# Oline scheduling patient matching

**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. | ppointment 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 I mmediately. | 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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| SCENARIOS<br>Depends on patient data entered during on-line booking | Setting 1:<br>Manual approval<br>Manual patient updates |
|---|---|
| Scenario 1 (new patient):<br>No match on mobile phone | Clinic must approve appointment. Confirmation is sent after approval. |
| Scenario 2 (uncommon):<br>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):<br>>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:<br>Match on mobile phone+DOB, other data* also matches | Clinic must approve appointment. Confirmation is sent after approval. |
| Scenario 5:<br>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:<br>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.)

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

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|  | Setting 2:<br>Automatic approval<br>Automatic minor patient updates |
|---|---|
| Scenario 1 (new patient):<br>No match on mobile phone | Appointment is approved automatically. New patient record is created. Confirmation is sent immediately. |
| Scenario 2 (uncommon):<br>Match on mobile phone,<br>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):<br>>1 match on mobile phone+DOB,<br>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:<br>Match on mobile phone+DOB,<br>other data* also matches | Appointment is approved automatically. Confirmation is sent immediately. |
| Scenario 5:<br>Match on mobile phone+DOB,<br>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 I mmediately. |
| Scenario 6:<br>1 match on mobile phone+DOB,<br>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. |

**SCENARIOS**
Depends on patient data entered during on-line booking

 * 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'.)

# Oline scheduling patient matching

| SCENARIOS<br>Depends on patient data entered during on-line booking | Setting 3:<br>Automatic approval<br>Automatic full patient updates |
|---|---|
| Scenario 1 (new patient):<br>No match on mobile phone | ppointment is approved automatically. New patient record is created. Confirmation is sent immediately. |
| Scenario 2 (uncommon):<br>Match on mobile phone,<br>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):<br>>1 match on mobile phone+DOB,<br>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:<br>Match on mobile phone+DOB,<br>other data* also matches | Appointment is approved automatically. Confirmation is sent immediately. |
| Scenario 5:<br>Match on mobile phone+DOB,<br>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:<br>1 match on mobile phone+DOB,<br>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. |

 * 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'.)