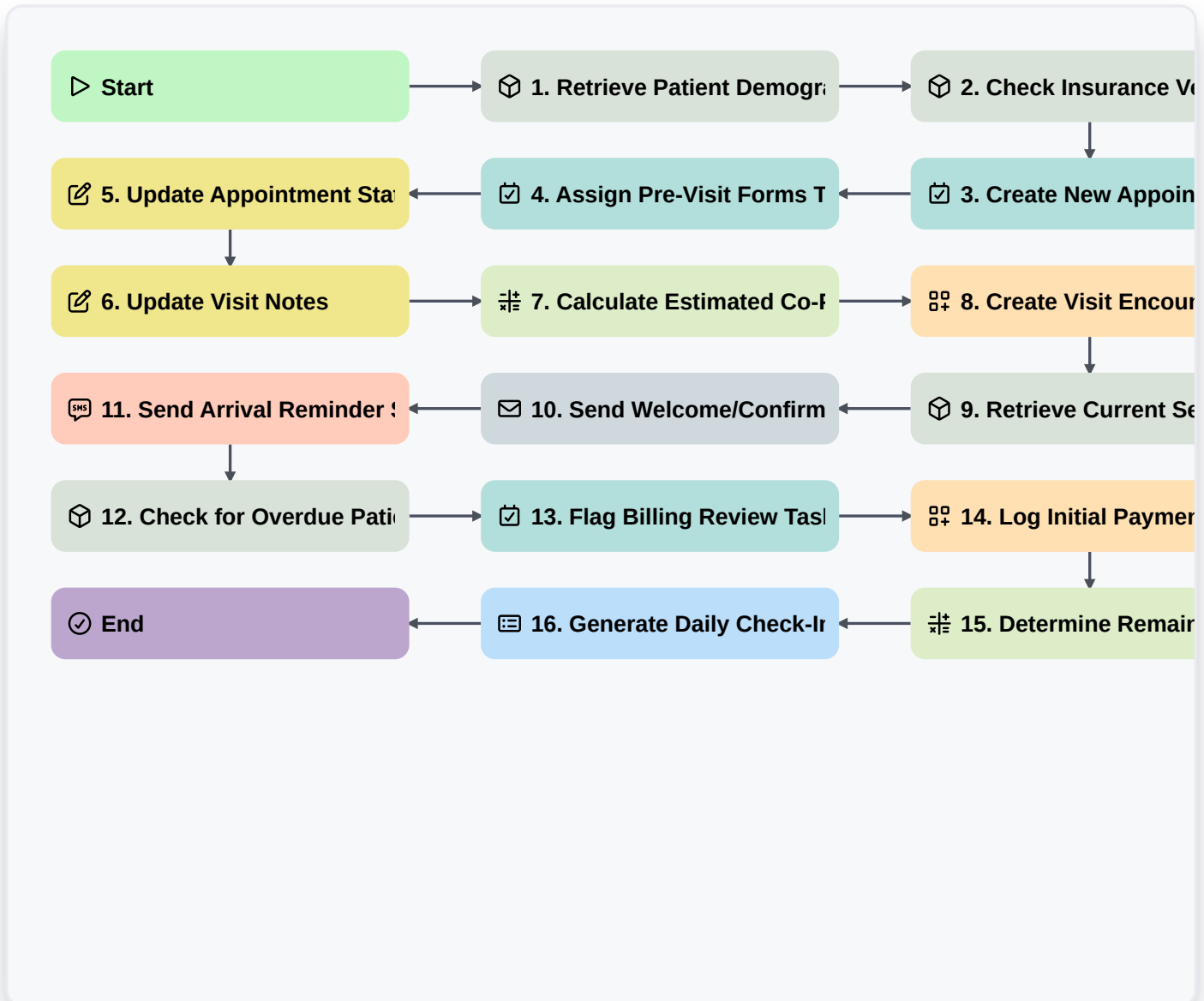


# Automated Dental Patient Check-In Workflow: Improve Efficiency & Experience



## ▶ Start

Start of the Workflow/Process.

### 1. Retrieve Patient Demographic Data

Automatically pull patient information from the central patient data model using patient ID or QR code scan.

### 2. Check Insurance Verification Status

Retrieve current insurance eligibility and verification details for the scheduled appointment.

### 3. Create New Appointment Confirmation Task

Generate a task for the front desk staff to confirm the appointment details and pre-screen for missing paperwork.

### 4. Assign Pre-Visit Forms Task

Automatically create tasks for the patient to complete necessary intake forms (e.g., medical history, consent) before arrival.

### 5. Update Appointment Status

Change the appointment status in the system to 'Checked In' and record the actual check-in time.

## **6. Update Visit Notes**

Allow staff to add initial observational notes to the patient's visit record.

## **7. Calculate Estimated Co-Pay Due**

Execute a formula combining services rendered and insurance co-pay rules to estimate the out-of-pocket cost.

## **8. Create Visit Encounter Record**

Generate a new visit record linked to the patient and date of service.

## **9. Retrieve Current Service Fee Schedule**

Fetch the master list of current service codes and associated fees for accurate billing.

## **10. Send Welcome/Confirmation Email to Patient**

Send an automated email to the patient containing directions, required items, and a link to pre-fill forms.

## **11. Send Arrival Reminder SMS**

Send a text message reminder to the patient 15 minutes before the appointment start time.

## **12. Check for Overdue Patient Balances**

Query the billing model to identify any outstanding balances associated with the patient record upon check-in.

## **13. Flag Billing Review Task**

Create a high-priority task for the billing specialist if an outstanding balance is detected.

## **14. Log Initial Payments Received**

Create a transaction entry in the ledger for any co-pays or deposits collected at check-in.

## **15. Determine Remaining Patient Balance**

Calculate the final amount the patient owes after applying insurance adjustments.

## **16. Generate Daily Check-In Report**

Create a summary report listing all patients who checked in on the current day for management review.

## **End**

Start of the Workflow/Process.