

Automated patient intake and history collection

This workflow automates patient intake and history collection for optometry visits, reducing front desk workload while ensuring complete and accurate patient information capture before the exam.

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WORKFLOW TRIGGER

Patient confirms appointment via online portal or arrives for their scheduled visit

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.



STEP 2 · ACTION
Send Digital Intake Forms
EyefityPractice Management MaximEyes

STEP 3 · DECISION
Evaluate Form Completion Status
MaximEyes

STEP 4 · ACTION
Verify Insurance and Benefits
VSP Vision Care
Compulink Advantage SMART Practice

STEP 5 · ACTION
Update Electronic Health Record
RevolutionEHR MaximEyes

STEP 6 · ACTION
Generate Pre-Exam Summary
RevolutionEHR
Compulink Advantage SMART Practice

STEP 7 · OUTPUT
Notify Provider Patient Ready
EyefityPractice Management MaximEyes



Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

Patient Confirms Appointment Arrival

Patient checks in through online portal, mobile app, or front desk kiosk. System captures arrival timestamp and retrieves patient record.

EyeftyPractice Management

2

 ACTION

Send Digital Intake Forms

Automated system sends customized intake questionnaires to patient's mobile device or tablet. Forms include medical history, current symptoms, and medication updates.

EyeftyPractice Management

MaximEyes

3

 DECISION

Evaluate Form Completion Status

System checks if patient has completed all required intake forms and identifies any missing critical information or red flags.

MaximEyes

4

 ACTION

Verify Insurance and Benefits

Automated insurance verification cross-references patient coverage with VSP database and confirms eligibility for scheduled services.

VSP Vision Care

Compulink Advantage SMART Practice

5

Update Electronic Health Record

System automatically populates patient's EHR with new intake information, flags changes from previous visits, and highlights areas requiring provider attention.

RevolutionEHR

MaximEyes

6

ACTION

Generate Pre-Exam Summary

AI creates a comprehensive patient summary for the optometrist including chief complaints, medication changes, and recommended exam protocols based on history.

RevolutionEHR

Compulink Advantage SMART Practice

7

OUTPUT

Notify Provider Patient Ready

System alerts optometrist that patient intake is complete with all documentation ready for review. Patient is queued for exam with estimated wait time provided.

EyefityPractice Management

MaximEyes



Outputs

- Complete digital patient history
- Updated insurance verification status
- Provider-ready exam summary
- Automated patient queue management



Key Metrics

- Average intake completion time
- Percentage of complete forms submitted
- Insurance verification success rate
- Patient satisfaction scores



Tools & Integrations

- EyefityPractice Management
- MaximEyes
- VSP Vision Care
- Compulink Advantage SMART Practice
- RevolutionEHR

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