NURA HEALTH

Patient Follow-Up Workflow Template

A starting structure for recall, no-show recovery, and treatment-plan follow-up — built for medical and dental clinic teams to adapt to their own systems.

For clinic owners, practice managers, front desk teams, and treatment coordinators

Use this template to design a consistent, human-reviewed follow-up process instead of relying on memory or ad-hoc outreach.

Positioning: these are starting templates, not finished scripts. Every message should be reviewed and adapted by your team before use, and never sent without human review for tone and accuracy.

How to Use This Template

Pick one workflow below to start with, not all of them at once. Map who owns each step, confirm the timing, and have a staff member review every message before it goes out. Once one workflow is running consistently, move to the next.

1. Recall & Reactivation Workflow

STEP	TIMING	CHANNEL	GOAL	OWNER
Identify overdue patients	Weekly	Internal report	Pull the list of patients past their recall or recheck window.	Front desk
First reminder	Day 0	Email / SMS	Friendly, low-pressure reminder that it's time to book.	Front desk
Second reminder	Day 10	SMS / phone	Slightly more direct follow-up, offer a specific time slot.	Front desk
Reactivation call	Day 30	Phone call	Personal outreach for patients who haven't responded.	Practice manager
Mark outcome	Ongoing	Internal system	Log booked / declined / unreachable so the list stays accurate.	Front desk

SAMPLE MESSAGE — FIRST REMINDER

> *"Hi [Patient First Name], it's been a while since your last visit with us at [Clinic Name]. We'd love to see you back — you can book online at [link] or reply to this message and we'll find a time that works."*

2. No-Show Recovery Workflow

STEP	TIMING	CHANNEL	GOAL	OWNER
Flag the no-show	Same day	Internal system	Confirm the appointment was missed, not cancelled.	Front desk
Same-day outreach	Within hours	SMS / phone	Check in without blame, offer to rebook.	Front desk
Rebooking follow-up	Day 3	Email / SMS	Second attempt if no response yet.	Front desk
Pattern review	Monthly	Internal report	Review repeat no-shows and adjust reminder timing or policy.	Practice manager

3. Post-Consult Follow-Up

STEP	TIMING	CHANNEL	GOAL	OWNER
Check-in message	Day 1–2 after visit	SMS / email	Confirm the patient is doing well and knows next steps.	Front desk / clinical support
Instruction reminder	As needed	Email	Reinforce any care instructions already given verbally.	Clinical support
Escalation check	Ongoing	Internal	Any concerning reply is routed to a provider immediately — never handled by template alone.	Clinical team

4. Dental Treatment-Plan Follow-Up

STEP	TIMING	CHANNEL	GOAL	OWNER
Plan presented	Day 0	In-person	Treatment coordinator or dentist presents the plan and estimate.	Treatment coordinator
First follow-up	Day 3–5	Phone / email	Answer questions, address cost or scheduling concerns.	Treatment coordinator
Second follow-up	Day 14	SMS / email	Gentle reminder the plan is still available.	Treatment coordinator
Case review	Day 30	Internal	Mark accepted / declined / still deciding, and note why for future reference.	Treatment coordinator

SAMPLE MESSAGE — TREATMENT-PLAN FOLLOW-UP

> *“Hi [Patient First Name], just following up on the treatment plan we discussed. If you have any questions about the process, timing, or cost, I'm happy to walk through it together — just reply or give us a call.”*

5. Review & Patient Satisfaction Workflow

STEP	TIMING	CHANNEL	GOAL	OWNER
Satisfaction check-in	Day 3–7 after visit	SMS / email	Ask a short, low-friction question about their experience.	Front desk
Review request	If positive response	Email / SMS with link	Invite a Google review only from patients who indicated a good experience.	Front desk
Concern routing	If negative response	Internal	Route directly to the practice manager or owner — never automated.	Practice manager

Tracking & escalation rule

Every follow-up workflow should have one place (a spreadsheet or dashboard) where outcomes are logged, and one clear rule for when something gets escalated to a person instead of staying in the template.

Follow-Up Tracking Log

PATIENT / REF #	WORKFLOW	DATE SENT	CHANNEL	RESPONSE	NEXT ACTION

Note: do not record patient names or identifying details in any shared tool that is not your clinic's secure system. Use reference numbers where possible.

Next step: Book a Clinic Workflow Review

Nura Health can help your clinic turn this starting template into a fully built workflow — with approved scripts, staff training, tracking dashboards, and a review process built around your actual patient volume and team capacity.

Disclaimer: This template is educational and operational. It is not legal, privacy, clinical, medical, or dental advice. All patient-facing messages should be reviewed by clinic staff before use.