

NURA HEALTH

Clinic Workflow Review

Sample Report

SAMPLE REPORT — ILLUSTRATIVE EXAMPLE

Prepared for: Sample Dental Clinic (a fictional clinic used for illustration only)

This is a sample deliverable showing the format and level of detail a clinic receives after a Nura Health Clinic Workflow Review. All clinic names, staff, and figures below are fictional and for illustration only — no real patient or clinic data is included.

Positioning: this report reflects operational findings only. It does not include, reference, or represent any real patient information.

Executive Summary

Sample Dental Clinic is a two-provider general and cosmetic dental practice with a front desk team of two and a treatment coordinator. The clinic asked for a review after noticing inconsistent recall follow-up and a growing number of unaccepted treatment plans. This review mapped the current patient journey, identified the highest-impact gaps, and produced a prioritized 30/60/90 roadmap.

Headline finding:

Recall and treatment-plan follow-up were handled informally by whichever staff member had time that day, with no tracking system — meaning follow-up happened inconsistently and was not measurable.

Clinic Snapshot (Illustrative)

DETAIL	SAMPLE VALUE
Providers	2 dentists, 1 hygienist
Front desk / admin team	2 front desk, 1 treatment coordinator
Patient volume	~90 active patients/month (illustrative)
Primary concern	Recall follow-up and treatment-plan acceptance
Review format	45-minute Clinic Workflow Review

Patient Journey & Workflow Map — Key Findings

- New patient intake forms were completed on paper and re-entered manually into the practice management system, creating a delay before the first appointment.
- Recall reminders were sent inconsistently — some months relied on the software's default reminder, other months nothing was sent at all.
- Treatment plans were presented once by the treatment coordinator, with no scheduled follow-up beyond a single phone call.
- No-show patients were rebooked only if they called back — there was no proactive outreach.
- There was no single person accountable for follow-up, so tasks were “everyone's job,” which in practice meant no one's.

AI Readiness Scorecard (Sample)

17 / 36 — Moderate Readiness

AREA	SUMMARY
Strategy & Governance	Clear leadership sponsor (owner-dentist), but no documented clinical boundary for AI use yet.
Privacy & Patient Information	Staff had informal awareness of privacy expectations, but no written policy or tool review process.
Workflow Opportunity	Recall and treatment-plan follow-up clearly identified as the highest-impact, lowest-risk starting point.
Patient Communication	No approved message templates existed — all outreach was ad-hoc and staff-dependent.
Team Training & SOPs	No written SOP for recall or follow-up; relied entirely on staff memory and tenure.

Operational Gap Analysis

GAP	IMPACT	PRIORITY
No recall tracking system	Patients fall out of recall unnoticed; lost recurring revenue and preventive care gaps.	High
Single-touch treatment-plan follow-up	Unscheduled treatment plans quietly go cold; lower case acceptance.	High
No no-show outreach process	Missed appointments are not recovered, reducing schedule utilization.	Medium
Manual intake re-entry	Front desk time lost to duplicate data entry.	Medium
No task ownership for follow-up	Diffused responsibility means nothing gets done consistently.	High

Priority Improvement Roadmap

TIMELINE	FOCUS	DELIVERABLE
First 30 days	Assign one owner for recall and follow-up; build the recall workflow and tracking log; write approved reminder templates.	Recall workflow SOP + tracking log + message templates
Days 31–60	Build the treatment-plan follow-up sequence with the treatment coordinator; add a no-show recovery process.	Follow-up sequence + no-show workflow + staff guide
Days 61–90	Review adoption and results; refine templates based on patient response; introduce a simple KPI dashboard.	Optimization report + KPI dashboard recommendation

Suggested KPIs to Track

- Recall reactivation rate (month over month)
- Treatment-plan case acceptance rate
- No-show recovery rate
- Front desk admin hours spent on manual follow-up

What the clinic received in the full engagement:

a clinic workflow map, an AI readiness scorecard, this operational gap report, a priority improvement roadmap, and a 30/60/90 action plan — the same deliverable set included in every Nura Health Clinic Workflow & AI Readiness Assessment.

Your notes — what stood out for your own clinic?

Next step: Book a Clinic Workflow Review

See what a review would surface for your own clinic — 30 or 45 minutes, live, with a clear picture of what to change first.

Disclaimer: this is a fictional, illustrative sample created for demonstration purposes only. It does not describe a real clinic, real patients, or real clinical data, and is not clinical, legal, or regulatory advice.