Clinic follow up checklist

Plan one clinic-owned recovery follow-up workflow. Complete this checklist and the responsibility sheet with your team before use. Keep patient records and private access links out of this pack.

Workflow name: _____ Review date: _____

Prepare the workflow

[ ] Choose one existing clinic-approved protocol and name its clinical reviewer. This pack supplies no treatment instructions.

[ ] Agree who prepares the patient-specific plan and checks its wording, timing and requested updates before it is shared.

[ ] Set a reasonable check-in window. A new calendar day alone does not make an update overdue.

Explain access and review

[ ] Confirm how owners open their private plan and submit an update. Explain any requested photos using the clinic-approved protocol.

[ ] Tell owners when updates are reviewed and provide the clinic-approved route for urgent concerns and out-of-hours help. The check-in inbox is not an emergency service.

[ ] Name the person reviewing incoming updates, their cover and the clinical escalation route. Record these on page 2.

Rehearse and keep the record

[ ] Use fictional data in an approved training environment: prepare a plan, submit an owner update, review it and post a practice reply.

[ ] Confirm how the team records responsibility, unresolved work and the next handover. Do not assume a fixed response time or automatic escalation.

[ ] Agree how recovery summaries enter the clinic record. Vet Aftercare requires manual patient entry and does not automatically synchronize with a PIMS.

Clinic approval role: _____ Next review: _____

Use pages 1-2 for planning, adapt the two messages on page 3, and rehearse the fictional example on page 4. Your clinic approves medical wording, timings and contact instructions before use.

Review responsibility sheet

Use role names while planning. Keep patient-specific notes in the clinic-approved record, not in this worksheet. Replace every planning placeholder before using the workflow.

Responsibility	Primary role	Cover or handover
Approve protocol and clinical wording	[Set role]	[Set role]
Prepare plan and explain owner access	[Set role]	[Set role]
Check incoming updates and concerns	[Set role]	[Set role]
Make clinical decisions and approve advice	[Set role]	[Set role]
Confirm unresolved work has an owner	[Set role]	[Set role]
Preserve summary in normal records	[Set role]	[Set role]

Agree the review arrangements

Planning field	Clinic decision
Check-in window	[Set day/date, start and end, and local time zone]
Review coverage	[Set staffed review periods and absence cover]
Clinical escalation	[Set responsible role and clinic-approved route]
Urgent or out-of-hours contact	[Insert approved contact instructions; do not invent coverage]
Shift handover	[Set where open work is recorded and how acceptance is confirmed]
Existing record process	[Set who exports or transfers the summary and where it is retained]

Check the agreement

The next shift can identify who is responsible, what remains open and where to find the record. Clinic staff decide whether an update needs clinical escalation. This worksheet does not set triage rules or promise a response time.

Approved by role: _____ Date: _____

Owner message templates

These are nonclinical starting points for staff to adapt and approve. They do not send automatically. Use your clinic-approved channel, replace every bracketed field, and check the recipient before sending.

1 Explain plan access

Subject: Accessing [pet name] recovery plan

Hello [owner preferred name],

Your clinic has prepared a recovery plan for [pet name]. Open it using [clinic-approved secure access instructions]. You do not need a clinic staff account.

Please follow the instructions approved for your pet and submit the updates requested in the plan during [clinic-approved check-in window and local time zone]. If you cannot open the plan, contact [clinic support route].

Our team reviews updates during [approved review periods]. This channel is not an emergency service. For urgent concerns or help outside those periods, use [clinic-approved contact instructions].

[Clinic team]

2 Request a planned update

Subject: Planned update for [pet name]

Hello [owner preferred name],

Your clinic has requested an update for [pet name] during [day/date, check-in window and local time zone]. Please open the private plan through [clinic-approved secure access instructions] and answer the questions shown there. Include a photo only if your clinic has requested one.

If you have already sent this update, no duplicate is needed. If you cannot access the plan, contact [clinic support route].

Our team reviews updates during [approved review periods]. For urgent concerns or out-of-hours help, use [clinic-approved contact instructions]. Do not wait for an inbox reply when urgent help is needed.

[Clinic team]

Send only when appropriate to the actual plan and update status. Do not describe an update as overdue before the clinic-approved window has ended. Replace secure access placeholders only within your clinic-approved communication process; never put private links in a public resource or website form.

Fictional workflow rehearsal

Every role, case and time below is fictional. This is an administrative training exercise, not a clinical protocol or a recommended medical schedule. Use an approved training environment without sending real messages.

Set the scene

Training Clinic A is testing one sample recovery workflow for Fictional Patient A. The clinical reviewer supplies the sample care wording. A plan coordinator, a reviewer, a cover reviewer and a staff member acting as the owner take part.

Planning item	Illustrative agreement
Owner check-in window	10:00-16:00 local time on the fictional practice day
Review and cover	Reviewer checks within the clinic-agreed staffed period; cover accepts the handover before the reviewer leaves
Clinical questions	Responsible clinician receives the question through the clinic-approved route
Records	Records role preserves the summary in the approved training record

Walk through one complete loop

1. The coordinator prepares a fictional plan using the sample protocol and checks the access instructions.

2. At 09:00, the agreed check-in window has not begun and the update is not overdue. The team does not mark it overdue merely because a new day has begun.

3. At 14:00, the staff member acting as the owner submits a practice update and the nonclinical note: "Please confirm my update reached the team." No actual photo or private record is needed.

4. The reviewer locates the update, checks its context and posts a practice acknowledgement. If the exercise introduces a clinical question, the reviewer uses the agreed clinical escalation route rather than inventing advice.

5. The cover reviewer accepts any unresolved work. The records role follows the agreed manual summary process; no automatic PIMS transfer is assumed.

Record what needs changing

Where did staff duplicate work or lose responsibility? _____

What access or wording confused the person acting as the owner? _____

What must change before the clinic approves use? _____

Vet Aftercare organizes clinic-authored plans, owner check-ins and clinic replies. This pack does not import automatically. Guide and demonstration: vetaftercare.com/guides/post-discharge-follow-up