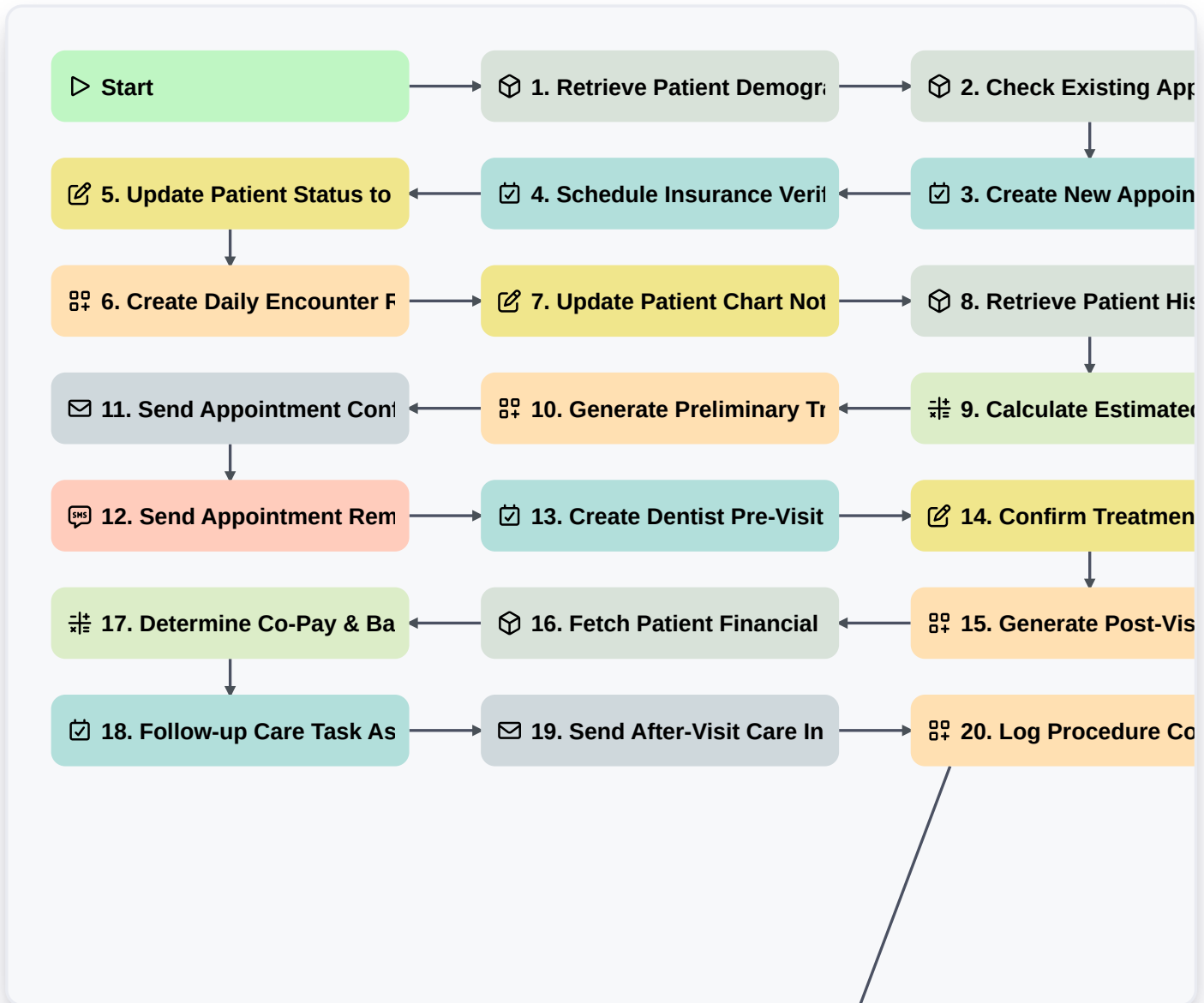


End-To-End Dental Practice Workflow Management For Modern Dentists



▷ **Start**

Start of the Workflow/Process.

 **1. Retrieve Patient Demographic Data**

Get basic patient contact and demographic information at the start of the visit.

 **2. Check Existing Appointment Details**

Fetch scheduled appointment time, duration, and pre-visit notes.

 **3. Create New Appointment Task**

Generate task for the front office staff to prepare the treatment room for the patient.

 **4. Schedule Insurance Verification Task**

Automatically assign task for billing staff to verify insurance eligibility.

 **5. Update Patient Status to 'Checked In'**

Mark the patient record as active for the current visit.

6. Create Daily Encounter Record

Log all visit details, services performed, and notes for billing.

7. Update Patient Chart Notes

Document any changes in patient health status or clinical findings during the visit.

8. Retrieve Patient History & Notes

Access previous visit records and medical history for comprehensive care.

9. Calculate Estimated Visit Cost

Calculate the total estimated cost based on codes and service codes.

10. Generate Preliminary Treatment Plan

Draft and create the initial proposed treatment roadmap for the dentist to review.

11. Send Appointment Confirmation Reminder

Automated email sent to the patient 24 hours before the appointment.

12. Send Appointment Reminder SMS

Send an SMS confirmation text to the patient's primary phone number.

13. Create Dentist Pre-Visit Checklist

Assign a task to the dentist to review imaging and patient file prior to seeing the patient.

14. Confirm Treatment Approval Status

Update the status of the treatment plan upon receiving patient authorization.

15. Generate Post-Visit Summary Report

Automatically compile a summary of the visit for the patient portal and file.

16. Fetch Patient Financial Details

Retrieve current insurance details and patient payment history for billing.

17. Determine Co-Pay & Balance Due

Calculate patient responsibility after insurance verification.

18. Follow-up Care Task Assignment

Schedule follow-up task for hygienist or dentist post-treatment.

19. Send After-Visit Care Instructions

Dispatch personalized aftercare instructions and next appointment booking link.

20. Log Procedure Codes & Notes

Input all billed codes (CDT codes) and comprehensive clinical notes.

21. Aggregate Total Service Revenue

Sum all services performed and coded for daily revenue reporting.

22. Generate Daily End-of-Day Report

Task for administrative staff to close out the day's financials and reports.

23. Verify Patient Insurance Eligibility

Query real-time insurance eligibility status and benefits.

24. Send Billing Submission Task

Create task for billing department to submit claims post-visit.

25. Nudge for Missing Information Email

Send automated email if critical patient data (e.g., allergy info) is missing.

26. Calculate Next Recall Interval

Determine the next recommended recall period based on the procedure performed.

27. Archive Completed Visit Data

Securely archive records after billing and follow-up actions are complete.

End

Start of the Workflow/Process.

