

Patient intake and assessment automation

Automatically processes new addiction treatment patients from initial contact through completed assessment, creating treatment plans and scheduling first appointments. This workflow reduces manual intake time by 70% while ensuring comprehensive clinical documentation and HIPAA compliance.

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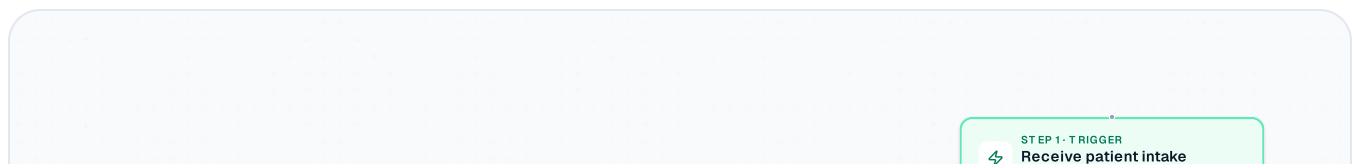
WORKFLOW TRIGGER

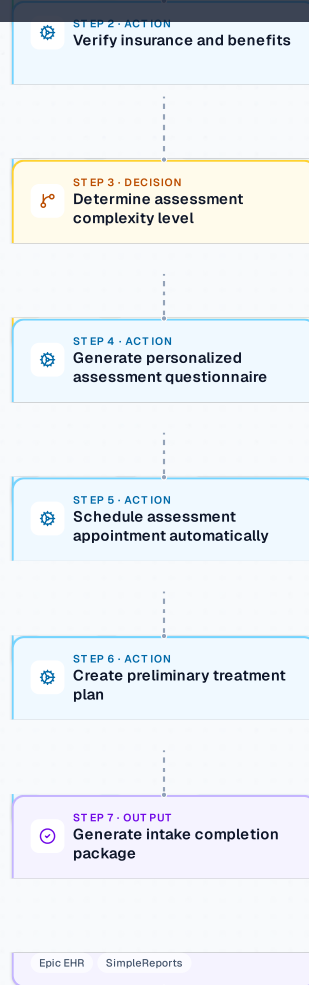


New patient submits online intake form or calls facility requesting treatment services.

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





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Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Receive patient intake request

Patient completes digital intake form with basic demographics, insurance information, and substance use history. System captures and validates required HIPAA consent forms.

TheraNest

Epic EHR

2

 ACTION

Verify insurance and benefits

Automatically check patient insurance coverage and treatment benefits through integrated verification system. Generate coverage summary and patient responsibility estimates.

Epic EHR

SimpleReports

3

 DECISION

Determine assessment complexity level

AI analyzes intake responses for substance type, usage severity, mental health indicators, and medical comorbidities. Routes to appropriate assessment track based on acuity level.

Kipu Health

Epic EHR

4

 ACTION

Generate personalized assessment questionnaire

Create customized clinical assessment forms based on patient's substance use profile and risk factors. Include standardized screening tools like AUDIT, DAST-10, or PHQ-9 as appropriate.

TherapyNotes

Kipu Health

5

Schedule assessment appointment automatically

Book patient with appropriate clinician based on specialization, availability, and urgency level. Send appointment confirmations and pre-assessment instructions via secure messaging.

TheraNest

Epic EHR

6

 ACTION

Create preliminary treatment plan

AI generates initial treatment recommendations based on assessment data, evidence-based protocols, and facility capabilities. Prepares documentation for clinician review and approval.

Kipu Health

TherapyNotes

7

 OUTPUT

Generate intake completion package

Compile complete patient file with verified insurance, scheduled appointments, preliminary treatment plan, and compliance documentation. Notify clinical team of new patient ready for assessment.

Epic EHR

SimpleReports



Outputs

- Complete patient file in EHR
- Verified insurance coverage summary
- Scheduled assessment appointment
- Preliminary treatment plan draft
- HIPAA-compliant intake documentation



Key Metrics

- Intake processing time
- Insurance verification accuracy rate
- Assessment show-up rate



Tools & Integrations

- Epic EHR
- TheraNest
- SimpleReports
- TherapyNotes
- Kipu Health

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