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| --- | --- | --- |
| Overview | Subflow provides patient lookup by either ANI or MRN, presents appointments and ability to cancel or confirm appointments within three days or cancel appointments scheduled greater than three days. | |
| Application | Workflow\_Test | |
| **Trigger** | **Application** | **Script** |
| 55186 | Workflow\_Test | subEpicAppointmentConfirm\_06192023.aef |
| na | Subflow | subEpicAPI\_04192023 |

# Application:

The subflow subEpicAppointmentConfirm\_06012023 provides patient lookup by either ANI or MRN. When authenticating the patient with a phone number, the patient is prompted to provide both birthdate and postal code for authentication. When providing MRN, only birthdate is required. If upcoming appointments are found, the patient will be prompted with either confirm or cancel if the appointment is within three days from the time of the call. If greater than three days, the patient will be offered only the choice to cancel the appointment.

# Test Steps:

Call 773-795-5186

Basic Tests: (will require test accounts created prior)

1. Test account not found – call from an unknown number and select one to confirm the number is correct. Provide fake postal and DOB. The phone number will not match any patient account.
2. Test with ANI - account found with no appointments – example: Choose option 2 to enter phone number. Enter 630-213-1326. Enter zip 10056. DOB 01-01-2000. MRN 5016500 will be found with appointment 06/22/2023 and system will offer option to cancel. \*\*Do not choose anything and you should hear test prompt
3. Test with MRN – account found with no appointments – example: Enter 5016503 DOB 01-01-2010.
4. Continue testing with accounts that have test appointments scheduled. Test both options to confirm and cancel the appointment.

# Reporting:

As the call progresses, custom variables 5 (MRN) and 6 (status) are set. The status shown will be the last status set before either the subflow script returns to main calling script or the caller disconnects. If the subflow completes successfully, one of the final statuses shown in green should be displayed.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Subflow Custom Variables |  |  |  |  |  |
| getaccountbyani | Acct by ANI Not Found | One Acct by ANI Found |  |  |  |
| getpatientinfobymrn | Acct by MRN Not Found | Acct by MRN Found |  |  |  |
| getappointments | **Appointment Not Found** | Appointment Found |  |  |  |
| (greater than 3 days) | **Appt Cancel Request** | **Cancel Request Confirmed** | **Appt Cancel API Failed** | **Cancel Request Cancelled** | **No Cancellation** |
| (less than 3 days) | **Appt Confirmed** | **Appt Confirm API Failed** |  |  |  |

In CUIC, the Call Custom Variables Report can be run for the chosen application.

A screenshot of a report

Description automatically generated with medium confidence

|  |  |  |
| --- | --- | --- |
| Prompts: | | |
|  | |
| Prompt Name | Text |
| p7000.wav | We see that you are calling from |
| p7001.wav | Press one if this is the number on your account. To enter a new phone number, press two. To enter your MRN, press three. |
| p7003.wav | You entered |
| p7004.wav | If this is correct, press one. Otherwise, press two. |
| p7005.wav | Please enter your five digit zip code. |
| p7006.wav | Please enter the ten digit phone number on your account. You can also enter your MRN number if you know it. |
| p7007.wav | Please enter the ten digit phone number. |
| p7008.wav | You have an upcoming appointment on |
| p7009.wav | Press two if you need to cancel |
| p7010.wav | Press one if you would like to confirm this appointment or press two to cancel. |
| p7011.wav | Are you sure you want to cancel this appointment? Press one if yes or two if no. |
| p7012.wav | There was an error confirming your appointment. |
| p7013.wav | Your appointment was successfully confirmed |
| p7014.wav | There was an error cancelling your appointment. |
| p7015.wav | Your appointment was successfully cancelled. |
| p7016.wav | Please enter the two digit month you were born. |
| p7017.wav | Please enter the two digit day. |
| p7018.wav | Please enter the four digit year. |
| p7019.wav | Please enter your MRN. |
| p7020.wav | We did not receive a valid response. |
| p7021.wav | We were unable to find any appointments. Please wait while we connect you with the next available representative. |
| p7022.wav | We were unable to find an account associated with this number. Please wait while we connect you with the next available representative. |
| p7023.wav | We were unable to find an account associated with this phone number. Please wait while we connect you with the next available representative. |
|  |  |
| p7026.wav | If you would like to confirm or cancel an appointment, please press 1. For all other, please press two. |

# Production Script Updates:

The Epic Appointments subflow will be inserted into production scripts when callers choose option 1 patients or option 2 physicians.

A screenshot of a computer

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Production Update Script Steps:

1. Create string variable sEpicAppointmentScript with value "Epic Appointment/subEpicAppointmentConfirm\_06192023.aef"
2. Create prompt variable P\_APIMenu with value P[Epic Appointment/p7026.wav]
3. Insert a menu step with prompt P\_APIMenu for each of the main menu options which should offer the patient appointment confirm/cancel subflow. Example:

A screenshot of a computer program

Description automatically generated with medium confidence

When returning from the subflow, the main calling script will check to see if the call is still active, and if so, redirect to the End step. If the call is still active, it will continue progressing through the main script steps.