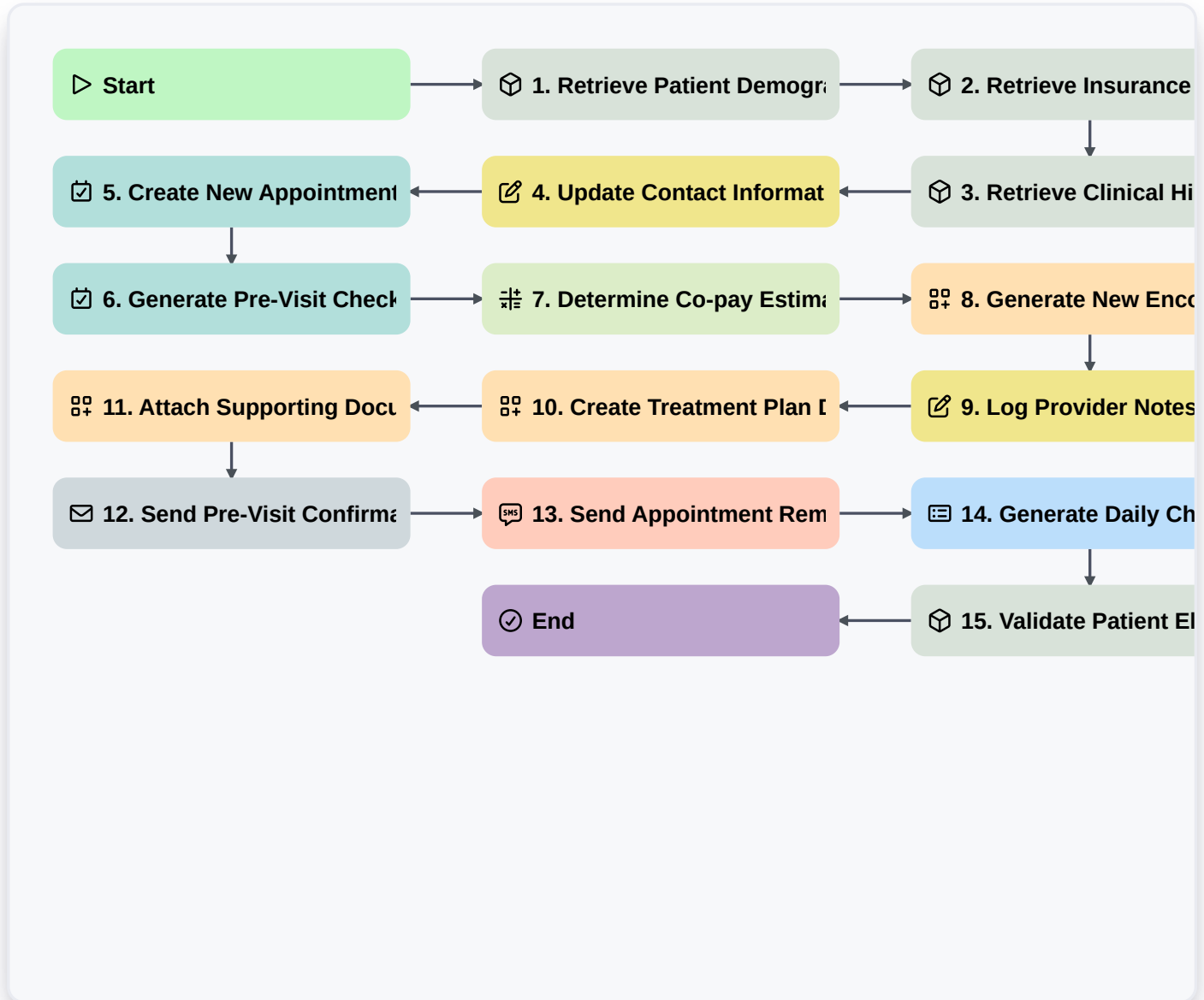


Dental Charting & Record Management Workflow: Best Practices For HIPAA Compliance



▶ Start

Start of the Workflow/Process.

📦 1. Retrieve Patient Demographics

Get core patient information (Name, DOB, Contact) from the Patient Record data model.

📦 2. Retrieve Insurance Details

Fetch current and historical insurance policy information.

📦 3. Retrieve Clinical History

Pull relevant past visit notes, X-rays, and diagnoses.

✍️ 4. Update Contact Information

Update any discrepancies found in patient contact details before starting the workflow.

✅ 5. Create New Appointment Task

Assign a task to the scheduling staff to book the necessary follow-up appointment.

6. Generate Pre-Visit Checklist

Automatically create a checklist for the clinical team before the patient arrives (e.g., required forms, necessary equipment).

7. Determine Co-pay Estimate

Calculate estimated patient co-pay based on services provided and insurance plan rules.

8. Generate New Encounter Record

Create a master record for the current visit within the patient's chart.

9. Log Provider Notes

Input and save detailed clinical notes (SOAP format, etc.) into the correct section of the visit record.

10. Create Treatment Plan Draft

Generate a preliminary treatment recommendation based on the initial examination findings.

11. Attach Supporting Documentation

Upload and link relevant files (X-rays, photos) to the patient's record.

12. Send Pre-Visit Confirmation Email

Send an automated email to the patient confirming appointment details and required paperwork.

13. Send Appointment Reminder SMS

Send a customizable SMS reminder to the patient 24 hours before the appointment.

14. Generate Daily Charting Audit Report

Compile a report summarizing all entries and updates made to the patient chart during the visit.

15. Validate Patient Eligibility

Check real-time insurance eligibility status against the payer's system.

End

Start of the Workflow/Process.