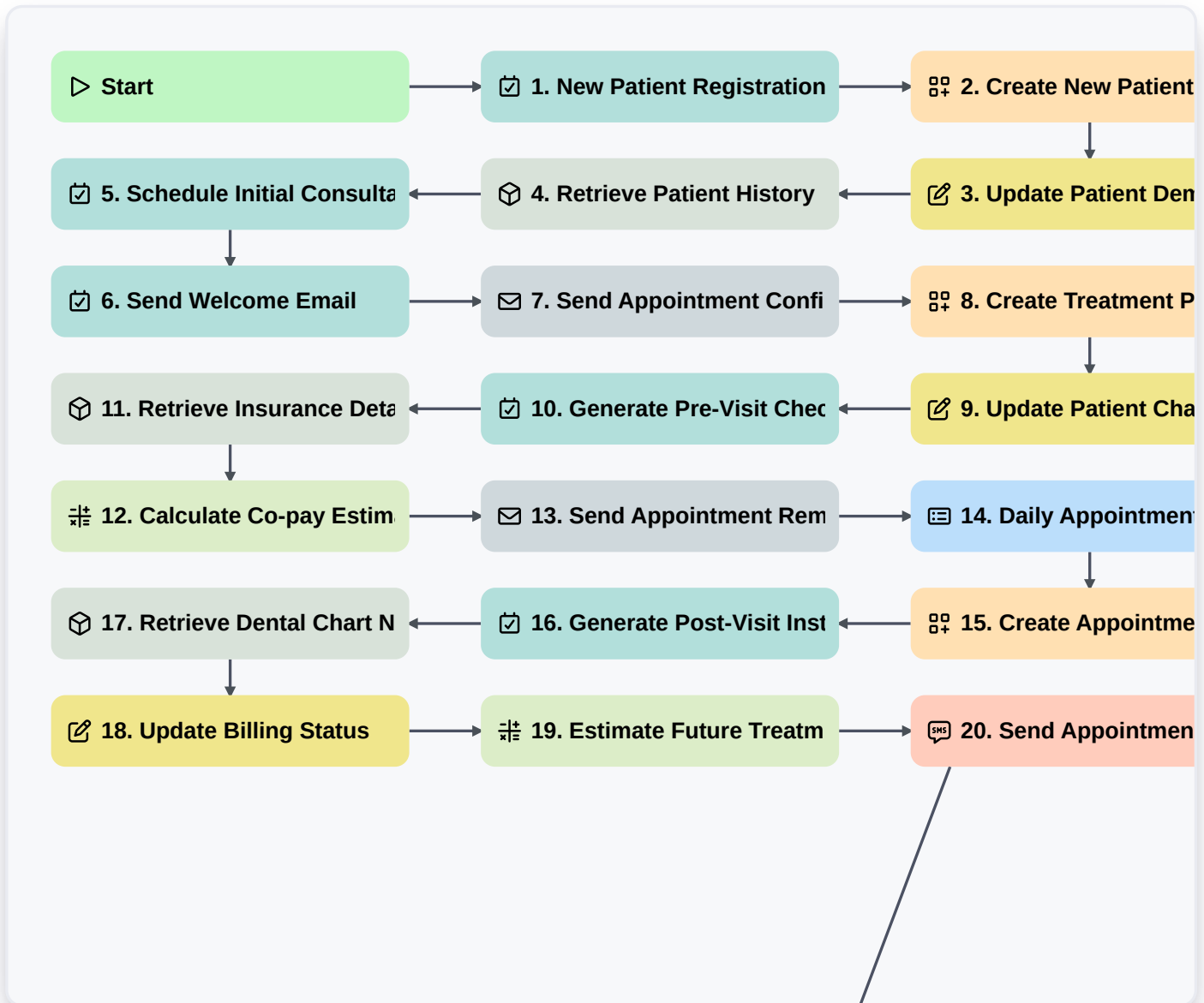


# Streamline Dental Clinic Operations: Comprehensive Workflow For Modern Dental Management



**▷ Start**

Start of the Workflow/Process.

**☑ 1. New Patient Registration Task**

Create task for patient registration steps.

**🗄️ 2. Create New Patient File**

Generate a new patient record in the system.

**✍️ 3. Update Patient Demographic Information**

Modify patient contact details upon check-in.

**📦 4. Retrieve Patient History**

Access existing patient medical and treatment records.

📌 **5. Schedule Initial Consultation Task**

Assign task to front desk staff for initial booking.

📌 **6. Send Welcome Email**

Automatically send new patient welcome information.

✉️ **7. Send Appointment Confirmation Email**

Automated email confirmation to patients before their visit.

📄 **8. Create Treatment Plan Entry**

Document proposed treatment plan after initial exam.

✍️ **9. Update Patient Chart Status**

Change patient status (e.g., 'Active' to 'Needs Follow-up').

📌 **10. Generate Pre-Visit Checklist Task**

Assign checklist items for staff prep before appointments.

📦 **11. Retrieve Insurance Details**

Fetch required patient insurance information for billing.

🧮 **12. Calculate Co-pay Estimate**

Calculate estimated patient portion based on insurance coverage.

✉️ **13. Send Appointment Reminder SMS**

Automated SMS reminder to patients before their appointment.

📄 **14. Daily Appointment Summary Report**

Generate daily report of appointments, no-shows, and walk-ins.

📄 **15. Create Appointment Slot**

Book and confirm patient appointment in the schedule.

📌 **16. Generate Post-Visit Instructions Task**

Assign follow-up tasks for patient after their visit.

📦 **17. Retrieve Dental Chart Notes**

Access and view patient's complete medical and treatment notes.

✍️ **18. Update Billing Status**

Mark patient account as paid or requires balance payment.

🧮 **19. Estimate Future Treatment Cost**

Calculate potential costs for recommended procedures.

✉️ **20. Send Appointment Reminder SMS**

Proactive SMS communication to reduce no-shows.

📌 **21. Pre-Visit Patient Questionnaire Task**

Ensure all necessary paperwork is completed before arrival.

📄 **22. Document Clinical Findings**

Record findings during the patient examination.

✍️ **23. Update Patient Chart Notes**

Log all clinical observations and updates in the chart.

📄 **24. Monthly Revenue Report**

Analyze financial performance for detailed business insights.

🏁 **End**

Start of the Workflow/Process.