Follow-Up Appointment Checklist

Nourish

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

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- ❑ **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