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MENTAL HEALTH & THERAPY · WORKFLOW

Appointment scheduling and reminder automation

Automates patient appointment scheduling, confirmation, and reminder communications while updating practice management systems. Reduces no-shows and administrative overhead while ensuring patients receive timely notifications about their therapy sessions.

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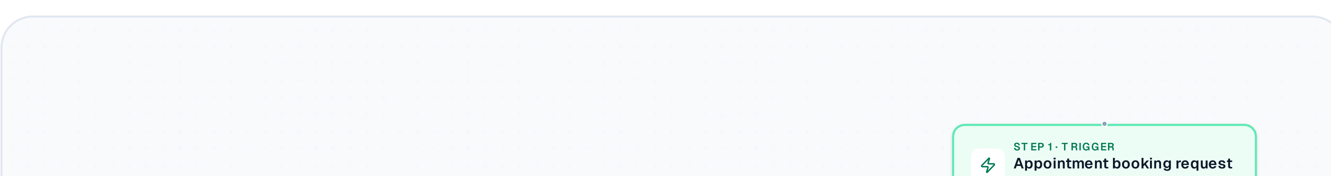
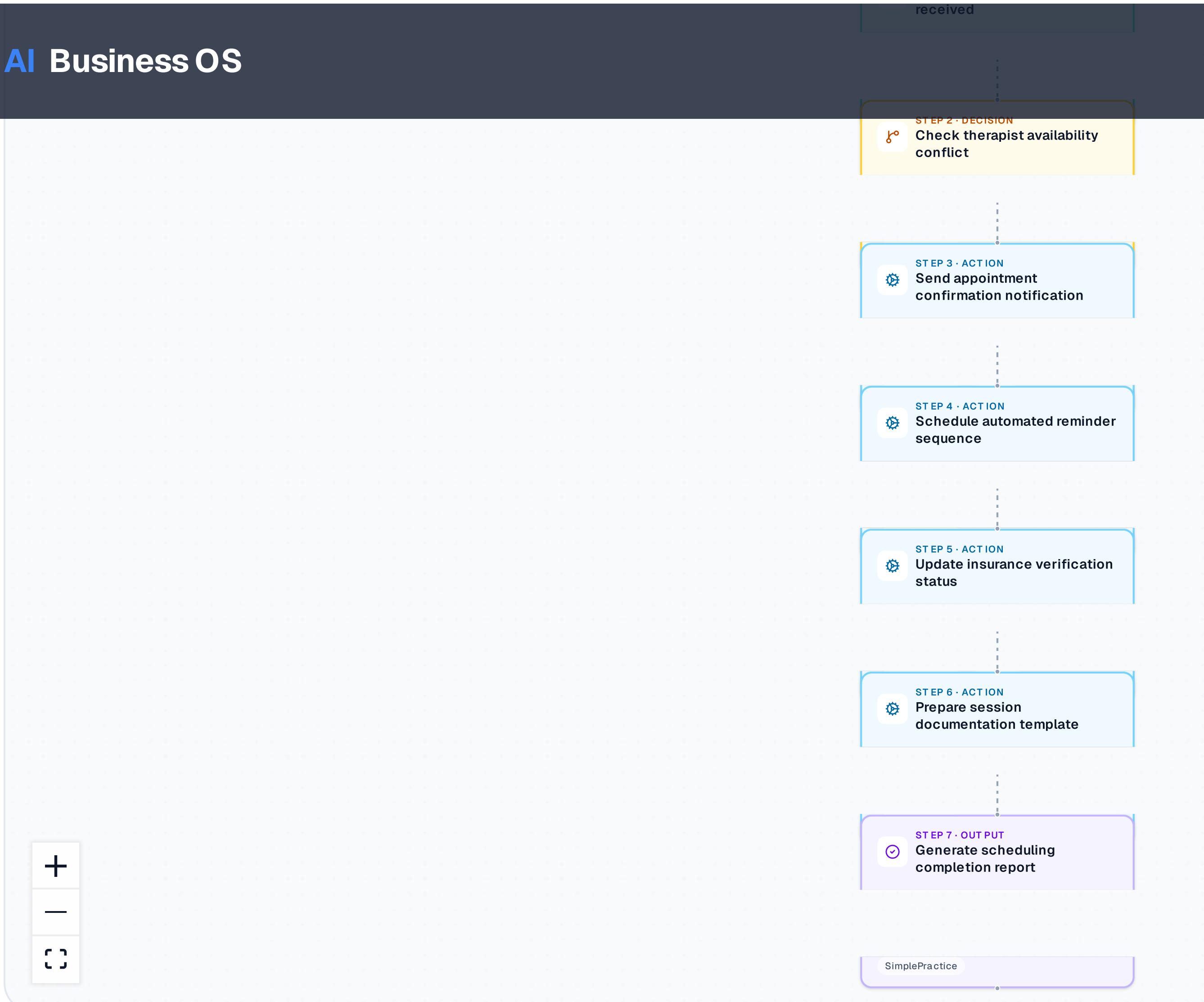
WORKFLOW TRIGGER

Patient requests appointment through online booking portal or therapist schedules session 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

Appointment booking request received

Patient submits appointment request through SimplePractice portal or therapist creates appointment directly in the system. Workflow initiates with appointment details and patient contact information.

SimplePractice

2

DECISION

Check therapist availability conflict

System verifies therapist schedule for conflicts and determines if appointment time is available. Branches workflow based on availability status.

SimplePractice

3

ACTION

Send appointment confirmation notification

Automatically sends confirmation email and SMS to patient with appointment details, therapist information, and Doxy.me telehealth link if virtual session. Updates appointment status to confirmed.

SimplePractice Doxy.me

4

ACTION

Schedule automated reminder sequence

Sets up automated reminders at 48 hours, 24 hours, and 2 hours before appointment via email and SMS. Includes session preparation instructions and intake forms if needed.

SimplePractice

5

ACTION

Update insurance verification status

Triggers insurance verification check and updates patient record with coverage details. Flags any authorization requirements for the upcoming session.

SimplePractice Therabill

6

ACTION

Prepare session documentation template

Pre-populates session note template with patient information, treatment plan goals, and previous session summary. Ensures clinical documentation is ready for therapist use.

TherapyNotes

7

OUTPUT

Generate scheduling completion report

Creates summary report with confirmed appointment details, reminder schedule status, and any required follow-up actions. Sends notification to practice administrator if manual intervention needed.

SimplePractice

Outputs

- Confirmed patient appointment with automated reminders
- Pre-populated session documentation template
- Insurance verification status update
- Practice administrator notification summary

Key Metrics

- Appointment no-show rate reduction
- Average time from booking to confirmation
- Patient reminder response rate
- Administrative time saved per appointment

Tools & Integrations

- SimplePractice
- Doxy.me
- Therabill
- TherapyNotes

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