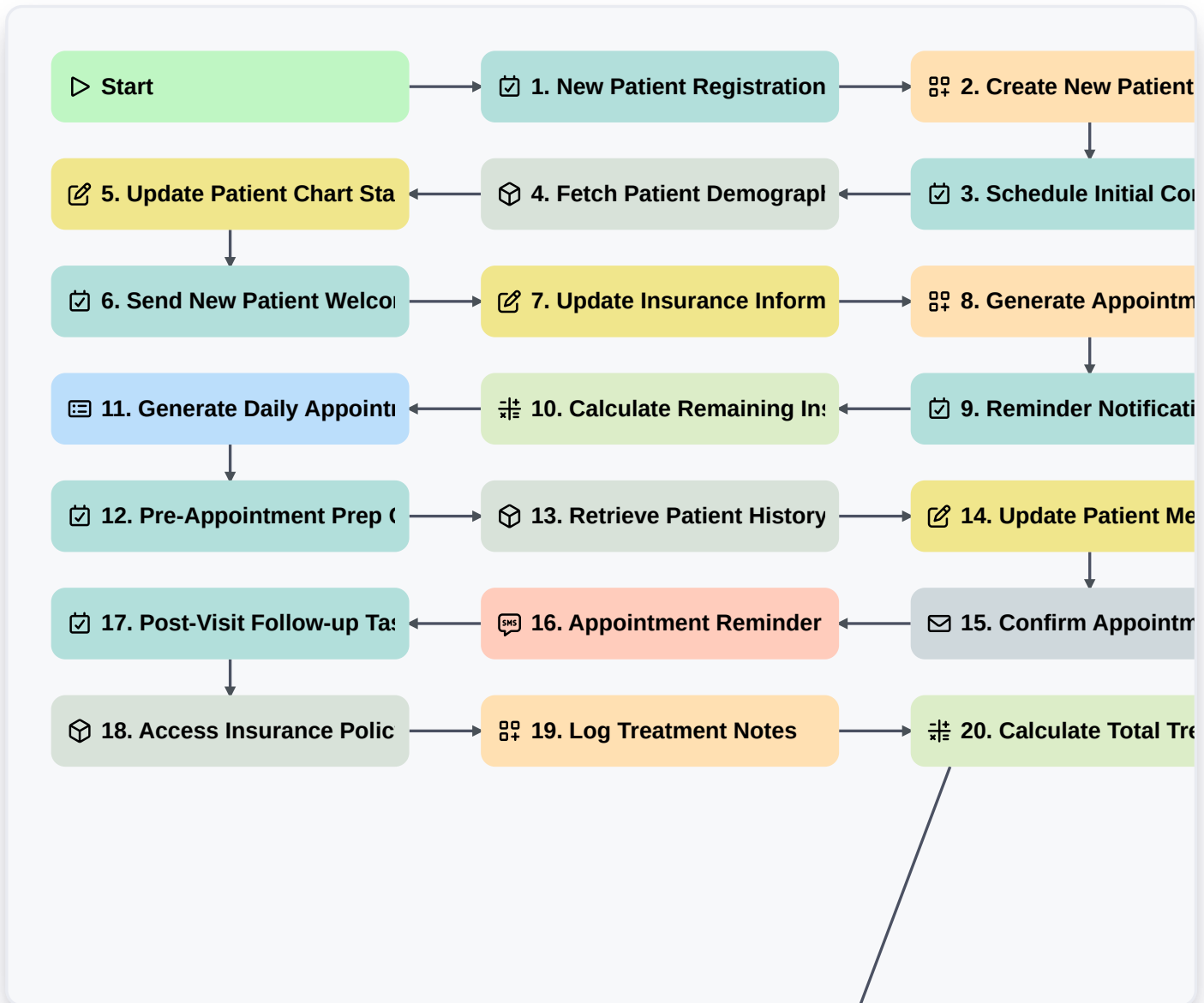


# Modern Dental Practice Workflow: Improve Efficiency With Our Dental Management Solution



## ▷ Start

Start of the Workflow/Process.

## ☑ 1. New Patient Registration Task

Initiate patient onboarding tasks for new patient files.

## 🔧 2. Create New Patient Record

Automatically create a new patient profile entry upon intake.

## ☑ 3. Schedule Initial Consultation Task

Create follow-up task for necessary initial consultation booking.

## 📦 4. Fetch Patient Demographics

Retrieve necessary patient information for billing and charting.

### **5. Update Patient Chart Status**

Mark patient file status (Active, Inactive, etc.) after visits.

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

Automatically send welcome and pre-visit instructions to new patients.

### **7. Update Insurance Information**

Ensure current and correct dental insurance details are attached to the patient record.

### **8. Generate Appointment Booking**

Create new appointment entry for appointments.

### **9. Reminder Notification Task**

Schedule automated reminders for upcoming appointments (SMS/Email).

### **10. Calculate Remaining Insurance Coverage**

Formula to determine patient remaining insurance benefits.

### **11. Generate Daily Appointment Report**

Create a summary report of the day's scheduled appointments.

### **12. Pre-Appointment Prep Checklist**

Tasks required before a scheduled dental appointment.

### **13. Retrieve Patient History**

Pull all past dental records for review before each visit.

### **14. Update Patient Medical History**

Record and update patient's current medical conditions and alerts.

### **15. Confirm Appointment Confirmation Email**

Send automated confirmation email to patient for booked appointments.

### **16. Appointment Reminder SMS**

Send automated text message reminders to patients before their dental visit.

### **17. Post-Visit Follow-up Task**

Schedule follow-up tasks for patient care after the visit.

### **18. Access Insurance Policy Details**

Retrieve detailed insurance coverage information for billing.

### **19. Log Treatment Notes**

Create detailed clinical notes immediately after a patient appointment.

### **20. Calculate Total Treatment Cost**

Formula to total all services rendered and associated materials.

### **21. Generate Daily Treatment Summary Report**

Create a report summarizing all services performed throughout the day.

### **End**

Start of the Workflow/Process.