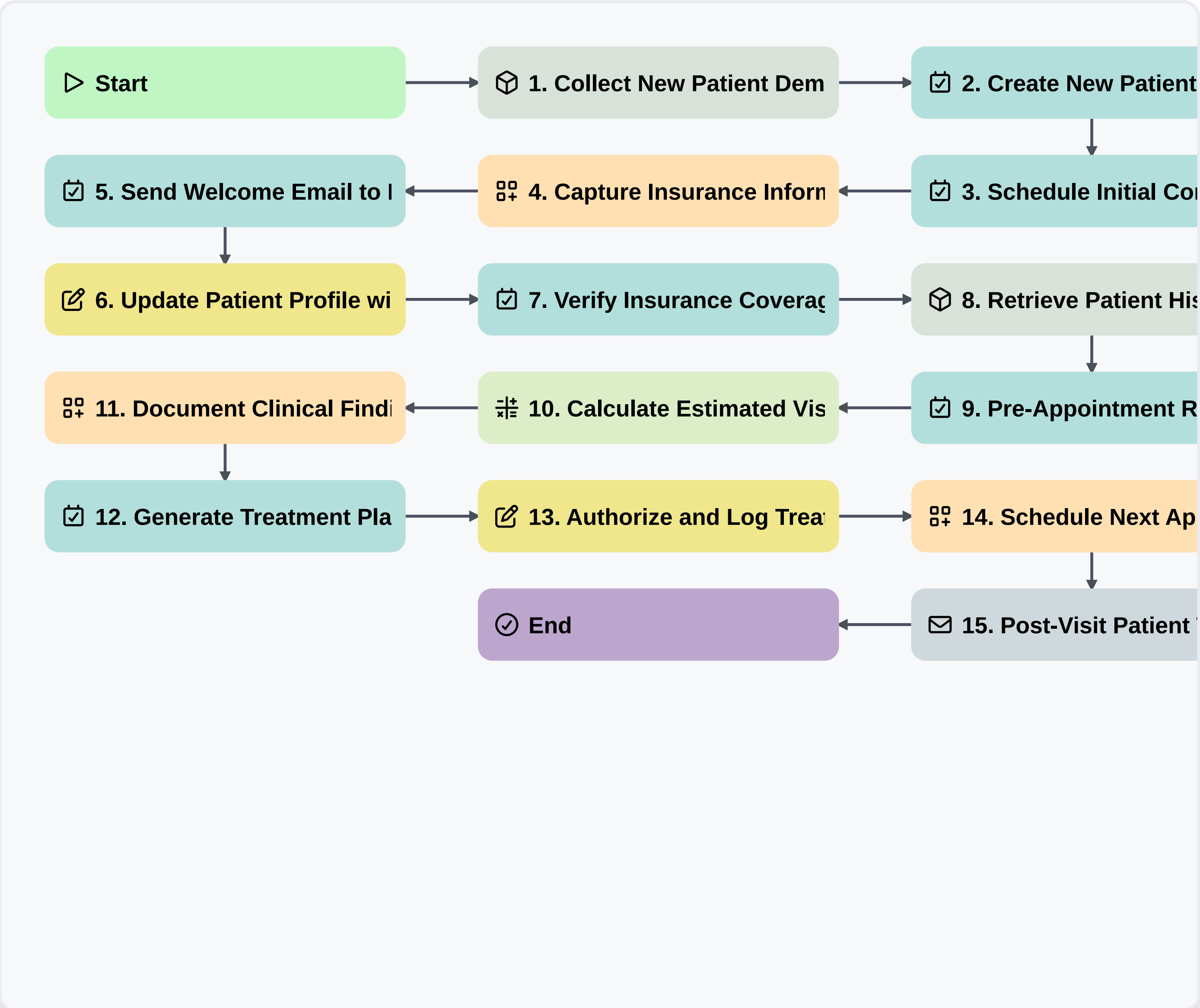
ChecklistGuro

End-To-End Dental Patient Journey Workflow: Maximize Revenue & Patient Satisfaction



Start

Start of the Workflow/Process.

1. Collect New Patient Demographics

Capture necessary patient information (Name, DOB, Contact Info) upon first visit.

2. Create New Patient File

Automatically generate a unique patient record within the EMR/EHR system.

3. Schedule Initial Consultation Task

Alert staff to book the first necessary appointment slot.

4. Capture Insurance Information

Input and verify patient insurance details for accurate billing.

5. Send Welcome Email to New Patient

Automated email welcome packet with pre-appointment instructions.

6. Update Patient Profile with New Forms
Ensure all necessary intake forms (medical history, consent) are attached and up-to-date.

7. Verify Insurance Coverage Check
Task assigned to billing staff to confirm active insurance coverage before service.

8. Retrieve Patient History Summary
Pull existing records (past visits, current diagnoses) for clinician review.

9. Pre-Appointment Reminders (SMS/Email)
Send automated reminders to reduce no-show rates.

10. Calculate Estimated Visit Cost
Formulas to estimate total cost based on proposed services and insurance parameters.

11. Document Clinical Findings (Notes)
Staff document exam findings, X-rays, and necessary next steps.

12. Generate Treatment Plan Task
Trigger the creation of a specific, actionable treatment plan for the patient.

13. Authorize and Log Treatment Plan
Update patient chart with approved treatment options and signatures.

14. Schedule Next Appointment
Book follow-up/next procedure based on the finalized treatment plan.

15. Post-Visit Patient Thank You & Feedback Request
Send automated follow-up email to encourage reviews and measure satisfaction.

End
Start of the Workflow/Process.