

# Treatment plan creation and presentation

Automatically creates comprehensive treatment plans from examination findings and presents them to patients with visual aids and cost breakdowns. Streamlines the treatment planning process and improves patient acceptance rates.

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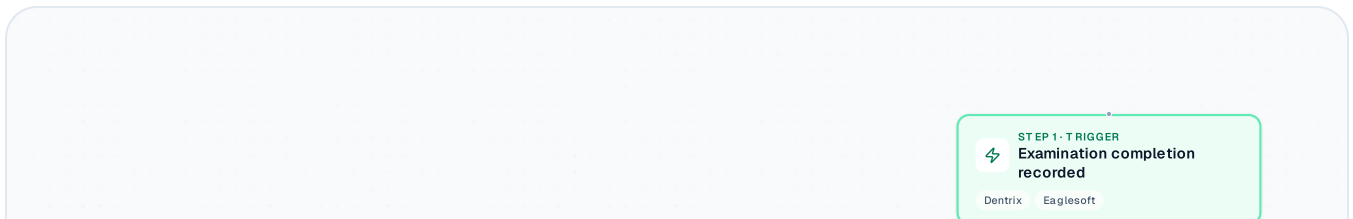


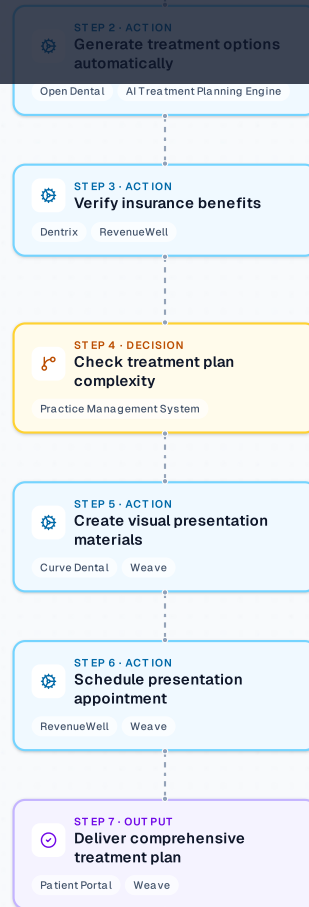
## WORKFLOW TRIGGER

Dentist completes clinical examination and diagnosis in practice management system

## 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

### Examination completion recorded

Dentist marks examination as complete with diagnosis codes and treatment needs in the practice management system. This triggers the automated

2

 ACTION

### Generate treatment options automatically

AI system analyzes diagnosis codes and patient history to generate multiple treatment plan options with procedures, sequencing, and estimated costs. Alternative treatment approaches are included when applicable.

Open Dental

AI Treatment Planning Engine

3

 ACTION

### Verify insurance benefits

System automatically checks patient's current insurance coverage and calculates estimated benefits for each proposed treatment. Real-time verification ensures accurate cost estimates.

Dentrix

RevenueWell

4

 DECISION

### Check treatment plan complexity

Workflow evaluates if treatment plan requires complex procedures or exceeds preset cost thresholds. Routes simple plans for immediate presentation and complex plans for dentist review.

Practice Management System

5

 ACTION

## Create visual presentation materials

### AI Business OS

System generates patient-friendly treatment plan presentations with procedure explanations, before/after images, and payment options. Materials are customized based on patient communication preferences.

Curve Dental

Weave

6

 ACTION

### Schedule presentation appointment

System automatically books a treatment consultation appointment and sends confirmation to patient with pre-presentation materials. Follow-up reminders are scheduled.

RevenueWell

Weave

7

 OUT PUT

### Deliver comprehensive treatment plan

Complete treatment plan package is delivered including detailed procedures, costs, insurance coverage, financing options, and visual aids. Patient receives digital copy and appointment confirmation.

Patient Portal

Weave



## Outputs

## AI Business OS

- Multi-option treatment plan with cost breakdown
- Insurance benefits verification report
- Patient presentation materials with visual aids
- Scheduled consultation appointment



### Key Metrics

- Treatment plan acceptance rate
- Time from diagnosis to plan completion
- Patient consultation show rate
- Average treatment value per plan



### Tools & Integrations

- Dentrix
- Eaglesoft
- Open Dental
- Curve Dental
- RevenueWell
- Weave
- AI Treatment Planning Engine
- Practice Management System
- Patient Portal

## AI Business OS

## AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

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