

Patient appointment scheduling and reminders

This workflow automatically schedules patient appointments based on exam type and insurance eligibility, then sends personalized reminders via preferred communication channels to reduce no-shows and optimize clinic scheduling.

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Get Your Blueprint

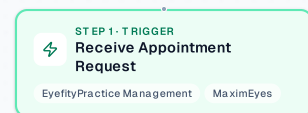


WORKFLOW TRIGGER

Patient requests appointment through online portal, phone call, or walk-in inquiry

Visual Flow

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



STEP 2 · ACTION
Verify Insurance Coverage
VSP Vision Care
EyefityPractice Management

STEP 3 · DECISION
Check Provider Availability
Compulink Advantage SMART Practice
RevolutionEHR

STEP 4 · ACTION
Schedule Optimal Time Slot
MaximEyes
Compulink Advantage SMART Practice

STEP 5 · ACTION
Send Confirmation and Prep Instructions
EyefityPractice Management
RevolutionEHR

STEP 6 · ACTION
Deploy Reminder Sequence
MaximEyes WinOMS

STEP 7 · OUTPUT
Generate Scheduling Analytics
Compulink Advantage SMART Practice
RevolutionEHR

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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 practice management system online portal or staff enters request from phone/walk-in. System captures patient details, preferred dates, and exam type needed.

2

 ACTION

Verify Insurance Coverage

System automatically checks patient insurance eligibility and benefits through VSP integration. Validates coverage for requested exam type and determines copay requirements.

VSP Vision Care

EyeFityPractice Management

3

 DECISION

Check Provider Availability

System evaluates optometrist schedules based on exam type requirements and patient preferences. Determines if immediate scheduling is possible or if alternative times needed.

Compulink Advantage SMART Practice

RevolutionEHR

4

 ACTION

Schedule Optimal Time Slot

System books appointment in the most suitable available slot considering exam duration, provider expertise, and patient preferences. Updates calendar and reserves necessary equipment.

MaximEyes

Compulink Advantage SMART Practice

5

 ACTION

Send Confirmation and Prep Instructions

Automated confirmation sent via patient's preferred method with appointment details, pre-exam instructions, and required documentation. System logs communication in patient record.

EyeFityPractice Management

RevolutionEHR

6

 ACTION

Deploy Reminder Sequence

System automatically sends reminders at 7 days, 24 hours, and 2 hours before appointment via SMS, email, or phone based on patient preferences. Includes option to reschedule if needed.

MaximEyes

WinOMS

7

 OUTPUT

Generate Scheduling Analytics

System produces appointment confirmation records, no-show predictions, and scheduling efficiency metrics for practice management review.

Compulink Advantage SMART Practice

RevolutionEHR



Outputs

- Confirmed patient appointment with optimal time slot
- Insurance verification and copay estimation

- Automated reminder sequence activation

AI Business OS



Key Metrics

- Appointment confirmation rate
- No-show reduction percentage
- Average time from request to scheduled appointment
- Insurance verification accuracy rate



Tools & Integrations

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

AI Business OS

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