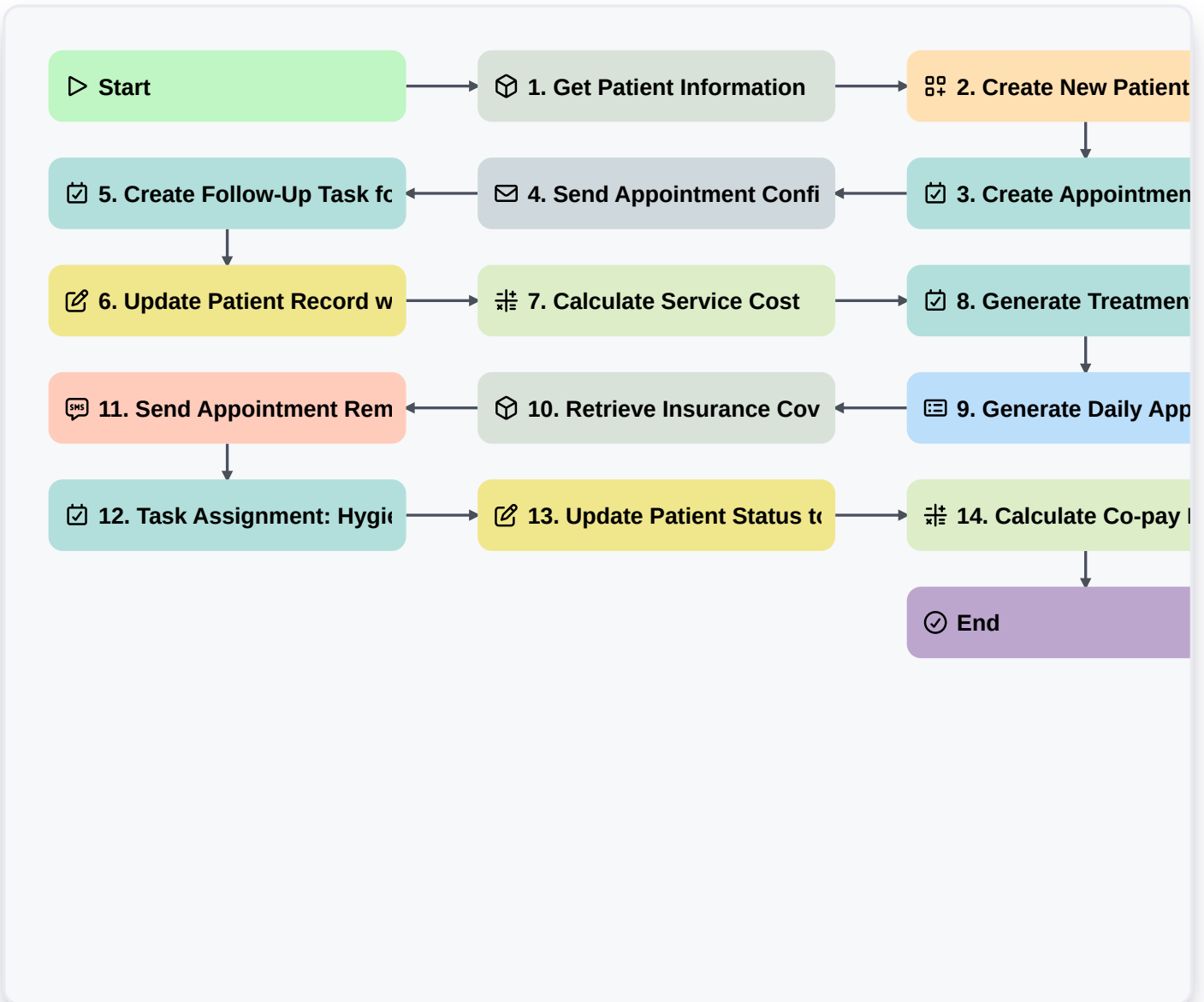


Best Dental Management Workflows: Streamline Your Practice For Growth



▶ Start

Start of the Workflow/Process.

📦 1. Get Patient Information

Retrieves existing patient records from the database.

📄 2. Create New Patient Chart

Generates a new patient file in the system.

✅ 3. Create Appointment Reminder Task

Automatically generates and assigns appointment confirmation tasks to staff.

✉️ 4. Send Appointment Confirmation Email

Sends automated email confirmation to the patient with appointment details.

✅ 5. Create Follow-Up Task for New Patients

Sets a follow-up task for necessary post-visit care reminders.

6. Update Patient Record with Visit Notes

Records and updates the patient's medical history after each visit.

7. Calculate Service Cost

Calculates total cost based on services rendered using service pricing variables.

8. Generate Treatment Plan Task

Creates necessary tasks for pre-authorization and treatment planning review.

9. Generate Daily Appointment Report

Compiles a summary report of the day's scheduled appointments and procedures.

10. Retrieve Insurance Coverage Details

Fetches real-time insurance eligibility and benefits information.

11. Send Appointment Reminder SMS

Sends SMS notification to the patient 24 hours before the scheduled visit.

12. Task Assignment: Hygiene Check

Assigns task to hygienist for routine cleaning and preventative care.

13. Update Patient Status to 'Checked In'

Marks patient as present for an appointment.

14. Calculate Co-pay Due

Determines the patient's estimated co-pay based on insurance and services.

End

Start of the Workflow/Process.