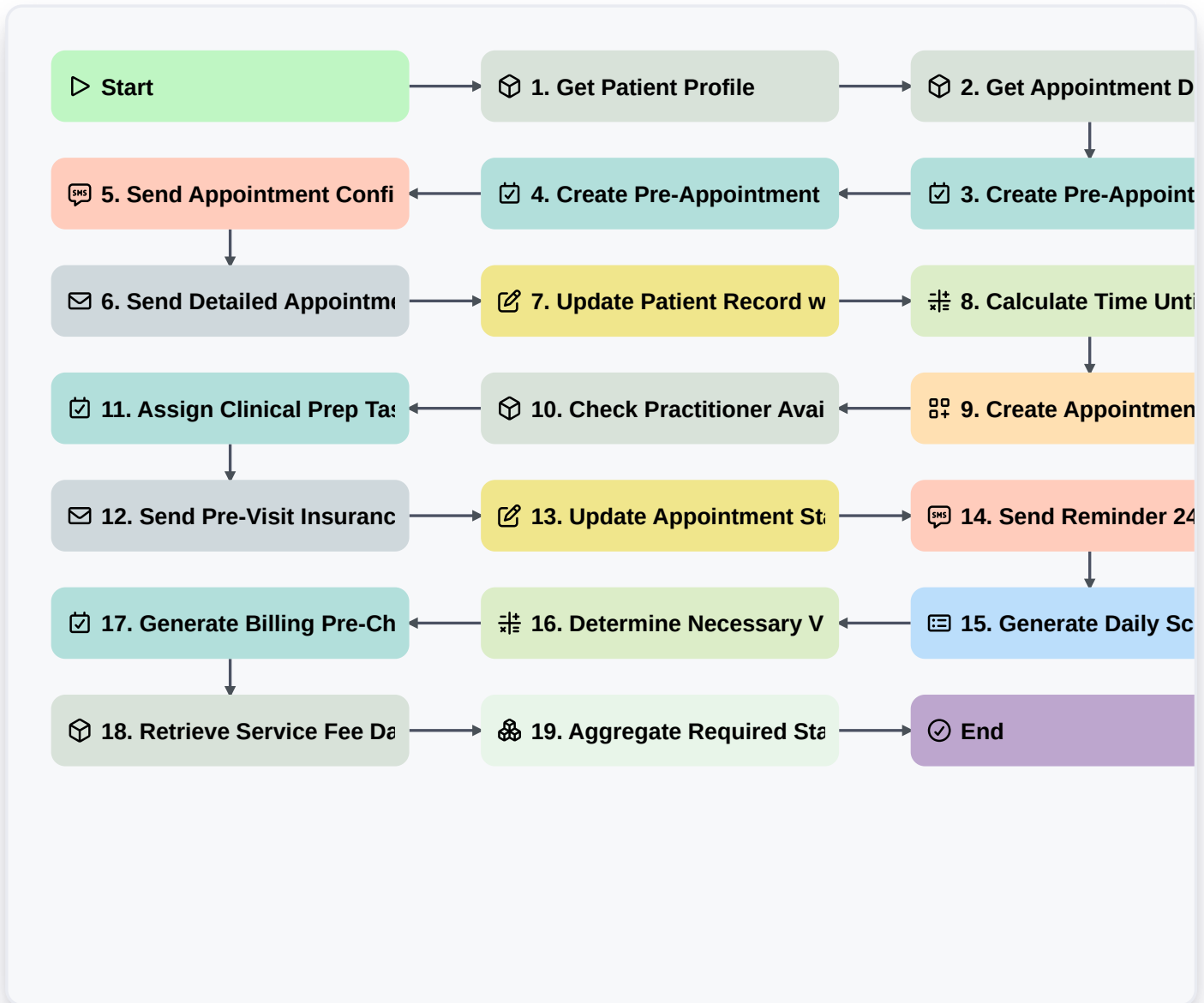


Dental Appointment Scheduling Workflow: Optimize Clinic Flow & Patient Care



Start

Start of the Workflow/Process.

1. Get Patient Profile

Retrieve core patient demographic and insurance data when a new appointment is booked.

2. Get Appointment Details

Retrieve specific appointment time, reason for visit, and associated service codes.

3. Create Pre-Appointment Reminder Task

Automatically assign a task to the front desk staff to confirm the appointment 48 hours prior.

4. Create Pre-Appointment Patient Task

Create a task for the patient (or caregiver) to confirm attendance and complete required forms online.

5. Send Appointment Confirmation SMS

Send an automated SMS confirmation to the patient with appointment details.

6. Send Detailed Appointment Email

Dispatch a comprehensive email to the patient, including pre-visit instructions and necessary documents.

7. Update Patient Record with Appointment Info

Update the patient's primary record with the confirmed appointment date, time, and reason.

8. Calculate Time Until Visit

Calculate the time difference between today and the appointment date for reminder logic.

9. Create Appointment Record

Generate and save the primary appointment record within the system.

10. Check Practitioner Availability

Verify the assigned dentist/hygienist's real-time schedule slot.

11. Assign Clinical Prep Task

Assign a task to the clinical team to prepare necessary tools or patient charts before the appointment.

12. Send Pre-Visit Insurance Verification Request

Email the patient to proactively request updated insurance information.

13. Update Appointment Status to Booked

Change the appointment status in the database from 'Pending' to 'Confirmed'.

14. Send Reminder 24 Hours Out SMS

Send a reminder message the day before the appointment.

15. Generate Daily Schedule Report

Compile a report summarizing the day's appointments for staff review.

16. Determine Necessary Visit Duration

Calculate the required time slot length based on the service code (e.g., cleaning vs. consultation).

17. Generate Billing Pre-Check Task

Create a task for the billing department to pre-verify insurance coverage for the booked services.

18. Retrieve Service Fee Data

Fetch current fee schedules for the planned procedure.

19. Aggregate Required Staff Count

Sum up the number of staff required based on multiple services booked.

End

Start of the Workflow/Process.