SAMPLE WORKFLOW 4
Contraceptive Initiation and Management

Users should customize this workflow based on their health center's staffing and workflow.

Open patient record → Connect with patient at scheduled time

Introduce self (first name and title) → Confirm patient's identity; ask patient for code word (if applicable) → Describe location, emphasizing the space is private and services will be confidential → Ask patient about other individuals present and privacy of the space

Is the patient in a private, confidential space? YES

Confirm reason for the visit includes contraceptive initiation or management

Obtain clinical and social information

Includes: Obtain, at minimum, menstrual, gynecologic, and obstetric history; medication allergies; infectious or chronic health conditions; and information about tobacco use

NO

Does the patient want to continue with the visit now? YES

Discuss patient's contraceptive experiences and preferences

Send patient links to educational materials, as needed

NO

Provide patient-centered contraceptive counseling to the patient, discussing methods that fit with patient's preferences

Includes: Counsel about dual protection for patients at risk for STIs

Would the patient like to select a (new) method of contraception at this time? YES

Conduct assessment as if physically in the same space

Provide instructions about correct and consistent use

Document patient informed consent

NO

Offer to reschedule the visit and provide instructions for how to do so

Continued on next page

See Workflow 5 – Hybrid Telehealth-In-Person Visit for steps
See Workflow 6 – Telehealth with Mail Delivery of Medications and Supplies for steps
See Workflow 7 – Telehealth with Curbside Pickup for steps

December 2020
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How would the patient like to access their chosen contraceptive method?

- Mail
- Insertion or injection at health center
- Curbside pick-up at health center
- E-prescription
  *Includes: Submit e-prescription to preferred pharmacy; review timing and process of refills (if applicable)*

Provide information about storage, handling, and disposal of contraceptive method (if applicable)

**YES to new method of contraception**

- Review plan of care and confirm patient understanding
- Provide instruction on routine follow up; schedule follow-up visit, if needed
- Confirm all the patient's questions and concerns have been addressed
- Disconnect from patient / triage to another staff person

Exit patient record

**NO to new method of contraception**

- Review record for complete documentation and signatures
- Document encounter and prescription, including all appropriate codes, in patient’s medical record

See Workflow 5 – Hybrid Telehealth-In-Person Visit for steps
See Workflow 6 – Telehealth with Mail Delivery of Medications and Supplies for steps
See Workflow 7 – Telehealth with Curbside Pickup for steps