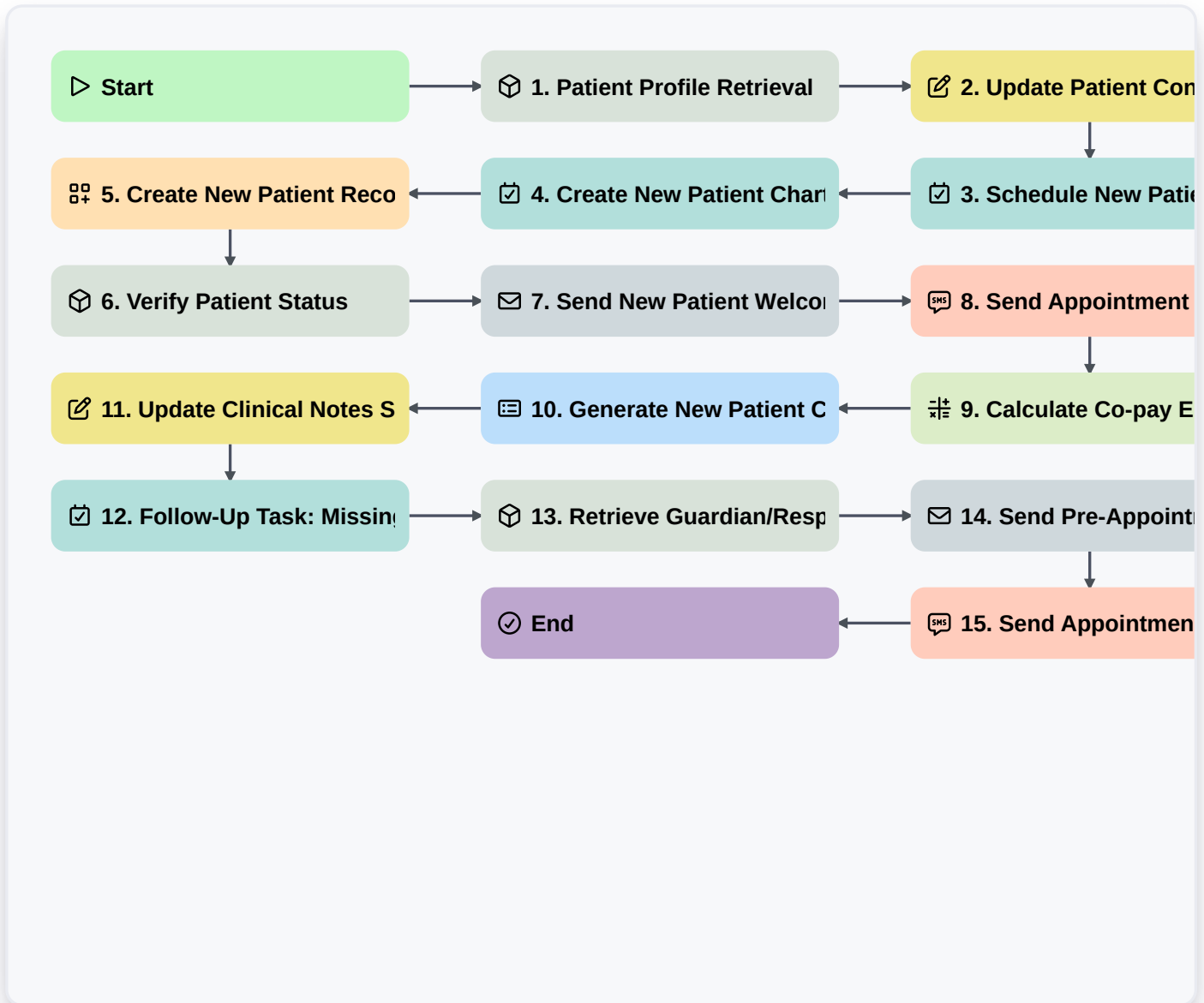


# HIPAA Compliant Dental Records Workflow: Secure Patient Data Management



**Start**

Start of the Workflow/Process.

**1. Patient Profile Retrieval**

Retrieve existing patient demographic and medical history records.

**2. Update Patient Contact Information**

Allow staff to update patient addresses, phone numbers, and insurance details.

**3. Schedule New Patient Verification Task**

Automatically create task for front desk staff to confirm insurance eligibility and necessary paperwork.

**4. Create New Patient Chart Task**

Generate initial tasks for intake forms and chart setup.

**5. Create New Patient Record**

Establish the primary, secure entry point for all new patient data.

## **6. Verify Patient Status**

Check for existing records, active alerts, or required follow-ups before service.

## **7. Send New Patient Welcome Email**

Automatically dispatch welcome packet and pre-appointment instructions to the patient.

## **8. Send Appointment Confirmation SMS**

Send automated SMS reminder to the patient confirming their visit time and instructions.

## **9. Calculate Co-pay Estimate**

Execute formulas based on CPT codes and insurance data to estimate patient cost.

## **10. Generate New Patient Chart Summary Report**

Create a comprehensive, easily accessible summary report of all collected initial data.

## **11. Update Clinical Notes Security Flag**

Ensure all clinical notes are tagged and stored according to HIPAA guidelines.

## **12. Follow-Up Task: Missing Documentation**

Trigger task for necessary missing documents (e.g., updated insurance cards).

## **13. Retrieve Guardian/Responsible Party Info**

Securely pull necessary contact details for minors or guardians.

## **14. Send Pre-Appointment Instructions Email**

Send detailed instructions and necessary forms to the patient before their first visit.

## **15. Send Appointment Reminder SMS**

Send automated SMS reminder 24 hours prior to the dental appointment.

## **End**

Start of the Workflow/Process.