

# Appointment scheduling and reminders

Automates patient appointment scheduling from initial request through confirmation, sending intelligent reminders and handling rescheduling requests to reduce no-shows and optimize provider schedules.

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Get Your Blueprint

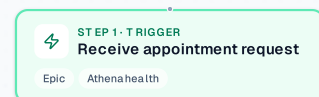


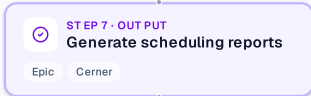
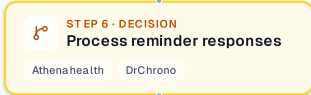
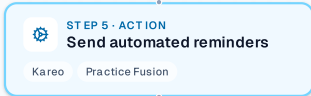
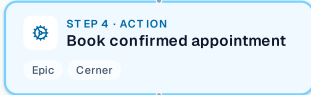
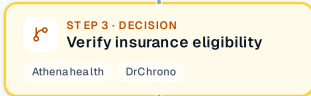
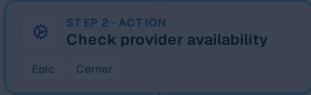
## WORKFLOW TRIGGER

Patient submits appointment request through patient portal or phone system

## 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 appointment request

Patient initiates appointment booking through online portal, phone system, or referral from another provider. System captures patient preferences, reason for visit, and insurance information.

2

 ACTION

### Check provider availability

System queries EHR scheduling module to find available appointment slots matching patient preferences, provider specialty, and appointment type requirements.

Epic

Cerner

3

 DECISION

### Verify insurance eligibility

Automatically checks patient's insurance coverage and benefits for the requested service. Routes to manual review if coverage issues are detected.

Athenahealth

DrChrono

4

 ACTION

### Book confirmed appointment

Creates appointment in EHR system with all patient details, updates provider calendar, and generates appointment confirmation with pre-visit instructions.

Epic

Cerner

5

 ACTION

### Send automated reminders

## AI Business OS

Delivers personalized appointment reminders via SMS, email, or phone call at 48 hours, 24 hours, and 2 hours before appointment with check-in instructions.

Kareo

Practice Fusion

6

 DECISION

### Process reminder responses

Handles patient responses to reminders including confirmations, cancellations, or rescheduling requests. Routes cancellations to waitlist management.

Athenahealth

DrChrono

7

 OUTPUT

### Generate scheduling reports

Produces daily scheduling summary with confirmed appointments, no-show predictions, and provider utilization metrics for practice management review.

Epic

Cerner



### Outputs

- Confirmed patient appointments in EHR

- Automated reminder confirmations

## AI Business OS

- Provider schedule optimization reports



### Key Metrics

- Appointment confirmation rate
- No-show percentage
- Provider schedule utilization



### Tools & Integrations

- Epic
- Cerner
- Athenahealth
- DrChrono
- Kareo
- Practice Fusion

## AI Business OS

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

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