

Integrative Health in Your Practice, Part I: What an Integrative Health Visit Looks Like, Part III

Bob's Personal Health Plan: What He Takes With Him

Documentation is a necessary part of any visit. As mentioned before, health plans vary in length, depending on the length of the visit, patient preference, and clinician style. Here is an example of a plan for Bob that was created using the [My Story: Personal Health Inventory](#). For teaching purposes, this is very detailed, with some additional information that was not mentioned so far. What you put in your own plans and how you document the visit will vary. You may just incorporate it all into your visit note. Or you may make it a separate document that can be scanned into the electronic record. If you use a template, you do not need to fill out every section. The following is designed to give you some ideas.

Personal Health Plan

Name: Robert (Bob) Smith

Date: Today

Meaning, Aspiration, Purpose (MAP):

My meaning, aspiration, or purpose in life is...

"To be active with events that really matter to me. To be there for my daughter and grandkids. To live a full and meaningful life where I stay healthy for as long as possible."

NOTE: It is best to put this section and the next one in their own words, if possible.

My Goal(s)

"In 12 months, I want to be able to walk my granddaughter down the aisle to give her away, and I want to stand in for the father-daughter dance with her at her wedding reception. I also want to be able to do better taking care of my wife's flower beds and to spend as much time as I can outside doing nature photography."

NOTE: The goals for this "Goals" section are more general. SMART goals can be featured here too, or in the "Areas of Self-Care" section.

Strengths (what's going right already)/Challenges

Strengths: Faith, connection with your family, and having some good friends who have a lot in common with you. Surroundings was rated highly, because you really like where you live. Regular Professional Care at primary care clinic with a team that does a good job. Photography, tied in with Personal Development) keeps me busy.

Challenges: Sleep, anxiety, heart disease risk. Depression limits engagement with other people. Blood sugars control a challenge. Arthritis pain limits activity. Want to cut back on drinking, and will focus on that more at future visits.

Mindful Awareness

Suggestions for Bob: We can keep talking about this more, but it is important to take some time for you, so that you can notice what you need, even as you do such a good job taking care of others. Practice paying more attention to what your body tells you through symptoms. This could include watching to see if you are truly hungry before you eat. In terms of sleep, which was a big goal for you today, pay attention to your sleep patterns. What seems to help you sleep, and what doesn't?

NOTE: If you type out a plan like this, it is fine to add a few other suggestions, even if you didn't go into detail with them all during the conversation.

Proactive Self-Care

NOTE: Recharge is put first, since it is the main area for Bob to focus on right now. Some additional examples of SMART goals have been added for other areas as well.

• **Recharge**

- “Starting tonight, I will stop reading in bed and always try to go to bed and get up at the same time.”
- See the expert on CBT-I.
- Download the CBT-I app on your smartphone.
- Review the information on healthy sleep in the [UW Integrative Health materials](#). Make sure you follow the sleep hygiene steps.
- We can talk more in the future about melatonin, which is on the VA formulary and might help you.

• **Physical Activity**

- “Starting on the first of the month, I will walk outside or use my stationary bike for 20 minutes, 5 days a week. I will check in with my Integrative Health Coach a week after I start to update her.”
- Over time, we can talk about how to ramp up your exercise with the goal of getting 150 minutes (2 1/2 hours) each week. Go out hiking once or twice a week.

- **Surroundings**
 - If needed, you can ask at your local senior citizen's center for help with your wife's flowerbeds, or offer to pay your grandson to help.
 - Set aside time at least once a week to tidy up your house.
- **Personal Development**
 - Take those photography classes you have been wanting to take.
 - Get out to church or to the senior center at least once a week.
- **Nutrition**
 - "Starting next Monday, I will focus on Nutrition by eating a salad or a vegetable dish every day. I will know I am successful if I can lose a pound every 1 to 2 weeks. I will continue to modify this goal by checking in weekly with the nurse case manager."
 - Follow up with your dietitian as scheduled.
- **Family, Friends, and Co-Workers**
 - Keep fishing with your grandsons.
 - If you are up for it, try to give your brother a call and reestablish connection.
- **Spirit and Soul**
 - You lit up talking about your photography. Be sure to keep it up. Display some of your work at that gallery that was interested.
 - Continue to pray. A Bible study group might be a great way to get more social contact and help you feel more spiritually connected.
- **Mind & Emotions**
 - Keep following through with your counselor and psychiatrist for the work with your PTSD.
 - As we agreed, we can talk about this more in the future. Talk with your counselor too.

NOTE: The SMART goals for Physical Activity and Nutrition were added to give you some additional examples. You would not necessarily suggest all these SMART goals at the same visit.

Professional Care: Conventional and Complementary

- **Health Concerns**

- Blood pressure is up today—150/90. Start that new blood pressure medication. Return for a recheck in 2 weeks.
- We can talk next time about other options for Gastroesophageal Reflux Disease (GERD).
- **Prevention/Screening**
 - Follow up with the cholesterol tests and A1c as scheduled.
 - Vaccinations are up to date
- **Treatment (e.g., conventional and complementary approaches, medications, and supplements)**
 - Continue medications as prescribed. Refills are ordered.
 - Chiropractic is fine to continue, but I would be cautious with intensive approaches where a lot of force is applied to your lower back.
 - Always feel free to ask questions about complementary therapies you read about.

Referrals/Consults

- You are already scheduled with your dietitian and psychiatrist
- Visit a physical therapist—referral is in
- Referral for sleep study as discussed

Community:

- Get active with your local senior citizen's center.
- Consider teaching a photography course at the senior center.
- Consider joining the gym at the YMCA.

Resources:

- Review the UW Integrative Health handout on [Improving and Maintaining Healthy Sleep Habits](#).
- Consider trying abdominal breathing, to relax. You have the handout.

My Support Team

- **Professionals**
 - Primary Care Clinician
 - Integrative Health Coach
 - Personal Trainer
 - Dietitian
- **Personal Support Team**
 - Daughter JoAnne

Buddy Roger

Next Steps

- Read the handouts we printed out for you.
- Visit the CBT-I psychologist. Download the CBT-I app.
- Visit your dietitian.
- Follow up with sleep study.
- Visit me again in 2 months. Return for nurse blood pressure check in 2 weeks after you start the new medication.
- Complete your living will and power of attorney, as discussed.

NOTE: Some of these sections are redundant. Again, use the plan templates as a tool. Only complete the sections that are relevant to the specific visit.

After the Integrative Health Visit: Documentation, Billing, and Future Visits

Bob has a plan, which includes follow up. There are a few other important aspects of practicing Integrative Health that must occur after Bob's visit is over. Clinicians need to be able to document the visit in the electronic record and bill appropriately. It may also be important to make mental note of other areas to discuss with Bob in the future.

Documentation

Generally, it is helpful to follow a template when you create a note about your visit. The [My Story: Personal Health Inventory](#) can provide a summary of the visit for a patient. Numerous sites are experimenting with different options, including ways to upload information from the PHI and health plan directly into the medical record. Check with your site to learn what protocols, if any, are in place.

Bob's note could also look much more standard H&P note with some key additional sections. Refer to the tool, "[The Integrative Health Note: Beyond the Standard History and Physical](#)" for additional insights.

Ideas for Future Visits

As Bob's clinician documents the visit, it helps to take note about other areas he or she (or other colleagues) could discuss with Bob in the future. For example,

- Bob's photography is important to him. You could explore this in more detail. Hobbies and skills are an important aspect of the Personal Development circle.
- At some point Bob was an avid walker. A SMART goal addressing walking might be something to discuss in the future, as part of the Physical Activity self-care circle. Using a pedometer might be helpful.
- Bob's anxiety may need to be addressed in greater depth, and it will be important to watch for his consult note with his psychiatrist. Bob had mentioned hearing that acupuncture might be useful for arthritis pain and would like to try it in the future. You can pursue this later on, after he has tried other items on his plan, like the CBT-I.



- You might mention the local meditation class again, provided that his psychologist concurs. This may help with his anxiety, and it will support him in other ways as well.

Conclusion

This overview and its supporting materials are intended to help you implement Integrative Health more fully into your practice. Keep asking yourself how you can incorporate elements like an Elevator Speech, MAP, the PHI, questions related to various aspects of the circle, the Key Principles of Health Planning, and various steps for follow up. Experiment, and figure out what works best for yourself and the rest of your team. Clinicians who have been doing Integrative Health visits for the past few years report that they have better insight into their patients, find their work more fulfilling, and have received a lot of positive feedback from their patients.

Finally, don't forget that one of the most important aspects of implementing Integrative Health is to apply it in your life. Be sure to complete a PHI and PHP for yourself, if you have not already done so, and take a look at "[Implementing Integrative Health in Your Own Life: Clinician Self-Care.](#)"

Integrative Health Tools

- [The Integrative Health Note: Beyond the Standard History and Physical](#)
- [How Do You Know That? Epistemology and Health](#)
- [How to Set a SMART Goal](#)
- [Questions You Can Ask During an Integrative Health Visit](#)

Author(s)

"Implementing Integrative Health in Your Practice" was adapted for the University of Wisconsin Integrative Health Program from the original written by J. Adam Rindfleisch, MPhil, MD (2014, updated 2018). Modified for UW Health Integrative Health in 2020.

This overview was made possible through a collaborative effort between the University of Wisconsin Integrative Health Program, VA Office of Patient Centered Care and Cultural Transformation, and Pacific Institute for Research and Evaluation.