

The BaleDoneen Method[®] Checklist

PATIENT CARE & PATIENT EXPERIENCE

- Introduce the Bale Doneen Method – Explain the method in detail.
- Request patient to read *Beat the Heart Attack Gene*.
- Make initial appointment for lab testing.
- Collect money from patient, prepare to provide encounter form (with diagnoses) to patient at time of appointment.
- Send paperwork to patient for intake.
 - Privacy Practices
 - Demographic information
 - Authorization for Release of Medical Information
 - Physician Provider Information Form
 - Patient Records of Disclosure
 - Universal insurance Claim Form (if applicable)
 - Private Medicare Contract/Non-Contract Form (if applicable)
 - Practice Specific Paperwork

OUT OF TOWN OR REMOTE TESTING:

- Order kits for patient – Oral Salivary Diagnostics kit (Dental), MyGenetx if using MyGenetx, Cleveland Heart Lab, Boston Heart Diagnostics (if out of town).
- Send kit instructions to patient so they know what to do with the kits (if out of town).
- Arrange phlebotomy with patient and technician/phlebotomist (see additional document for recommendations/options/tips for remote lab testing. Whenever possible, personally speak directly with the technician/phlebotomist, provide instructions to them, and go over the kit and processing (if out of town).

ON SITE TESTING

- Confirm lab appointment with patient – 24 hours prior, remind them to fast for at least 10 hours and drink water. Advise approximate time they will need allocated for labs (2 ½ hours if doing glucose tolerance test).
- On day prior to lab draw, label all tubes for labs and prepare requisitions.
- Perform vital signs, body composition, waist circumference.
- Take a picture of patient for chart.
- Collect oral DNA sample from patient.
- Perform lab draw and start OGTT.
- During one-hour wait, perform EKG, ABI and CIMT (if available).
- Reinforce the principles and schedule of the BaleDoneen method to patient – labs quarterly and follow up appointment needed to review (interim labs may be needed at 4, 6, or 8 weeks on a case by case basis).
- Perform one-hour lab draw.
- Provider perform education during hour wait for next lab draw.
- Collect MyGenetx sample.
- Confirm initial evaluation appointment.
- Perform 2-hour lab draw.
- Perform processing and packing of all labs, as directed.
- Ship kits.

See reverse for more checklist items



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- Monitor portal for lab results – if any are significantly out of range, advise provider.
- Upon results finalizing, upload into EMR.
- Prepare flowsheet for patient.
- Print color copies of all results for patient folder – add additional practice-specific paperwork or instructions. Put a copy of lab flow sheet into the folder, as well.
- Remind patient of appointment 24 hours prior to time.
- Prepare provider for appointment – review folder to see if additional testing is needed and prepare orders. Assist with slide or AV educational/patient specific needs – begin this process 7 days ahead of time, when possible.
- Ensure patient has notepad to take notes with extra pens, folder with all lab results and flowsheet.
- Ensure provider has notepad, extra pens and lab results with flowsheet or access to EMR for all records.
- Provide water and snacks.
- Check in patient – vitals, ht, wt, (body composition if available machine), waist circumference, EKG, ABI (if not performed on testing day). Confirm medications with patient.
- Record any concerns from patient and advise provider.
- Provider has consultation appointment with patient.
- Once complete, the provider will advise patient and the care coordinator will wrap up the appointment.
- If patient is continuing with exclusive care, complete all referrals, as needed, to lifestyle coaches, imaging facility, or specialists.
- Provide orders for testing, as needed.
- Oral pathogens should be a priority to schedule for treatment – many dental offices treating oral pathogens will need labs with oral pathogen report (if ordered by medical and not dental).
- Submit prescriptions, if needed, and if patient is continuing with exclusive care – explain dosing and optimal goals.
- Arrange a one-week post appointment follow-up phone call with patient and care coordinator to check in. Document and update provider. If patient is struggling or has questions or concerns, advise provider and set up call asap.
- Ensure consultation note is correct and copy to the patient and/or invitation to portal for EMR within 2 days.
- Ensure CIMT and other test results to patient within 2 days.
- This ends the assessment / consultation.
- For those who continue exclusive BDM care (most will), take payment and educate on the 3-month recall schedule for testing and consultation.
- Ensure the above post appointment follow-up steps have been accomplished and that the medical provider and dental provider are in communication regarding collaborative care –and document.
- Make appointment for next set of labs and appointment. Full set of labs in 3 months and 6-week labs, as needed.