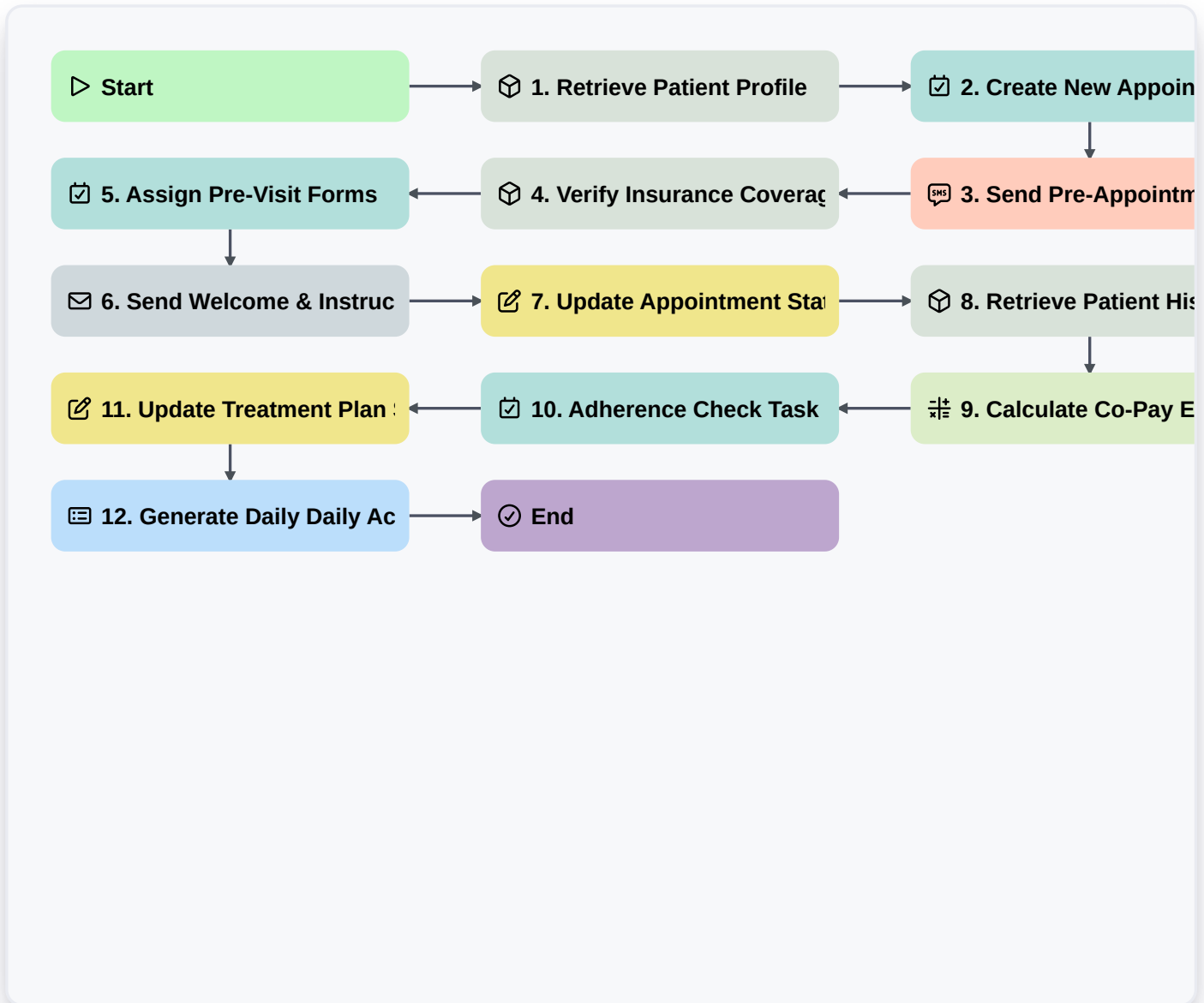


Streamline Dental Clinic Operations: Essential Management Workflows



▶ Start

Start of the Workflow/Process.

📦 1. Retrieve Patient Profile

Get patient demographic and insurance data based on appointment details.

✅ 2. Create New Appointment Task

Automatically create task for necessary pre-visit reminders and necessary preparations.

📧 3. Send Pre-Appointment Confirmation SMS

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

📦 4. Verify Insurance Coverage

Check payer eligibility and benefits using patient ID.

✅ 5. Assign Pre-Visit Forms

Generate and assign digital forms (medical history, consent) to the patient.

✉ **6. Send Welcome & Instructions Email**

Email welcome packet with pre-visit instructions and necessary forms to patient.

✍ **7. Update Appointment Status**

Mark appointment as confirmed, checked in, or rescheduled within the system.

📦 **8. Retrieve Patient History**

Fetch comprehensive medical and dental records before the appointment begins.

⚙ **9. Calculate Co-Pay Estimate**

Calculate estimated patient responsibility based on insurance and procedure codes (e.g., (Service_Code * Rate) - Deductible).

📅 **10. Adherence Check Task for Staff**

Create reminder task for the staff member responsible for checking the treatment plan completeness before the dentist enters the room.

✍ **11. Update Treatment Plan Status**

Update the patient record with the final agreed-upon treatment plan and authorization status.

📄 **12. Generate Daily Activity Report**

Create a summary report of the day's appointments, services rendered, and billing items.

🏁 **End**

Start of the Workflow/Process.