

Oline scheduling patient matching

SETTINGS

Clinic chooses one setting for on-line bookings

SCENARIOS
Depends on patient data entered during on-line booking

	Setting 1: Manual approval Manual patient updates	Setting 2: Automatic approval Automatic minor patient updates	Setting 3: Automatic approval Automatic full patient updates
Scenario 1 (new patient): No match on mobile phone	Clinic must approve appointment. Confirmation is sent after approval.	Appointment is approved automatically. New patient record is created. Confirmation is sent immediately.	Appointment is approved automatically. New patient record is created. Confirmation is sent immediately.
Scenario 2 (uncommon): Match on mobile phone, no match on DOB	Clinic must approve appointment. Clinic can choose to update DOB for existing patient, or create new patient. Confirmation is sent after approval.	Clinic must approve appointment. Clinic can choose to update DOB for existing patient, or create new patient. Confirmation is sent after approval.	Appointment is approved automatically. New patient record is created. Clinic can manually merge patients if necessary. Confirmation is sent immediately.
Scenario 3 (uncommon): >1 match on mobile phone+DOB, no single match on other data*	Clinic must approve appointment. Clinic can choose to use one of the existing patients, or create new patient. Confirmation is sent after approval.	Clinic must approve appointment. Clinic can choose to use one of the existing patients, or create new patient. Confirmation is sent after approval.	Appointment is approved automatically. New patient record is created. Clinic can manually merge patients if necessary. Confirmation is sent immediately.
Scenario 4: Match on mobile phone+DOB, other data* also matches	Clinic must approve appointment. Confirmation is sent after approval.	Appointment is approved automatically. Confirmation is sent immediately.	Appointment is approved automatically. Confirmation is sent immediately.
Scenario 5: Match on mobile phone+DOB, other data* is similar**	Clinic must approve appointment. Clinic can choose whether to update other data for existing patient. Confirmation is sent after approval.	Appointment is approved automatically. Other data of matching patient is updated automatically. The system picks the most complete data.*** Confirmation is sent immediately.	Appointment is approved automatically. Other data of matching patient is updated automatically. The system picks the most complete data.*** Confirmation is sent immediately.
Scenario 6: 1 match on mobile phone+DOB, other data* does not match	Clinic must approve appointment. Clinic can choose whether to update other data for existing patient. Confirmation is sent after approval.	Clinic must approve appointment. Clinic can choose whether to update other data for existing patient. Confirmation is sent after approval.	Appointment is approved automatically. Other data of matching patient is updated automatically. The system picks the most complete data.*** If the data are not similar, The data entered during the on-line booking is preferred. Confirmation is sent immediately.

* Other data: sex, initials, first name, last name, email address.

** Other data is similar if there are only differences in punctuation, or one of the values is an extended form of the other. (E.g., 'Jeff' and 'Jeffrey' are similar, but 'Jeff' and 'John', or 'Jeff' and 'Steff' are not.)

*** In case of differences, the system picks the most complete/longest data. (E.g., 'Jeffrey' is preferred over 'Jeff'.)

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	Setting 1: Manual approval Manual patient updates
Scenario 1 (new patient): No match on mobile phone	Clinic must approve appointment. Confirmation is sent after approval.
Scenario 2 (uncommon): Match on mobile phone, no match on DOB	Clinic must approve appointment. Clinic can choose to update DOB for existing patient, or create new patient. Confirmation is sent after approval.
Scenario 3 (uncommon): >1 match on mobile phone+DOB, no single match on other data*	Clinic must approve appointment. Clinic can choose to use one of the existing patients, or create new patient. Confirmation is sent after approval.
Scenario 4: Match on mobile phone+DOB, other data* also matches	Clinic must approve appointment. Confirmation is sent after approval.
Scenario 5: Match on mobile phone+DOB, other data* is similar**	Clinic must approve appointment. Clinic can choose whether to update other data for existing patient. Confirmation is sent after approval.
Scenario 6: 1 match on mobile phone+DOB, other data* does not match	Clinic must approve appointment. Clinic can choose whether to update other data for existing patient. Confirmation is sent after approval.

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	Setting 2: Automatic approval Automatic minor patient updates
Scenario 1 (new patient): No match on mobile phone	Appointment is approved automatically. New patient record is created. Confirmation is sent immediately.
Scenario 2 (uncommon): Match on mobile phone, no match on DOB	Clinic must approve appointment. Clinic can choose to update DOB for existing patient, or create new patient. Confirmation is sent after approval.
Scenario 3 (uncommon): >1 match on mobile phone+DOB, no single match on other data*	Clinic must approve appointment. Clinic can choose to use one of the existing patients, or create new patient. Confirmation is sent after approval.
Scenario 4: Match on mobile phone+DOB, other data* also matches	Appointment is approved automatically. Confirmation is sent immediately.
Scenario 5: Match on mobile phone+DOB, other data* is similar**	Appointment is approved automatically. Other data of matching patient is updated automatically. The system picks the most complete data.*** Confirmation is sent immediately.
Scenario 6: 1 match on mobile phone+DOB, other data* does not match	Clinic must approve appointment. Clinic can choose whether to update other data for existing patient. Confirmation is sent after approval.

* Other data: sex, initials, first name, last name, email address.

** Other data is similar if there are only differences in punctuation, or one of the values is an extended form of the other. (E.g., 'Jeff' and 'Jeffrey' are similar, but 'Jeff' and 'John', or 'Jeff' and 'Steff' are not.)

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	Setting 3: Automatic approval Automatic full patient updates
Scenario 1 (new patient): No match on mobile phone	Appointment is approved automatically. New patient record is created. Confirmation is sent immediately.
Scenario 2 (uncommon): Match on mobile phone, no match on DOB	Appointment is approved automatically. New patient record is created. Clinic can manually merge patients if necessary. Confirmation is sent immediately.
Scenario 3 (uncommon): >1 match on mobile phone+DOB, no single match on other data*	Appointment is approved automatically. New patient record is created. Clinic can manually merge patients if necessary. Confirmation is sent immediately.
Scenario 4: Match on mobile phone+DOB, other data* also matches	Appointment is approved automatically. Confirmation is sent immediately.
Scenario 5: Match on mobile phone+DOB, other data* is similar**	Appointment is approved automatically. Other data of matching patient is updated automatically. The system picks the most complete data.*** Confirmation is sent immediately.
Scenario 6: 1 match on mobile phone+DOB, other data* does not match	Appointment is approved automatically. Other data of matching patient is updated automatically. The system picks the most complete data.*** If the data are not similar, The data entered during the on-line booking is preferred. Confirmation is sent immediately.

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