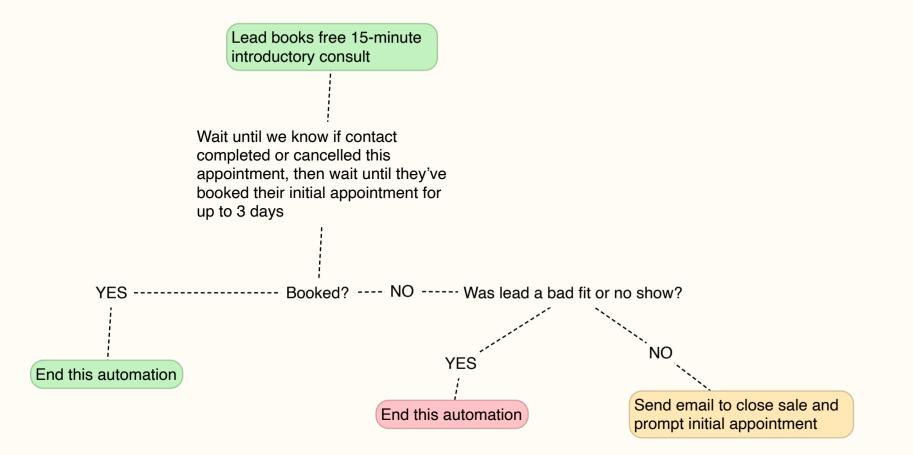
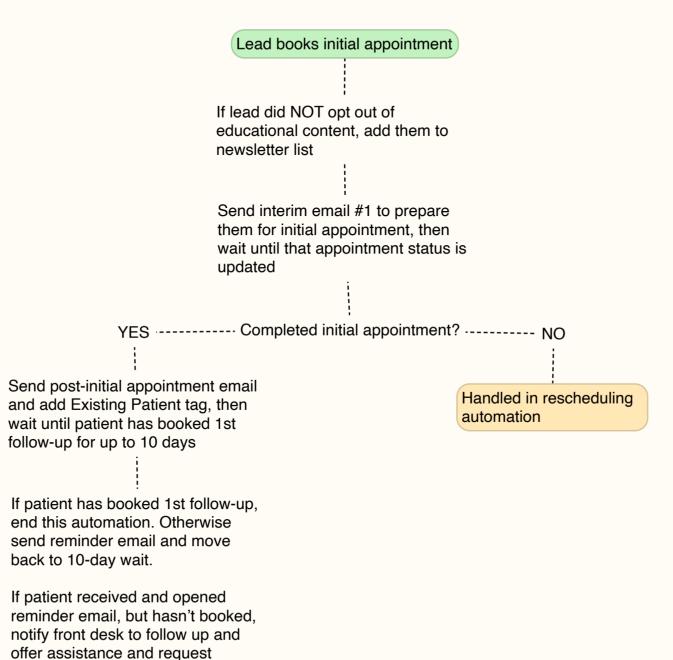
Closing Introductory Consults



New Patient Retention



feedback.

Rescheduling Cancelled Appoinments

Tag Cancelled upcoming appointment is added

Wait 1 day then send email to prompt rescheduling

Reset relevant fields by appointment type so the system recognizes when they book another appointment

Quarterly Follow-up Reminder

Last recurring appointment marked complete

Wait 80 days then check if patient has booked next appointment. If yes, end this automation, otherwise send prompt email

If patient received and opened reminder email, but hasn't booked, notify front desk to follow up and offer assistance and request feedback.

Recurring Appointment Process

Patient books recurring appointment

Send Interim email #2 and clear relevant fields so appointment status can be processed upon completion