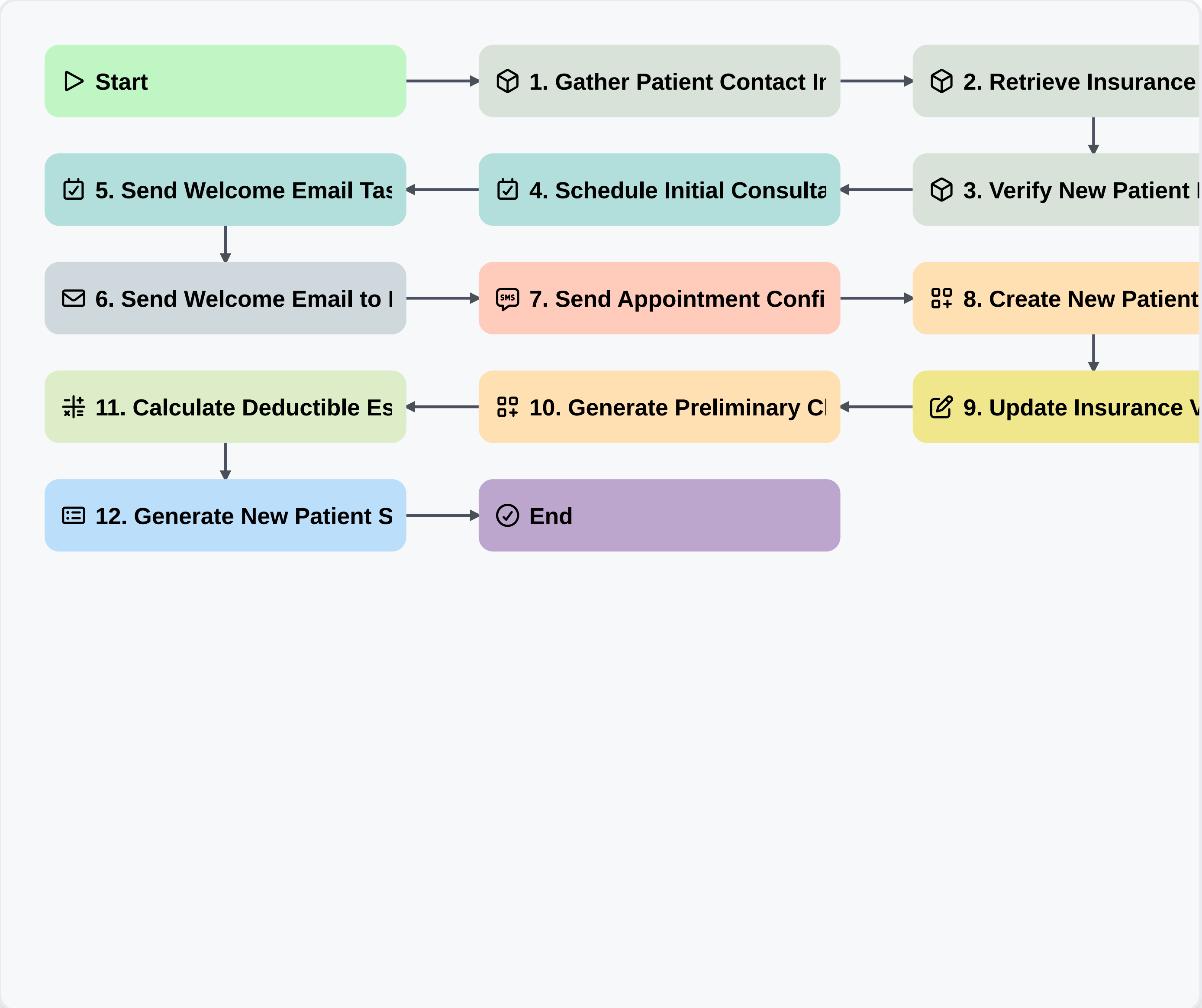
ChecklistGuro

Complete Dental Patient Intake & Onboarding Workflow Guide



Start
Start of the Workflow/Process.

1. Gather Patient Contact Information
Collect initial patient details (Name, Phone, Email) from Intake Form.

2. Retrieve Insurance Policy Details
Fetch existing insurance information using Patient ID for verification.

3. Verify New Patient Forms
Retrieve and review submitted consent forms and health questionnaires.

4. Schedule Initial Consultation Task
Create a task for the front desk staff to schedule the first appointment.

5. Send Welcome Email Task
Create a task to send the automated 'Welcome to Our Practice' email.

6. Send Welcome Email to Patient
Dispatch an automated email to the new patient confirming their scheduled appointment and providing preliminary care guidelines.

7. Send Appointment Confirmation SMS
Send an SMS reminder to the patient 24 hours before the first visit.

8. Create New Patient Record
Create the master patient file entry in the EMR/Data Model.

9. Update Insurance Verification Status
Update the patient record with the results of the insurance eligibility check.

10. Generate Preliminary Chart Notes
Create a baseline chart entry summarizing the initial intake screening data.

11. Calculate Deductible Estimate
Calculate estimated co-pay/deductible based on gathered insurance data and procedure codes.

12. Generate New Patient Summary Report
Compile key data points (Intake Summary, Insurance, Initial Visit Notes) into a single pre-visit report for the treating dentist.

End
Start of the Workflow/Process.