

**MEDICAL ASSISTANT PROTOCOL**

**The Complete Medical Weight Loss Business System**

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# S:\1-Internal\Jordan's Desktop\Documents\Jordan's Things\HHMC 3d logo.pngMedical Assistant Protocol

## New Patient Visit:

**Purpose:** To assist the medical assistant with their respective duties to accommodate the Medical Provider and detail the duties of checking in and preparing patients for the Medical Provider.

**Policy**: All medical assistants must provide care, comfort and confidentiality for all patients.

1. Retrieve patient’s chart from the Front Desk and verify the **Superbill** is complete and attached to the outside of the chart.
2. Review the patient information to ensure all intake forms are complete and other necessary forms are present (for example: valid driver’s license, valid government photo ID, etc.).
3. Call the patient from the lobby, using only their first name. If there are two (2) patients with the same name:
   * Use just the first initial of their last name
   * Always confirm date of birth as you take the patient back
4. Greet the patient with a smile, introduce yourself, guide them to the scale and make the patient feel as comfortable as possible. Record their weight for that day and continue to the pre-exam room.
5. Once in the pre-exam room, invite the patient to sit down and ensure that the door is completely closed for privacy and confidentiality. Inform the patient of the purpose of their visit (for example: seeing the Medical Provider for Lifestyle or HCG evaluation, HCG pick up, have labs ordered).
6. Record the following information using the **Initial Exam** form:
   * Date of visit, patient name, date of birth, and age
   * Reason for visit (must notate any or all that apply)
     + Lifestyle evaluation
     + HCG evaluation
     + HCG pick up
     + Injection
   * Blood pressure and pulse
   * Height and weight
   * Goal weight
   * BMI/fat %
   * Waist circumference
   * All medical history questions
7. This information is then recorded upon the **Follow-Up Visit** form in the chart during each visit.
8. Review any allergies, surgeries and the patient’s medical history one more time.
9. Guide the patient to an appropriate waiting area and place the chart in the correct location so that the Medical Provider may use it when ready to see the patient. The Medical Provider will review the patient’s information before calling them into their exam room.
10. Upon completion of the Medical Provider visit, the patient’s chart is handed to the medical assistant and the patient is directed to the appropriate treatment area or directed to the front desk to check out.
11. If the patient purchased a package with Lipo Plus injections, then after seeing the Medical Provider, the patient would return to the medical assistant for their first Lipo Plus injection. The patient may not receive their first Lipo Plus injection without the approval of the Medical Provider.

## Follow-Up Visit:

**Purpose:** To assist the medical assistant with their respective duties to accommodate the Medical Provider and detail the duties of checking in and preparing patients for follow-up visits with the Medical Provider.

**Policy**: All medical assistants must provide care, comfort and confidentiality for all patients.

1. Retrieve the patient’s chart and verify the **Superbill** is complete and attached to the outside of the chart.
2. Review the patient information to ensure all intake forms are complete and other necessary forms are present (for example: valid driver’s license, valid government photo ID, available prepaid Lipo Plus injections, etc.).
3. Check if lab work has been completed, is current and has been signed off by the Medical Provider. Lab work must be performed once a year, or as needed by the Medical Provider.
4. Call the patient from the lobby, using only their first name. If there are two (2) patients with the same name:
   * Use just the first initial of their last name
   * Verify birthdate as you take you patient back.
5. Greet the patient with a smile, introduce yourself, guide them to the scale and make the patient feel as comfortable as possible. Record their weight for that day and continue to the pre-exam room.
6. Once in the pre-exam room invite the patient to sit down and ensure that the door is completely closed for privacy and confidentiality. Inform the patient of the purpose of their visit (for example: seeing the Medical Provider for medication, receiving a Lipo Plus injection, lab work, or HCG evaluation or HCG pickup).
7. Record the following vital signs based on the type of office visit below and record the information in the **Follow- Up Visit** form:
   * **Weight Loss Medication Visit (Appetite Control, AppTrim or HCG):** Weight, weight change, total weight loss, blood pressure, pulse, BMI and fat percentage.
   * **Lipo Plus Injection Visit:** None (blood pressure and pulse if needed or directed).
   * **Lab Work Visit:** None (blood pressure and pulse if needed or directed).
8. Ensure that all patient forms have been signed.
9. Check if there are any changes to their existing medications or allergies.
10. Only answer questions that are within your scope of education and educate the patient if needed. If there is a question that you cannot answer for the patient, refer them to the appropriate staff member.
11. When faced with a patient complaint, tell your supervisor directly.
12. Perform the necessary job duties according to the type of office visit listed below:
    * **Weight Loss Medication Visit (Appetite Control, AppTrim or HCG):** If the patient is scheduled to see the Medical Provider, perform your job duties and guide the patient to the appropriate waiting area to have a seat until the Medical Provider calls them to their office. Inform the patient of their possible wait time for the Medical Provider. Place the chart in the appropriate location so that the Medical Provider may use it when ready to see the patient.

**PLEASE NOTE:** IF HCG IS A CONTROLLED SUBSTANCE IN YOUR STATE OF PRACTICE, CALL OUR OFFICE.

* + **Lipo Plus Injection Visit:** Confirm patient has available injections on the Injection Sheet, then administer the injection when prepared. All new patients must see the Medical Provider before a Lipo Plus injection is administered.
  + **Lab Work Visit:** Perform any blood draws indicated by policy and ensure that the order has been written by the Medical Provider in the progress notes of the **Follow-Up Visit** form.
  + **Weight Loss Counselor Visit:** If the patient is scheduled to see the weight loss counselor, escort them to the appropriate waiting area to have a seat until the counselor calls them. Inform the patient of their possible wait time for the counselor.

1. If the patient does not have any further treatment that day, direct them to the front desk to checkout. Always end the time you had with the patient politely and positively.

## **HCG Injection Order & Pickup Protocol\_*Patient Specific***

**Purpose:** To assist the medical assistant with HCG injections and teach patients how to self-inject.

Prerequisites:

* Patient signed up for HCG program
* Patient had V1 with medical provider and cleared to do HCG
* Patient had 12hr fasting labs. (*Note: results take 48 hours from lab*)

1. When the office receives lab results, the MA must retrieve the patient chart attach a sticky note to flag/notify the medical provider to review and approve the patient to continue with their HCG program. The medical provider will fill out a pharmacy order form for either 1 or 2 – 5,000 IU vials depending on the length of the HCG program.
2. The MA will fax the HCG order form and stamp the order form “faxed” with time and initials of who faxed it and put it in the “HCG pending order receipts” box.
3. The pharmacy will fax the order confirmation receipt. Place this confirmation in the file folder marked “Compounding pharmacy HCG order confirmations.” The MA should check daily for these order confirmations.
4. On the delivery date of the HCG order to the office, remove the order confirmation from the file folder and shred it. Check to see if the patient had their first health coaching visit and a scheduled appointment for HCG pick up. If not, call the patient and make the necessary appointments. The patient must have the first weight loss coaching visit *before* they take home their HCG. Next, move patient’s chart to the “HCG pending pickup” box.
5. Be sure the MA looks at the schedule the night before to ensure that the office has the patient’s HCG and the HCG pickup appointment is scheduled. Draw up the HCG injections for the patient.
6. When the patient arrives, take and record:
   1. Vitals
   2. Weight
   3. BMI and fat %
7. Take the patient to the medical provider to dispense the HCG. **(Only a medical provider can dispense HCG injections to the patient).**
8. After the medical provider dispenses the HCG, take the patient back to the MA room and go over the HCG injection instructions with the patient. Have the patient sign and complete an Injection Release Acknowledgement Form. Further, offer the patient a sharps biohazard container. Let them know this is the only way the office can dispose of used injections.
9. Give the patient the **Self-Administered Injections** handout to take home.
10. The patient must demonstrate the proper use of the injections. A saline solution filled syringe may be used by the patient during this time if patient is ineligible\* to give themselves their first HCG injection. (\*If they are not ready to start the first day of loading then the patient is considered ineligible for the HCG injection.)

## **Lipo Plus Injection Procedure:**

**Purpose:** To assist the medical assistant with administering Lipo Plus injections (initial and continuing) and teach patients how to self-inject.

Patients can come to the office for Lipo Plus injections during office hours without an appointment.

1. Retrieve patient’s chart and verify that a **Superbill** is complete and attached to outside of the chart.
2. Review the patient chart to ensure all necessary forms are present and current (current labs, valid driver’s license, available prepaid Lipo Plus injections, etc.).
3. Put on gloves and prepare injection site by wiping with alcohol pad.
4. Administer Lipo Plus injection.
5. Notate and complete the **Injection Sheet** in patient chart appropriately.
6. Patient and medical assistant signs **Injection Sheet** to acknowledge receipt of injection.

**PLEASE NOTE:** ALL NEW PATIENTS WHO RECEIVE A LIPO PLUS INJECTION FOR THE FIRST TIME MUST REMAIN IN THE CLINIC FOR 5 MINUTES AFTER THEY HAVE BEEN GIVEN AN INJECTION. THIS IS TO ENSURE THAT THE PATIENT DOES NOT HAVE ANY ADVERSE REACTIONS TO THE INJECTION THEY WERE GIVEN.

1. Direct patient to front desk to check out.

### If patient wants to take injections home for self-injection\*\*:

1. **Check with your local, state, and federal laws before allowing clients to take injections home.**
2. Retrieve patient’s chart and verify that a **Superbill** is completed and attached to outside of the chart.
3. Review the patient chart to ensure all necessary forms are present and current (labs, valid driver’s license, available prepaid Lipo Plus injections, etc.).
4. Explain and demonstrate to patient the self-injection process using the **Self-Administered Lipo Plus Injections Handout**.
5. Instruct the patient that the purchase of a bio-hazard container to dispose of injection needles is required for self-administered injections.
6. Supervise patient giving them self a Lipo Plus injection.
7. The patient must initial and sign the **Injection Release Acknowledgement**, which is then filed on right side of chart.
8. Provide the patient a copy of the **Self-Administered Lipo Plus Injections** handout.
9. Ask the patient how many injections they want to take home. Remind patient that injections have a **6-week shelf life.**
10. Bag the appropriate amount of injections in an injection amber bag. Be sure to include alcohol swabs.
11. Complete the **Injection Bag Label** on the front of the injection amber bag:
    * + Patient name
      + Date
      + Injection type
      + Quantity
      + Injection expiration date
      + Medical staff initials
12. Notate the **Injection Sheet** in patient chart appropriately.
13. The patient and medical assistant signs **Injection Sheet** to acknowledge receipt of injection.

### \*\*Patient Specific Update\*\*:

The law in some states require that Lipo Plus injections be patient specific. Patients who have purchased Lipo Plus injections previously and still have a balance remaining on their chart may take the remainder home. However, moving forward, any new purchase must be ordered patient specific if the patient desires to take them home and self-inject.

If the patient chooses to come in office and receive injections, then nothing needs to change, it is “business as usual.”

Any future Monthly Specials will be “in-office use only.” If a patient wants to take any ‘monthly special’ injections home, or wants to order a vial, order a 10mL vial patient specific from your compounding pharmacy and charge the patient $190 (or your market rate). The $190 includes the 10mL vial, syringes and sharps biohazard container.

If a patient wants your office to draw up the injections for them from their patient specific vial you may do so, otherwise the patient will take the vial home and draw their own injections.

## **Selling Specials and Products Guidelines**

1. Be a people person!
2. GET TO KNOW THE PATIENTS. Once you know the patients, you will know how to approach a sale; what they are most likely to buy and how to present the monthly special or product in such a way that the patient will want to purchase from you.
3. Be confident in yourself and what you are selling.
4. Do not be pushy.
5. Explain the specials and products.
6. Answer any and all questions.
7. Make sure you do not pressure patients.
8. Always share a personal experience.
9. Always leave the ultimate decision to the patient.

**Suggestions:**

Always have the patient’s weight, BMI and body fat percentage on hand before attempting to sell. Often it is easier to sell a monthly special to a patient when they know exactly how much they weigh and how much they need to lose. They are more likely to want to start doing something about their weight right away.

Stay confident and learn as much as you can about any product you are selling—you need to be able to answer any and all questions the patients may have, without being hesitant! It reassures the patient they are making a good decision in trusting you, and the monthly special and/or products you suggest would be best for them.

**HCG/LIPO/B12/SUPER B**

Mixing Instructions

**HCG**-------Items needed 10cc syringe, 22g 1” needle to draw, 29g 1/2cc syringe, alcohol swabs and vial of **Bacteriostatic Water** and vial of **11,000 IU HCG**.

Take the **HCG Vial 11,000 IU vial** swab top with alcohol then using 10cc syringe with 22g needle draw up 11cc from the bacteriostatic water vial and put into the HCG vial. Swish around gently **DO NOT SHAKE.** Then remove 8cc from the bacteriostatic water and put into empty vial or dispose of in trash. Take the 11cc you have already mixed in the HCG vial and put in the vial with the 11cc of bacteriostatic water. Label the vial with date mixed and expiration date, which should be 28 days from the date mixed. Use the 29g 1/2in and 1/2cc syringe to draw up to the .25 mark on the syringe.

**KEEP ALL HCG** **REFRIGERATED**

HCG Mixing instructions state there should only be 22ml of bacteriostatic water mixed with HCG.  Often times the 30ml vials of bacteriostatic water are not exactly 30ml, there can be an extra 2-5ml of bacteriostatic water in the 30ml making the mix inconsistent hence the unsure quantity of injections per vial.

SOLUTION:  To verify the HCG mix is correct and consistent for injection quantity:

Draw 11ml of bacteriostatic water and place in the HCG vial.

Draw another 11ml of bacteriostatic water and set aside for HCG (this will be your total of 22ml of water to constitute w/ HCG).

Draw out the remainder water from 30ml bacteriostatic vial and discard this bacteriostatic water.

Now take the 11ml bacteriostatic water that was set aside and replace back in 30ml bacteriostatic vial, then take HCG vial and draw all HCG solution out and place in 30ml bacteriostatic bottle.

\*\*\*\*This will ensure the HCG will be mixed properly and should get the same amount of injections every time which will keep our injection tracking inventory consistent. \*\*\*\*

**LIPO+ ------**Items needed 3cc syringe with (1) 22g 1” needle attached to draw, alcohol swabs, vial of **L-Carnitine**, vial of **Vitamin Cocktail** and vial of **B12** (Cyanocobalmin/Hydroxocobalmin).

Take vial of **L-Carnitine** and reconstitute the vial of **Vitamin Cocktail**. Your entire vial of Vitamin Cocktail will be liquid (**LIPO+**)

You will need to remove the 25g needles from the 3cc syringes as you do not want to use this needle to draw up with.

Using the 22g 1” needle and 3cc syringe draw up 3/4cc of **B12** (Cyanocobalmin/Hydroxocobalmin) and 1/4cc of **LIPO+**, attach the 25g 1” needle back on the syringe and store in cool dry place and protected from light. **DO NOT REFRIGERATE**

**B12------**Items needed 3cc syringe with (1)22g 1” needle attached, vial of **B12** (Cyanocobalmin/Hydroxocobalmin).

First remove 25g needles from 3cc syringes and replace with 22g 1” needle to draw up 1cc of **B12** into 3ml syringe, attach 25g needle. Store in cool dry place protected from light. **DO NOT REFRIGERATE**

**Super B**------Items needed 3cc syringe with (1) 22g 1” attached, alcohol swab, vial of Methylcobalmin.

First remove 25g needles form 3cc syringes and replace with the 22g 1” to draw with. Swab top of vial of **Super B** (Methylcobalmin) prior to piercing. In 3cc syringe draw up 1cc, then attach 25g needle on 3cc syringe.

**KEEP ALL SUPER B REFRIGERATED**