

Safety & Regulations TCM Herbal Telemedicine



Galina V. Roofener

L.Ac., L.C.H., A.P., Dipl. Ac. (NCCAOM)®, Dipl. C.H. (NCCAOM)®

• 1

Disclaimer

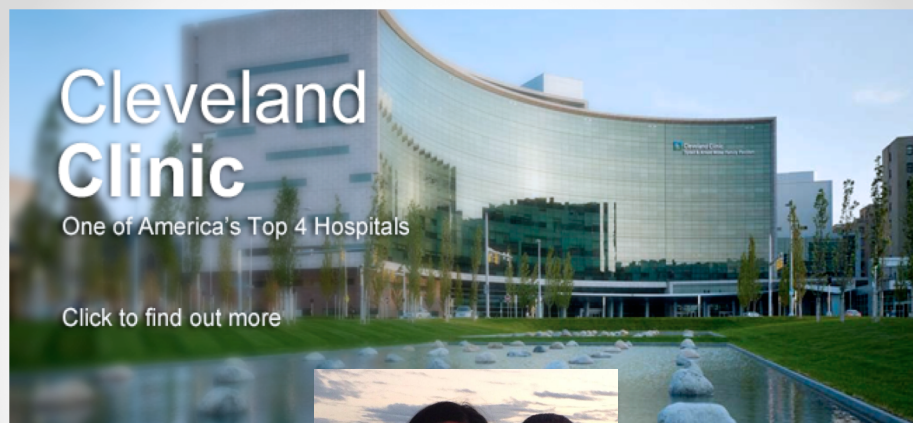
- All files reflected in this presentation are fully FDA compliant reflecting imaginary patients.
- Author has no financial interests with any of the companies referred to in this presentation.
- Author has no intentions to promote a specific product or a company reflected in this presentation

• 2

Syllabus

- Telemedicine/Telehealth in US
- Telemedicine Rules and Regulations.
- Telemedicine specifics to TCM Practice.
- Strategies to avoid Medical Errors.
- HIPAA compliant Telehealth Technology
- Contraindications and referral guidelines at Cleveland Clinic herbal clinic.
- Herbal pharmacy selection guidelines.
- EHR records.
- Patient Communication.

● 3



**Jamie
Starkey,
L.Ac.**



**Tanya I.
Edwards,
M.D.**

● 4

my.clevelandclinic.org/departments/wellness/integrative/medical-appointments/virtual-visits

Cleveland Clinic | Wellness & Preventive Medicine

Executive Health Program | Integrative & Lifestyle Medicine | Patient Resources | Wellness Store | More ▾

800.223.2273 | MyChart

Virtual Visits

Appointments 216.448.4325

APPOINTMENTS & LOCATIONS

SIGN UP FOR OUR NEWSLETTER

Virtual Visits with Integrative and Lifestyle Medicine Specialists

What are Virtual Visits?

Select patients can now see our providers online from their home or office by using the [Cleveland Clinic Express Care® Online tool](#). This service allows patients a fast, secure and easy way to receive care from their healthcare team in a live virtual visit using a smartphone (iPhone or Android), tablet or computer. The benefits of choosing a virtual visit include no travel or parking, less waiting, significant time savings, no facility fee and the convenience of seeing your physician from wherever you choose.

Medical Consults

- [Integrative Medicine](#)
- [Lifestyle Medicine](#)

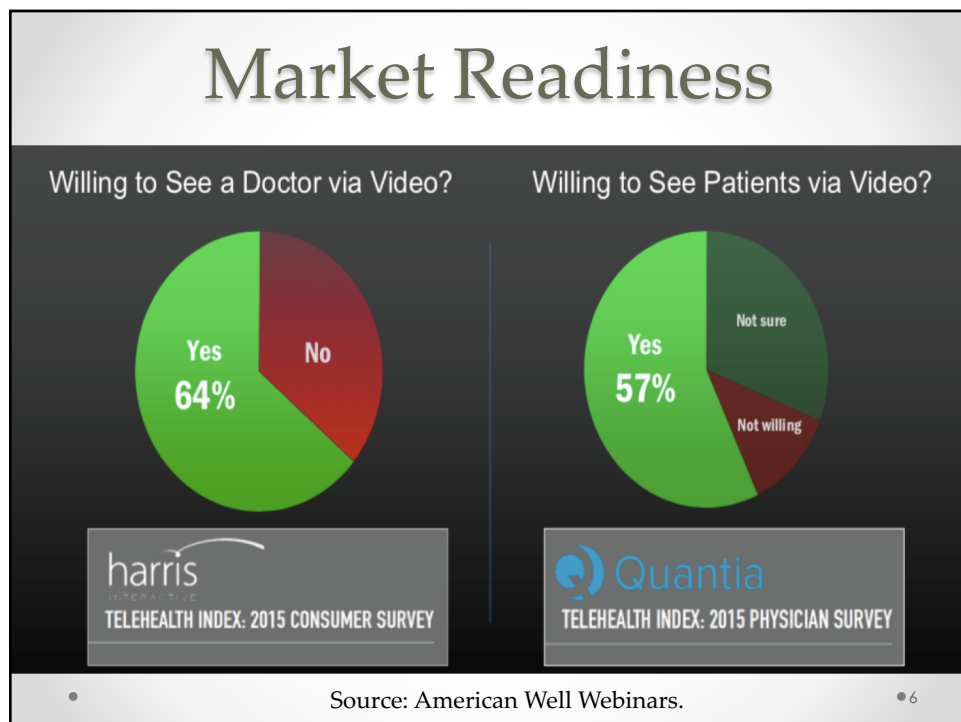
Complementary Therapies

- [Culinary Consults](#)
- [Herbal Therapy](#)
- [Holistic Psychotherapy](#)
- [Mind / Body Coaching](#)
- [Nutrition Consultation](#)

Some insurance plans cover virtual visits similarly to in-office doctor appointments. Please verify with your insurance provider. © 2019 Cleveland Clinic. All rights reserved. Cleveland Clinic is a registered trademark of Cleveland Clinic.

WELLNESS & PREVENTIVE MEDICINE
Integrative & Lifestyle Medicine

- Medical Appointments
- Integrative Medicine Consults
- Lifestyle Medicine Consults
- Virtual Visits



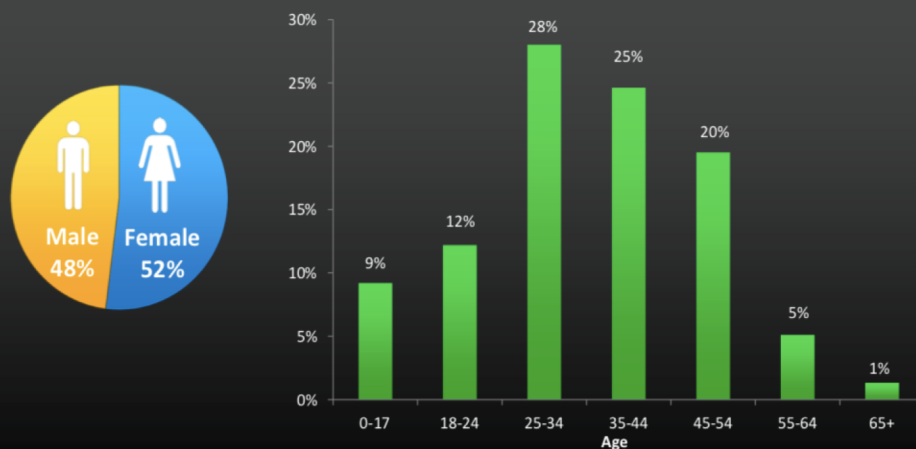
Telemedicine Utilization



Source: American Well Webinars

7

Use by age



Source: American Well Webinars

8



I am not a Medical Doctor, Do I need to comply with telemedicine law?

If you are:

- Licensed/Certified healthcare provider in any state
- Offering individualized consult
- Collecting personal information of a patient
- Reviewing health history
- Performing an assessment
- Establishing diagnosis
- Creating a treatment plan
- Recommending treatment

You ARE the subject to federal and state licensing regulations and practice law!
Including Telemedicine & TCM governing law.

Under FL rule HB 23, the following licensed or certified professionals are considered “telehealth providers:”

- Behavior analysts
- Emergency medical technicians
- Paramedics
- **Acupuncturists**
- Allopathic physicians
- Osteopathic physicians
- Allopathic and osteopathic physician assistants
- Chiropractors
- Podiatrists
- Optometrists
- Nurses (any type)
- Pharmacists
- Dentists
- Midwives
- Speech-language pathologists
- Audiologists
- Occupational therapists
- Basic X-ray machine operators; general radiographers; nuclear medicine technologists; radiologist assistants; specialty technologists
- Respiratory therapists
- Dietetics and nutrition practitioners; nutrition counselors
- Athletic trainers
- Orthotists; pedorthists; prosthetist; prosthetist-orthotists
- Electrologists
- Massage therapists
- Clinical laboratory personnel
- Medical physicists
- Opticians
- Physical therapists
- Psychologists
- Clinical social workers
- Marriage and family therapists
- Mental health counselors

• 11

Cross-State Licensing Telehealth

- To Practice telemedicine you MUST be licensed in the state where patient resides!

- May 11, 2018, 08:59:00 AM

VA Expands Telehealth by Allowing Health Care Providers to Treat Patients Across State Lines

- <https://www.va.gov/opa/pressrel/pressrelease.cfm?id=4054>

New technologies are revolutionizing health care and VA is recognized as a world leader in the development and use of telehealth. Telehealth services are **mission-critical** to the future direction of VA care to Veterans.

- https://www.va.gov/COMMUNITYCARE/docs/news/VA_Telehealth_Services.pdf

• 12

Florida Professional Regulation/Health & Safety Definitions

- "Telemedicine means the practice of medicine by a licensed Florida physician or physician assistant where patient care, treatment, or services are provided through the use of medical information exchanged from one site to another via electronic communications. Telemedicine shall not include the provision of health care services only through an audio only telephone, email messages, text messages, facsimile transmission, U.S. Mail or other parcel service, or any combination thereof."

[FL Admin Code 64B15-14.0081. \(Accessed Mar. 2019\).](#)

Source: <https://www.cchpca.org/telehealth-policy/current-state-laws-and-reimbursement-policies?jurisdiction=38&category=All&topic=All>

• 13

Florida Rule: 64B15-14.0081

Standards for Telemedicine Practice.

- (2) The standard of care, as defined in Section 456.50(1)(e), F.S., shall remain the same regardless of whether a Florida licensed physician or physician assistant provides health care services in person or by telemedicine.
- (3) Florida licensed physicians and physician assistants providing health care services by telemedicine are responsible for the quality of the equipment and technology employed and are responsible for their safe use. Telemedicine equipment and technology must be able to provide, at a minimum, the same information to the physician and physician assistant which will enable them to meet or exceed the prevailing standard of care for the practice of medicine

<https://www.flrules.org/gateway/RuleNo.asp?title=PRACTICE%20REQUIREMENTS&ID=64B15-14.0081>

• 14

Florida Rule: 64B15-14.0081

Standards for Telemedicine Practice.

- (4) Controlled substances shall not be prescribed through the use of telemedicine. This provision does not preclude physicians from ordering controlled substances through the use of telemedicine for patients hospitalized in a facility licensed pursuant to Chapter 395, F.S.
- (5) **Prescribing medications based solely on an electronic medical questionnaire constitutes the failure to practice medicine** with that level of care, skill, and treatment which is recognized by reasonably prudent physicians as being acceptable under similar conditions and circumstances, as well as prescribing legend drugs other than in the course of a physician's professional practice.

• 15

Florida Rule: 64B15-14.0081

Standards for Telemedicine Practice.

- (7) The practice of medicine by telemedicine does not alter any obligation of the physician or the physician assistant regarding patient confidentiality or recordkeeping.
- **(8) A physician-patient relationship may be established through telemedicine.**
- (9)(a) Nothing contained in this rule shall prohibit consultations between physicians or the transmission and review of digital images, pathology specimens, test results, or other medical data by physicians or other qualified providers related to the care of Florida patients.

• 16

Florida Telemedicine Licensure

- **Professional Board Telehealth-Specific Regulations**

FL Board of Medicine

FL Board of Osteopathic Medicine

[Florida Admin Code 64B15-14.0081](#)

- At the time of licensure renewal, each healthcare practitioner, as defined in Section 456.001, F.S., must fully complete DH5019-MQA (07/2016), Telehealth Practitioner Survey, incorporated by reference and available at <https://www.flrules.org/Gateway/reference.asp?No=Ref-07607>.



• 17



Department of Health Telehealth Practitioner Survey

Governor Rick Scott signed House Bill 7087 into law April 14, 2016. This legislation requires the Department of Health (DOH) to survey health care practitioners on the status and scope of telehealth activities in the state. DOH is required to work with the Agency for Health Care Administration to compile and submit a report of the survey findings to the Governor, the President of the Senate, and the Speaker of the House. The completion of this survey is mandatory at renewal.

If you have any questions regarding this survey or any requirements of this legislation, please contact the Agency for Health Care Administration at telehealth@ahca.myflorida.com.

• 18

Ohio

Oriental Medicine Law

4762.10 Supervisory period; treatment instructions for herbal therapy.

(D) In an individual's practice of oriental medicine or acupuncture pursuant to a certificate to practice issued under this chapter, all of the following apply:

- (1) Prior to treating a patient, the individual shall advise the patient that oriental medicine or acupuncture, as applicable, is not a substitute for conventional medical diagnosis and treatment.
- **(2) On initially meeting a patient in person,** the individual shall provide in writing the individual's name, business address, and business telephone number, and information on oriental medicine or acupuncture, as applicable, including the techniques that are used.
- (3) While treating a patient, the individual **shall not make a diagnosis.** If a patient's condition is not improving or a patient requires emergency medical treatment, the individual shall consult promptly with a physician.
- <http://codes.ohio.gov/orc/4762>

● 19

Traditional Herbal Medicine may or may not be represented in the Acupuncturist Scope of Practice

- **Illinois** legislature passed the [Acupuncture Practice Act](#) in 2018, licensed acupuncture practitioners have been able to provide a much wider range of treatments commonly used alongside acupuncture. In addition to an expanded scope that includes cupping, Asian body work, cold laser, etc., practitioners are also able to prescribe herbal remedies for the first time. Starting January 2020, a new state law will require acupuncturists who want to practice Chinese herbology to take an ACAOM-accredited course and pass an additional board exam.
- **Kentucky** – I have not found any mentioning of Herbs, Nutraceuticals or Labs ordering in the scope of practice.
- **Maine** - Refrain from recommending medicines or treatments of a *secret* nature, and *adequately disclose the contents of medicines* or the nature and description of treatments recommended to a patient.

**Check the state there your patient resides
legislative authorities for law changes frequently!**

● 20

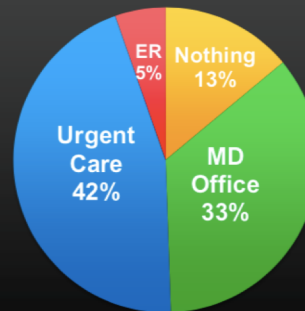
Statistics – Conditions Treated via Virtual Visits

Telehealth 1.0 Has Been Ideal For Urgent Care

Top 10 Diagnoses

1. Sinusitis
2. Upper Respiratory Infections/Flu
3. Pharyngitis
4. Skin Disorders
5. UTI
6. Bronchitis
7. Conjunctivitis
8. Otalgia/Earache
9. Anxiety/Depression
10. Back Pain

What would you have done without Telehealth?¹



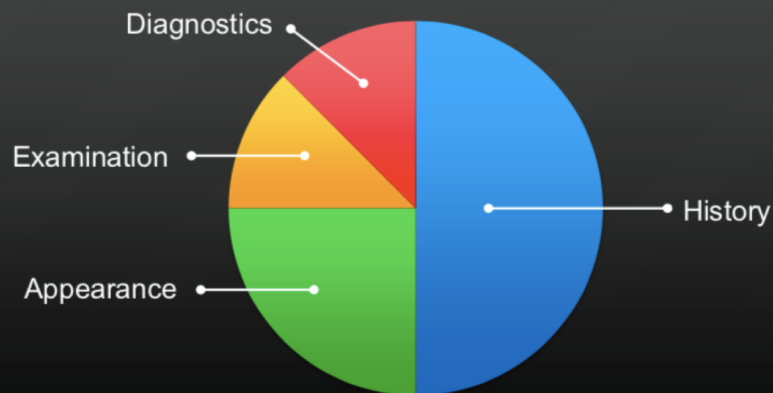
Source: American Well, 2015. ¹Based on survey of health plan subscribers using American Well platform.

Source: American Well Webinars

● 21

Conventional Medicine

What do you need to make a diagnosis:



● 22

Yin Qiao anyone?



Common diagnoses include:

- Sinusitis
- Upper respiratory infection
- Bronchitis
- Urinary tract infection
- Pharyngitis
- Conjunctivitis
- Cough
- Influenza
- Allergies
- Dysuria
- Asthma

60%
of visits result in
a prescription

Source: American Well Webinars

Florida Rule: 64B15-14.0081

Standards for Telemedicine Practice.

Physicians and physician assistants shall not provide treatment recommendations, including issuing a prescription, via electronic or other means, unless the following elements have been met:

- (a) A documented patient evaluation, including history and physical examination to establish the diagnosis for which any legend drug is prescribed.
- (b) Discussion between the physician or the physician assistant and the patient regarding treatment options and the risks and benefits of treatment.
- (c) Maintenance of contemporaneous medical records meeting the requirements of Rule 64B15-15.004, F.A.C.

● 24

SOAP

- Patient's name, DOB, Treatment date, Type of visit (in-person /virtual)
- Current medications: including prescriptions, over the counter products, herbs, and supplements
- Known allergies, health history, comorbidities
- Subjective Symptoms
- Objective examinations including tongue, pulse, etc.
- Billable ICD-10 diagnosis & Non-Billable TM pattern
- TCM principle/strategy: clear heat, transform phlegm, move Qi, etc.
- TCM treatment: Acupuncture, Nutrition, Herbs (Herbal Rx must include: Lot number, expiration date, allergy warning, each Ingredient dosage, intake dose, how many times a day, etc.)

● 25

4 Pillars of TCM Examination

- **Observation:** Use video
Notice - appearance, rash, complexion, patients ROM, behavior, mental state, etc
- **Palpation:** Be creative
Ask a patient to push on this... area,
- **Questioning & Listening:** use audio
Real time interaction with a patient, no different from in person exam



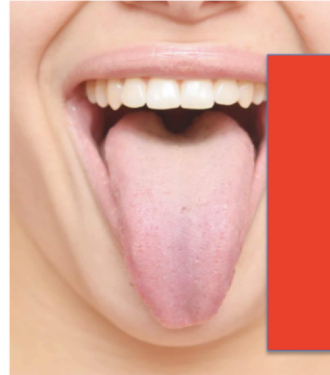
● 26

TCM Tongue

Observation of the tongue is one of the principal diagnostic methods in TCM. Details of the tongue, including shape, size, color, texture, cracks, teeth marks, as well as tongue coating are all important diagnostic signs.

To take picture of your tongue:

- Stand or sit in front of the window with natural daylight illuminating your tongue. If sunlight is not available, use a second light source such as a vanity light in your bathroom
- Extend your tongue out in a relaxed manner; make sure that root and tip of the tongue are clearly visible. Place color strip by the side of your tongue. Do not hold your tongue out for more than 20 seconds.
- Ask someone to take a picture of your tongue with your phone or tablet. Make sure that picture has good quality and small details such as cracks are clearly visible.



● 27

TCM Pulse



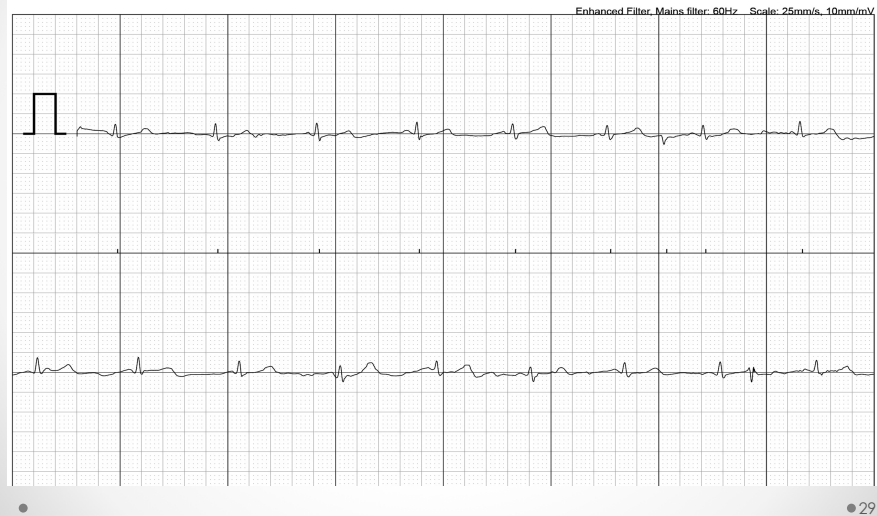
Kardia™ Mobile electrodes may be purchased at <https://www.alivecor.com>
Download Kardia™ App on your smart phone or tablet. Follow instructions on your device.

- EKG taking should take place in a calm, restful environment.
- Allow 1 hour to rest after strenuous physical activity, or after eating large meal.
- Allow 15 minutes after urination, defecation or ingestion of liquids.
- Do not take an EKG immediately after stressful emotional event, allow yourself to calm down completely.
- Relax and hold your finger on the electrodes steady. Do not talk and take an EKG.
- Save EKG as PDF file in Kardia™ App, email to yourself.
- Download EKG PDF to your computer screen.
- Upload EKG PDF into documents folder in your Charm EHR patient's portal and share with the provider a day before the start of each virtual

● 28

Moderate, vacuous, sunken, irregular, thin

Heart Rate: 66 bpm Duration: 30s

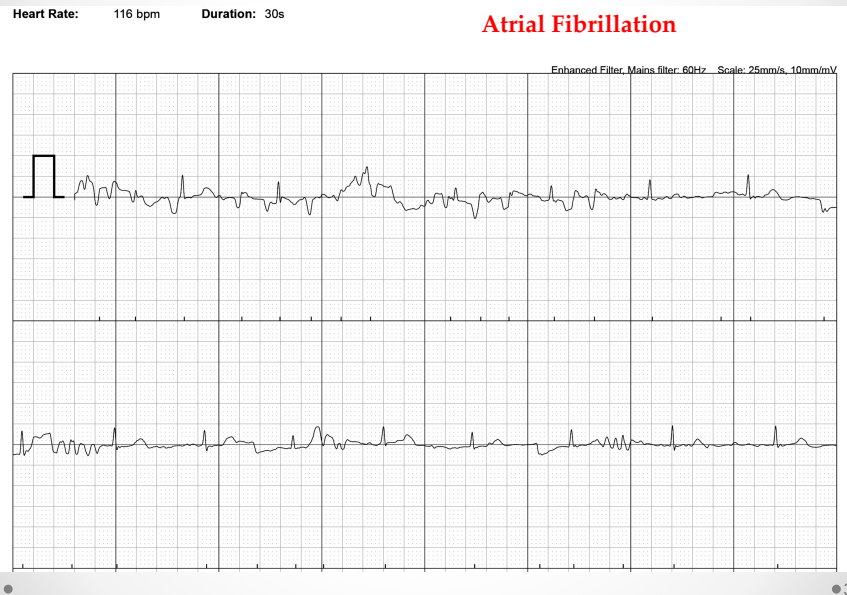


Moderate, replete, floating, regular

Heart Rate: 75 bpm Duration: 30s



Racing, vacuous, rootless, irregular, thin



HIPAA Requirements

HIPAA guidelines on telemedicine is contained within the HIPAA Security Rule and stipulates:

- Only authorized users should have access to ePHI.
- A system of secure communication should be implemented to protect the integrity of ePHI.
- A system of monitoring communications containing ePHI should be implemented to prevent accidental or malicious breaches.
- Unsecure channels of communication such as SMS, Skype, and email should not be used for communicating ePHI at distance.
- <https://www.hipaaajournal.com/hipaa-guidelines-on-telemedicine/>

● 32

Informed Consent to Telehealth

(is not mandated by Florida – last checked 07/13/19 - subject to change)

- I understand that telemedicine is the use of electronic information and communication technologies by a health care provider to deliver services to an individual when he/she is located at a different site than the provider; and hereby consent to PROVIDER NAME HERE providing consulting services to me via telemedicine.
- I understand that the laws that protect privacy and the confidentiality of medical information also apply to telemedicine. I understand that I have the right to withhold or withdraw my consent to the use of telemedicine in the course of my care at any time, without affecting my right to future care or treatment.

● 33

Electronic Health Records (EHR) Software

ChARM Health

Products ▾ Services ▾ Resources ▾ Pricing Partner Program Login Sign Up

The single solution for your practice

MIPS/MACRA READY. MU3 CERTIFIED

- Electronic Health Records
- Practice Management
- Patient Engagement
- TeleHealth
- Revenue Cycle Management
- Medical Billing Platform
- Connect | Collaborate
- Mobile Health Apps

Free Sign Up

Intro Schedule Demo

● 34

Charm EHR Telehealth Features

- ChARM TeleHealth service, a HIPAA compliant end-to-end telehealth solution for your practice.
- Patients can pay online and book telehealth appointments from ChARM Patient Portal and practice website.
- Providers can have secure telehealth session with patients and write chart notes simultaneously from ChARM EHR.
- ChARM video platform works on both Desktop and Mobile Devices.
- Multi-user telehealth sessions allow more than one patient representatives to participate in the video call.
- Screen sharing feature helps patient to share medical records stored on their desktop and mobile phone with providers.
- Providers can also have an instant text chat with patients during telehealth sessions.
- TeleHealth Kiosk supports assisted telehealth sessions from remote facilities.
- Providers can create their own compliance document and get patient's consent before every telehealth session.
- Consultation summary is automatically shared with patients at the end of telehealth session.
- Supports local recording of telehealth sessions in provider's computer. The recorded files can be uploaded to ChARM Patient Documents for future reference.

● 35

Provider Schedule

Calendar | Waiting List | Appointment Requests | Reports

List View | Day | Week | Month | Thursday, Dec 28, 2017

Sort appointments by Time

1 ALL | **1 CONFIRMED**

John Anton [cha0001] | [Join URL](#)

Dr. Mary Williams | 10:00

Reason: Followup Consult | Visit Type: Remote Consult | Patient Balance Due: [Show](#)

DOB: Jan 01, 2017 | Last Visit: No previous visits | Copay: -

Status: **Confirmed** | Resource: - | Encounter: [Start](#)

[Questionnaire](#) / [Past Visits](#) / [Medical Hist](#)

<https://www.charmhealth.com/resources/telehealth/video-consultation.html>

● 36

Email Remainder to Patient

Video Consult Reminder

From: Asian Therapies Clinic (noreply@charmtracker.com)

To: **Dummy@me.com**

Date: Thursday, March 28, 2019, 9:00 AM EDT

Appointment Reminder

Dear Dummy Patient,

This is a courtesy reminder that you have a video consultation scheduled with **Galina Roofener** on **Friday Mar 29, 2019 at 01:30 PM (EST)**

Join the video session 30 minutes prior to appointment time, using the link below. If clicking on the link doesn't work, copy and paste it into your browser.

phr.charmtracker.com/checkinTeleHealth.sas?
ID=ddd5b433fb8cb0c5066f9ac0f48a40815b59c667f57b59f5f910b45de94d727181f3d95ecf78e20c

Regards,
Administrator
Asian Therapies Clinic

Patient's Charm EHR Portal



Welcome to ChARM Patient Portal

[Sign In](#)

Securely access and manage your health data anytime, anywhere.

Clinical Summary

View, Download and Transmit Clinical Summary shared by your providers.

Appointments

Request and Schedule appointments with your Care Team easily from the portal.

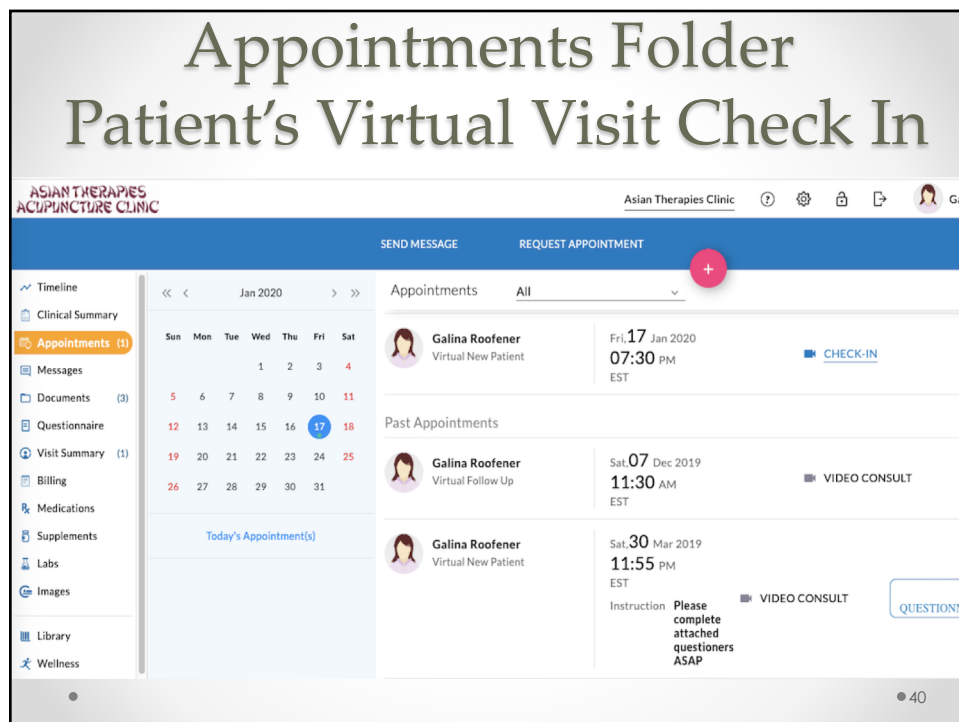
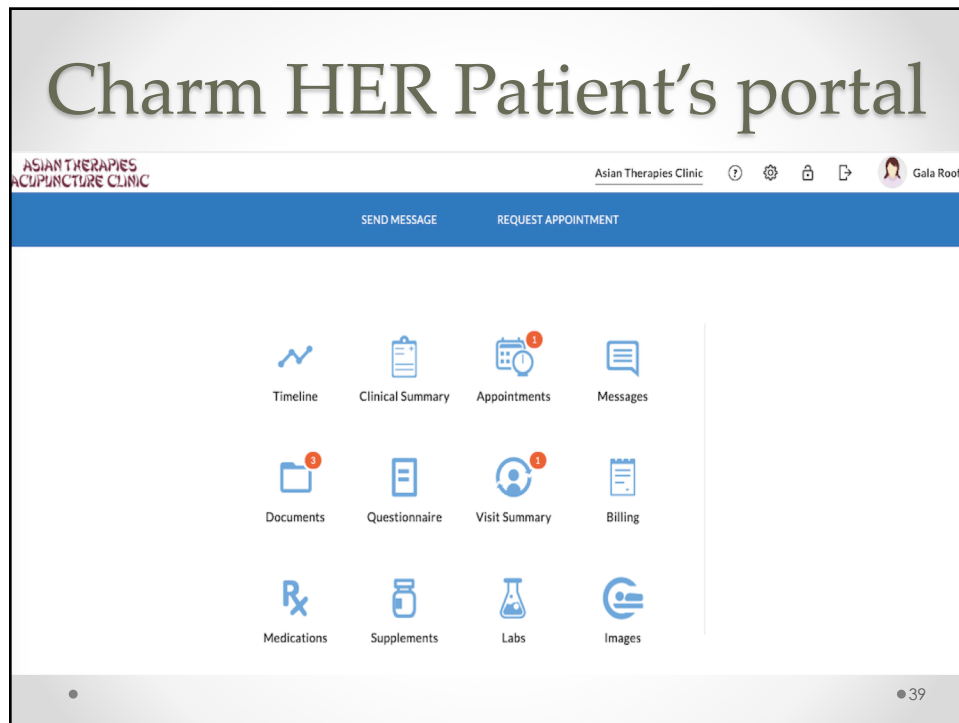
Lab Results/Rx

View automatic updates of Lab Results and Prescriptions from your provider

Documents

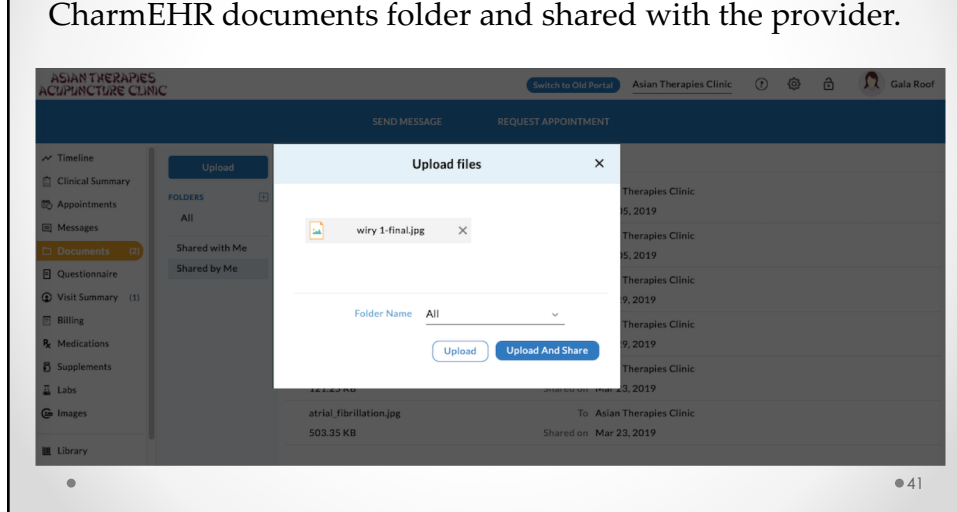
Questionnaires

Secure Messaging



If initial encounter is established via telemedicine, a patient must present valid means of identification prior to an appointment.

Patient can upload scanned ID, Lab work, Images, etc. into the CharmEHR documents folder and shared with the provider.



Mobile Patient



Provider Side – Patient's Chart

CharmEHR Search Patient by Name / ID Asian Therapies Clinic

Provider: Galina Roofener Date: Jan 17, 2020 Visit Type: Virtual New Patient

Reason for visit: --

Questionnaires Chart Notes Procedure Codes MU

Chief Complaints

Symptoms

Flowsheet

Update Entries | Past Data

43

CharmEHR Provider Legal Consent

New Feature: Working Hour Exceptions on specific dates. Click to Know More

CharmEHR Search Patient by Name / ID Asian Therapies Clinic

Provider: Galina Roofener Date: Jan 17, 2020 Visit Type: Virtual New Patient

Reason for visit: --

Questionnaires Chart Notes Procedure Codes MU

Chief Complaints

Symptoms

Flowsheet

Update Entries | Past Data

44

Healthcare Provider Responsibilities

Each healthcare provider is solely responsible for the delivery of medical care and determining whether such provider is able permitted to do so based on the patient's location when using the Service for the telehealth session.

For each telehealth session, the healthcare provider is solely responsible for:

- (a) confirming that the provider has the necessary licenses, patient connections and qualifications to use the Service to deliver the telehealth session; and
- (b) providing telehealth healthcare and advice using the Service solely within the scope of the providers licenses, qualifications and applicable regulatory requirements.

I agree

Provider view - Virtual Consult in Action

John Anton [Cha0001] Male / 23 DOB: Jan 17, 1994

Zoom Meeting ID: 984-563-883

Video Save Preview Sign Print

BMI

-- Select --

Add Dx / Templates / Past Dx

Add Rx / Templates / Past Rx / Sign / Transmit

Add Supplement / Templates / Past Supplement

Vaccine Chart / Add Vaccine / Templates

Add Injection / Templates / Past Injections

Charting during virtual visit

John Anton [Cha0001] Male / 23 DOB: Jan 17, 1994

Provider: Dr. Mary Williams Encounter Date: Dec 29, 2017 Reason for visit: Followup consult

Face Sheet

Providers - Last Visit

Dr. Mary Williams Dec 29, 2017

FAM - Annual Exam X IM - Master X

CHIEF COMPLAINTS

Vitals Flowsheet

Weight lbs ozs Height ft ins BMI

Temp °F

BP

Systolic mmHg Diastolic mmHg

Pulse Rate bpm Pattern -- Select --

Volume -- Select --

DX CODES

RX

SUPPLEMENTS

VACCINES

INJECTIONS

Add Dx / Templates / Past Dx

Add Rx / Templates / Past Rx / Sign / Transmit

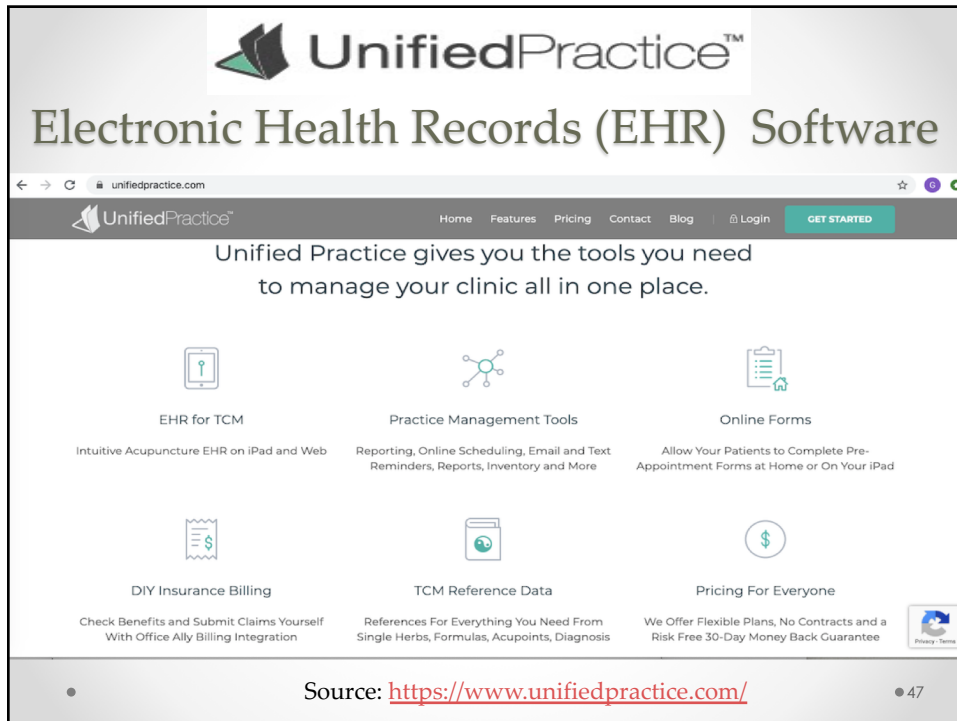
Add Supplement / Templates / Past Supplement

Vaccine Chart / Add Vaccine / Templates

Add Injection / Templates / Past Injections

Here is your Smart Chart (Ctrl+Space)

46



The screenshot shows the homepage of UnifiedPractice.com. The header features the UnifiedPractice logo and navigation links: Home, Features, Pricing, Contact, Blog, and Login. A 'GET STARTED' button is prominently displayed. The main content area is titled 'Unified Practice gives you the tools you need to manage your clinic all in one place.' Below this, six key features are highlighted with icons and brief descriptions:

- EHR for TCM:** Intuitive Acupuncture EHR on iPad and Web
- Practice Management Tools:** Reporting, Online Scheduling, Email and Text Reminders, Reports, Inventory and More
- Online Forms:** Allow Your Patients to Complete Pre-Appointment Forms at Home or On Your iPad
- DIY Insurance Billing:** Check Benefits and Submit Claims Yourself With Office Ally Billing Integration
- TCM Reference Data:** References For Everything You Need From Single Herbs, Formulas, Acupoints, Diagnosis
- Pricing For Everyone:** We Offer Flexible Plans, No Contracts and a Risk Free 30-Day Money Back Guarantee

At the bottom, a source link is provided: <https://www.unifiedpractice.com/>. A small 'Privacy Terms' link is also visible in the bottom right corner of the content area.

Unified Practice EHR Telehealth Features

- Practice management and electronic health records for TCM practitioners. Telehealth feature included in all subscriptions through COVID-19
- Patients can book telehealth appointments from practice website.
- Providers can have secure telehealth session with patients and write chart notes simultaneously from Unified Practice
- Unified Practice telehealth works on both desktop and mobile devices.
- Multi-user telehealth sessions allow more than one patient representatives to participate in the video call.
- Screen sharing feature helps patient to share medical records stored on their desktop and mobile phone with providers.
- Providers can upload their own consent form and get patient's consent before every telehealth session.
- By upgrading to a paid account, providers can also have an instant text chat with patients during telehealth sessions.
- Practitioner can upgrade to a paid account to record sessions

Booking Telehealth Appointment

Appointment Info

Mon, Lee
42 yr., male
kanan@unifiedpractice.com
415-361-3337

Appt. Type: Visit Status: Accepted
Start Onboarding
Patient File
Cancel appointment

You selected to choose from services for existing patients ☒

Complaint
Date: March 27, 2020
Starts: 2:10 PM
Practitioner
Location: East Country
Join: <https://call.lifesizecloud.com/3330203>
Service: Virtual Visit
Duration: 15
Room: EC 1
Practitioner notes
Push and notifications for this appointment ☐

Integrated telehealth appointments directly in Unified Practice

HIPAA Compliant virtual visits available on phone, tablet or computer

Single use meeting links for security

Customizable intake forms to get express permission for telehealth appointments

Email and SMS reminders with links to join

Telehealth features offered at no additional charge for all clinics during the COVID-19 crisis

- Hot/Cold pack application
- Weight/Nutritional guidance
- Acupressure, Gua Sha, or Cupping
- Postural alignments
- Exercises
- Qi Gong, meditation, yoga, tai qi

Source: <https://www.unifiedpractice.com/>

● 49

Email and/or SMS Reminder to Patients

UnifiedPractice

Hi Heart Jones,

A telemedicine appointment has been confirmed.

When it comes time for your appointment, please click the video link from your computer, tablet or smartphone.

This is a telemedicine appointment, so please be prepared to video chat with your patient.

Mar 26, 2020 at 10:00 AM

Lee Mon (existing)
Virtual Visit

<https://call.lifesizecloud.com/1328881>

Thank you,
From The Heart Clinic

For support call 1-866-525-5650 or email support@unifiedpractice.com
Privacy Statement | www.unifiedpractice.com


● 50

Upload your consent forms for express permission from patients for telehealth (these are filled out by patients prior to appointment)

Onboarding Forms Start Onboarding X

Medical Questionnaires: **Filled in** 4 Read & Sign Forms: **Consent NOT signed**

Medical questionnaires **Read & sign forms**

 Medical History Template

● 51

EDIT APPOINTMENT Save Close

Appointment details

Date: at Duration 30 min

Location:

Join: <https://call.lifefizecloud.com/1328237>

Service:

Room:

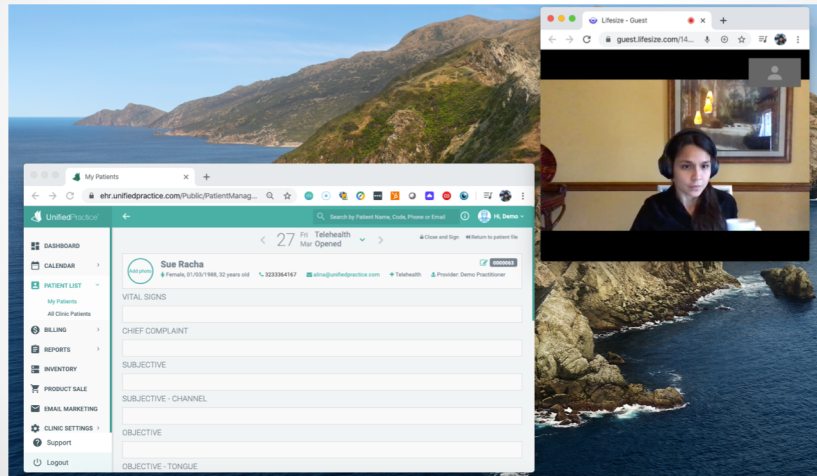
Send notifications for this appointment? ☒ yes ☐ no
SMS notifications are disabled for this patient.

| | Email | SMS |
|------------------------|-------------------------------------|--------------------------|
| Appointment created | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| First reminder | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Second reminder | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| No show warning | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Reschedule appointment | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Cancel appointment | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Thank you email | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Practitioners can join from calendar or set up email or SMS reminders for themselves

● 52

Charting during virtual visit



53

Provider Side – Patient's Chart (iPad)

28 WED Acupuncture
AUG Opened

Sign

Otta, Rick (#00000028)
6 yr., 8 mo., male
Created by Demo Practitioner (Aug 28, 2019 2:00 PM)

VITAL SIGNS

| | |
|----|----|
| HR | RR |
| BW | T |
| BP | HT |

CHIEF COMPLAINT & ICD

Enter Notes

SUBJECTIVE

Enter Notes

OBJECTIVE

Enter Notes

TONGUE

Enter Notes

PULSE

Enter Notes

CHANNEL PALPATION

Enter Notes

Home Pulse Tongue Subjective Objective PE Acc Rx Tx Principals More

Creating Herbal Rx

10:40 AM Fri Apr 10

Herbs Rx Save Protocol

ai ye [1 mod]
library > Granule

| MEDICINALS (2) | DOSE (73) | UOM | TXT DOSE | MOD |
|----------------|-----------|-----|----------|-----|
| ai ye | 3 | g | | |
| ba zhen tang | 70 | g | | |

Total Units X 1

[+ Add RX Items](#)

Administration

| UNITS | DOSE | X DAILY | DAYS | TOTAL |
|-------|------|---------|------|-------|
| g | 3 | 3 | 0 | 0.00 |

Patient Instructions

Take 3 level spoons three times a day. Separate by 1 hour from meds. [Assign to medicinal](#)

Expiration date Date of service
Feb 25 2020

Home CC/CD Tx Principle Subjective PE Objective Tongue Rx Pulse More

Printing Herbal Rx label

10:42 AM Fri Apr 10

ai ye [1 mod]
library > Granule

[Cancel](#) **Printer Options** [Print](#)

Printer [Select Printer >](#)

1 Copy [-](#) [+](#)

Stark, Arya

Demo Clinic

234 W 42nd St, New York NY 10036

Phone: 212-555-5555 / Fax: 555-555-5555

ADMINISTRATION - DATE: Feb 25 2020

| Dose / Unit | x Daily | Days | Total |
|-------------|---------|------|-------|
| 3.0 g | 3 | 0 | 0.00 |

PRACTITIONER: Doctor Acupuncture

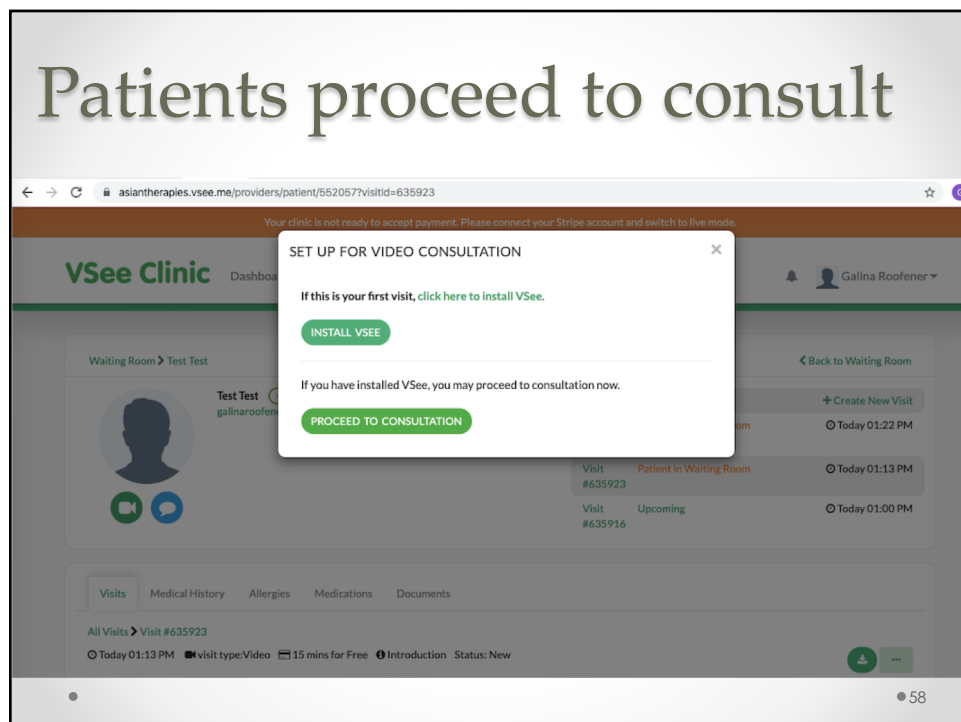
THIS RX CONTAINS:

☐ Shellfish ☐ Gluten ☐ Wheat ☐ Tree nuts ☐ Soy

NOTES:

Page 1

Home CC/CD Tx Principle Subjective PE Objective Tongue Rx Pulse More



Patient's Vsee Portal

Home Visits Health

Help
Test Computer
Test Test

Welcome to Asian Therapies Clinic

Room code: ASIAN THERAPIES

Service currently not available. Please check back later

Services include but not limited to:

- Custom Traditional Chinese Herbal medicine
- Individualized supplement recommendation
- Individualized nutritional recommendation

For more information on our services please visit our website:
<http://AsianTherapies.org>

Current number of patients waiting: 0

If this is an emergency, please call 911

ENTER WAITING ROOM

BOOK APPOINTMENT

Upcoming Appointment

Galina Roofener, L.Ac. L.C.H

Today - 01:00 PM
 Video visit

START APPOINTMENT

Cancel Appointment

Recent Visits

There is no recent visit.

Our Providers

Galina Roofener, L.Ac. L.C.H

SEND MESSAGE

VSee informed consent

Telemedicine Services.

I hereby request, consent and authorize VSee and its subsidiaries, affiliates, representatives, and agents (collectively, "VSee") and their employed or contracted physicians, physician assistants, nurse practitioners or other licensed health care professionals in its care network (the "Practitioners"), to utilize telemedicine through VSee's proprietary systems, methods and protocols to access, diagnose, consult, treat and educate me and those I am authorized to represent (the "Services").

I acknowledge and consent to see a Practitioner via telemedicine. I understand that my eligibility to receive a visit via telemedicine is based on the Practitioner's medical judgment that it is appropriate and that the quality of care will not be diminished by the use of telemedicine. I understand that a telemedicine visit is distinct from an in-person visit because I will not be in the same room as the health care Practitioner, and instead, I will communicate with the Practitioner through advanced communication technology using live video and audio feed.

I acknowledge that in order to protect my privacy, I need to choose a private location to place my telemedicine call. I understand that in order to provide the best call environment, I should reduce background light from windows or light emanating from behind me. I understand that my camera should be placed on a secure, stable platform to avoid wobbling and shaking during the telemedicine session. To the extent possible, my camera should be placed at the same elevation as my eyes with my face clearly visible to the other person. I understand that I will be informed of the presence of any third party, including those that may be present to assist with the audio or video equipment, and that I have the right to: (1) omit specific details of medical history or physical examination that are sensitive to me during such third party presence, (2) ask non-medical personnel to leave the telemedicine examination room, and/or (3) terminate the consultation at any time by notifying the Practitioner or disconnecting from the telemedicine portal.

I understand the potential risks of receiving the Services via telemedicine include: delays in medical evaluation due to technological equipment failure, a lack of access to all relevant information, or a security breach allowing unauthorized access to my confidential medical information. I understand that my Practitioner or I may terminate the telemedicine visit at any time, including if the Practitioner or I feel that an in-person visit is necessary for any reason. I have had the Services and alternatives to telemedicine for my Services explained to me and I choose to and continue with a telemedicine visit.

I understand that any complaint may be filed with the Secretary of the Department of Health and Human Services.

I have read and understood the written information provided above. I agree that the information provided above adequately explains the Services, along with the risks and benefits to me of said Services. I have had the opportunity to ask questions about this information – if I had any questions, all of my questions have been answered in full. By electronically signing this form, I acknowledge and agree to all of the above, and certify that I have no questions and/or have had my questions answered in full.

By electronically signing this informed consent, I am agreeing to conduct transactions electronically, and intend for my electronic signature to be a binding electronic signature on myself and those I am authorized to represent. Further, I understand and acknowledge that I am digitally receiving a copy of this Agreement concurrently upon execution to print and/or retain a copy of this Agreement, and may also request a paper copy from VSee using the contact information below:

If you have any questions, please contact support@vsee.com.

●
● 60

If initial encounter is established via telemedicine, a patient must present valid means of identification prior to an appointment.

Patient can upload scanned ID, Lab work, Images, etc. into VSee app before the appointment start.

Practitioner will have to relocate it to your EMR system.

VSee Clinic Home Test Computer Test Test

WHAT IS YOUR HEALTH CONCERN TODAY?

Reason for visit (optional)

test

File upload (health record, labs, or relevant information) (optional)

Drag and Drop files here
Or Click Here to browse files

tongue.jpg (25K)

1 - ECG.pdf (3M)

☒ I give my consent to participate in a Telemedicine Consultation *

CONTINUE >

Welcome to Asian Therapi

Service currently not available. Please che

Services include but not limited to:

Custom Traditional Chinese Herbal medic
Individualized supplement recommendat
Individualized nutritional recommendatio

For more information on our services please
<http://AsianTherapies.org>

Current number of patients waiting: 0

If this is an emergency, please call 911

Our Providers

Appointment

Roofener, L.Ac. L.C.H

01:00 PM

visit

POINTMENT

Appointment

visits

visit.

Vsee Standard Intake

VSee Clinic Home Test Computer Test Test

PLEASE VERIFY AND UPDATE THE FOLLOWING INFORMATION

Past and Current Medical Conditions [Update](#)

Past Surgical History [Update](#)

Allergies [Update](#)

Current Medications [Update](#)

< BACK

CONTINUE >

Welcome to Asian Therapi

Service currently not available. Please che

Services include but not limited to:

Custom Traditional Chinese Herbal medic
Individualized supplement recommendat
Individualized nutritional recommendatio

For more information on our services please
<http://AsianTherapies.org>

Current number of patients waiting: 0

If this is an emergency, please call 911

Our Providers

Appointment

Roofener, L.Ac. L.C.H

01:00 PM

visit

POINTMENT

Appointment


visits

There is no recent visit.

62

Provider Side – Waiting Room

Waiting Room > Test Test Back to Waiting Room



Test Test Online

galinaroofener@yahoo.com

Open Visits Create New Visit

| | | |
|---------------|-------------------------|----------------|
| Visit #635923 | Patient in Waiting Room | Today 01:13 PM |
| Visit #635916 | Upcoming | Today 01:00 PM |

Visits Medical History Allergies Medications Documents

All Visits > Visit #635923

Today 01:13 PM visit type: Video 15 mins for Free Introduction Status: New

Patient in Waiting Room

Wait time: 5 mins

CHECKOUT

Intake Date: 01/19/2020 01:13 PM

Chief Complaint

Referral Guidelines to Traditional Medicine Herbal Clinic

- Vague multiple symptoms
- Poor response to conventional treatment
- Does not want to take pharmaceuticals
- Developed resistance to pharmaceuticals
- To counteract side effects of pharmaceuticals
- To aid in fertility treatment
- Digestive disorders
- Chronic constipation/diarrhea/irritable bowels & bladder
- Poorly understood diagnosis of "syndrome"
- To restore convalescent patient after serious disease treatment (ex: post chemo, etc)
- Preventative treatment (ex: easy catching flu)
- Chronic pain that did not responded to acupuncture

64

Contraindication for Traditional Herbal Medicine

- If patient is on: Coumadin, Warfarin, Heparin, Interferon.
- Active Chemo – only with written referral of their oncologist
- If patient has: Liver or Kidney failure (elevated liver enzymes)



• 65

FDA Regulations for Chinese herbs

- Chinese Herbal Medicines ARE regulated by the FDA.
- Chinese Herbal Medicines are held to cGMP regulation under Title 21 CFR 111.



• 66

Herbal pharmacy selection guidelines

- Quality of herbs used by a pharmacy.
- Adherence to the FDA and USP guidelines for herbal compounding practices.
- Ease of prescription software use.
- Wide range of single herbs and formula options. available for custom formula compounding.
- Allergy warning on the label.
- Quick shipment options of custom and patent herbal formulas directly to the patient.
- Prescription pick up monitoring options.
- High customer service standards.
-

● 67

Manufacturing facilities and industry safety standards

Certifications:

- TGA-PIC/S GMP (Therapeutic Good Administration)
 - USDA-NOP (United States Department of Agriculture, National Organic Program)
 - NSF-cGMP (National Sanitation Foundation)
 - Kosher
 - Halal
 - ISO 9001:2008 (International Accredited Forum)
 - ISO 17025:2005 (Taiwan Accreditation Foundation)
 - GMP (Good Manufacturing Practice)
- Source: <http://www.kpc.com/>



● 68

TCM Herbs – Quality Standards Information Resource for MD's

← → × kpc.com/manufacturing-process/ ☆ ⓘ

KPC-Herbs.
港香蘭
714-790-1457

Search

[About Us](#) | [Manufacturing](#) | [Quality Assurance](#) | [Products](#) | [Testimonials](#) | [Articles](#) | [Contact Us](#)

STEP 1

Raw Material

OUR SPECIES IDENTIFICATION PROCESS

Quality begins with using the right species of raw herbs

PHYSICAL APPEARANCE

Inspecting the physical qualities of raw herbs

KPC Herbs are manufactured from premium quality raw materials that must pass a series of stringent inspections performed by in-house professional technicians utilizing our state-of-the-art process and precision instruments:

Species Identification:

<https://www.kpc.com/manufacturing-process/>

Contact Us

Safety of Custom Traditional Chinese Herbal Medicine Practice at Cleveland Clinic

Gallina V. Roofener LAc, LCH; Jamie Starkey LAc; Yanming Huang LAc, LCH; Susan Veleber LAc, LCH; Brenda Powell MD
Cleveland Clinic Wellness Institute, Department of Integrative and Lifestyle Medicine

AIM

To evaluate the safety of Traditional Chinese Herbal Medicine (TCHM) as practiced at the Cleveland Clinic Center for Integrative and Lifestyle Medicine (CILM):

- Outpatient facility
- Vigorously tested herbs
- Custom prescriptions for each patient

TCHM AT CILM

- Under supervision of a physician, licensed Chinese Herbalists prescribe custom herbal formulas based on TCHM diagnosis
- Patients are re-evaluated in person on an as-needed basis
- Detailed treatment plan, progress, adverse events and hospitalizations are documented in the patient's medical record
- A complete metabolic panel (CMP) is ordered at baseline, 1-2 months, 6 months, 12 months and 24 months of herbal intake

METHODS

- Review of medical records of patients referred to TCHM clinic from June 1, 2014 to June 1, 2016
- Exclusion criteria:
 - Patients younger than 12 years old
 - Patients on Heparin, Warfarin or Coumadin
 - Patients on Interferon or active chemotherapy
 - Patients with liver or kidney failure
 - Patients with a liver or kidney transplant
- Safety was evaluated using CMP results with emphasis on kidney and liver functions

FDA ADHERANT TCHM LABEL

FDA disclaimer

Custom herbal directions

Adverse warning

Prescription #

Prescription and Expiration Date

Pharmacy Address

CUSTOM CLINIC NAME

John Doe 123456789

Address: 1234 Main St, Cleveland, OH 44101

Phone: (216) 123-4567

Email: john.doe@kpc.com

Prescribed by: Dr. John Doe

Manufactured by: KPC Herbs

Latin botanical, Plant part, Parts, Dosage

Prescription

Manufacturer, Concentration, Cautions, Expiration, Ingredients

All TCHM formulas are custom compounded from concentrated 5:1 water-decocted extract granules manufactured according to ISO/TC249 international standards, ISO/IEC 17025:2005 testing lab and FDA GMP Title 21 CFR 111

24 MONTHS DATA

3 Mild Adverse Events

- No abnormal findings on CMP that could be attributed to herbs
- Three cases of mild adverse events (1.5%) were reported, which included anxiety, nausea and pruritus.
- These events were reported to The State of Ohio Medical Board according to Ohio law but none required FDA reporting

CONCLUSIONS

- This chart review illustrates TCHM, as practiced at Cleveland Clinic CILM, is likely to be safe

Cleveland Clinic

LabCor for Licensed Acupuncturists

professionalco-op.com



PROFESSIONAL CO-OP®
Laboratory Services
SERVICE WITH INTEGRITY SINCE 2001

[BECOME A MEMBER](#)

[HOME](#)
[ABOUT PCS](#)
[RESOURCES](#)
[PATIENTS](#)
[CONTACT](#)
[LOGIN](#)

In 2001, we leveled the playing field so that every appropriately licensed practitioner in America could have access to inexpensive lab testing!

An Original Concept for Lab Testing™



MEMBER'S LAUNCHPAD

• The new member LAUNCHPAD puts everything at your fingertips



FREE MEMBERSHIP

• Thousands of discounted lab tests
• Services for specialty practices



INFORMATION AND RESOURCES

• We sponsor non-commercial lab test information from leading experts

<https://professionalco-op.com/>
 Services nationwide (except NY, NJ, RI)


Florida Law

64B1-3.001 Definitions.

(5) Adjunctive therapies shall include but not be limited to:

(a) Nutritional counseling and the recommendation of nonprescription substances which meet the Food and Drug Administration labeling requirements, as dietary supplements to promote health;

Specific Authority 457.102, 457.104 FS. Law Implemented 457.102 FS. History—New 8-13-84, Amended 9-19-84, Formerly 21AA-3.01, Amended 12-14-87, 9-3-89, 5-30-91, 1-26-92, 2-27-92, Formerly 21AA-3.001, 61F1-3.001, 59M-3.001, Amended 9-6-06.



72

Prescription Label compliant to FDA standard

These statements have not been evaluated by the Food & Drug Administration. This product is not intended to diagnose, treat, cure or prevent any disease.

Take 6 capsules 2 times a day between meals. Days 3 thru day 14 of the cycle. Separate by 2 hours from the rest of your meds & supplements

Allergy Warning:
This herb prescription contains Du Zhong (Chao) (Eucommia (Dry-Fried)), which is a potential Latex allergen.

Manufactured & distributed by
CRANE HERB PHARMACY
Mashpee, MA 02649
(508) 539-1700
www.CraneHerb.com



Gui Shao Di Huang Tang Mod.

Dosage: 6 caps 2 times per day for 14 days

Prescription # 10675593
 Ms. Sarah Golden, LMT
 7 Main St.
 Oberlin, OH 44074
 Prescribed: 4/27/15
 Filled: 4/28/15
 Discard after: 4/27/16
 158 capsules approx. 335 mg each

Prescriber:
Ms. Galina Roofner, L.Ac.
Cleveland Clinic - Chinese Herbal
Therapy Clinic
1550 Richmond Road TR2
Lyndhurst, OH 44124

Herbal Supplement

Herbal Supplement Facts
 Serving Size 6 caps
 Servings Per Container about 26

| Amount Per Serving | % Daily Value |
|------------------------------------|----------------------------------|
| Herbal Extract of: | |
| Latin Binomial | Part Pin Yin |
| Poriae Cocos Sclerotium | Sclerotium Fu Ling 201 mg* |
| Alismatis Rhizoma | Stem Ze Xie 168 mg* |
| Corni Officinalis Fructus | Fruit Shan Zhu Yu 168 mg* |
| Dioscorea Batatas Rhizoma | Stem Shan Yao 168 mg* |
| Angelicae Sinensis Radix | Root Dang Gui (Shen) 168 mg* |
| Zizyphi Spinosi Semen | Seed Suan Zao Ren 150 mg* |
| Rehmanniae Radix (cooked) | Root Shu Di Huang 150 mg* |
| Moutan Radicis Cortex | Root Peel Mu Dan Pi (Su) 150 mg* |
| Paoniae Lactiflorae Radix | Root Bai Shao 150 mg* |
| Cuscutae Semen | Seed Tu Si Zi 100 mg* |
| Eucommiae Ulmoidis Cortex | Bark Du Zhong (Chao) 100 mg* |
| Atractylodis Macrocephalae Rhizoma | Stem Bai Zhu 100 mg* |
| Proprietary Mixture | 233 mg* |

* Daily Value not established

<https://www.craneherb.com>

Create TCM Herbal Formula

Top Hospitals Choose Crane Herb

Pharmaceutical-quality Herbs
Traditional Chinese Herbal Medicine
FDA cGMP Compliance

Practitioner & Student Area

Username

Password

☐ Remember Me

[Forgot password?](#)

Not Registered? [Start Here](#)

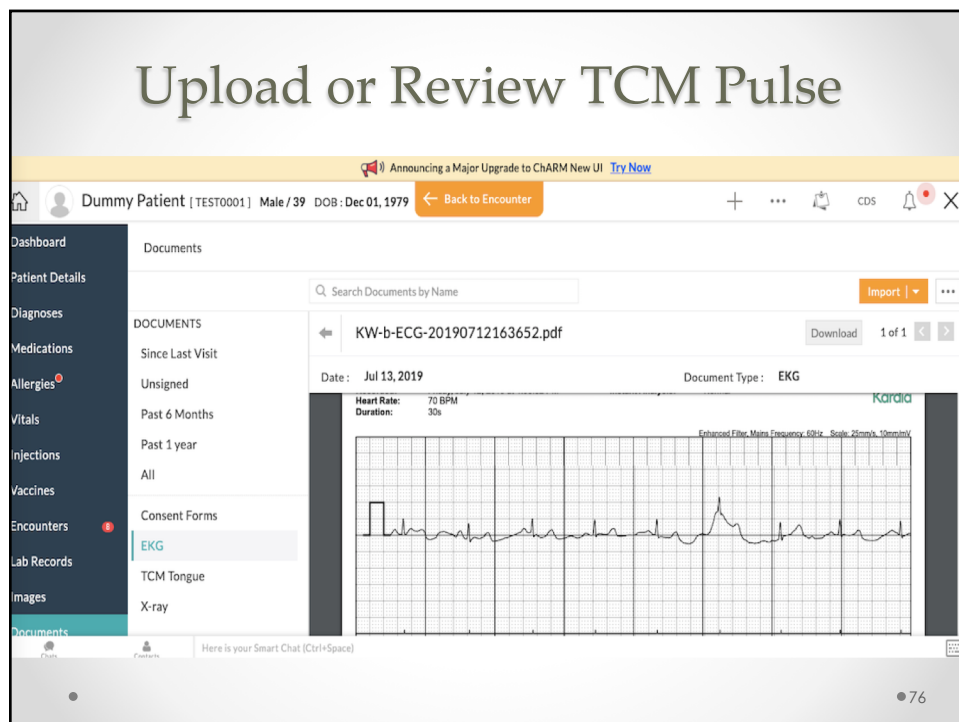
Watch Our Compounding Video



FDA cGMP
Current Good Manufacturing Practices
HERB COMPOUNDING COMPLIANCE

Choose from Over 5,000 Products
No Upfront Inventory Investment Required [GO](#)

<https://www.craneherb.com/>



Upload or Review TCM Tongue

Announcing a Major Upgrade to CHARM New UI [Try Now](#)

Dummy Patient [TEST0001] Male / 39 DOB: Dec 01, 1979 [Back to Encounter](#)

Dashboard Patient Details Diagnoses Medications Allergies Vitals Injections Vaccines Encounters Lab Records Images Documents

Documents

Search Documents by Name

DOCUMENTS

Since Last Visit

Unsigned

Past 6 Months

Past 1 year

All


Consent Forms

TCM Tongue

X-ray

IMG_2761.JPG

Date: Jul 13, 2019 Document Type: TCM Tongue



Download 1 of 1

Here is your Smart Chat (Ctrl+Space)

77

Add Current Billing ICD-10 & Future ICD-11 Traditional Medicine Diagnosis

Dummy Patient [TEST0001] Male / 39 DOB: Dec 01, 1979

Provider Galina Roofener Encounter Date Jun 29, 2019 Visit Type Acute New Patient Visit

Mar 29, 2019: Galina Roofener: Virtual Repeat Questionnaires Chart Notes Procedure Codes MU

Save Preview Sign Print

Add Dx / Templates / Past Dx

Templates / Past Rx / Sign / Transmit

Add Suppl / Templates / Past Suppl

Vaccine Chart Add Vaccine / Templates

Add Injection / Templates / Past Injections

Search & Add Add Lab / Templates / Past Orders Map Dx

LABS

78

Add Diagnoses

| Diagnosis | ICD Code | Notes |
|--|----------|-------------------------|
| Migraine without aura, not intractable | G43.009 | SF52 Liver yang ascenda |
| Search by name (or) code | | |
| Search by name (or) code | | |

More Add Cancel

Assessment Notes

different disorders may require different length of the treatment that may range from few days to few years. Be aware that it may take few weeks to notice subtle changes and up to 3 months for herbal formula to reach its therapeutic potential. It is important to note that because everyone responds to treatment differently, I cannot guarantee the outcome of the treatment. Herbs and nutritional supplements (which are from plant, animal, or mineral sources) that have been recommended are traditionally considered safe but some allergic reactions or other side effects (i.e. nausea, gas, stomach ach

Diagnoses

Unspecified menopausal and perimenopausal disorder

ICD-11 Website

ICD-11 for Mortality and Morbidity Statistics (Version : 04 / 2019)

Search [Advanced Search] [Browse](#) [Coding Tool](#) [Special Views](#) [Info](#)

▶ 14 Diseases of the skin
 ▶ 15 Diseases of the musculoskeletal system or connective tissue
 ▶ 16 Diseases of the genitourinary system
 ▶ 17 Conditions related to sexual health
 ▶ 18 Pregnancy, childbirth or the puerperium
 ▶ 19 Certain conditions originating in the perinatal period
 ▶ 20 Developmental anomalies
 ▶ 21 Symptoms, signs or clinical findings, not elsewhere classified
 ▶ 22 Injury, poisoning or certain other consequences of external causes
 ▶ 23 External causes of morbidity or mortality
 ▶ 24 Factors influencing health status or contact with health services
 ▶ 25 Codes for special purposes
 ▼ 26 Supplementary Chapter Traditional Medicine Conditions - Module I
 ▶ Traditional medicine disorders (TM1)
 ▶ Traditional medicine patterns (TM1)
 SJ3Y Other specified supplementary Chapter Traditional Medicine Conditions - Module I
 SJ3Z Supplementary Chapter Traditional Medicine Conditions - Module I, unspecified
 ▶ V Supplementary section for functioning assessment
 ▶ X Extension Codes

ICD-11 for Mortality and Morbidity Statistics (ICD-11 MMS) 2018 version

Version for preparing implementation

Release Notes

- The code structure for the ICD-11 MMS is stable.
- Updating mechanism is in place, based on the proposals submitted on the [maintenance platform](#)

<https://icd.who.int/> 79

ICD-11 Traditional Medicine Codes - Chapter 26

ICD-11 Coding Tool Mortality and Morbidity Statistics (MMS) April 2019 [Help](#)

liver pat

Guessing the word being typed...

Word list sort: Relatedness/repetition

pattern
patch
patterns

Destination Entities sort: Matching score

| | | |
|------|--|-----------|
| SF5C | Liver meridian cold stagnation pattern (TM1) | [Details] |
| SF5Z | Liver system patterns (TM1), unspecified | [Details] |
| SG2B | Liver meridian pattern (TM1) | [Details] |
| SF50 | Liver yin deficiency pattern (TM1) | [Details] |
| SF51 | Liver yang deficiency pattern (TM1) | [Details] |
| SF5K | Disharmony of liver and stomach systems pattern (TM1) | [Details] |
| SF5A | Liver-gallbladder dampness-heat pattern (TM1) | [Details] |
| SF53 | Liver qi deficiency pattern (TM1) | [Details] |
| SF54 | Liver blood deficiency pattern (TM1) | [Details] |
| SF57 | Liver qi stagnation pattern (TM1) | [Details] |
| SF58 | Liver fire flaming upward pattern (TM1) | [Details] |
| SF5Y | Other specified liver system patterns (TM1) | [Details] |
| SF5B | Liver meridian dampness-heat pattern (TM1) | [Details] |
| SF52 | Liver yang ascendant hyperactivity pattern (TM1) | [Details] |

Filter

| | | |
|-------------------------------------|-----------------------------------|---|
| <input checked="" type="checkbox"/> | Infections | 0 |
| <input checked="" type="checkbox"/> | Neoplasms | 0 |
| <input checked="" type="checkbox"/> | Blood | 0 |
| <input checked="" type="checkbox"/> | Immune system | 0 |
| <input checked="" type="checkbox"/> | Endocrine, nutritional, metabolic | 0 |
| <input checked="" type="checkbox"/> | Mental and behavioural | 0 |
| <input checked="" type="checkbox"/> | Sleep-wake | 0 |
| <input checked="" type="checkbox"/> | Nervous system | 0 |
| <input checked="" type="checkbox"/> | Eye and adnexa | 0 |
| <input checked="" type="checkbox"/> | Ear and mastoid | 0 |
| <input checked="" type="checkbox"/> | Circulatory system | 0 |
| <input checked="" type="checkbox"/> | Respiratory system | 0 |
| <input checked="" type="checkbox"/> | Digestive system | 0 |
| <input checked="" type="checkbox"/> | Skin | 0 |
| <input checked="" type="checkbox"/> | Musculoskeletal system... | 0 |
| <input checked="" type="checkbox"/> | Genitourinary system | 0 |
| <input checked="" type="checkbox"/> | Sexual health | 0 |
| <input checked="" type="checkbox"/> | Pregnancy, childbirth... | 0 |
| <input checked="" type="checkbox"/> | Perinatal and neonatal | 0 |
| <input checked="" type="checkbox"/> | Developmental anomalies | 0 |
| <input checked="" type="checkbox"/> | Symptoms, signs, findings... | 0 |

https://icd.who.int/ct11/icd11_mms/en/release 80

This is the FUTURE!

Dummy Patient | TEST0001 | Male / 39 | DOB: Dec 01, 1979

[Announcing a Major Upgrade to CHARM New UI](#)
[Try Now](#)

Provider: **Galina Roofener** | Encounter Date: **Jun 29, 2019** | Visit Type: **Acu New Patient Visit**

Saved at 7:43 PM | [Close Encounter](#)

Mar 29, 2019: Galina Roofener : Virtual | [Repeat](#) | [Questionnaires](#) | [Chart Notes](#) | [Procedure Codes](#) | [MU](#)

[Save](#) | [Preview](#) | [Sign](#) | [Print](#) | ...

Allergies
 gluten

Assessment
Assessment Notes
 Different disorders may require different length of the treatment that may range from few days to few weeks. Be aware that it may take few weeks to notice subtle changes and up to 3 months for verbal formula to reach its therapeutic potential. It is also important to note that because everyone responds to treatment differently, I cannot guarantee the outcome of the treatment. Herbs and nutritional supplements (which are from plant, animal, or mineral sources) that have been recommended are traditionally considered safe but some allergic reactions or other side effects (i.e. nausea, gas, stomach ach

DX CODES
 Migraine without aura, not intractable, without status migrainosus (ICD10 : G43.009)
 SF52 Liver yang ascendand hyperactivity pattern (TM1)

[Add Dx](#) / [Templates](#) / [Past Dx](#)

RX

[Add Rx](#) / [Templates](#) / [Past Rx](#) / [Sign](#) / [Transmit](#)

SUPPLEMENTS

[Add Suppl](#) / [Templates](#) / [Past Suppl](#)

VACCINES

[Vaccine Chart](#) / [Add Vaccine](#) / [Templates](#)

INJECTIONS

[Add Injection](#) / [Templates](#) / [Past Injections](#)

Create Custom TM Formula

craneherb.com/practitioner/custompharmacy/design.aspx?a=157271&p=172714

Products Discounts Clinic Orders Patent Pharmacy Custom Pharmacy Clinic Protocols Patients My Account About Crane Videos

Home > Practitioner Home > Custom Pharmacy > Design Formula

Design Formula

Formula Information

Formula Type: ☐ Clinic ☒ Patient

Patient Name: Test, Test

Chief Complaints/Pattern:
Read about patient data security
Learn more about Patient Analytics
See the Complete Pattern tab at the right for pattern ingredients.

Allergies: None recorded

Formula Name:

Antecedent: Test Test 11/4/2019
\$33.53 per 100 grams

Practitioner Cost: \$33.53 per 100 grams

Patient Price: \$33.53 per 100 grams

Add Ingredients

Browse Material Medica for ingredients.

- ▼ **Material Medica**
 - Release the Exterior
 - Clear Heat
 - Downward-Draining
 - Drain Dampness
 - Dispel Wind-Dampness
 - Transform Phlegm and Stop Coughing
 - ▼ Aromatic Herbs that Transform Dampness
 - Transform Dampness
 - Relieve Food Stagnation
 - Regulate the Qi
 - Regulate the Blood
 - Warm the Interior and Expel Cold
 - Tonifying Herbs
 - Stabilize and Bind
 - Substances that Calm the Spirit
 - Aromatic Substances that Open the Orifices
 - Extinguish Wind and Stop Tremors
 - Expel Parasites
 - Substances for Topical Application
 - Obsolete Substances

| Pin Yin | Common Name | Pharmaceutical Name | Parts (HHH HH) | Pct | Patient Price |
|--|---------------------------------|---------------------|----------------|--------|---------------|
| Shang Zhong Xia Tong Yong Feng (5-1) ^{†*} [wuxie] | Cinnamon & Angelica Formula | | 100.00 | 81.30% | \$26.54 |
| Chai Hu Jia Long Mu Tang (5-1) | Bupleurum & Fossilized Minerals | | 20.00 | 16.26% | \$5.93 |
| Yuan Zhi | Polygonal | Polygonal Radix | 3.00 | 2.44% | \$1.06 |
| Total: | | | 123.00 | 100% | \$33.53 |

† Potential allergen: Tree Nuts
 * Potential allergen: Gluten
 ‡ Potential allergen: Wheat

Transform Dampness Compare

| Pin Yin | Common | Pharma | Compare |
|----------------|-----------------------|-------------------------------|--|
| Cang Zhu | Ataclyodes | Ataclyodis Lanceae Rhizoma | add <input type="checkbox"/> |
| Hou Po | Magnolia Bark | Magnoliales Officialis Cortex | add <input type="checkbox"/> |
| Hou Po (Chuan) | Magnolia Bark (Chuan) | Magnoliales Officialis Cortex | Not available: expensive <input type="checkbox"/> |
| Huo Xiang | Agastache | Agastaches Rugosa Herba | <input type="checkbox"/> |
| Pei Lan | Eupatorium | Eupatori Fortunei | add <input type="checkbox"/> |
| Sha Ren | Anemom | Anemom semen | add <input type="checkbox"/> |
| Bai Dou Kou | Cardamom | Cardamom Fructus | Not available: out of stock <input type="checkbox"/> |
| Gao Dou Kou | Katsumada | Alpiniae Katsumadai Semen | add <input type="checkbox"/> |
| Gao Guo | Tsaoko Fruit | Tsaoko Fructus | Not available: n/a <input type="checkbox"/> |

82

After Visit Summary Sent to Patient Portal

Instructions

TCM Rx Herbal Formula (KPC 5:1): Jia Wei Xiao Yao San mod 5/17/2019

Created: Jun 21, 2019 9:30 PM

Prescription Number: 10775612

Number of Days: 28

Dosage Instructions: Take 3 level spoons morning; 4-5 at lunch and 7 before bed. Separate by 1 hour from med's & supplements

Ingredients

| Pin Yin | Pharmaceutical Name | |
|----------------------------|-----------------------------|--------|
| Jia Wei Xiao Yao San (5:1) | | 79.37% |
| Mai Men Dong | Ophiopogonis Tuber | 3.97% |
| Pu Huang | Typhae Pollen | 2.38% |
| Bai He | Lili Bulbus | 3.97% |
| Tian Hua Fen | Trichosanthis Radix | 3.97% |
| Dan Shen | Salviae Miltiorrhizae Radix | 3.97% |
| Long Gu (Duan) | Draconis Os | 2.38% |

KPC 5:1 concentrated water-extract granule

Carrier: non-GMO Potato starch

You should receive an e-mail from Crane Herb Pharmacy with instructions on how to pick up your herbal formula prescription. Please be advised to check your spam folder as well. Please verify shipping address. With the selection of priority shipping, you should receive the herbal product within 3-4 business days.

Adverse reaction instructions

In case of an adverse reaction if it is a life-frightening emergency take the bottle with your herbal prescription, all supplements and medications that you are currently taking and go to ER or call 911.

In all other cases of adverse reactions or if any unusual symptoms have appeared or if you contracted any infectious disease (ex: common cold, etc.) please stop herbs and contact me immediately via your patient's portal at <https://phr.charmtracker.com> or call: 000-000-0000

83

Crane Dispensary Patient portal – TM Herbal Rx Pick Up

craneherb.com/patient/pickup/pickup.aspx?PrescriptionNumber=18825133&LastName=Test

CRANE

HERB COMPANY

Prescriptions

Practitioner Database

Product Lines

About Crane

Home

Practitioner Home

Patient Home

Resources

Forums

Contact Us

Pick Up a Prescription

Home > Patient Home > Prescriptions > Pick Up a Prescription

Welcome, Test Test

You have 2 unfilled prescriptions. Choose the prescription(s) you wish to purchase below. Prescriptions that you do not purchase today can be purchased at a later date. To learn more about using the pharmacy, read the [Prescription Pickup FAQ](#).

Patent Prescriptions

Prescription 18890684
Prescribed Aug 5, 2019

Zheng Gu Zi Jin Dan(5:1) (990)

100 gm.

\$18.50

Quantity (up to 15)

The quantity available is the number prescribed minus any previous pickups.

Check

Custom Prescriptions

Prescription 18825133
Prescribed Nov 4, 2019

Test Test 11/4/2019 ()

126 grams (in capsules)

\$61.05

Check

There are 3 ingredients in this formula.

| Name | Common | Pin Yin | Amount/Unit |
|-----------------|-------------------------------|--------------------------------|-------------|
| | Cinnamon & Angelica Formula | Shang Zhong Xue Tong | 2,430 mg |
| | Bupleurum & Fossilized Marula | Chai Hu Jia Long Mu Tang (5:1) | 488 mg |
| Polygalae Radix | Polygala | Yuan Zhi | 72 mg |

KPC 5:1 concentrated water-extract granule

Carrier: non-GMO Potato starch

*Actual compounded weight may vary slightly.

84

42

CPT © codes for clinicians who do **NOT** have E/M services in their scope of practice

- "For online digital E/M services provided by a qualified non - physician health care professional who may not report the physician or other qualified health care professional E/M services (eg, speech-language pathologists, physical therapists, occupational therapists, social workers, dietitians), see 98970, 98971, 98972)." [\[2\]](#)
- CMS, however, said in the 2020 Final Rule that they would not recognize these codes, because they are defined by CPT as "evaluation and management" services, and CMS reserves those words exclusively for **physicians, advance practice nurse practitioners and physician assistants**. These codes have a status indicator of invalid in the Medicare fee schedule, and don't have RVUs assigned to them.
- **98970** Qualified non-physician health care professional online digital evaluation and management service, for an established patient, for up to 7 days, cumulative time during the 7 days; 5-10 minutes
- **98971** 11-20 minutes
- **98972** 21 minutes or more
-

●85

CPT © codes for use by clinicians who **HAVE** E/M in their scope of practice

- **99421** Online digital evaluation and management service, for an established patient, for up to 7 days cumulative time during the 7 days; 5-10 minutes
- **99422** 11—20 minutes
- **99423** 21 or more minutes



●86

Future Crane EHR

All changes have been saved.

Chris Swain #3, 7/29/18 Date of Birth: Jan 2, 1999 Crane ID 1127991 First visit: Jan 24, 2018

ID 876543 Blood Pressure: /

Gender: **Male** Height: ft. in.

Smoker: **Heavy** Weight: lb.

Pain: initial (1/24/18): **7** latest (4/15/18): **3**

Energy: initial (1/24/18): **4** latest (4/15/18): **n/a**

Digestion: initial (1/24/18): **3** latest (4/15/18): **n/a**

Sleep: initial (1/24/18): **8** latest (4/15/18): **n/a**

Chief Complaints

Pain-hyper* ●
migraine* ●
Pain-Low Back ●

Pain-hyper* ●
Today: initial (1/24/18): **6** latest (4/15/18): **n/a**

Chronic: ☒ Since: 6/16/2015

Other Symptoms

- Abdomen(Lower)-Cold ●
- Knees-Swelling ●
- Aversion to cold ●

Intake Note (patient info¹)

Chris was referred by my sister. He has been to other doctors and specialists and is still in pain. Insomnia and sweats at night.

Visit Note

Patient called and said he was in extreme pain 2 weeks ago.

ICD-11 TM Diagnostic Patterns (about 5%)

All patterns

- Blood Decrease pattern [SF00][I]
- Qi Counterflow pattern [SE92][I]
- Liver Yang Ascendant Hyperactivity pattern [SF52][I]

Biomedical Diagnoses

- Abscess-Pulmonary
- Hypothyroidism ●
- Lumbago-Soreness ●

Pulse

- Choppy-Liver-Blood Deficiency ●

Treatment Principles

- Drain the Liver
- Pacify the Liver
- Tonify Wei Qi

Lab Results (patient info¹)

New Lab Date: Detail: Add

| Component (Units) | Latest Ref. | 2/14/18 Lab 1 |
|----------------------------|-------------|---------------|
| Albumin (g/dL) | 3.5 - 5 | 4.1 |
| Alkaline Phosphatase (U/L) | 40 - 150 | 73 |

*required

Tongue

- Bluish-Purple ●

Acupuncture Points Add Points

- Lung Meridian: LU-8/L LU-8/R
- Stomach Meridian: ST-32/L ST-32/R ST-36/L ST-36/R
- Small Intestine Meridian: SI-8/L SI-8/R

Current Medications

- TYLENOL W/ CODEINE [side effects] Add

TCM and WM Costs

| | |
|-------------------|-----------------|
| Acupuncturist fee | 110.00 X |
| Massage cost | 70.00 X |
| Moxa cost | 25.00 X |
| Chiropractor fee | 95.00 X |
| Total | \$300.00 |

Herb Treatments (patient info¹) Add Treatment

Chris Swain 4/15/2018 picked up 2/17/19 custom [view details] In use at time of visit
take with warm water R 4/15/18

Jia Wei Xiao Yao San (5-1) picked up 2/17/19
Show only recent and in-use clinic treatments and prescriptions

Patients deserve increased access to
TCM Herbal Medicine
Let's do TELEMEDICINE !



<https://www.asiantherapies.org/academy>