

Dear New Patient-

Greetings! We are so excited that you have taken this step to work together to help you reach your optimal health.

I enjoyed connecting with you during your discovery call. I want to let you know the next steps to get started.

In order to use your first visit most efficiently, we would like to have your data back to us **1 week prior to your visit**.

What data do we need?

1. **Questionnaires:** When you make an appointment you are sent an email from Hormone Wellness MD with an invitation to the patient portal and several questionnaires to complete. We use CHARM EHR. Here is the website link to log into the system. <https://phr2.charmtracker.com/login.sas>. The questionnaires are pretty detailed. I would allow 1.5 hours to complete.
2. **Labs** from the last 1-2 years. Labs we are interested in are as follows:

C-Reactive Protein, Cardiac
CBC With Differential/Platelet
Comp. Metabolic Panel (14)
Ferritin, Serum
GGT
Hgb A1c with eAG Estimation
Insulin
Iodine, Serum or Plasma
Iron and TIBC
Lipid Panel With LDL/HDL Ratio
Magnesium, RBC
Reverse T3, Serum
Thyroid Antibodies
TSH+T4F+T3Free
Vitamin B12 and Folate
Vitamin D, 25-Hydroxy
Zinc, RBC

- If you have had any of these labs done in the last 6-12 months and they are normal we don't necessarily need to repeat them, just send us a copy of the report. You can upload them and share through your portal using the steps below.
3. **Pathology** reports if you have had cancer or precancer.

4. Most recent ***Pap smear, Mammogram and DEXA*** scans if applicable.
5. If you have seen another functional medicine doctor/provider, please share lab testing that was done such as OATS testing/ hormone testing/ gut testing/ food sensitivity testing.

How to upload and share documents, tests, imaging, etc. via the portal

- First- make sure that your document is in a PDF format. The easy way to do that is to right click, hit the print option, and then save as PDF. Then you have a PDF.
- In the Documents section you can create a folder using the “+” icon next to “Folders”.
- Enter a Folder name and description to create the folder (medical history, previous tests, etc.).
- You can upload the documents using the “upload” button located in the “documents” section.
- While the documents are uploading, you can select the folder you created and the document will be saved to that folder.
- You can then share the document with Dr. Watson by using the “share” option in the “documents” section.
- Click on the “Share” button and follow these steps:
 - 1: Select the “Care Member” option
 - 2: Select or enter the name of the provider in the “To” field
 - 3: Click the “Share” button

Should I bring another person to my appointment?

We want you to be comfortable and supported in your health journey. If it helps you to bring a partner or friend to have another set of ears, they are more than welcome to be present for your visit. If you would like some privacy during part of your consultation or during your exam, you will need to let us know so that we can assist your partner or friend to the waiting area. If you are comfortable with them present for the entire appointment that is fine.

Please bring supplements you are taking in their original containers with you to your appointment. If we can use something you already have, we will!

What if I can't get this done before my appointment? We will simply use some of your appointment time to do the intake and you may require additional follow up appointments to review labs that are drawn after the appointment.

Thank you! We look forward to partnering with you at Hormone Wellness MD.

Wishing you optimal health!

Polly Watson MD FACOG NCMP IFMCP