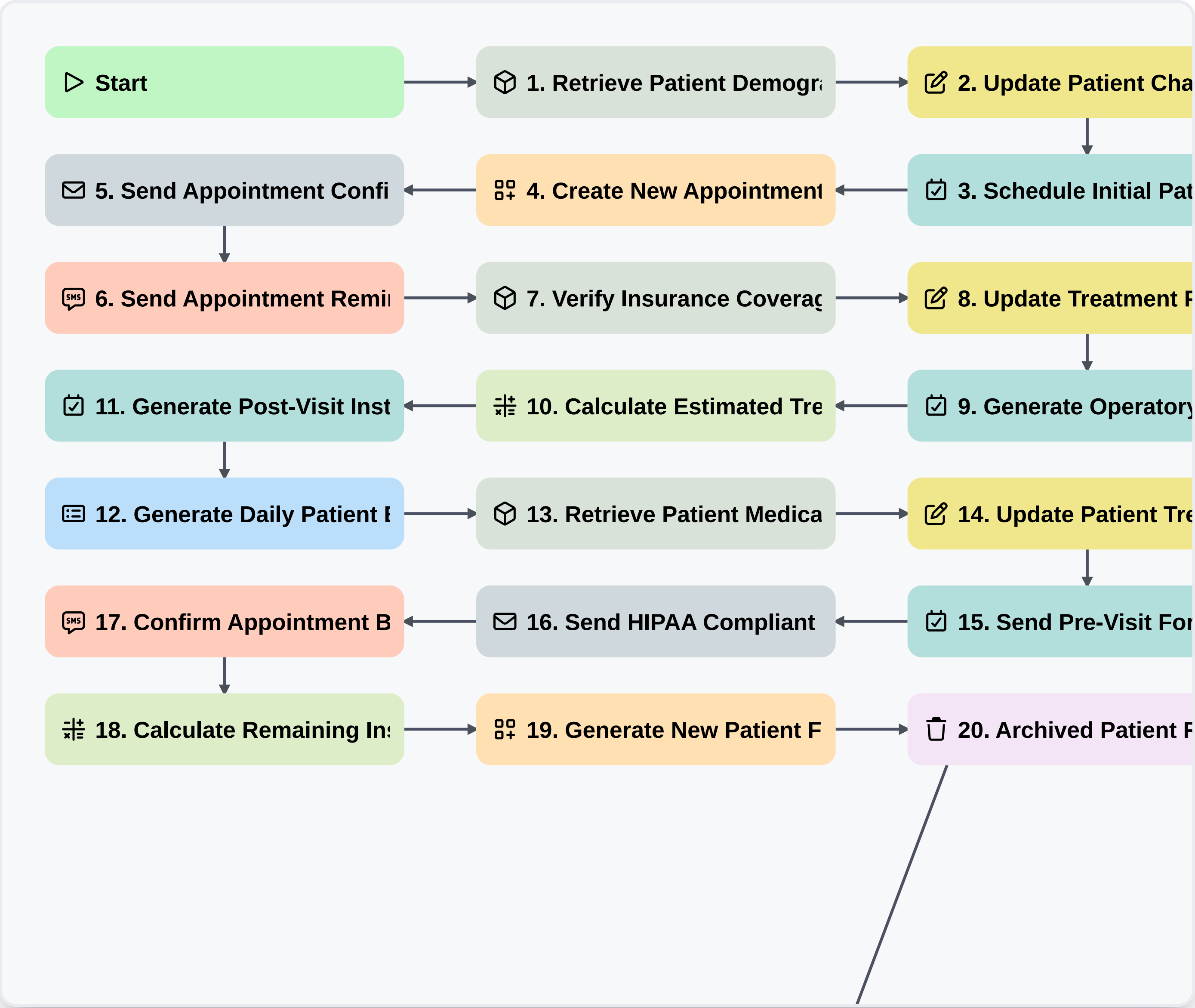
ChecklistGuro

Dental Practice Workflow Solutions: Optimize Your Clinic Management



Start
Start of the Workflow/Process.

1. Retrieve Patient Demographic Data
Fetch existing patient contact and insurance information.

2. Update Patient Chart Information
Modify patient details (e.g., address, emergency contact) during intake.

3. Schedule Initial Patient Welcome Tasks
Automatically generate tasks for necessary follow-up (e.g., Pre-appointment forms, Insurance Verification).

4. Create New Appointment Slot
Book and confirm the appointment in the scheduling system.

5. Send Appointment Confirmation Email
Automatically send appointment reminders and pre-visit instructions to the patient.

6. Send Appointment Reminder SMS
Send timely SMS reminders 24-48 hours before the visit.

7. Verify Insurance Coverage Details
Check patient's current insurance eligibility and benefits.

8. Update Treatment Plan Status
Log and modify the agreed-upon treatment plan and necessary next steps.

9. Generate Operatory Prep Task
Assign tasks to the supporting staff before the patient arrives (e.g., sterilize tools, prep rooms).

10. Calculate Estimated Treatment Cost
Compute total estimated cost based on services and insurance data.

11. Generate Post-Visit Instructions Task
Create follow-up tasks for the hygienist/dentist regarding aftercare instructions.

12. Generate Daily Patient Encounter Report
Compile necessary documentation summarizing the patient's visit details for record-keeping.

13. Retrieve Patient Medical History
Access and review the patient's full medical history before treatment.

14. Update Patient Treatment Records
Document all procedures, notes, and diagnostics from the visit.

15. Send Pre-Visit Forms Task
Remind patient to complete necessary paperwork before arrival.

16. Send HIPAA Compliant Consent Form
Email necessary legal and treatment consent forms to the patient.

17. Confirm Appointment Booking via Text
Send quick, actionable confirmation texts to reduce no-shows.

18. Calculate Remaining Insurance Balance
Determine the patient's out-of-pocket cost after insurance application.

19. Generate New Patient File Record
Establish a clean, comprehensive record for a brand new patient.

20. Archived Patient Record Cleanup
Flag or delete outdated or inactive patient entries according to policy.

End
Start of the Workflow/Process.