

# Patient intake and assessment processing

Automates new patient intake from initial form submission through complete assessment processing, creating treatment-ready patient records while ensuring HIPAA compliance. Streamlines the onboarding process and reduces administrative burden on clinical staff.

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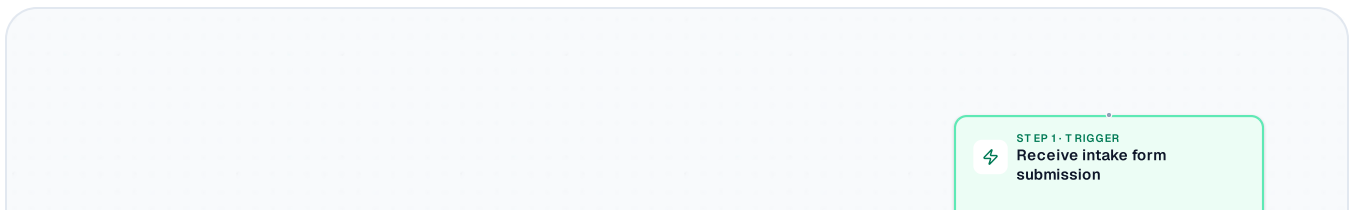


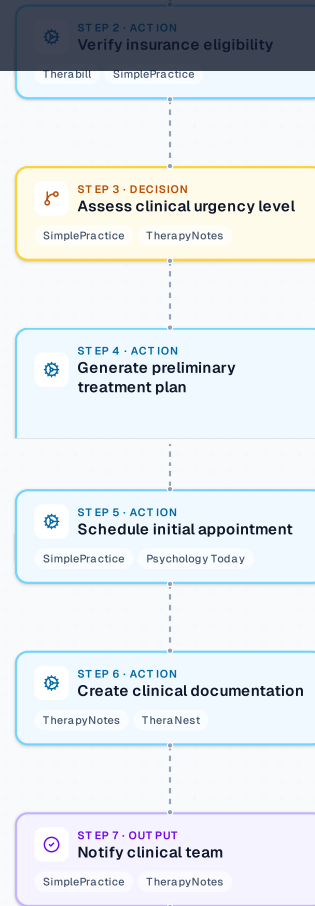
## WORKFLOW TRIGGER

New patient submits intake form through practice portal

## 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 intake form submission

Patient completes and submits initial intake questionnaire with personal information, insurance details, and presenting concerns. Form data is

2

 ACTION

### Verify insurance eligibility

System automatically checks patient insurance coverage and benefits for mental health services. Retrieves copay amounts, deductible status, and session limits.

Therabill

SimplePractice

3

 DECISION

### Assess clinical urgency level

AI analyzes intake responses for crisis indicators, suicidal ideation, or severe symptoms requiring immediate attention. Routes high-risk cases for priority review.

SimplePractice

TherapyNotes

4

 ACTION

### Generate preliminary treatment plan

System creates initial assessment summary and suggested treatment approaches based on presenting symptoms and evidence-based practices. Flags potential diagnoses for clinician review.

TherapyNotes

TheraNest

5

 ACTION

### Schedule initial appointment

Automatically books first available appointment slot with appropriate therapist based on specialty match and availability. Sends confirmation with intake paperwork to patient.

SimplePractice

Psychology Today

6

 ACTION

### Create clinical documentation

Generates structured intake notes, assessment forms, and treatment goal templates in patient record. Ensures all documentation meets clinical standards and compliance requirements.

TherapyNotes

TheraNest

7

 OUTPUT

### Notify clinical team

Sends summary notification to assigned therapist with patient overview, urgency level, and pre-populated session preparation materials. Includes links to complete patient record.

SimplePractice

TherapyNotes



### Outputs

- Complete patient record with intake assessment

## AI Business OS

- Scheduled first appointment
- Insurance verification and billing setup
- Clinical urgency classification
- Preliminary treatment recommendations



### Key Metrics

- Intake processing time
- Insurance verification accuracy rate
- Clinical urgency detection rate



### Tools & Integrations

- SimplePractice
- Therabill
- TherapyNotes
- TheraNest
- Psychology Today

# AI Business OS

## AI Business OS

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