First Appointment Checklist

Keys to a great first session with a new patient

Nourish

Before the Session:

- [ ] **Review & Personalize Intake Info**
  - Ensure you have always read the AI summary + patient sign-up details in advance. Knowing the background of the patient is critical to ensuring they feel like it is a personalized experience

🕒 First 15 Minutes: Build Connection & Set Expectations

- [ ] **Build Rapport**
  - Start with open-ended questions to understand them beyond nutrition (work, hobbies, family, etc.), finding common ground or shared interests to strengthen connection
  - Validate their decision to seek care and express enthusiasm about working together
- [ ] **Set Clear Expectations**
  - Explain that you are here to help them improve their nutrition and overall well-being, detailing how you can specifically support them with their conditions listed
  - Outline the journey ahead: In the first session you will focus on understanding their background + giving them a short-term action plan, and future sessions will build out a personalized roadmap
- [ ] **Address Insurance & Nourish Guarantee**
  - Nourish maintains a no-surprise billing experience through the Nourish Guarantee. Until we hear back from a patient's insurance, they'll never pay more than their estimated cost
  - The Nourish Guarantee applies to all appointments until we learn their final cost from insurance. At that point, they can choose if they want to continue appointments at the new cost. Reminder that 94% of patients are fully covered, and we never charge patients for denied claims!

🕒 15 to 40 Minutes: Personalized Intake & Education

- [ ] **Understand Their Goals & Priorities**
  - Ask them "What are you hoping to achieve by working with a dietitian?"
  - Get to their deeper "why." Identify their top motivators (symptom relief, energy levels, weight management, etc.) and reaffirm that you will help them connect their goals to an actionable plan
- [ ] **Collect Additional Intake Data and Outcomes**
  - Collect relevant labs and tests for the patient's specific condition (e.g., weight, blood pressure)
  - Explain that you will revisit these outcomes on a regular cadence to measure progress
  - Avoid re-asking intake questions — frame it as refining details with clarifying questions to fill in gaps and make the session feel tailored
- [ ] **Educate & Build Trust**
  - Provide 1-2 small but valuable educational insights (related to their condition/goals)
  - Reinforce your expertise without overwhelming them—keep it digestible

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🕑 40 to 53 Minutes: Drive Retention & Provide Next Steps

- ❑ **Assign Tailored Action Steps**
  - ○ Provide 3 or fewer specific to-dos based on their goals (e.g., track meals in the Nourish app, test a new food, mindful eating exercise)
  - ○ Ensure at least one is achievable by the next session to build momentum
  - ○ Confirm they understand their concrete action items and are comfortable with them
- ❑ **Schedule Weekly Follow-Ups**
  - ○ Say: "Weekly sessions at the start lead to better results—let's lock in your next few!"
  - ○ Explain that weekly sessions optimize progress and are flexible if needed, reminding them future week appointments are covered by the Nourish Guarantee. Try to get 4 future appointments on the calendar
  - ○ Book sessions during the appointment to keep consistency and reduce drop-off. Be prescriptive in this conversation, do not leave it up to the patient to schedule

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

- ❑ **Send Appointment Summary**
  - ○ Review AI-generated chart note for accuracy and tone. This feature is only available if you opt to record the session in Zoom!
  - ○ Use the AI appointment summary feature to quickly summarize key insights + action items. This will be sent to the patient post session!
  - ○ Reinforce their progress and build excitement for the next session, specifically focusing on any action items they should prioritize between sessions
  - ○ Encourage them to reach out in-app if they have questions before the next visit
  - ○ Include relevant resources and recipes, but don't inundate them with information - keep it to 1 or 2 resources for them to review between sessions
- ❑ **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. The sooner you complete this step, the sooner the patient will get their claim sent out for the appointment!