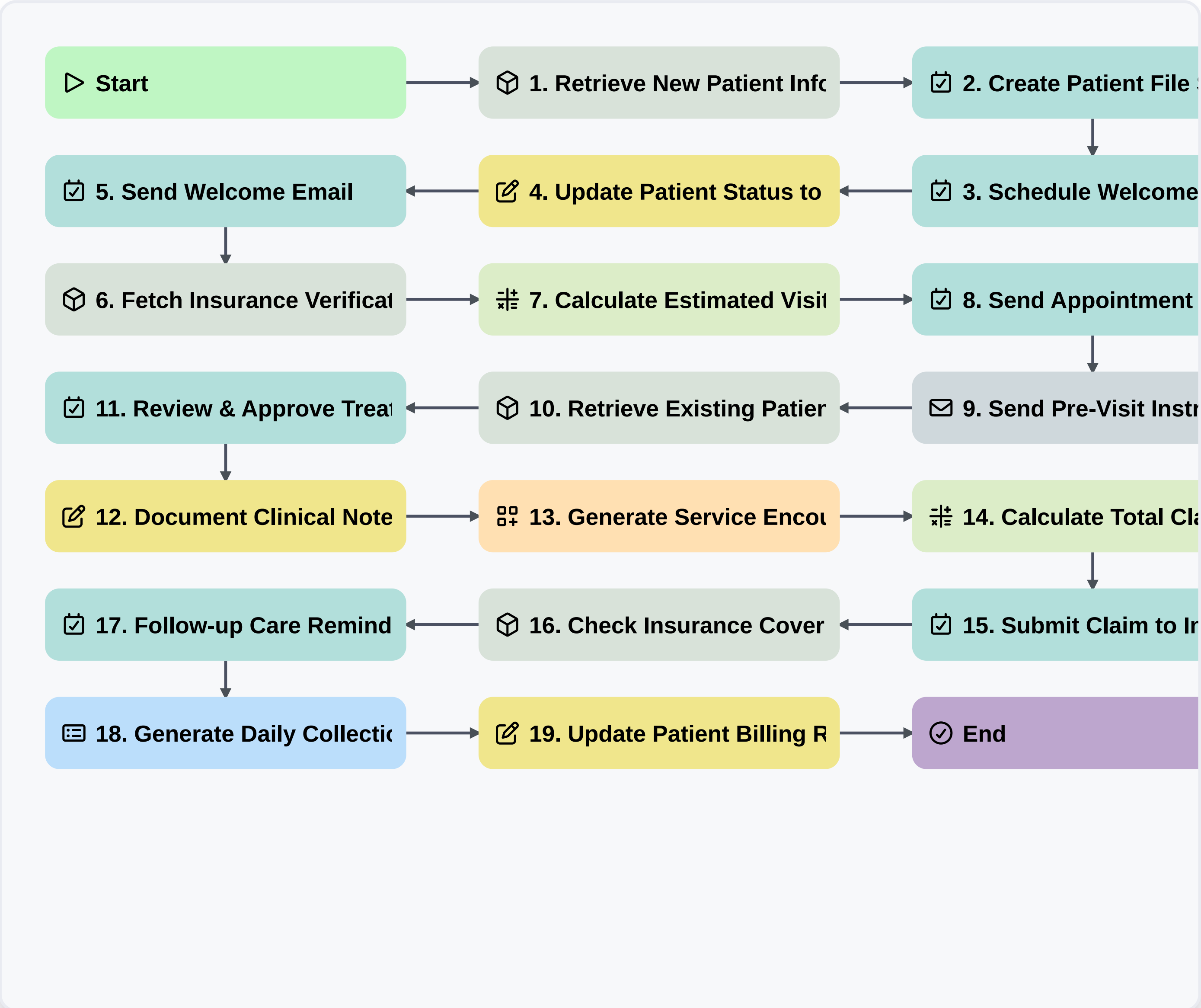
ChecklistGuro

Dental Management Workflow Processes: Optimize Your Practice Operations



Start
Start of the Workflow/Process.

1. Retrieve New Patient Information
Automatically pull contact details, insurance info, and initial consultation notes from the intake form.

2. Create Patient File Setup Task
Assign initial tasks to the front desk staff (e.g., verification, record creation).

3. Schedule Welcome Call Task
Create a task for a team member to call new patients for pre-appointment instructions.

4. Update Patient Status to 'Active'
Change patient status in the database after successful initial screening.

5. Send Welcome Email
Trigger an automated email to the new patient with pre-visit instructions and FAQs.

6. Fetch Insurance Verification Data
Retrieve and validate current insurance coverage details for the patient.

7. Calculate Estimated Visit Cost
Sum costs based on service codes and pre-authorization requirements (e.g., (Exam Fee + X-Ray Fee) * Insurance Multiplier).

8. Send Appointment Confirmation SMS
Send automated SMS reminder to the patient 24 hours prior to the appointment.

9. Send Pre-Visit Instructions Email
Dispatch detailed preparatory instructions to the patient email address.

10. Retrieve Existing Patient History
Pull past records, notes, and treatment plans from the patient's existing file.

11. Review & Approve Treatment Plan Task
Assign a task to the dentist/hygienist to review proposed services and check for internal approvals.

12. Document Clinical Notes Post-Visit
Update the patient chart with findings, diagnoses, and treatment summaries.

13. Generate Service Encounter Record
Create a new formal entry documenting the date, procedures performed, and materials used.

14. Calculate Total Claim Amount
Aggregate all services rendered costs, factoring in discounts and modifiers.

15. Submit Claim to Insurance
Generate and submit the necessary electronic claim file (e.g., CDT coding) to the payer.

16. Check Insurance Coverage Eligibility
Verify active coverage, deductibles, and in-network status using provided policy details.

17. Follow-up Care Reminder Task
Schedule a task to automatically follow up with the patient regarding next necessary appointments.

18. Generate Daily Collection Report
Compile a summary report of payments received and outstanding balances for the day.

19. Update Patient Billing Record
Record co-pays and patient portions of services rendered against the account.

End
Start of the Workflow/Process.