

AI SCHEDULING PRE-CHECK

Practice: _____ Date: _____
Prepared by: _____

SECTION A: PATIENT REVIEW

- ☐ High-risk patients flagged by AI scheduling tool
- ☐ Attendance history reviewed
- ☐ Appointment time adjusted if risk is high

Notes: _____

SECTION B: CONFIRMATION STEPS

- ☐ Double-confirmation sent to flagged patients
- ☐ Reminder text/email scheduled
- ☐ Backup communication method used (phone call if needed)

Notes: _____

SECTION C: GAP MANAGEMENT

- ☐ Standby patient list updated
- ☐ AI system set to auto-offer open slots
- ☐ High-value procedures prioritized in available gaps

Notes: _____

continued...

SECTION D: TEAM CHECK-IN

- ☐ Staff trained on AI scheduling alerts
- ☐ Daily huddle review of flagged patients
- ☐ Roles assigned for follow-up

Notes: _____

SIGN-OFF

Manager: _____ Doctor: _____ Date: _____

For more forms, SOPs, and training guides,
join DOMA 🖱️ dentalofficemanagers.com/joindoma

This sample form is published by Dental Manager Connect LLC for illustrative purposes only. Your clinical procedures, documentation practices, and associated risks may differ from those described here. We strongly encourage you to adapt this form to fit the unique needs of your practice and your patients. The information provided in this document is not intended to serve as legal advice. Each dental practice presents unique circumstances, and laws or regulations may vary by state. For this reason, we recommend consulting with your attorney before using this or any similar form within your practice. © 2025 Dental Manager Connect LLC. All rights reserved.