

# SimboVara Workflow Customization: Build Medical Records Workflow Questions - Admin Panel

## Purpose

Control how Copilot handles medical records requests.

**Where to edit:** Medical Records Workflow Questions

## Suggested questions and conditions

- What type of records are requested: full medical record or a specific visit
- What is the mode of delivery. We support secure email, physical copy, patient portal, and fax
- What is the purpose for the requested medical records. Is it for continuity of care, personal use, legal purposes, or another purpose

## Steps

1. Enter the lines above and modify to match your policy.
2. If you want certain cases transferred to a team, add a rule line such as “If the request is for legal purposes, transfer to .”
3. Click **Save**.

## Tips and Good practices

- Mention acceptable delivery methods exactly as your practice supports them.
- Add turnaround times in this section if you want Copilot to share them.

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Revision #3

Created 18 September 2025 04:40:47 by Admin

Updated 18 September 2025 05:39:50 by Admin