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| --- | --- | --- |
| Overview | There are three pilot groups – Primary Care, South Shore and Flossmoor. The subflow will be inserted to provide patients and physicians with the ability to cancel or confirm appointments. | |
| Application | TestPractice13 – Primary Care  TestPractice14 – South Short  TestPractice27 - Flossmoor | |
| **Trigger** | **Application** | **Script** |
| 58077  58078  58242 | TestPractice13  TestPractice14  TestPractice27 | PrimaryCare\_pcs-cb-ewt-api\_6-6-23\_TEST.aef  SouthShore\_pcs-cb-ewt-api\_6-29-23\_TEST.aef  Flossmoor\_pcs-cb-ewt-api\_6\_29\_23\_TEST.aef |
| na | Subflow | subEpicAppointmentConfirm\_06192023.aef |
| na | Subflow | subEpicAPI\_04192023 |

# Application:

Production applications will be Primary Care, South Shore and Flossmoor

# Production Script Updates:

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

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Production Update Script Steps:

1. Create boolean variable bTesting as a parameter and set default value to false
2. Create boolean varibable bReturn and set default value to false
3. Create string variable sDebug with no default value
4. Create string variable sEpicAppointmentScript with value "Epic Appointment/subEpicAppointmentConfirm\_06192023.aef"
5. Create prompt variable P\_APIMenu with value P[Epic Appointment/p7026.wav]
6. Create boolean variable bIsActive with default value true
7. Create boolen variable bAppointmentSystem – setting true will enable and setting this to false will skip the appointment steps in the script (added 06/27/23)
8. 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

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The subflow will complete and return to the main calling script after presenting the prompts below:

No appointments found – p7021.wav

No patient found by MRN – p7022.wav

No patient found by Phone Number – p7023.wav

Appointment Confirmed – p7013.wav

Appointment Confirmation Failed – p7012.wav

Appointment Cancelled – p7015.wav

Appointment Cancellation Failed – p7014.wav

Patient Decided Not to Cancel – No prompt

No Entry Made – No prompt

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.

# Test Steps:

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Call 773-795-8077 – Primary Care

Call 773-795-8078 – South Shore

Call 773-795-8242 - Flossmoor

\*Set bTesting to “true” in the application during Testing and “false” in Production

\*Note – the default value of bAppointmentSystem is set to true. In case the system needs to be disabled, set this application parameter to false.

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 7 (MRN) and 10 (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.

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|  |  |  |
| --- | --- | --- |
| Prompts: | | |
|  | |
| Prompt Name | Text |
| 7000.wav | We see that you are calling from |
| 7001.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. |
| 7002.wav | Please enter the patient’s date of birth in the format 2-digit month, 2-digit day, 4-digit year. For example, if the patient’s date of birth is January 05, 1996, then enter 01051996. |
| 7003.wav | You entered |
| 7004.wav | If this is correct, press one. Otherwise, press two. |
| 7005.wav | Please enter your five digit zip code. |
| 7006.wav | Please enter the ten digit phone number on your account. You can also enter your MRN number if you know it. |
| 7007.wav | Please enter the ten digit phone number. |
| 7008.wav | You have an upcoming appointment on |
| 7009.wav | Press two if you need to cancel |
| 7010.wav | Press one if you would like to confirm this appointment or press two to cancel. |
| 7011.wav | Are you sure you want to cancel this appointment? Press one if yes or two if no. |
| 7012.wav | There was an error confirming your appointment. |
| 7013.wav | Your appointment was successfully confirmed |
| 7014.wav | There was an error cancelling your appointment. |
| 7015.wav | Your appointment was successfully cancelled. |
| 7019.wav | Please enter your MRN. |
| 7020.wav | We did not receive a valid response. |
| 7021.wav | We were unable to find any appointments. Please wait while we connect you with the next available representative. |
| 7022.wav | We were unable to find an account associated with this account number. Please wait while we connect you with the next available representative. |
| 7023.wav | We were unable to find an account associated with this phone number. Please wait while we connect you with the next available representative. |
|  |  |
| 7026.wav | If you would like to confirm or cancel an appointment, please press 1. For all other, please press two. |

# Go Live Steps:

1. Update Pilot Production Applications to use the new main calling script.
2. Set parameter bTesting to false for all pilot applications.

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