

GHL – EMR Appointment Automation Integration

Summary

Our application automates end-to-end patient appointment workflow by integrating insurance verification, scheduling, and CRM updates into a unified system. When a patient submits an appointment request through the website, the system validates insurance eligibility in real time using Availity and seamlessly coordinates appointment creation between Clinic EMR and GoHighLevel (GHL).

By eliminating manual intervention, the system improves operational efficiency, ensures accurate insurance validation, and maintains synchronization between patient records and CRM opportunity stages.

Key Components

- **Web Interface:**
A user-friendly frontend form that allows patients to submit appointment requests along with their personal and insurance details.
- **GoHighLevel (GHL):**
Acts as the CRM system to manage patient contacts, track opportunities, and maintain pipeline stages throughout the workflow.
- **EMR:**
Responsible for maintaining patient medical records and handling appointment scheduling and completion tracking.
- **Availity:**
Provides real-time insurance eligibility verification to ensure only valid appointments proceed further in the workflow.
- **Automation Layer (Make / AWS Lambda):**
Connects all systems and orchestrates the workflow by handling data exchange, triggers, and synchronization between platforms.

Workflow

Form Submission:

The patient submits an appointment request through the website form integrated with GHIL.

Insurance Verification:

The submitted insurance details are sent to Availity API for real-time eligibility validation.

Verification Decision:

- If insurance is verified, the workflow proceeds to scheduling
- If insurance is not verified, the appointment request is rejected and marked accordingly in GHIL

Contact & Opportunity Creation:

A new contact is created in GHIL, and an opportunity is generated or updated in the pipeline.

Appointment Booking:

The patient selects a preferred time slot using the available scheduling interface.

Patient Creation in EMR:

A corresponding patient record is created in EMR using the collected details.

Appointment Creation in EMR:

The selected appointment slot is booked in EMR and linked to the patient record.

Appointment Completion:

Once the patient visit is completed, the appointment status is updated in EMR.

CRM Synchronization:

The opportunity stage in GHIL is updated based on the appointment status, ensuring both systems remain aligned.

Referral Data Collection

- Frontend Form Fields

Patient: Full Name, Date of Birth, Gender, Email Address, Phone Number

Insurance Information: Insurance Card Details

Go High Level Pipeline Management

Opportunity Stages

The system utilizes a structured pipeline with the following stages:

Stage Name	Description
New Lead	Initial stage when patient submits the form
Insurance Verified – Awaiting Scheduling	Insurance approved, pending appointment booking
Appointment Scheduled	Appointment successfully scheduled in EMR
Appointment Completed	Patient visit completed successfully
Appointment Rejected	Insurance verification failed – Card Expired

Data Storage and Tracking

GHL Opportunity Record

The following information is stored and continuously updated:

- Patient details submitted via form
- Insurance verification results
- Appointment details (date, time, status)
- Opportunity stage progression
- Workflow activity logs

EMR

- Patient profile and medical record
- Appointment details and schedule
- Visit completion status