



**IMPROVING INTAKE  
EFFICIENCY AND PATIENT  
EXPERIENCE**

WITH

**COOL SPRINGS FAMILY DENTISTRY**

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# Executive Summary

In early 2025, Cool Springs Family Dentistry partnered with Subflow to digitize and streamline their patient intake process.

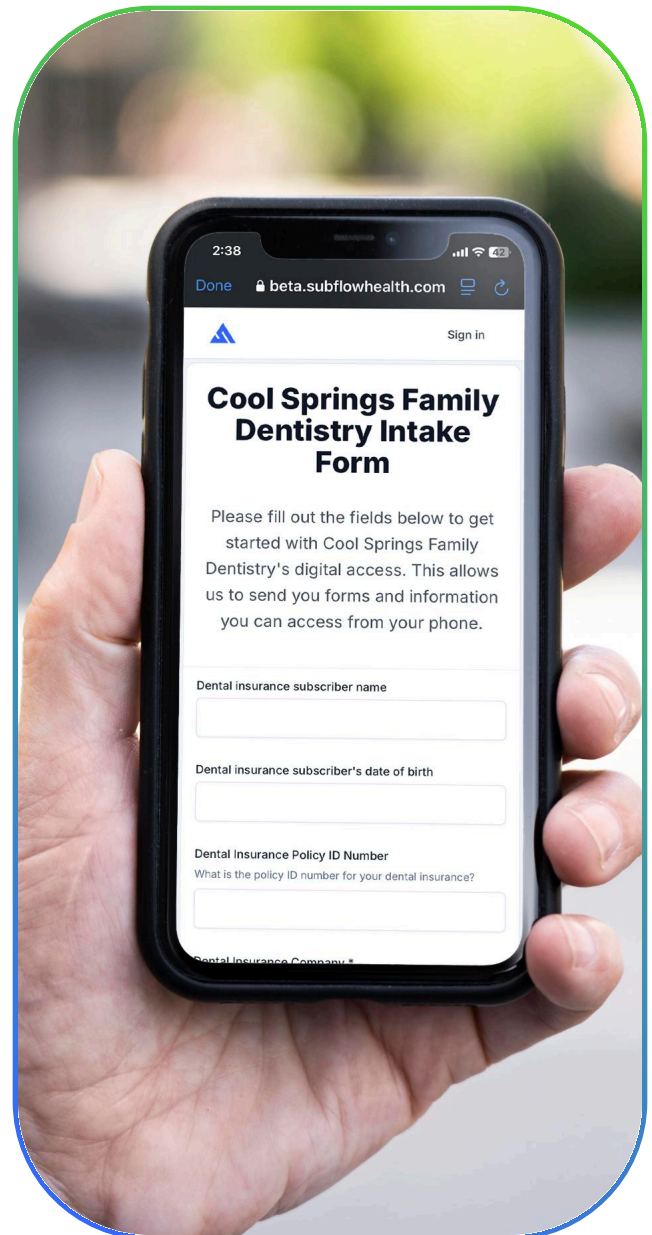
Prior to the pilot, the clinic relied entirely on paper intake forms completed in-office on the day of the appointment.

These forms were time-consuming for patients, **taking an average of 9 minutes and 2 seconds to complete, and added 15–20 minutes of manual administrative work for staff per visit.**

Subflow converted their paper-heavy process into a mobile-friendly digital intake solution that reduced paperwork, improved front desk efficiency, and enabled patients to complete their intake before arriving at the office. With automated text-based communication and reminders, Subflow ensured higher compliance without adding extra effort for the front desk team.

Over a ~45-day period, 30 patients completed the new digital intake process. **The intake process became 68.8% faster for patients, and front office staff reported a 70.6% reduction in time needed to complete patient intake.**

This pilot required no setup time requirements from clinic staff, allowing them to quickly deploy this new intake workflow.



# Background

Cool Springs Family Dentistry is a community-focused general dentistry practice that prides itself on patient-centered care and a warm, welcoming environment. However, their reliance on paper forms created workflow bottlenecks and frustration for both patients and staff.

## Before the pilot:

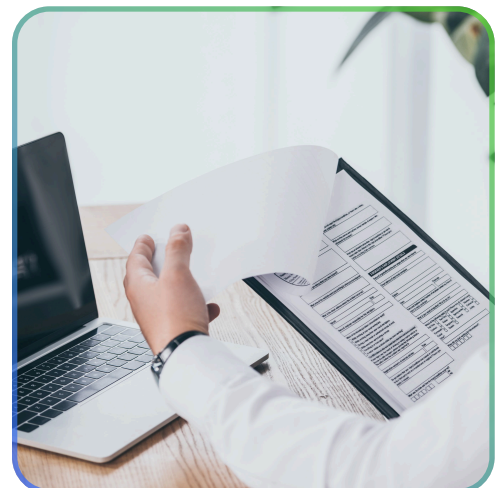
- New patients needed to fill out a paper intake form upon arrival, which led to longer wait times.
- Patients needed on average 9 minutes and 2 seconds to complete the paper intake form.
- Staff required an additional 15–20 minutes per patient to manually process the paper intake form.

With no digital process in place, forms required scanning, photocopying, and often required additional follow-up to clarify illegible handwriting, missing fields, etc.

## Pilot Objectives

The Subflow pilot aimed to:

- **Convert paper intake forms into a mobile-friendly, digital format.**
- **Deliver digital intake to patients via text message before their appointment.**
- **Automate follow-up reminders for incomplete forms.**
- **Standardize patient communication with text message templates.**
- **Reduce time spent on administrative intake tasks.**



# Implementation Overview

## Pre-Appointment Improvements

Cool Springs Family Dentistry wanted patients to call their practice first to schedule an appointment. During the scheduling call, the receptionist would enter the patient's first name, last name, email, and phone number into the digital Subflow consent form.

**This process took less than 30 seconds on average.**

Subflow created two core resources to support the pilot:

1. A 4-field opt-in form is used by receptionists when a patient calls to book an appointment. This supported Cool Springs Family Dentistry's desire to facilitate patient phone calls to schedule appointments while collecting consent required to send the intake form via text message.
2. A full digital intake form, including patient information, insurance, and medical history was delivered automatically via SMS after the phone call was completed.

Receptionists received a notification when the intake was submitted, making it easy to transfer information to the clinic's existing EHR.

## Communication Workflow Automation

To further streamline patient intake, Subflow created a series of reusable text messaging templates that could be sent to manually patients with three clicks, or through workflow automations.

Subflow's onboarding team created workflow automations that delivered personalized text messages to patients without requiring additional staff time.

Text message templates included intake form delivery, Google review requests, and gentle reminders if forms were not completed.

Clinic staff reported that most patients preferred receiving intake instructions via text. Patients appreciated the ability to complete the form on their phone before arriving which resulted in a better patient experience.

Hi **</> First name** please fill out the new patient form below. You can text us with any questions!

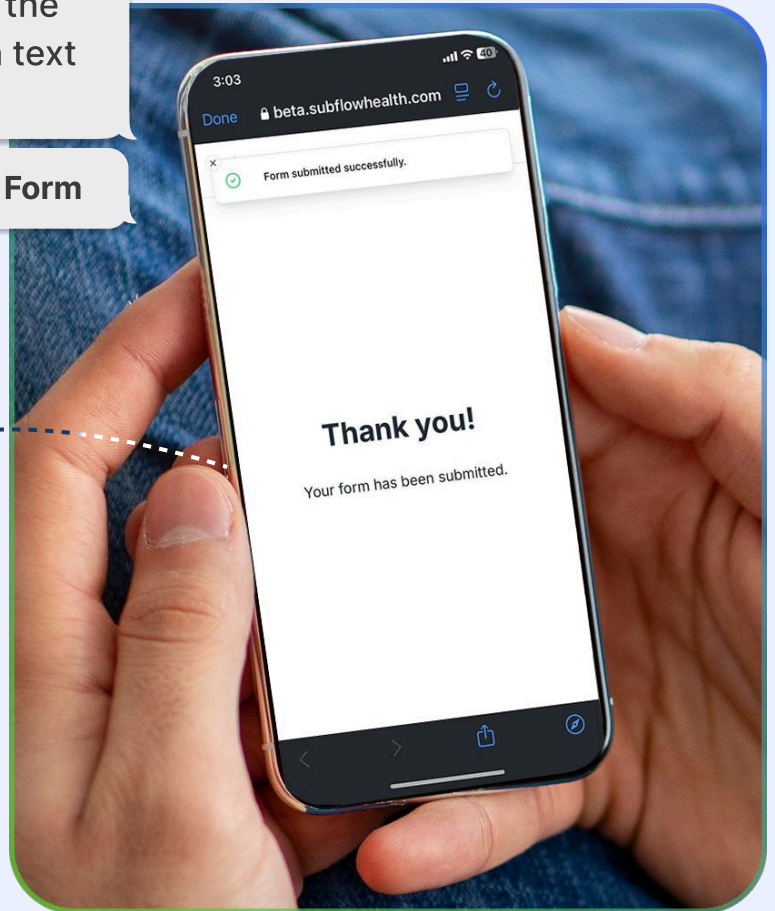
 **New Patient Intake Form**



**Sam Jacobs**

Intake Form Completed 05/07/25

-  Patient Information
-  Patient Insurance Details
-  Patient Medical History



## Clinical Use of Digital Forms & Communication

Cool Springs Family Dentistry began using text-based messaging for asynchronous intake workflows, which resulted in greater operational efficiency. Staff used standardized templates to send personalized messages, answer questions, and complete intake before the appointment.

This approach replaced time-consuming paper-heavy processes, allowing staff to complete check-in faster while reducing back office tasks. Patients completed the intake form when convenient, and the staff could triage and proceed accordingly.

This method improved the overall practice efficiency while improving the patient experience.

# Outcomes

## Survey Adherence and Follow-Up Efficiency

In a 45-day period, 30 patients completed the digital intake workflow. The time impact was significant:

- **Patient time savings:** 6 minutes and 13 seconds per patient
- **Staff time savings:** 12 minutes per patient

This improvement enabled receptionists to handle intake duties faster, with fewer errors and no need to transcribe handwritten notes.

## Wider Impact

Although this pilot included a relatively small cohort, this trend demonstrates that larger **clinics with 100 patients per month using a similar intake process would result in ~20 hours per month saved through intake alone.**

Using the national average hourly rate for medical receptionist of \$20/hour, **this trend would translate into annual savings of \$4,800 for larger practices.**

## Staff Experience

Receptionists found the new workflow easier, faster, and more reliable than the previous paper-heavy process. Standardized texting templates reduced the need to write custom messages or call patients repeatedly.

# Conclusion

Subflow's pilot with Cool Springs Family Dentistry offers a strong case for how simple digital tools can reduce operational friction and improve the patient experience.

Key outcomes from the pilot include:

## 1. Enhanced Patient Access and Experience

Patients now receive a text message with a link to complete their intake before arriving at the clinic—cutting down wait times and increasing convenience. On average, **patients spent just 2 minutes and 49 seconds completing the digital form, compared to 9 minutes and 2 seconds with the old paper version.**

**This resulted in a 68.8% reduction in the time required for each patient to submit the intake form.** Most patients preferred receiving instructions via text, aligning with growing trends in mobile-first healthcare communication.

## 2. Operational Efficiency for Front Office Staff

The administrative burden on receptionists was significantly reduced. Previously, staff spent an average of 15–20 minutes per patient on manual intake-related tasks. With Subflow, that time dropped to just 5 minutes per patient. **This translates to a 70.6% reduction in staff time required for patient intake.**

Across 30 patients in 45 days, the clinic saved a total of 6 hours of staff time, averaging 1 hour and 18 minutes saved per week. This allowed staff to reallocate time toward higher-value activities like patient service and scheduling.

## 3. Scalable Impact for Larger Practices

This 45-day pilot included just 30 patients—yet still resulted in **over 9 hours of combined time saved** between patients and staff.

For a larger practice or network, the compounding effect could yield hundreds of hours saved monthly. This case reflects a broader shift in healthcare: digitization doesn't have to mean disruption. With the right tools, even small, independently owned clinics can drive real efficiency gains without sacrificing the patient touch.

Cool Springs Family Dentistry's success shows that simplicity scales. Subflow helped the clinic modernize without complexity—digitizing intake, improving follow-up, and reducing friction on both sides of the front desk. For practices seeking to do more with less, this pilot provides a clear path forward.



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