

Streamlined Dental Clinic Workflow: Best Practices For Modern Dental Management



Start

Start of the Workflow/Process.

1. Retrieve Patient Information

Pull patient demographics and medical history from the EHR database.

2. New Appointment Scheduling

Creates a new appointment task for the relevant staff member and patient.

3. Update Patient Chart Details

Modify existing patient records (address, insurance, contact info).

4. Appointment Confirmation Email

Sends automated confirmation email to patient with appointment details and necessary prep materials.

5. Pre-Appointment Reminders

Sends automated SMS reminders to patients 24-48 hours before their visit.

☑ **6. Generate Treatment Plan Task**

Assigns the dentist/hygienist the task to review and create a treatment plan after consultation.

🗄️ **7. New Treatment Record Entry**

Creates a new record for services rendered (e.g., cleaning, filling).

🧮 **8. Calculate Patient Co-Pay & Balance**

Calculates patient portion of the total treatment cost based on insurance coverage and service codes.

☑ **9. Staff Workflow Task Assignment**

Assigns follow-up tasks to billing staff (e.g., submitting claim, verifying insurance).

📦 **10. Verify Insurance Eligibility**

Retrieves real-time insurance coverage details and pre-authorization status.

☑ **End**

Start of the Workflow/Process.