

New patient intake and forms

Automates new patient intake by sending digital forms, processing responses, verifying insurance, and scheduling appointments while updating the practice management system. Reduces front desk workload and ensures complete patient information before the first visit.

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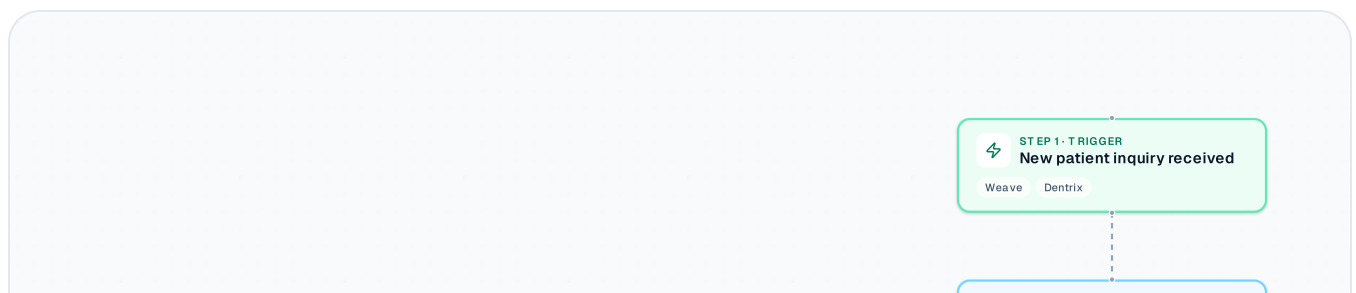


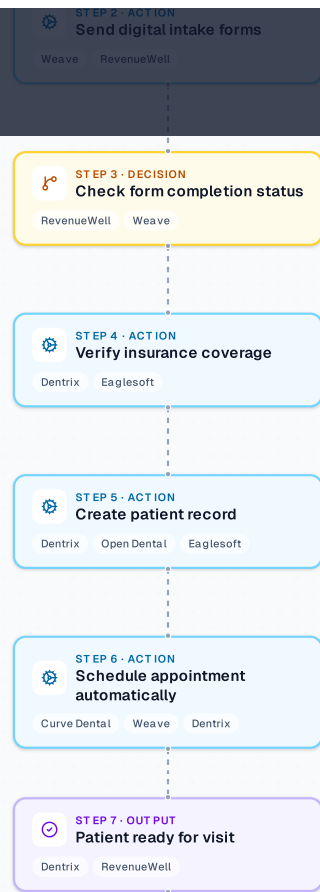
WORKFLOW TRIGGER

New patient requests appointment through website, phone call, or referral

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

New patient inquiry received

A new patient contacts the practice requesting an appointment or consultation. This triggers the automated intake workflow to begin collecting necessary information.

2

 ACTION

Send digital intake forms

Automatically sends customized patient intake forms including medical history, dental history, and consent forms via email or SMS. Forms are mobile-friendly and HIPAA compliant.

Weave

RevenueWell

3

 DECISION

Check form completion status

Monitors whether patient has completed all required forms within 24 hours. Routes to reminder sequence if incomplete or proceeds to next step if complete.

RevenueWell

Weave

4

 ACTION

Verify insurance coverage

Automatically verifies patient insurance eligibility and benefits using provided insurance information. Checks coverage limits, deductibles, and pre-authorization requirements.

Dentrix

Eaglesoft

5

 ACTION

Create patient record

AI Business OS

Imports completed form data into the practice management system and creates comprehensive patient record. Flags any medical alerts or special considerations for clinical staff.

Dentrix

Open Dental

Eaglesoft

6

 ACTION

Schedule appointment automatically

Books first appointment based on patient preferences and doctor availability, considering appointment type needed and insurance verification status. Sends confirmation with pre-visit instructions.

Curve Dental

Weave

Dentrix

7

 OUTPUT

Patient ready for visit

New patient is fully processed with complete records, verified insurance, and confirmed appointment. Clinical team receives summary of patient information and any special notes.

Dentrix

RevenueWell



Outputs

- Complete patient record in PMS

AI Business OS

- Verified insurance information
- Scheduled first appointment
- Clinical team patient summary



Key Metrics

- Form completion rate
- Insurance verification success rate
- Time from inquiry to scheduled appointment
- Front desk time saved per new patient



Tools & Integrations

- Dentrix
- Eaglesoft
- Open Dental
- Curve Dental
- RevenueWell
- Weave

AI Business OS

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