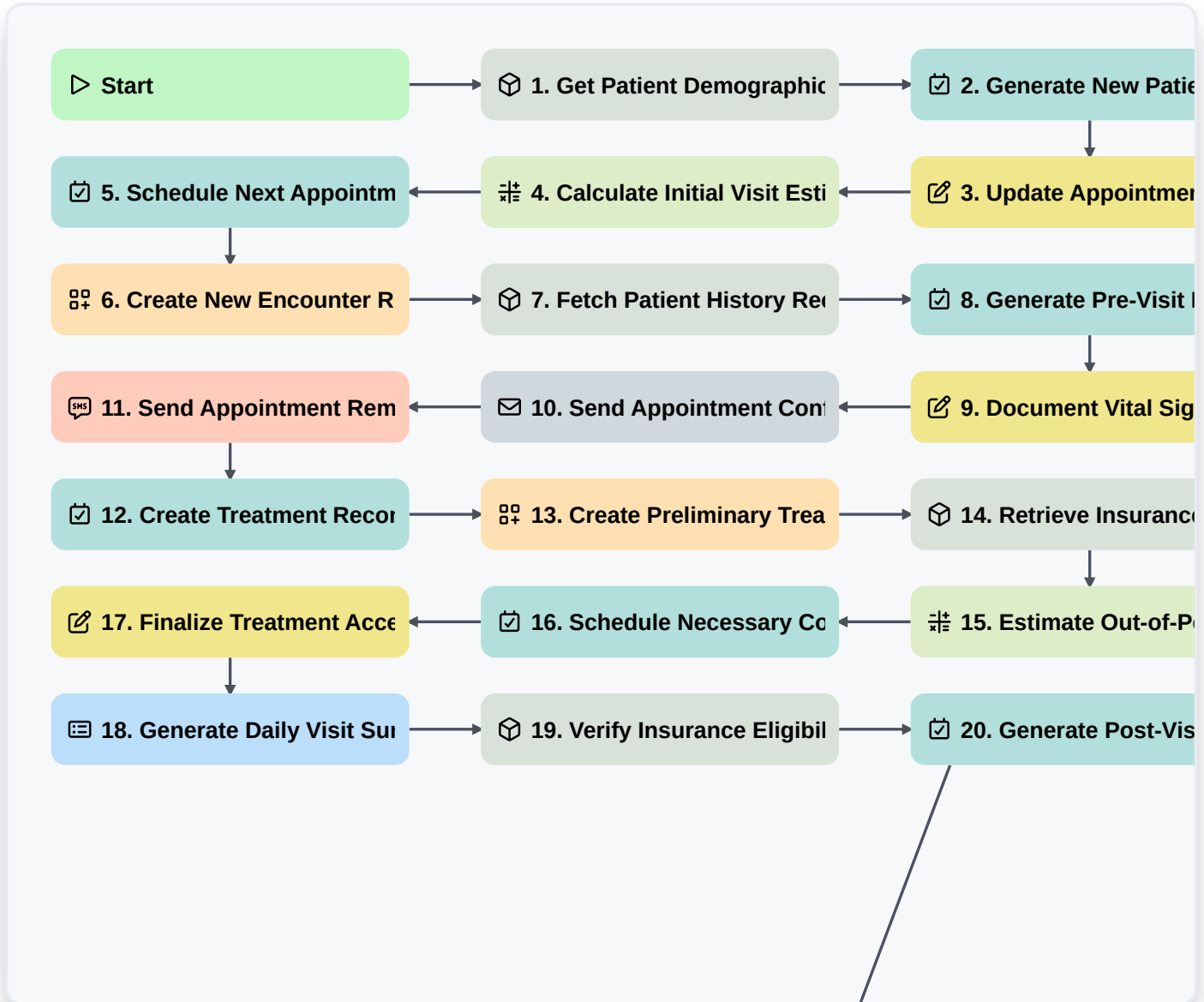


# Dental Office Workflow Optimization: Boost Efficiency With Our Management Solution



**Start**

Start of the Workflow/Process.

**1. Get Patient Demographic Data**

Retrieve necessary patient information from the patient data model.

**2. Generate New Patient Check-In Task**

Create a task for front desk staff to greet and process the patient.

**3. Update Appointment Status**

Mark the appointment as 'Checked In' in the system record.

**4. Calculate Initial Visit Estimate**

Calculate preliminary service cost based on service codes and fees.

**5. Schedule Next Appointment**

Create a follow-up appointment reminder task for the patient.

## **6. Create New Encounter Record**

Generate a fresh encounter record for the current visit.

## **7. Fetch Patient History Records**

Retrieve comprehensive medical and dental history for the patient.

## **8. Generate Pre-Visit Pre-Screening Task**

Assign task to clinical staff to review necessary pre-visit paperwork.

## **9. Document Vital Signs**

Input and update the patient's current vital signs and chief complaints.

## **10. Send Appointment Confirmation Email**

Automatically send appointment confirmation details to the patient.

## **11. Send Appointment Reminder SMS**

Send an automated SMS reminder to the patient 24 hours before the appointment.

## **12. Create Treatment Recommendation Task**

Assign task to the dentist for reviewing diagnostics and creating a treatment plan.

## **13. Create Preliminary Treatment Plan**

Document the initial proposed treatment steps in the EHR.

## **14. Retrieve Insurance Policy Details**

Look up the patient's current insurance coverage and policy details.

## **15. Estimate Out-of-Pocket Costs**

Calculate the patient's estimated financial responsibility based on services and insurance rates.

## **16. Schedule Necessary Consultations**

Create follow-up tasks for specialized imaging or necessary consults.

## **17. Finalize Treatment Acceptance**

Update the patient file upon acceptance of the treatment plan, capturing authorization.

## **18. Generate Daily Visit Summary Report**

Compile a report of all services rendered and payments collected for the day.

## **19. Verify Insurance Eligibility**

Check real-time insurance eligibility before rendering services.

## **20. Generate Post-Visit Instructions Task**

Create a task for the hygienist/assistant to provide post-visit care instructions.

## **End**

Start of the Workflow/Process.