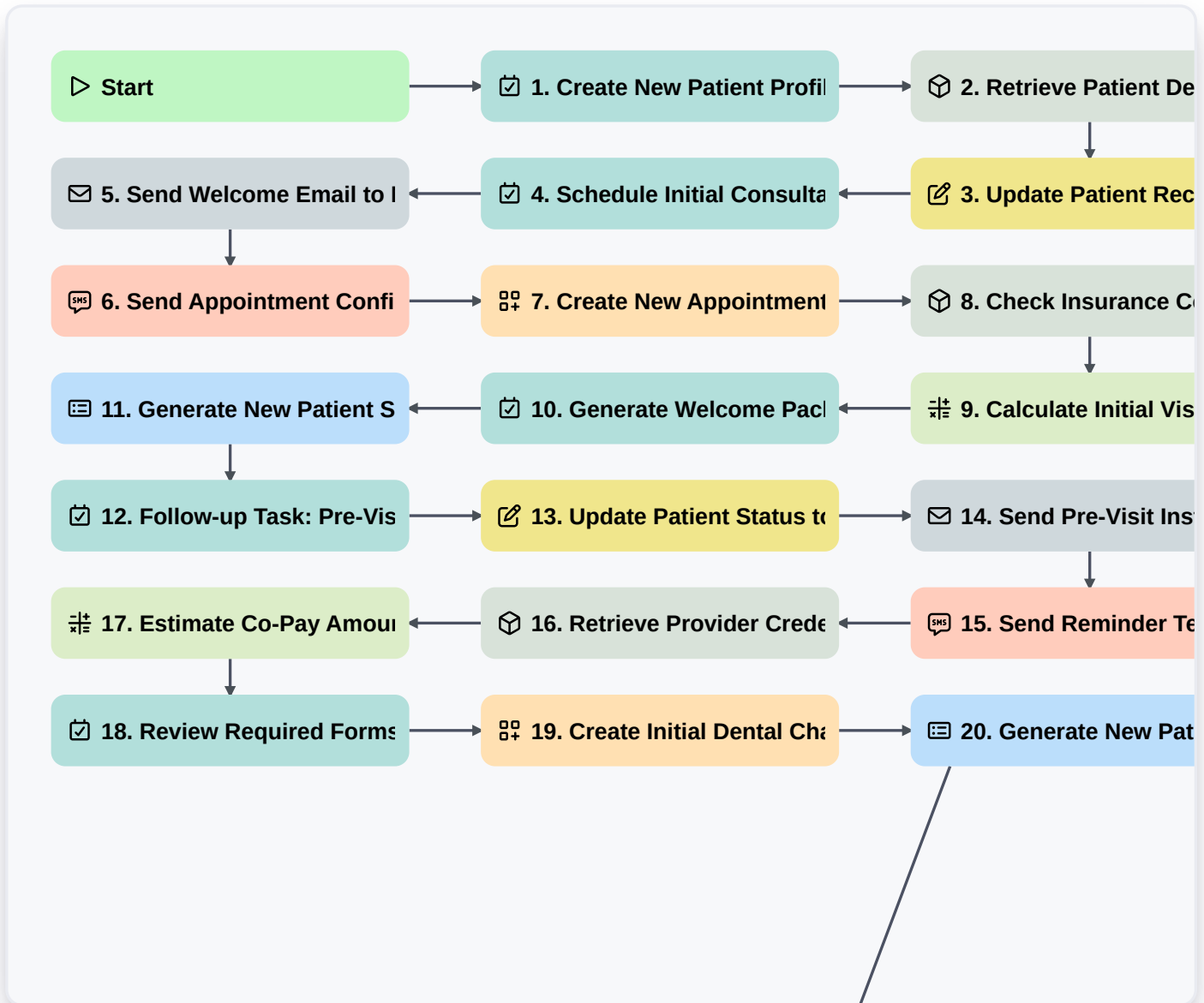


Best Dental Management Workflows: Streamline Your Practice Operations



▷ **Start**

Start of the Workflow/Process.

1. Create New Patient Profile

Generate a new patient record upon first contact.

2. Retrieve Patient Demographic Data

Fetch existing patient details (Name, DOB, Contact Info) for verification.

3. Update Patient Records with New Information

Modify and save updated patient demographic or insurance information.

4. Schedule Initial Consultation Task

Automatically assign a 'New Patient Consult' task to the front desk staff.

5. Send Welcome Email to New Patient

Automatically send patient welcome packet and pre-appointment instructions via email.

 **6. Send Appointment Confirmation SMS**

Send automated SMS confirmation for the first dental appointment.

 **7. Create New Appointment Record**

Log the initial appointment into the scheduling system.

 **8. Check Insurance Coverage Eligibility**

Verify patient's insurance status and co-pay details.

 **9. Calculate Initial Visit Estimate**

Formula to calculate estimated total cost based on services and insurance estimates.

 **10. Generate Welcome Packet Checklist**

Create a checklist task for staff to complete required paperwork pre-visit.

 **11. Generate New Patient Summary Report**

Compile a report summarizing initial consult details for the dentist's review.

 **12. Follow-up Task: Pre-Visit Reminders**

Assign task to ensure patient receives reminders 48 hours prior to appointment.

 **13. Update Patient Status to Active**

Flag the patient record as 'Active' upon completion of initial onboarding.

 **14. Send Pre-Visit Instructions Email**

Send email reminder to patient detailing necessary items (ID, insurance card) for their first visit.

 **15. Send Reminder Text Message**

Send automated text reminder 24 hours before the appointment.

 **16. Retrieve Provider Credentials**

Pull necessary credentials for billing and insurance verification.

 **17. Estimate Co-Pay Amount**

Calculate the expected patient co-payment based on service codes and insurance rates.

 **18. Review Required Forms Completion**

Task for admin to confirm all necessary forms (medical history, consent) are signed.

 **19. Create Initial Dental Chart Entry**

Build the foundational set of records for the new patient.

 **20. Generate New Patient Welcome Report**

Creates a summary report for the clinical team reviewing the new patient file.

 **End**

Start of the Workflow/Process.