Call Details screen overview (single-page guide)

Purpose: Explain every part of the Call Details screen shown in the two snapshots and how staff can use it in one workflow.

Steps

1. **Open the call**
   - Click a call from your queue to open the Call Details screen.
2. **Use the header bar**
   - Select **More info** to view internal details such as Call ID, Copilot line, call time, duration, language, and call reason.
   - Use **Block** to block this number if it is spam. An admin can later unblock it.
   - Click **I am Working on it** to show ownership to your team.
   - Click **Mark as Resolved** when the work is complete, or use the **Status** menu to set Open, In-progress, Resolved, or Resolved No Response.
   - Use **Assign To** to send the call to a teammate. Click **Submit** to notify them by email.
   - Use the **thumbs up** or **thumbs down** icons to give quick AI feedback.
3. **Review caller history on the left**
   - Scroll the **left panel** to see all past calls and SMS from this phone number with time and status badges (Open, Resolved, and others).
   - Click any entry if you need to open a past interaction.
4. **Read the transcript in the center**
   - The **center panel** shows the full conversation between the Copilot and the caller.
   - Click the **play** icon next to any bubble to hear that exact part of the audio.
   - Use the **copy** icon on a bubble if you need the exact text.
5. **Listen to the full recording**
   - At the very bottom of the center panel, use the **audio player** to play the entire call recording.
6. **Scan the AI summary and requests on the right**
   - At the top of the **right panel**, confirm **Patient Info** such as DOB, patient ID, insurance ID, email, and phone. Use copy icons to copy values.
   - Read the **Summary** card to understand the call outcome in seconds. The example shows a three and a half minute call that the Copilot resolved.
   - Open **PII Data** to check key identity details captured in the call.
   - Review **Open message for office** if the patient left questions or messages.
   - Open **Request – Need Appointment** to see structured details such as reason (for example, Regular check-up) and provider (for example, Dr. John Foster).

- Open **Request – Confirm Appointment** to see if a confirmation is needed or already done.
- Use the **Audit Trail** button to view any automated actions or messages sent by the Copilot.

7. **Add Staff Comments**
   - At the lower part of the screen, type your note in **Staff Comments** and click **Save**. Examples: updates, call outcomes, or instructions for a teammate.
8. **Optional quick actions**
   - Use the **phone** button to call the patient back from this screen.
   - Use the **message** button to open SMS chat with the patient. You can send messages, receive replies, and download images the patient sends.

What you will see on this page

- **Header bar** with More info, Block, I am Working on it, Mark as Resolved, feedback icons, Status menu, Assign To, and caller details.
- **Left panel** with a timeline of this caller's past calls and SMS, grouped by date, each with a status tag.
- **Center panel** with the transcript bubbles, per-line **play** controls, and a **full recording** player at the bottom.
- **Right panel** with Patient Info, Summary, PII Data, Open message for office, Request cards for appointments, and an **Audit Trail** button.
- **Staff Comments** input and **Save** button.
- **Floating phone and message icons** for quick call back and SMS.

Tips and good practice

- Read the **Summary** first. It gives you the outcome in seconds and often removes the need to play the full call.
- Use **per-line play** only when you must verify wording such as names, dates, or instructions.
- Set **Status** and **Assign To** before you leave the page so teammates know the next step.
- Use **copy icons** for Patient Info to paste clean data into your EHR.
- Check the **Audit Trail** before sending a new SMS to avoid duplicate messages.
- Add a short **Staff Comment** when you hand off a call so the next person has context.

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