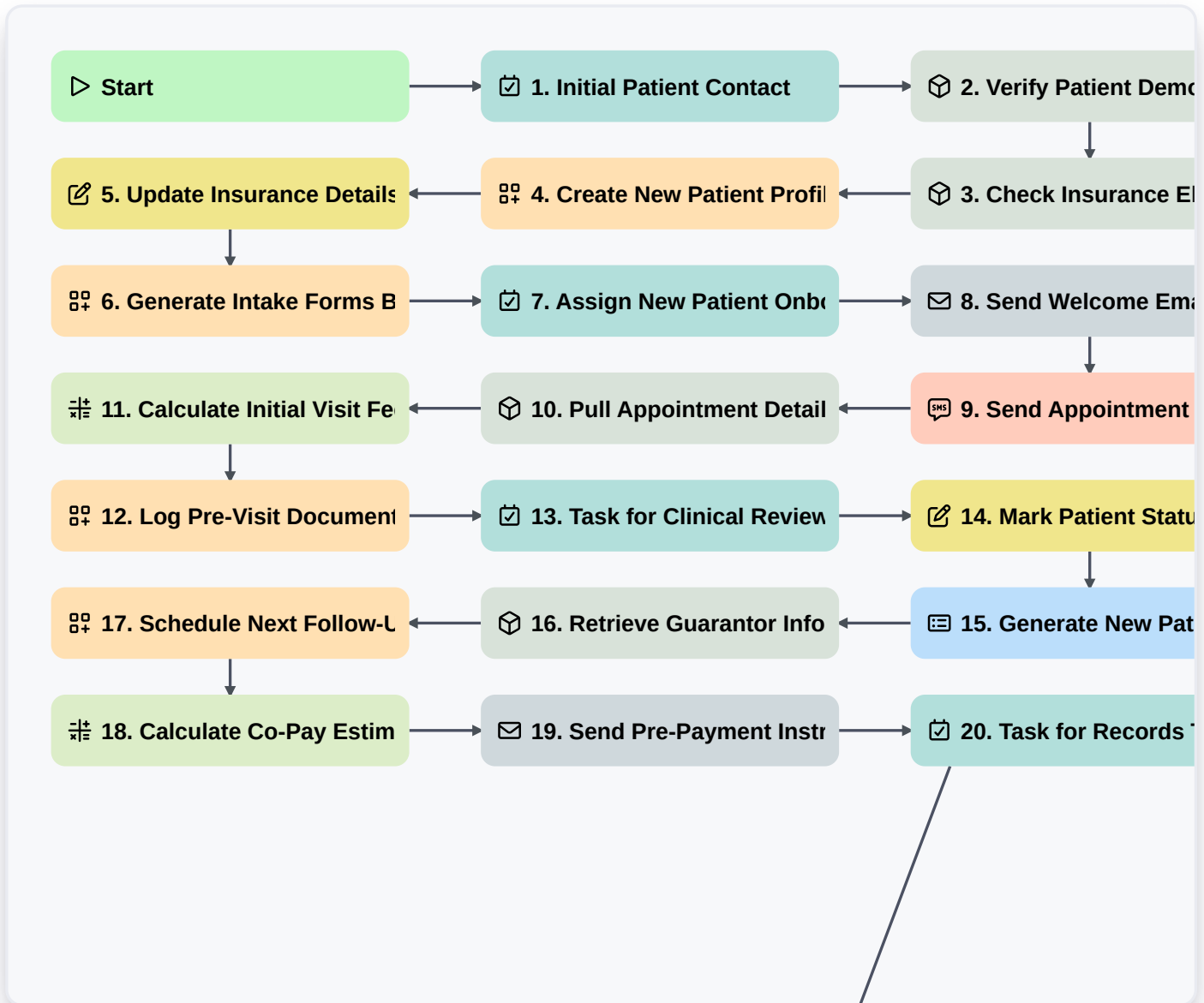


Efficient Dental Patient Onboarding Workflow For Modern Practices



▷ **Start**

Start of the Workflow/Process.

 **1. Initial Patient Contact**

Task for front office staff to initiate contact with new patient.

 **2. Verify Patient Demographic Data**

Retrieve existing patient records using Name and Date of Birth.

 **3. Check Insurance Eligibility**

Get real-time insurance verification details.

 **4. Create New Patient Profile**

Create the foundational patient record in the system.

 **5. Update Insurance Details**

Update patient billing and insurance information after verification.

6. Generate Intake Forms Bundle

Create a set of necessary intake form records (medical history, consent, etc.).

7. Assign New Patient Onboarding Tasks

Create follow-up tasks for clinical staff (e.g., pre-visit instructions).

8. Send Welcome Email to Patient

Automated email sending welcome kit and pre-appointment instructions.

9. Send Appointment Confirmation SMS

Automated SMS confirmation sent 24 hours before the appointment.

10. Pull Appointment Details

Retrieve scheduled appointment slot information.

11. Calculate Initial Visit Fee Estimate

Formula to estimate initial visit costs based on provider and service codes.

12. Log Pre-Visit Documentation

Create a record for signed digital consent forms.

13. Task for Clinical Review

Create a task for the hygienist to review medical history prior to the appointment.

14. Mark Patient Status as 'Active'

Update the patient's status flag in the master record.

15. Generate New Patient Welcome Report

Create a summary report for the dentist summarizing the onboarding progress.

16. Retrieve Guarantor Information

Fetch necessary guarantor details for billing purposes.

17. Schedule Next Follow-Up Reminder

Create a task or follow-up entry for routine recall scheduling.

18. Calculate Co-Pay Estimate

Formula to calculate estimated patient co-pay based on insurance and services.

19. Send Pre-Payment Instructions

Emailing patients with payment options before their first visit.

20. Task for Records Transfer (if applicable)

Assign a task if patient records need to be imported from another provider.

21. Confirm Data Accuracy Check

Final step to flag all required fields as complete and accurate.

22. Archive Temporary Onboarding Data

Clean up temporary entries used only for the onboarding process.

End

Start of the Workflow/Process.