|  | **Talk Track** | **Est. Demo Time** |
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| 1 | This will be a recorded video:  **Caller DO**: Calls 1888-280-8047  **BOT DO:** Answers call (2 Message)  **Caller Says**: I received a strange bill from a provider I don’t recognize.  **BOT DO:** Asks a few questions, then asks the user if they want to talk to a live agent.  **Caller Says:** Yes  **SHOW:**  Show that the call has come into the call center  Al: Now we are going to switch to Chat for the duration of this call. Start a live chat from [Home  · Customer Self-Service](https://cmsngd.powerappsportals.com/)  **Explain**: That we could proceed with the call, but we are going to switch to Chat. Explain that the visuals will be easier to follow. | 6-7 mins |
| 2 & 8 | CHAT   1. Ensure Luis is logged in: [luis.navarro@emaildemo.com](mailto:luis.navarro@emaildemo.com): 2. P: Fg1PGOXv!LN 3. Luis open chat: [Home  · Customer Self-Service](https://cmsngd.powerappsportals.com/) and accepts the disclosure. 4. Brad: Explain disclosure > Submit 5. **BOT**: [Opening conversation] 6. **Customer**: Hi, I received a strange bill from a provider that I don’t recognize. 7. **BOT**: Okay - I can help you with your billing inquiry. First, I need to collect some information from you. 8. **BOT**: What is your first name? 9. **Luis**: Luis 10. BOT: Thanks Luis, and your last name 11. **Luis**: Navarro 12. **BOT**: What are the last four digits of your Medicare ID? 13. **Luis**: A7B55 14. **BOT**: What is the name of the provider on the bill? 15. **Luis:** MultiCare Rockwood Clinic 16. **BOT:** In your own words, briefly describe the issue. 17. **Luis:** I received a $400 medical bill from a provider I don’t recognize and I’m not sure why I was charged. I’m calling to get help understanding the bill and whether it’s legitimate. 18. **LUIS DO: Upload the file** 19. **BOT**: Responds with summary adaptive card 20. **BOT**: Is the collected information correct? 21. **Luis**: Yes 22. **BOT:** Ok great, would you like to speak to a customer service representative? 23. **Luis:** Yes  * **[BRAD DO: Summarize Conversation]** * **Brad:** Explain the screen pop message (Toast) * **Brad**: Say I can review the chat transcript. * Brad: Walk through the screen itself   + Communication Panel     - Sentiment     - Voice & Video   + **New Conversation Window**     - SSearch Customer – Repeat?     - Customer Details     - Conversation Details     - **Coplot Actions**     - Case Details     - Recent Cases     - Timeline   + **Right Pane Navigation Bar**     - Copilot       * Ask a Question       * Write an email       * Intent Based Suggestions       * Prompts + Describe what you need     - Teams Chat     - Smart Assist – But this is being depreciated with Copilot     - Agent Scripts – Manual (Also note script adherence)     - Knowledge Search     - Join a Teams Call   + Brad SAY:     - These are a few of the things that I have as an agent to make me more productive and allow me access to the tool in a central location     - I am sure I will say this a few times, but I want to make sure it’s understood that this screen can be updated. David just mentioned that the UI will be shaped by the Magnify process to reflect what information should appear on this screen     - So, to wrap this section up, let’s finalize the customer search   **As an agent I can:**   1. Brad: In this example since user is logged in, we will have access to their profile by default. 2. I can show you what a manual search looks like or even advanced search a well. 3. **Search Customer:** Explain this is an out-of-box way to look at Luis’s record.    1. Remove Luis Navarro from the search box, show how I can search and add him in again    2. Explain Hyperlink to persons name | 5-6 mins |
| 3 | User Logged in: [Home  · Customer Self-Service](https://cmsngd.powerappsportals.com/)   1. Brad: Explain: This is an example of how integration to a 3rd party system could be utilized. VA does this.    1. Explain we did a participant search to validate the customer    2. Hyperlink to their system record    3. Explain that this occurred via the chatbot however the agent can see this in the transcribed chat.    4. I have also bubbled up other information as in the fact that a Fraud Alert has been identified in a certain time frame for Luis.    5. Explain this could come from an integration to another system 2. **Agent DO:** **Participant Search:** Explain this is a custom about a page of code that interfaces with the AP to search for the customer and their related fraud alerts and verification: A7B55 3. AL Macey - Explain Intent Agent for part “a” to the right: 4. We give lots of ways to do things at Microsoft, wanted to show you there are several options.   **Brad**: So lets continue our conversation with Luis  **SYSTEM: Conversation window opens with Luis’s details.**  **Agent DO**: Using Quick replies: /q Hello [Customer], my name is [Agent]. I can help you with your request, but first can you confirm I can review your personal account details?  Explain:   * **Luis**: Sure, that is fine * **Agent**: I see the details of your prior conversation with MyCMS Assistant? I hope you enjoyed the experience. * Luis: Yes, it was very easy. * **Agent**: Great * **Agent DO**: Further verification using Participant Search {explain custom} * **Agent**: Ok, I can see the details you entered regarding the bill you do not recognize. I am reviewing it now. * **Agent**: I see you also uploaded a copy of the bill in question.   **Agent DO:** Agent finishes reviewing the details and creates a case. | 4-5 mins |
| **4 & 6**  **&**  **7** | **[UI/UX David LaBarca Magnify UX/UI]**  ***As we mentioned earlier, the final UI will be shaped by the Magnify process to reflect CMS user needs. For example, in this step, Magnify might uncover that users need to quickly differentiate high-risk cases. That could drive ad different method that what I have shown you for features like customer profile flagging or visual indicators tied to behavioral data — all integrated into a single, unified view. And over time, user analytics could show us which data points are most referenced, or which fields are ignored, helping us streamline and refine the display for faster decision-making.***  Brad: So, let’s move on to the customer profile record so we can look at the customer profile details like interaction history or any type of flagging.  Do: Show the following:   1. Open Contact Record    1. 3 ways: Search, Link at Searches 2. Fraud Notification 3. Contact Information 4. Fraud Toggle 5. Timeline 6. Recent Cases    1. Do: Run the Flow    2. Brad: Explain this is an AI generated feature, Run the Flow    3. Post Interaction Steps 7. Recent Claims    1. Related Cases 8. Recent Fraud    1. Ai Fraud Review 9. Claims and Fraud Activity (Just another way to view) 10. Common Working File (CWF) simulation | 6-7 mins |
| **5** | **Out of character, lets review Knowledge Base – May no longer continue with the chat:**  **Brad: Now during the course of the interaction we have received a lot of help from Copilot. Copilot also uses generative AI and so does the intent agent to surface information in the knowledge base.**  **As an agent I can also go directly to the Knowledge Base to generate to view articles as well.**  **While helping Luis I could also go directly to the “CMS Assisting a Customer with a Suspicious Medical Bill”**  Agent DO: Agent moves the case to the Fraud Queue. | 7-8 mins |
| **6** | **Agent**: I’ve created a case for you and tagged it as potential fraud. Here’s the reference number: xxxx. **Customer**: Thanks’ will someone follow up? **Agent**: Yes, we’ve notified you once we investigate the billing issue.  Suspicios Bill KB Article  AI Next steps button and AI Generated content | 6-7 mins |
| **7** | **Brad: Go back and show the updated Contact record**  **Agent**: I've logged everything. Would you prefer email or text updates? **Customer**: Email or text, please. **Agent**: Got it. You’ll receive a summary and follow-up via text shortly. | 5-6 mins |
| **8** | **Agent**: I see you started a new chat. Welcome back, Luis. **Customer**: Just checking if there’s any update. **Agent**: Your case is under review. We expect an update by tomorrow. **Customer**: OK, thanks for letting me know.  [Screen shot: Where I showed you the Voice and Video – Image] | 5-6 mins |
| 9 | Portal: [Home  · Customer Self-Service](https://cmsngd.powerappsportals.com/)  Mobile App: [Mobile App](https://bradlaw76.github.io/cmsmobile/cms_app.html) | 5-6 mins |