

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
- 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

- 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

Educate & Build Trust

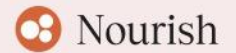
- Provide 1-2 small but valuable educational insights (related to their condition/goals)
- Reinforce your expertise without overwhelming them—keep it digestible

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
- 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

- Refine AI-generated 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