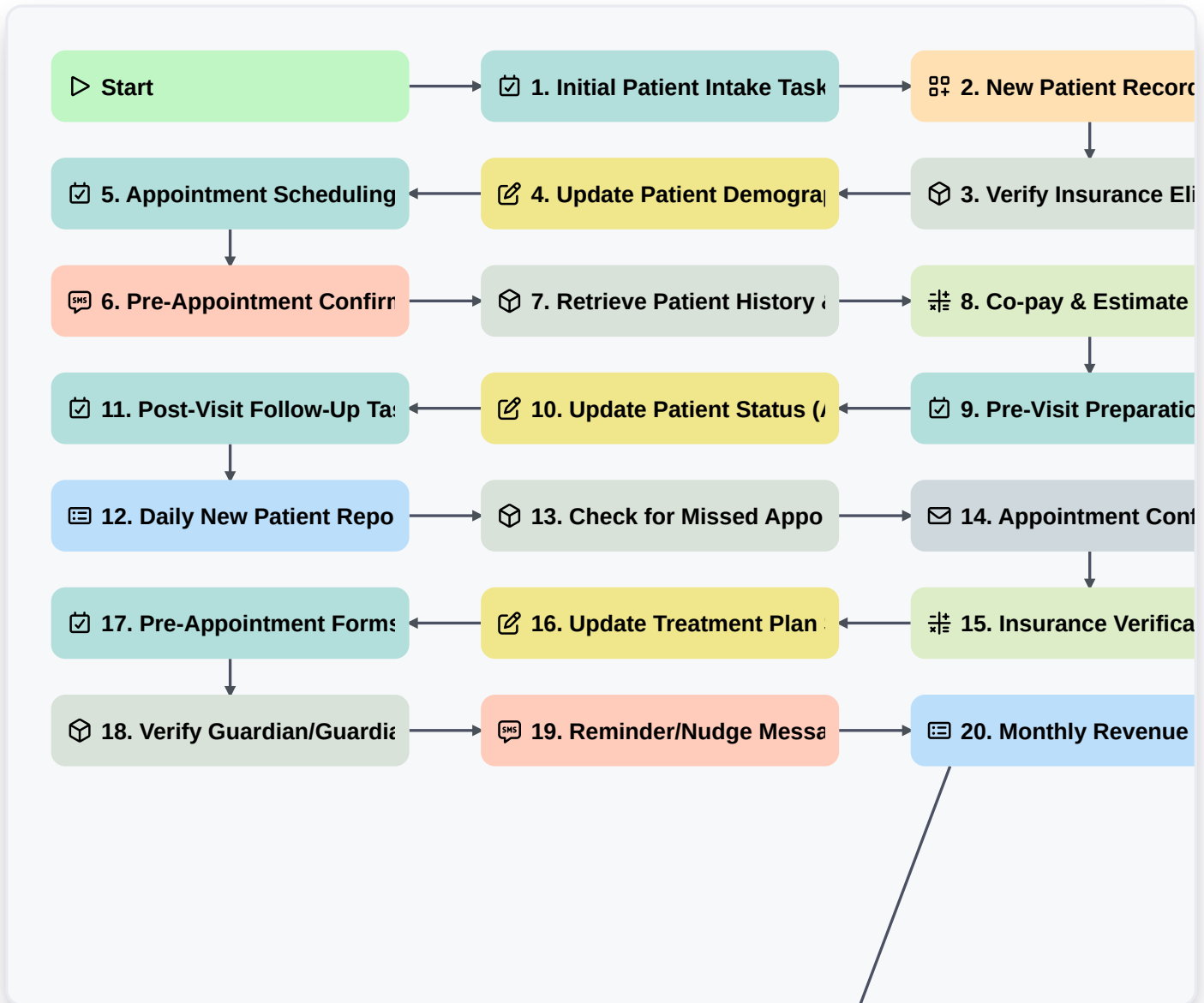


Optimized Dental Patient Lifecycle Workflow: From Booking To Check-Out



▷ **Start**

Start of the Workflow/Process.

 **1. Initial Patient Intake Task**

Create a new task for new patient setup, including required information.

 **2. New Patient Record Creation**

Create the initial patient record using necessary data points.

 **3. Verify Insurance Eligibility Check**

Automatically check patient insurance coverage and eligibility before appointment booking.

 **4. Update Patient Demographics**

Update or verify patient demographic information for accuracy.

 **5. Appointment Scheduling Task**

Assign task to schedule the appointment, including reminders and confirmations.

6. Pre-Appointment Confirmation SMS

Send automated SMS reminder to patient 24-48 hours before visit.

7. Retrieve Patient History & History Forms

Fetch comprehensive patient medical and dental history records.

8. Co-pay & Estimate Calculation

Calculate estimated out-of-pocket patient costs based on insurance and services.

9. Pre-Visit Preparation Checklist

Generate checklist for front desk staff for every patient visit.

10. Update Patient Status (Active/Inactive)

Change patient status after service completion or inactivity.

11. Post-Visit Follow-Up Task

Schedule follow-up tasks for recall or necessary follow-up care.

12. Daily New Patient Reports

Generate reports on new patient admissions daily.

13. Check for Missed Appointments

Identify and flag patients who missed scheduled appointments.

14. Appointment Confirmation Email

Send automated appointment confirmation emails to patients.

15. Insurance Verification Calculation

Calculate potential patient co-pays and remaining insurance benefits.

16. Update Treatment Plan Status

Update the status of the patient's overall treatment plan within the EHR.

17. Pre-Appointment Forms Task

Ensure all necessary intake paperwork is completed before the visit.

18. Verify Guardian/Guardian Contact Information

Retrieve and validate necessary guardian contact details.

19. Reminder/Nudge Messaging

Send automated SMS reminders for upcoming appointments.

20. Monthly Revenue Analysis Report

Generate financial summary report for the entire month's procedures and revenue.

End

Start of the Workflow/Process.