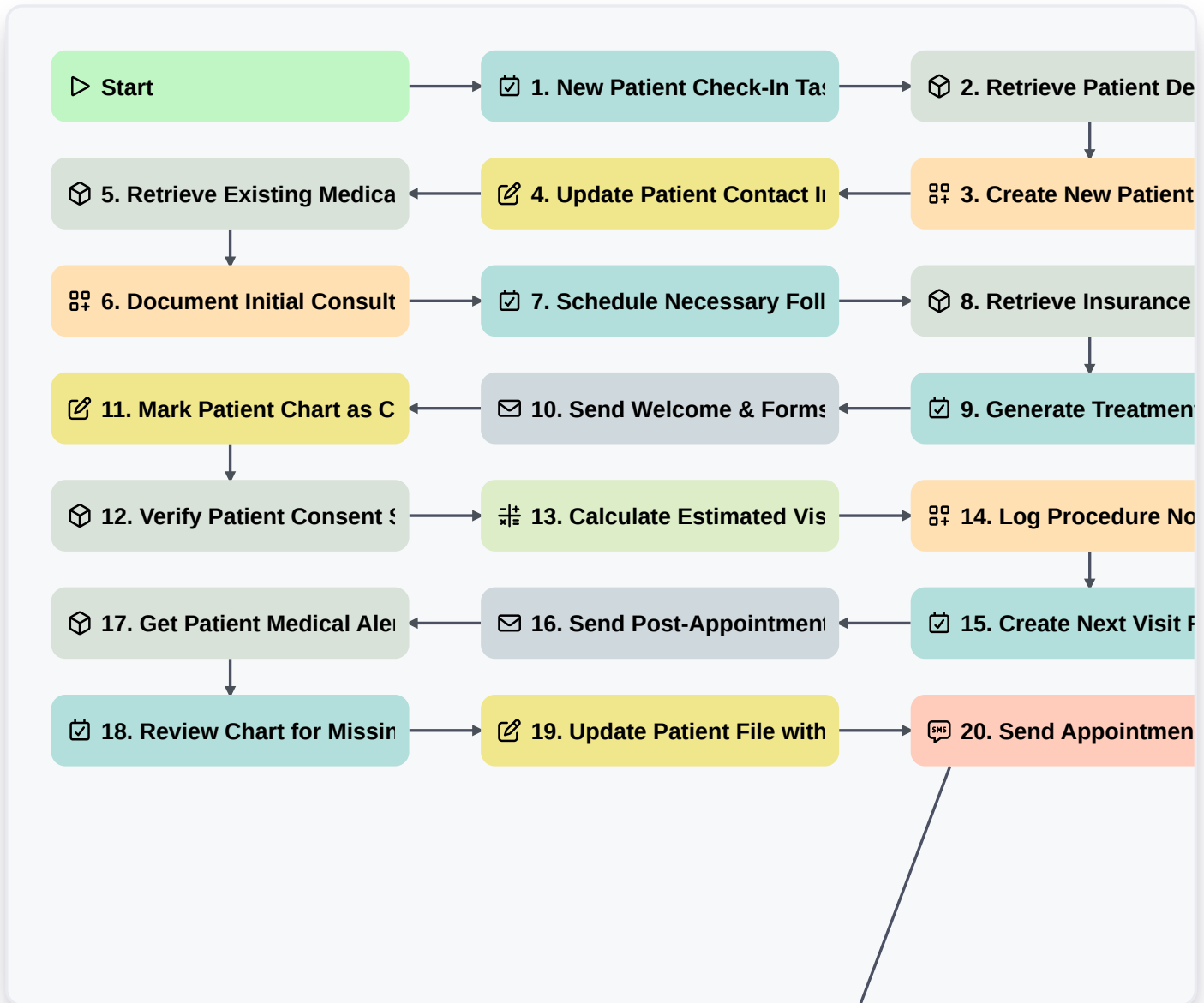


Dental Charting Workflow: Accurate Record Keeping & HIPAA Compliance Guide



▶ Start

Start of the Workflow/Process.

☑ 1. New Patient Check-In Task

Create initial task for new patient appointment preparation.

📦 2. Retrieve Patient Demographics

Get essential patient information (Name, DOB, Contact) from the patient data model.

📋 3. Create New Patient Record

Generate a new comprehensive patient file upon first visit.

✍ 4. Update Patient Contact Information

Update any changes to patient address or phone number on file.

📦 5. Retrieve Existing Medical History

Pull relevant past medical records for comprehensive charting.

6. Document Initial Consultation Notes

Record subjective findings and preliminary consultation notes.

7. Schedule Necessary Follow-Up Tasks

Auto-create tasks for future recall appointments or procedures.

8. Retrieve Insurance Policy Details

Fetch current dental insurance information for verification.

9. Generate Treatment Plan Task

Assign the responsible clinician to draft and review the proposed treatment plan.

10. Send Welcome & Forms Email

Automatically send new patient intake forms and required preliminary documents via email.

11. Mark Patient Chart as Complete

Finalize and sign off on the patient's initial chart within the system.

12. Verify Patient Consent Status

Check if all required consent forms (treatment, privacy) are signed and on file.

13. Calculate Estimated Visit Duration

Calculate required time based on procedures booked (e.g., Cleanings + X-rays).

14. Log Procedure Notes

Enter detailed notes for services rendered during the visit.

15. Create Next Visit Reminder Task

Set a task for staff to proactively call the patient for their next appointment.

16. Send Post-Appointment Care Instructions

Automatically email after-visit care instructions to the patient.

17. Get Patient Medical Alert Status

Retrieve any known allergies or critical medical conditions affecting treatment.

18. Review Chart for Missing Signatures Task

Flag the chart for review if required signatures are missing.

19. Update Patient File with Diagnosis Codes

Input and standardize current ICD-10/CDT diagnosis codes.

20. Send Appointment Confirmation SMS

Send automated SMS reminder to the patient confirming the upcoming dental appointment.

End

Start of the Workflow/Process.