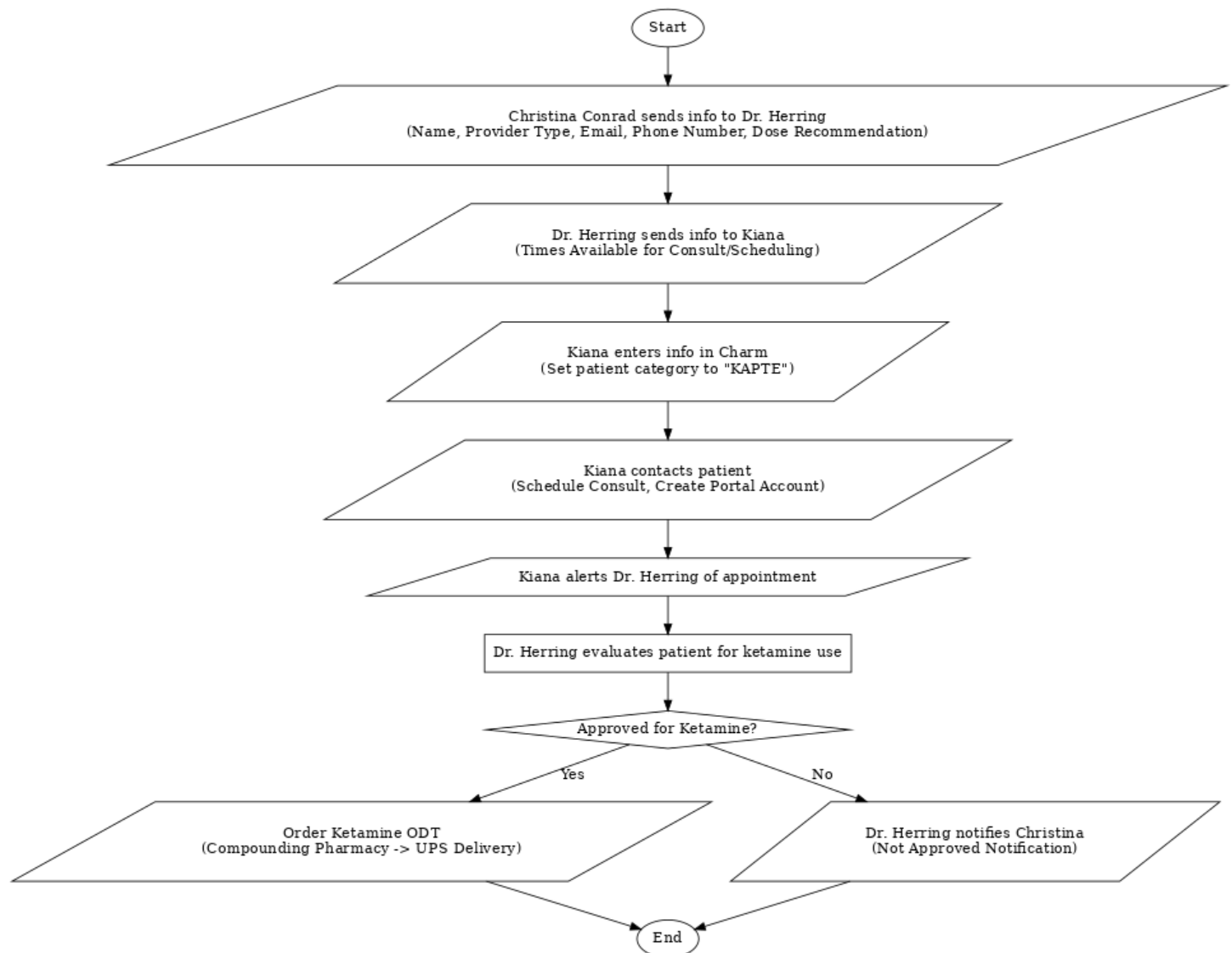


# KAP TRAINING EVALUATION WORKFLOW

**Created:** Mon 2/26/24 7:54:00 AM | **Revised:** 2/28/24 12:27:00 PM

**Background:** Dr. Herring will be doing consults for therapists who will be engaging in KAP Training with Christina Conrad at Palo Santo (<https://palosantotherapy.com/kap/>) which is scheduled to begin in Mid-April. The evaluations however will begin immediately. The evaluation is to determine whether a participant (therapist, or other qualified individual) can safely engage in the experience of ketamine prior to being involved in the treatment of KAP patients.

## HIGH LEVEL PROCESS FLOW



## INITIAL CONTACT & SCHEDULING

### 1. Christina Conrad Initiates Process:

Christina Conrad sends a message to Dr. Herring through Charm, including the participant's

*Name, DOB, phone, email, recommended dosing if approved, and participant type (can type ".kapte" in charm for quick text)*

### 2. Dr. Herring Coordinates with Kiana:

Dr. Herring forwards the participant's information to Kiana, along with available times for a consultation/scheduling.

### 3. Kiana Sets Up Participant in Charm:

Kiana enters basic demographic information in Charm and sets the patient category to "KAPTE."

Run PMP and if concerns, notify Dr. Herring

### 4. Consultation Scheduling:

Kiana contacts the participant to schedule consultation, create a portal account, inform participant of the forms for completion which will be available after their portal registration is complete.

#### APPOINTMENT DETAILS

- Appointment Type: KAP Training Evaluation
- Duration: 30 minutes
- Evaluation Fee: \$225

#### QUESTIONNAIRES FOR APPOINTMENT (AUTO SENT ON SCHEDULING)

- Credit Card Authorization Form (TF)
- HIPAA Privacy (TF)
- Photo ID and Chart Picture (TF)
- KAPTE Attendance and Refund (TF)
- KAPTE Relationship (TF)
- Ketamine Assisted Psychotherapy Pre-screen (TF)

### 5. Notification of Appointment:

Kiana informs Dr. Herring of the upcoming evaluation appointment.

## EVALUATION & APPROVAL

### 6. Evaluation by Dr. Herring:

Dr. Herring conducts the evaluation to determine the participant's suitability for ketamine experience.

### 7. Approval Communication:

If the participant is approved for ketamine, Dr. Herring notifies Kiana via Charm with recommended dosing.

If the participant is not approved, Dr. Herring will notify Christina.

## KETAMINE PRESCRIPTION AND ORDERING

### 8. Ordering Ketamine:

If approved, the order ketamine tablets from the compounding pharmacy steps are initiated. The ketamine ODT (Oral Disintegrating Tablet) is delivered via UPS to the participant before their training session.

#### KETAMINE COST

- \$10 per ODT tablet of 100mg
- \$15 UPS 2<sup>nd</sup> day – Signature required.
  - 300 mg total cost: \$45
  - 400 mg total cost: \$55

#### ADD MEDICATION TO PROFILE IN IN CHARM

Open the record for the participant in charm and add ketamine to active med list. You should know at this point if they will be getting 300 mg or 400 mg.

- Medications > + Medication > search “ketamine compounding powder” > Add
- In the Add Medications window, enter “DISSOLVE #3 TABS (300 mg) UNDER TONGUE IN PRESENCE OF PROVIDER PRIOR TO KETAMINE ASSISTED SESSION
- Click pencil icon to edit the entry, in the Note to Pharmacy field enter “Ketamine 100 mg ODT #3” or Ketamine 100 mg ODT #4” as appropriate.
- Add today’s date in the From Date field

The screenshot shows the 'Edit Prescription' window in the IN CHARM system. The window has a title bar with a close button (X). The main content area contains the following fields:

- Drug:** ketamine compounding powder
- Directions:** DISSOLVE #3 TABS (300 mg) UNDER TONGUE IN PRESENCE OF PROVIDER PRIOR TO KETAMINE ASSISTED SESSION
- Note to Pharmacy:** Ketamine 100 mg ODT #3
- From Date:** mm/dd/yyyy
- To Date:** mm/dd/yyyy
- Status:** Active (dropdown menu)

At the bottom right, there are two buttons: 'Save' (orange) and 'Cancel' (grey).

- Click Save to close the window
- This information will be the same information we use for generating the Rx/order with the compounding pharmacy

## KETAMINE RX AND ORDERING STEPS

### CREATE PATIENT PROFILE IN LIFEFILE

1. Login to LifeFile
2. Quick Menu > Recent Patients > New Patient
3. Complete the new patient fields including driver license number.
4. Click Save Patient

New Patient

Cancel

Save Patient

Patient Information

\*Supervising Practitioner

-- CHOOSE ONE --

\*First Name

Middle Name

\*Last Name

\*Date of Birth

-- -- -- --

Month, day, Year

\*Gender

☐ Female
 ☐ Male
 ☐ Animal
 ☐ Unknown

Species

Human

Identification Type

-- Choose One --

Miscellaneous 1

\*Address

Address (cont)

\*City

\*State

--CHOOSE ONE--

Pet Name

Weight (Kg)

Identification Number

Miscellaneous 2

\*Zip

Email

\*Phone (Digits Only)

Cell Phone (Digits Only)

Height (cm)

Cancel

Save Patient

### CREATE E-RX IN LIFEFILE

Select Patient > eRx

ORDER PROCESSING INFORMATION	
Delivery Information:	UPS 2 DAY
PATIENT INFORMATION	
Verify all fields are accurate including driver license number	
DELIVERY DELIVERY/SHIPPING INFORMATION	
Click "Copy Patient Information"	
Recipient Type:	Patient
Signature Type:	Signature Required
Verify Delivery Service Matches:	UPS 2 DAY
Residential Address Indicator:	Residential

ALLERGIES - DIAGNOSIS/PROBLEMS INFORMATION	

Click green "Medication Information" button

**Written steps are incomplete to this point. Kiana and Scott will do the first few orders together to be sure all steps clearly documented. After this, these steps will be updated in this document for reference.**