

The Ultrasound Visit: *Pearls & Lessons Learned*

Sandy Christiansen, MD
Care Net National Medical Director

Did you recently make a medical conversion, or are you new to medical services?
Taking a practical, patient flow approach, learn tips and takeaways for best practices in conducting the medical visit. Who does the intake? What should be included? Options coaching highlights and more--vital signs?

- I. Learning objectives
 - A. Participants will become familiar with a patient flow model that maximizes optimal patient care.
 - B. Participants will learn about the core components and significance of the reproductive health-focused medical intake and clinical evaluation during a limited obstetrical ultrasound exam appointment.
 - C. Participants will gain insight into conducting critical conversations during the ultrasound appointment, including pertinent health screenings.
- II. What it means to be a medical clinic-*the Paradigm Shift*
- III. Starting Assumptions & Context
 - A. Mission-focused medical pregnancy center
 - B. The primary client
 - C. The registered nurse is the clinic manager/sonographer
 - D. Nurses help patients, not clients
- IV. Basic Requirements
 - A. Function under the authority and direction of a licensed physician who is in good standing with the physician's state licensing board
 - B. Only utilize trained and licensed medical professionals to perform medical procedures, including ultrasounds
 - C. Carry sufficient medical liability coverage for the center and all medical personnel (unless they have their coverage).
- V. Pre-appointment
 - A. PT contacts the center for an appt
 - B. Scheduler pre-screen
 - C. PT vs. PT/Sono appointments
 - D. Timing
 - E. Gestational age
 - F. Encourage partner attendance
 - G. Minors
 - H. What to expect

- VI. Electronic vs. paper charting
 - A. CRMs: Take advantage of the capabilities you like
 - B. Example: texting consent forms, privacy forms
 - C. A blend of the two is the most common
 - D. Plan for growth
- VII. An Example of Patient Visit Flow
- VIII. Components of the PT/Sono Appointment
- IX. The Medical Intake
- X. Healthcare Screenings
- XI. Options Coaching
- XII. Spiritual History
- XIII. Vital Signs
- XIV. During the Ultrasound Exam
- XV. Post-Sono Patient Debrief
- XVI. Patient Follow-up