

# Patient intake and registration

Automates patient intake and registration by capturing patient information, verifying insurance eligibility, and creating medical records in the EHR system. Reduces administrative workload and ensures complete patient data collection before appointments.

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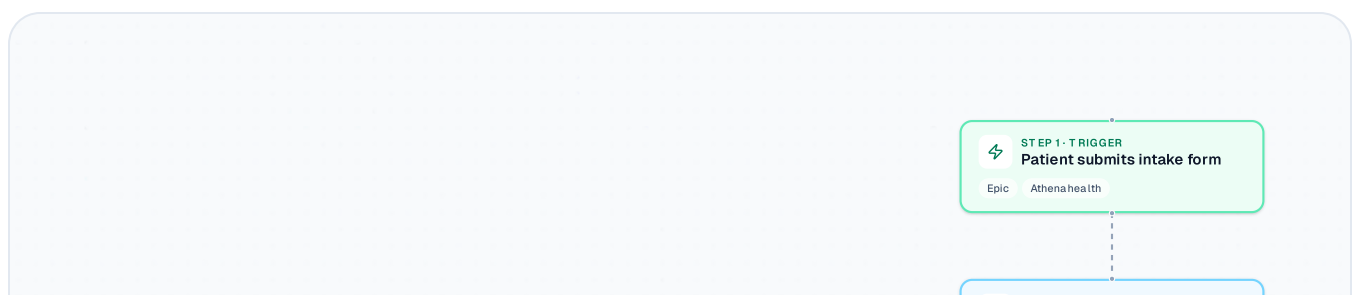


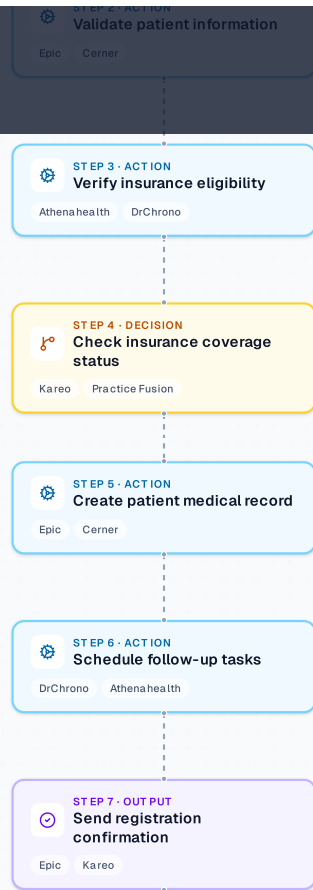
## WORKFLOW TRIGGER

Patient completes online intake form or arrives for appointment

## 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

### Patient submits intake form

Patient completes digital intake form with personal information, insurance details, medical history, and current symptoms. Form submission initiates the automated registration workflow.

2

 ACTION

### Validate patient information

System automatically validates patient demographics, contact information, and checks for duplicate records in the EHR. Missing or invalid data triggers follow-up requests.

Epic

Cerner

3

 ACTION

### Verify insurance eligibility

Automated insurance verification checks coverage status, copay amounts, deductibles, and prior authorization requirements. Real-time eligibility verification prevents billing issues.

Athenahealth

DrChrono

4

 DECISION

### Check insurance coverage status

Workflow branches based on insurance verification results. Active coverage proceeds to record creation, while inactive or problematic coverage triggers financial counselor notification.

Kareo

Practice Fusion

5

 ACTION

### Create patient medical record

## AI Business OS

System automatically creates or updates patient record in EHR with intake information, insurance details, and medical history. Assigns patient ID and sets up appointment tracking.

Epic

Cerner

6

 ACTION

### Schedule follow-up tasks

Automatically generates necessary follow-up tasks such as prior authorization requests, specialist referrals, or additional documentation collection based on patient needs.

DrChrono

Athenahealth

7

 OUTPUT

### Send registration confirmation

Patient receives automated confirmation with appointment details, required documents, copay information, and check-in instructions. Provider receives patient summary and alerts.

Epic

Kareo



### Outputs

- Complete patient medical record in EHR

- Insurance verification status and coverage details

## AI Business OS



### Key Metrics

- Patient registration completion rate
- Insurance verification accuracy rate
- Average intake processing time



### 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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