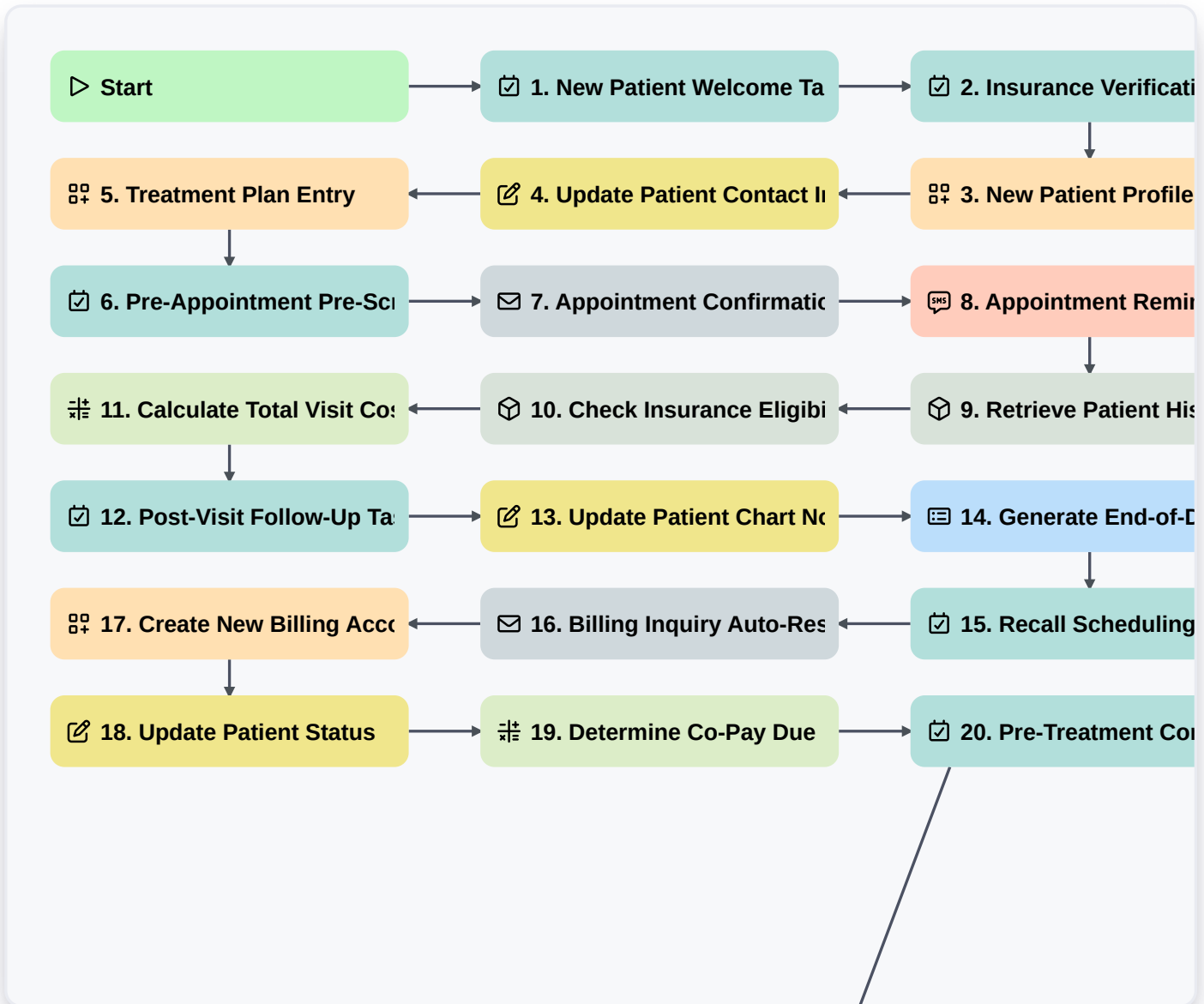


Dental Practice Workflow Automation: Seamless Operations With Our Management Solution



▷ Start

Start of the Workflow/Process.

☑ 1. New Patient Welcome Task

Automatically assign initial onboarding tasks for new dental patients.

☑ 2. Insurance Verification Task

Task for administrative staff to verify patient dental insurance coverage.

🗄️ 3. New Patient Profile Creation

Create core patient records upon check-in.

✍️ 4. Update Patient Contact Information

Update patient demographics (address, phone, email) after initial visit.

🗄️ 5. Treatment Plan Entry

Document and create the recommended treatment plan for the patient.

📌 **6. Pre-Appointment Pre-Screening Task**

Generate tasks for patient forms/screening before the dental appointment.

✉️ **7. Appointment Confirmation Email**

Send automated confirmation email to the patient 48 hours before the appointment.

📱 **8. Appointment Reminder SMS**

Send SMS reminder to the patient 24 hours prior to visit.

📦 **9. Retrieve Patient History**

Fetch and populate previous visit notes and procedures for the current patient record.

📦 **10. Check Insurance Eligibility**

Query payer portal to confirm active insurance coverage before treatment.

🔢 **11. Calculate Total Visit Cost**

Calculate service fees + materials cost for the current appointment.

📌 **12. Post-Visit Follow-Up Task**

Schedule a follow-up task for the hygienist/dentist to review notes.

📝 **13. Update Patient Chart Notes**

Add detailed clinical notes after the patient has left the operatory.

📊 **14. Generate End-of-Day Revenue Report**

Compile all payments, procedures, and collections for the day.

📌 **15. Recall Scheduling Task**

Create tasks to prompt scheduling of future checkups (e.g., 6 months).

✉️ **16. Billing Inquiry Auto-Response**

Send automated email response to common billing questions.

🔢 **17. Create New Billing Account**

Setup a new billing profile for out-of-network patients.

📝 **18. Update Patient Status**

Change patient status (Active, Inactive, Lost) in the management system.

🔢 **19. Determine Co-Pay Due**

Calculate the patient's remaining out-of-pocket cost after insurance adjudication.

📌 **20. Pre-Treatment Consent Task**

Ensure signed informed consent before performing complex procedures.

📦 **21. Fetch Patient Allergy List**

Retrieve existing documented allergies to prevent cross-contamination.

👍 **End**

Start of the Workflow/Process.