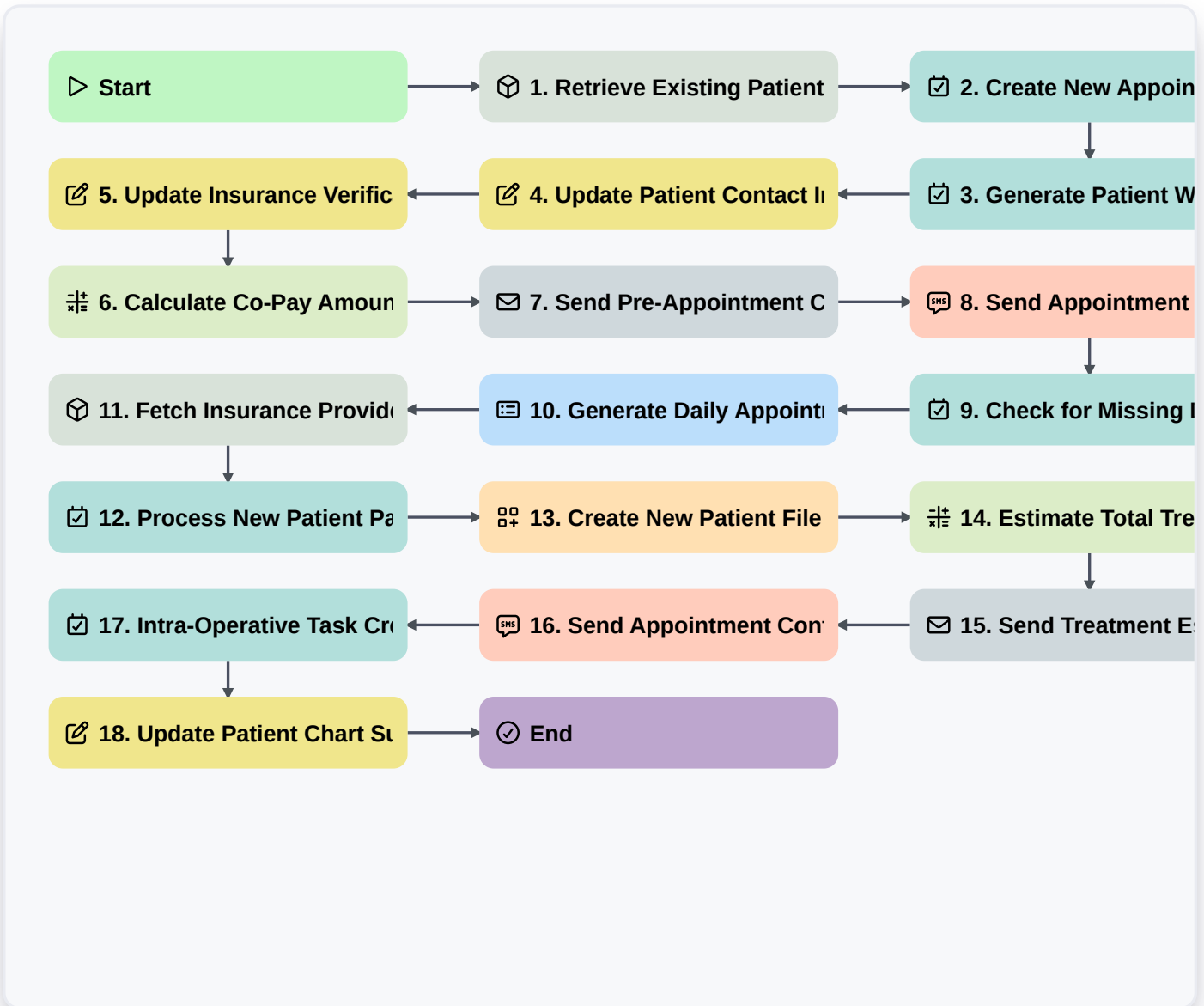


Ultimate Dental Management Workflow: Simplify Your Practice With Our Solution



Start

Start of the Workflow/Process.

1. Retrieve Existing Patient Records

Get demographic and medical history details for the scheduled patient.

2. Create New Appointment Task

Assign task to front desk staff: Verify insurance and pre-authorize appointment.

3. Generate Patient Welcome Packet Task

Create follow-up task for onboarding new patients.

4. Update Patient Contact Information

Verify and update patient's phone number, address, or emergency contact.

5. Update Insurance Verification Status

Flag the patient record with current insurance details and eligibility.

6. Calculate Co-Pay Amount

Calculate estimated patient copay based on insurance plan and procedure codes.

7. Send Pre-Appointment Confirmation Email

Send automated reminder email to patient 48 hours before visit.

8. Send Appointment Reminder SMS

Send automated SMS alert to patient 24 hours before appointment.

9. Check for Missing Dental Histories

Task for clinical staff to review patient charts for missing X-rays or notes.

10. Generate Daily Appointment Report

Create summary report of all scheduled patients for the day.

11. Fetch Insurance Provider Details

Retrieve necessary PPO/Payer information for billing verification.

12. Process New Patient Paperwork Task

Ensure all necessary forms (consent, history) are completed upon arrival.

13. Create New Patient File

Initial setup of new patient profile in the EHR/PMS.

14. Estimate Total Treatment Cost

Calculate the projected cost for multi-stage dental procedures.

15. Send Treatment Estimate Email

Automated communication to send the patient a transparent cost breakdown.

16. Send Appointment Confirmation Texts

Send multiple automated SMS reminders for booked appointments.

17. Intra-Operative Task Creation

Create checklist tasks for the dentist during the actual procedure.

18. Update Patient Chart Summary

Add notes and update the patient's clinical summary post-visit.

End

Start of the Workflow/Process.