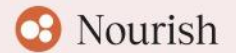


# Follow-Up Appointment Checklist



Keys to a great follow-up session with an existing patient

## **First 15 Minutes: Reconnect & Reflect**

### **Reconnect with Patient**

- Welcome patient back and take a moment to check in relationally
- Reference previous session note or AI recap to ask about life updates

### **Reflect on Progress & Action Steps**

- Check in on last session's action steps and celebrate small wins
- Affirm any changes or stressors to build empathy and trust
- Create space for honest reflection without judgment
- Explore barriers collaboratively; adapt plan if in pre-contemplation
- If relevant, pull up Nourish App data to review logging/tracking patterns

## **15 to 30 Minutes: Education, Skill Building, and Application**

### **Deliver Condition-Specific Education**

- Ask what's worked before to collaborate on goals and strategies
- Assess patient's knowledge on specific topics before providing education
- Provide 1-2 aligned recommendations or strategies tailored to patient goals
- Use visuals, examples, or the meal planning tool to support patient understanding
- Anchor insights to patient symptoms, motivators, or recent reflections
- Invite feedback on your recommendations and assess relevance to their daily routine

### **Habit and Skill Building**

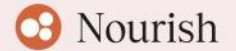
- Explore opportunities for habit formation around food, movement, sleep, or stress
- Leverage habit stacking, environment tweaks, or anchor pairing to ease implementation

## **30 to 45 Minutes: Track Progress & Realign Goals**

### **Review Progress & Clinical Data**

- Confirm relevant baseline data has been collected (e.g., weight, A1C, BP, cholesterol, symptom logs)
  - If missing, help patient enter data live or create a follow-up plan for collection
- Compare trends to baseline and patient's long-term goals using clinical benchmarks when helpful
- Reframe slow or flat trends as normal; validate progress in behavior, consistency, or mindset
- Update patient conditions in the chart as new symptoms or data emerge

# Follow-Up Appointment Checklist



Keys to a great follow-up session with an existing patient

## ❑ Adjust Goals & Action Plan

- Revisit any SMART goals set in previous sessions and assess fit and feasibility
- Adjust care plan based on progress data + patient reflection
- Define 1-3 achievable, short-term action steps to build momentum before next session
- Reinforce that plans are collaborative and evolving - adjust if patient confidence is low
- Encourage use of the Nourish App (e.g., logging, tracking, messaging) for continued monitoring

## 45 to 53 Minutes: Plan Next Steps & Encourage Follow-Through

### ❑ Adjust Go-Forward Plan

- Revisit PES statements and evaluate for any needed updates
- If progress is limited, continue weekly cadence and rework plan next session

### ❑ Look Ahead & Wrap-Up

- Reflect back patient effort and reinforce momentum
- Encourage patient with a short celebration or positive affirmation to reinforce momentum
- Schedule the next session (if not already booked); aim to have 3-4 sessions queued
- Reinforce continued use of the Nourish App for communication and care support

## Immediately Post-Session: Complete Documentation & Follow-up with Patient

### ❑ Send Appointment Summary

- Review AI-generated chart note for accuracy and tone prior to sending
- Refine AI-generated patient summary and send follow-up message with:
  - Recap of action steps
  - Reinforcement of effort
  - 1-2 linked resources (recipe, education article, etc.)
- If relevant, include sample meal plan tied to discussed goals

### ❑ Set Status, Sign & Lock Note

- Set the appointment status and duration as soon as the appointment is completed
- Review your documentation, and sign & lock the chart note within 48 hours of the appointment