

SimboVara Workflow Customization: Build Appointment Workflow Questions - Admin Panel

Purpose

Define how Copilot books or collects details for new and follow-up appointments.

Where to edit: Appointment Workflow Questions

Suggested questions and conditions

- Is the caller an existing patient with us or a new patient
- What is the reason for the appointment
- With which doctor or department do they need to schedule the appointment
- ****If the patient says they are a new patient**, please transfer the call to XXX-XXX-XXXX**

Steps

1. Enter the questions and the new-patient transfer rule.
2. Replace the placeholder transfer number with your own.
3. Click **Save** and test.

Tips and Good practices

- Keep the “reason for visit” prompt simple to increase completion rates.
- Route new patients to a dedicated line if your intake requires extra steps.

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