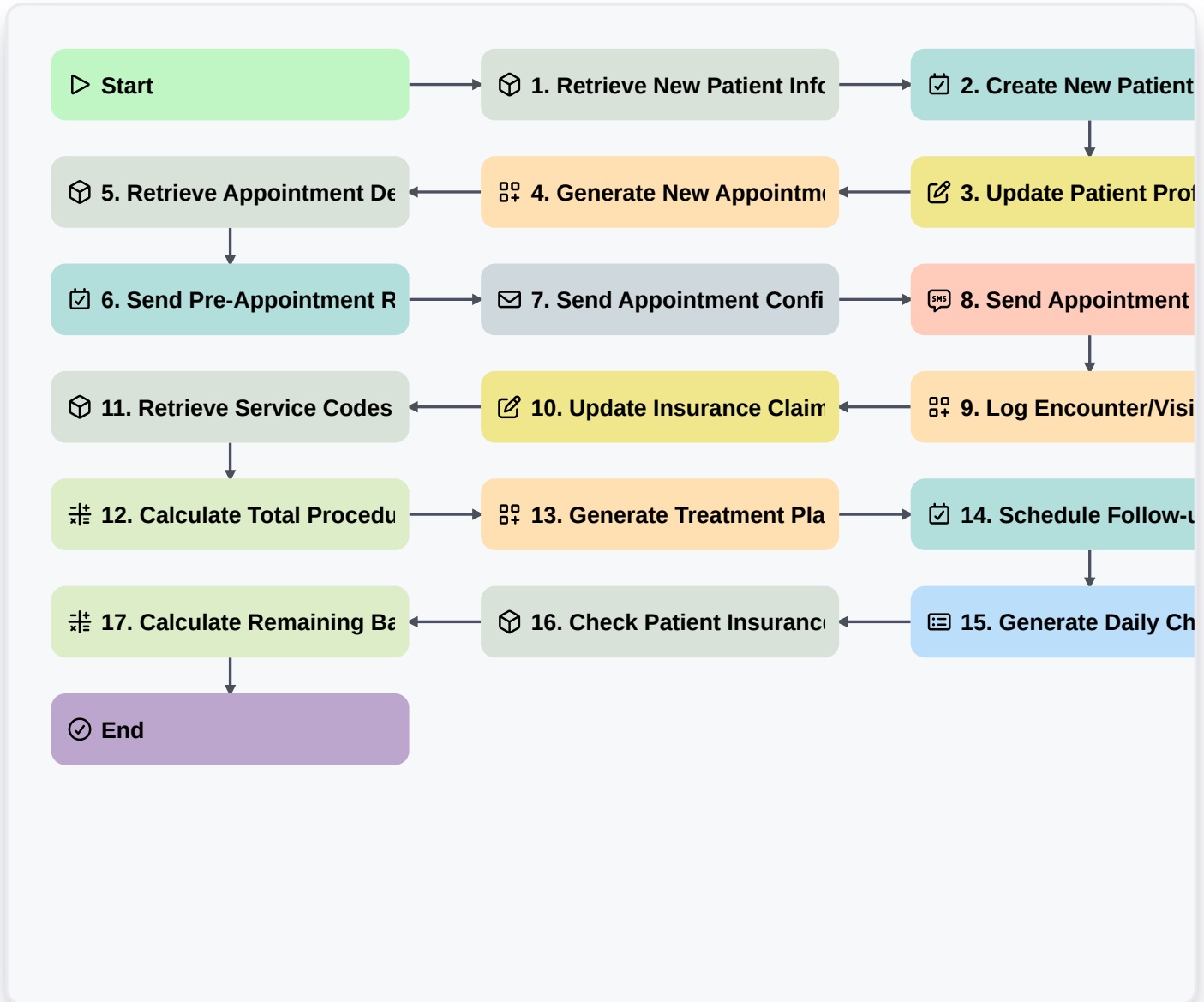


Streamline Dental Practice Operations: Comprehensive Workflow Guide



▷ **Start**

Start of the Workflow/Process.

 **1. Retrieve New Patient Information**

Get basic patient details upon first visit booking.

 **2. Create New Patient Welcome Task**

Assign onboarding tasks to administrative staff for new patients.

 **3. Update Patient Profile Status**

Change patient status (e.g., Active, Inactive, Follow-up).

 **4. Generate New Appointment Record**

Create a record for the scheduled appointment in the system.

 **5. Retrieve Appointment Details**

Fetch specific appointment date, time, and associated services.

📅 **6. Send Pre-Appointment Reminder Task**

Schedule an automated reminder task for the patient and/or hygienist.

✉️ **7. Send Appointment Confirmation Email**

Automatically send confirmation email to the patient upon booking.

📱 **8. Send Appointment Reminder SMS**

Send a brief SMS reminder to the patient 24 hours before the appointment.

📋 **9. Log Encounter/Visit Notes**

Create a clinical record entry summarizing the visit notes and procedures performed.

✍️ **10. Update Insurance Claim Status**

Update the financial data model with the claim submission status.

📦 **11. Retrieve Service Codes and Fees**

Fetch the standard fee schedule based on the procedures performed during the visit.

🧮 **12. Calculate Total Procedure Cost**

Calculate the sum of all procedure costs for billing purposes (e.g., Sum(Service Fee)).

📋 **13. Generate Treatment Plan Draft**

Draft the initial recommended treatment plan based on exam findings.

📅 **14. Schedule Follow-up Task**

Create a task for the hygienist to schedule the next cleaning appointment.

📋 **15. Generate Daily Check-in Report**

Create a summary report of all patients checked in today for administrative review.

📦 **16. Check Patient Insurance Eligibility**

Retrieve real-time insurance eligibility status for billing verification.

🧮 **17. Calculate Remaining Balance Due**

Calculate the patient co-pay minus insurance coverage for the final bill.

🏁 **End**

Start of the Workflow/Process.