			Total Number of Patients Personally Spoke With Today:					

Total # Patients Currently on Programs	# Personally Contacted This Week So Far	# Left to Contact	# Days Left to Call

Signed: _____ Fax nightly to (801) 998-8370

Patients on Programs - Tickler Future Follow Up   Date to Follow Up: _____

Date Entered	Task	Completed	Logged On Patient F/U Sheet	Not Completed	Date Moved for F/U

Overview of Forms for Patient Coach Binder

1. Patients on Programs – All Patients at a Glance (By Purchase Date)
2. Patients on Programs – All Patients at a Glance (Alphabetical)
3. Patients on Programs – Scheduled Personal Contact Times
4. Patients on Programs - Patient Follow Up Sheet
5. Patients on Programs – Daily Follow Up Time Log
6. Patients on Programs – Tickler Future Follow Up

(Forms below are abbreviates at P.O.P – instead of Patients on Programs)

Patient Coach Binder Instructions

1. Each day the office manager gives patient coach "<u>P.O.P. – All Patients At a Glance</u>" forms in two forms Alphabetically and By Date Purchased

    a. Take the new names off of the list and enter them on a new sheet, "<u>P.O.P. – Patient Follow Up Sheet</u>"
    b. Call each new patient and explain to them that you are their "Personal Coach" and that you will be calling them once a week.   Explain the "Hawthorne Effect" and the importance of having someone on their side helping to monitor their progress
        - While on the phone, determine the best time and phone number for the weekly call. When you decide the best time log that on "<u>Patients on Programs – Scheduled Personal Contact Times</u>" so you'll remember the best time to call them.
        - Enter the new time to call the patient on the "<u>P.O.P. – Tickler Future Follow Up</u>" sheet

2. Each day, your top priority during downtime is calling patients on programs. Using the log "<u>P.O.P. – Daily Follow Up Time Log</u>" enter all the time spent and the results of each call.
    a. Enter specific patient information about every single call on "<u>P.O.P – Patient Follow Up Sheet</u>"
    b. If there are ANY problems or concerns that you can't resolve, "red flag" that and review with Dr. Singleton on that day
    c. Fill in a new follow up date and enter it on "<u>P.O.P. – Tickler Future Follow Up</u>" sheet

3. If any patients are finished with their program today, put a check by their name on the "<u>P.O.P. – All Patients At a Glance</u>" form and give it back to the office manager so she can take them off the list

4. Take the "P.O.P.-Patient Follow Up Sheet" forms from finished patients and move them into the Maintenance Binder.