

SimboVara Workflow Customization: Build Refill Workflow Questions - Admin Panel

Purpose

Define how Copilot gathers prescription refill details and when to escalate.

Where to edit: Refill Workflow Questions

Suggested questions and conditions

Paste and adapt the following example lines:

- Which medications would the caller like to refill
- Who is the caller's doctor
- Confirm their pharmacy name and location
- Confirm if their insurance is the same or has changed
- ****If the patient says their insurance has changed**, please transfer the call to XXX-XXX-XXXX**

Steps

1. Enter the questions and any transfer rules in plain English, one per line.
2. Replace the placeholder transfer number with your own.
3. Click **Save** and place a test call.

Tips and Good practices

- Ask for medication names exactly as on the bottle.
 - Always confirm pharmacy location to avoid misrouting.
 - Use a transfer rule for insurance changes so staff can update records immediately.
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