

# Patient scheduling and confirmation

Automates patient appointment scheduling, insurance verification, and multi-channel confirmation to reduce front desk workload and minimize no-shows.

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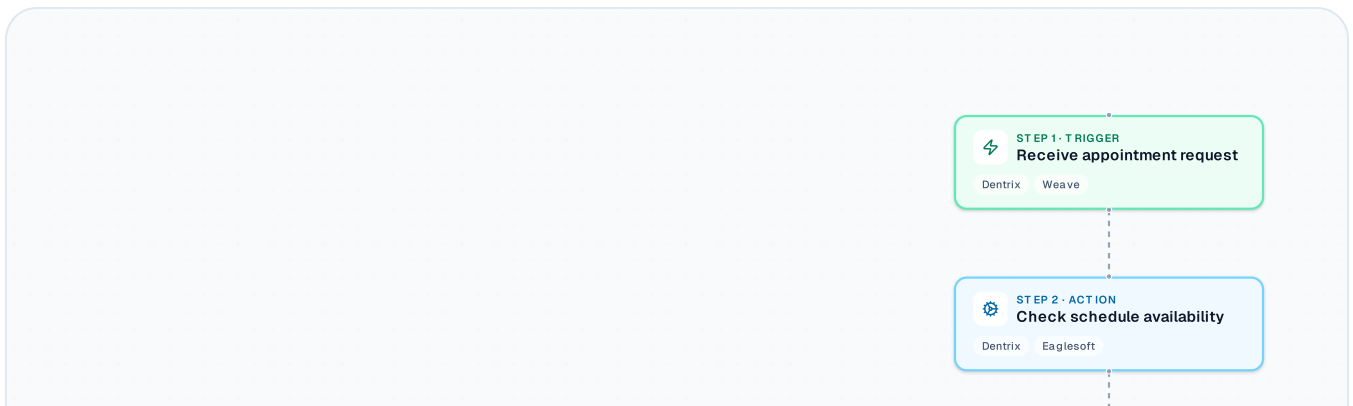


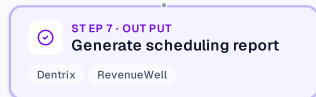
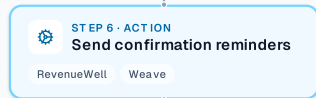
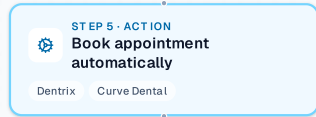
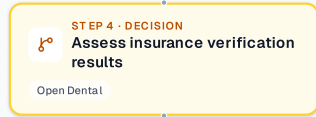
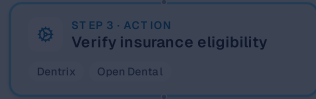
## WORKFLOW TRIGGER

Patient requests appointment via online portal, phone, or text message

## Visual Flow

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





## Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

### Receive appointment request

Patient initiates appointment booking through online portal, phone call, or text message. System captures patient information and preferred appointment times.

Dentrix

Weave

### Check schedule availability

System queries practice management software to find available appointment slots matching patient preferences and treatment type. Considers provider availability and treatment duration requirements.

Dentrix

Eaglesoft

3

 ACTION

### Verify insurance eligibility

Automatically validates patient insurance coverage and benefits for requested treatment. Checks for pre-authorization requirements and coverage limits.

Dentrix

Open Dental

4

 DECISION

### Assess insurance verification results

Determines if insurance is active and covers treatment, or if patient needs to be contacted about coverage issues. Routes workflow based on verification outcome.

Open Dental

5

 ACTION

### Book appointment automatically

Confirms appointment slot in practice management system and sends initial booking confirmation to patient. Updates provider schedule and blocks time slot.

6

 ACTION

### Send confirmation reminders

Delivers automated confirmation messages via SMS, email, and voice calls at scheduled intervals. Includes appointment details, preparation instructions, and cancellation options.

RevenueWell

Weave

7

 OUT PUT

### Generate scheduling report

Creates summary of scheduled appointments, insurance verification status, and patient confirmation responses for front desk review.

Dentrix

RevenueWell



### Outputs

- Confirmed appointment in practice management system
- Patient confirmation status tracking
- Insurance verification report
- Automated reminder campaign initiated



## Key Metrics

- Appointment confirmation rate
- No-show reduction percentage
- Insurance verification accuracy
- Front desk time savings per appointment



## Tools & Integrations

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

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