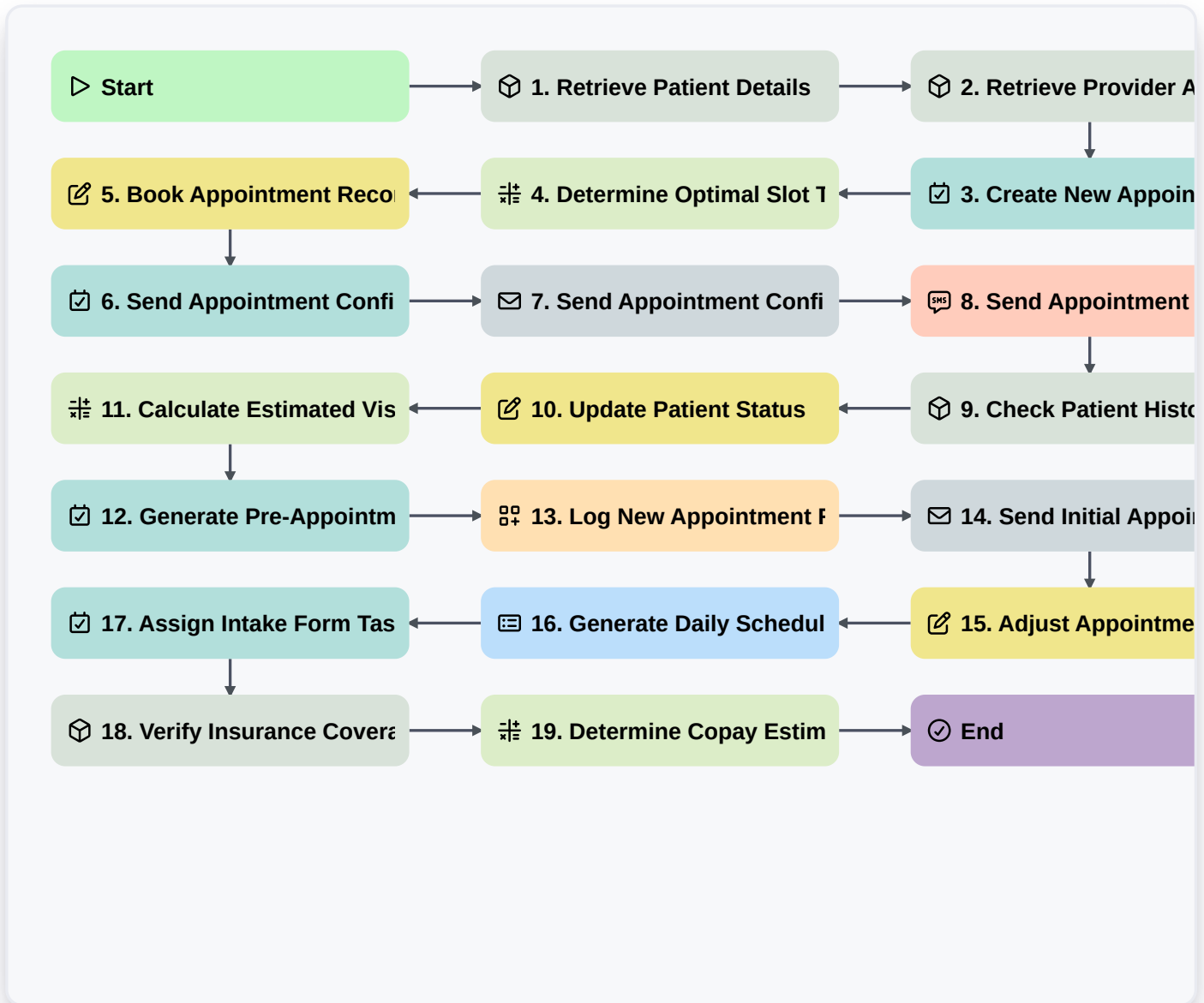


Streamline Dental Appointment Scheduling Workflow For Best Practice Management



▷ Start

Start of the Workflow/Process.

📦 1. Retrieve Patient Details

Get patient's basic information (name, contact, insurance) from the Patient Data Model.

📦 2. Retrieve Provider Availability

Fetch the dentist/hygienist's real-time schedule and capacity from the Provider Availability Model.

✅ 3. Create New Appointment Task

Automatically generate a task for the administrative staff to confirm the initial booking.

⌚ 4. Determine Optimal Slot Time

Calculate the best available appointment slot considering the requested service duration and provider availability.

📝 5. Book Appointment Record

Create or update the Appointment record in the Practice Schedule Model with confirmed details.

✔ **6. Send Appointment Confirmation Task**

Assign a task to the system to send confirmations to the patient.

✉ **7. Send Appointment Confirmation Email**

Send a detailed confirmation email to the patient (includes time, address, and pre-arrival instructions).

📱 **8. Send Appointment Reminder SMS**

Send a concise, automated SMS reminder to the patient 24 hours before the appointment.

📖 **9. Check Patient History for Notes**

Retrieve any pre-existing notes or special instructions for the patient before booking.

✍ **10. Update Patient Status**

Update the patient's status in the CRM/Master Record (e.g., 'Booked' or 'Pending Confirmation').

⌚ **11. Calculate Estimated Visit Duration**

Calculate the required time block based on the selected procedure codes (e.g., cleaning + exam = 60 min).

✔ **12. Generate Pre-Appointment Checklist Task**

Create a checklist task for the patient/staff regarding required paperwork or prep work.

🗄 **13. Log New Appointment Record**

Create the primary record for the new appointment in the Scheduling Data Model.

✉ **14. Send Initial Appointment Request Email**

Send an initial outreach email to the patient suggesting available time slots.

✍ **15. Adjust Appointment Time Due to Conflict**

Update the appointment time if a conflict is found during initial booking attempts.

📅 **16. Generate Daily Schedule Report**

Create a temporary report for the front desk staff summarizing today's appointments.

✔ **17. Assign Intake Form Task**

Create a follow-up task for staff to ensure the patient fills out necessary forms.

📖 **18. Verify Insurance Coverage**

Pull necessary insurance details to cross-reference eligibility during booking.

⌚ **19. Determine Copay Estimate**

Calculate the estimated patient co-pay based on service codes and insurance data.

✔ **End**

Start of the Workflow/Process.