

# Patient intake and assessment automation

This workflow automatically processes new patient intake from initial form submission through assessment completion and treatment plan creation. It streamlines the entire intake process while ensuring insurance verification and proper clinical documentation.

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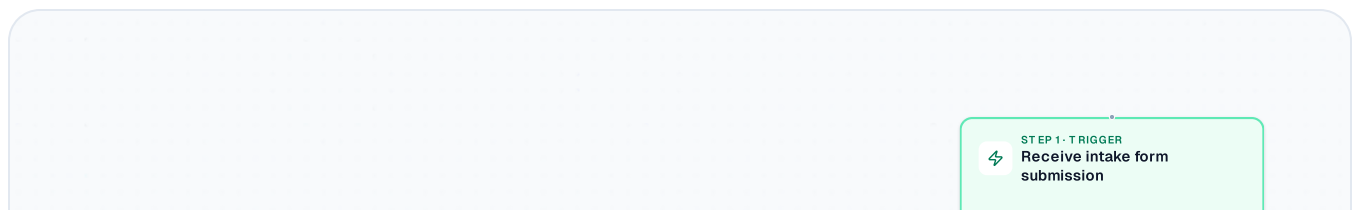


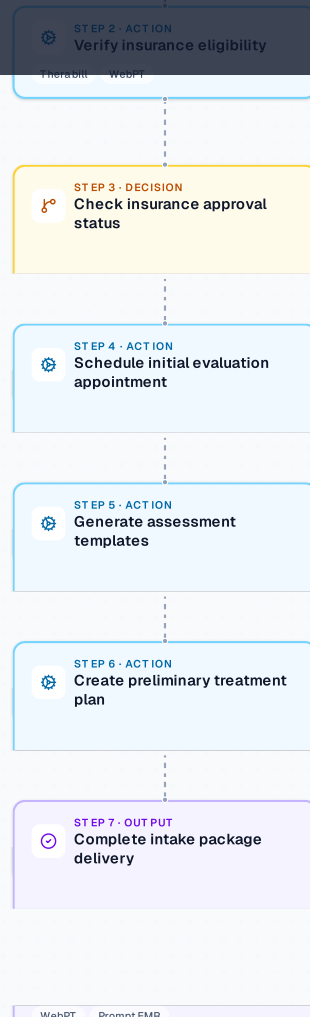
## WORKFLOW TRIGGER

New patient submits online intake forms through patient 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 intake forms including medical history, current symptoms, and insurance information through the online portal. The

system captures all patient data and initiates the automated workflow.

## AI Business OS

WebPT

2

 ACTION

### Verify insurance eligibility

System automatically checks patient insurance coverage, benefits, and prior authorization requirements. Real-time verification ensures accurate billing and identifies any coverage limitations.

Therabill

WebPT

3

 DECISION

### Check insurance approval status

Workflow branches based on insurance verification results. Approved patients continue to scheduling while denied cases are flagged for manual review.

Therabill

4

 ACTION

### Schedule initial evaluation appointment

System automatically finds available therapist slots based on patient condition type and therapist specialization. Confirmation and reminder notifications are sent to patient.

WebPT

Clinicient

5

 ACTION

### Generate assessment templates

## AI Business OS

AI creates customized evaluation forms and outcome measures based on patient's reported condition and symptoms. Templates are populated with patient-specific information for efficient assessment.

BreezyNotes

Prompt EMR

6

 ACTION

### Create preliminary treatment plan

System generates evidence-based treatment recommendations and exercise protocols based on assessment data and clinical guidelines. Plan includes frequency, duration, and specific interventions.

WebPT

BreezyNotes

7

 OUTPUT

### Complete intake package delivery

Finalized patient record with verified insurance, scheduled appointment, pre-populated assessment forms, and preliminary treatment plan is delivered to assigned therapist. Patient receives appointment confirmation and preparation instructions.

WebPT

Prompt EMR



## Outputs

## AI Business OS

- Complete patient EMR profile
- Generated initial evaluation appointment

- Pre-populated assessment templates
- Preliminary evidence-based treatment plan



### Key Metrics

- Intake processing time
- Insurance verification accuracy rate
- Patient no-show rate



### Tools & Integrations

- WebPT
- Therabill
- Clinicient
- BreezyNotes
- Prompt EMR

# AI Business OS

## AI Business OS

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