

Initial Inquiry Follow-Up

PURPOSE

1. Welcome patients to our clinic and continue to inspire confidence and excitement.
2. Inform patient of next steps in the process: registering for the EHR and scheduling the Initial Consult.
3. Guide patient to complete EHR registration and schedule their Initial Consult (IC).
4. Start AR sequence that guides patient to complete onboarding process and gets them excited about working with our clinic.
5. Offer to support them if they need help or get stuck at any point in the process.

PROCEDURE

1. Thank-you page
 - a. Patient is directed to a thank-you page after submitting Wufoo application form.
 - b. Patient watches **Initial Inquiry Follow-up Video** on thank-you page. Video reiterates welcome/excitement and explains next steps in the process.
 - c. Text underneath the video on thank-you page clearly lists the next steps in the process—registering for the EHR and scheduling an Initial Consult—and links to the EHR registration page.
 - d. Patient clicks on link to register in the EHR.
 - e. Proceed to **EHR Registration**.
2. Autoresponder (AR)
 - a. Patient receives email #1 in AR sequence after submitting Wufoo application and being added to AR. (See **NP Onboarding AR Outline** for complete outline of AR sequence.)
 - b. Email #1 thanks patient for their submission and advises patient to click link to take next step in the new patient application process.
 - c. Patient clicks link, which takes them to thank-you page above.
 - d. Patient clicks on link to register in the EHR.