



## iTrust Wiki

### UC22 Flow of Events for the Schedule Appointments Use Case

#### 22.1 Preconditions:

The iTrust user (patient, LHCP) or administrator has authenticated himself or herself in the iTrust Medical Records system (UC3), (UC2).

#### 22.2 Main Flow:

An administrator can manage a standardized list of appointment types [S1]. An LHCP can schedule an appointment with a patient [S2]. A patient can request to schedule an appointment with an LHCP [S3]. Both patients and LHCPs can view a list of their upcoming appointments [S4]. An LHCP can view a list of their upcoming appointment requests [S5]. LHCP's can edit or delete future appointments [S6]. The LHCP is notified if a new or edited appointment time conflicts with another existing appointment [S7].

#### 22.3 Sub-flows:

- [S1] The system shall enable the administrator to (1) add a new entry for an appointment type, including its type name with up to 30 alpha characters and duration in the unit of minutes [E1], and (2) modify the duration in an existing entry [E1]. A new entry shall not have the same type name as that of any existing entry [E1]. Note that the administrator is not allowed through the system interface to delete an existing entry or modify the appointment type name in an existing entry.
- [S2] The LHCP chooses to schedule an appointment with a patient (it is assumed that the LHCP and patient have already worked out the details of the appointment in person or via telephone outside of the system). The LHCP enters the patient MID [E4], selects the type of appointment from a pull-down menu of the existing appointment types, enter the appointment date and start time (only a date/time equal or after the current date/time is allowed)[E3] (the user interface shall provide both the option of typing in a specific date in the date format and the option of selecting a date from a calendar for the current month), enter comment (optional) up to 1000 characters such as reason for the appointment [E1].
- [S3] The Patient chooses to request an appointment with an LHCP. The patient selects an LHCP from his or her provider list. The patient selects the type of appointment from a pull-down menu of the existing appointment types, enter the appointment date and start time (only a date/time equal or after the current date/time is allowed)[E3]. If the requested appointment time does not conflict with any existing appointment for the LHCP, the request is saved. If the requested appointment time does conflict with an existing appointments, the patient is presented with a list of the three next non-overlapping available appointment times within 7 days of the requested date. The patient selects one of these appointments and the request is saved.
- [S4] A user (an LHCP or patient) wishes to view a list of his or her upcoming appointments (i.e., a list including appointments whose appointment date and start time is equal or later than the current date/time). The user chooses to open his or her upcoming appointment list. Each row in the list includes the appointment type, appointment date and start time, duration, and the name of either the patient (only for the user being an LHCP) or the LHCP (only for the user being a patient). The appointments in the list shall be ordered by appointment date and start time, the soonest upcoming first. The row for each conflicting appointment is highlighted in bold (a conflicting appointment is one that has overlap in its appointment duration period with that of at least another appointment of the same user). When viewing the calendar, the user selects an appointment from the list to read comment by clicking the "Read Comment" link beside the row for the appointment, and then the comment for the appointment shall be displayed in a new page [E2].
- [S5] **An LHCP views a list of pending appointment requests. Each appointment request is listed as being pending, approved, or rejected. The LHCP is presented with an option to approve or reject each pending appointment request. When the LHCP approves or rejects an appointment request, a message is sent to the**

**Patient indicating the requests's status. When the date of an appointment request has passed, it is no longer displayed.**

- [S6] When an LHCP views a list of his or her upcoming appointments, they are presented with an option to edit or remove the appointment. The LHCP is unable to edit or remove any past appointments. [E3]
- [S7] When an LHCP adds a new appointment [S2] or edits the date or time of an existing appointment [S4], the LHCP is notified of any existing appointments that occur during the same time. The LHCP is presented with a list of other appointments that conflict with the new one. The LHCP may choose to override this warning and confirm the date and time or may cancel and return to referring page.

#### 22.4 Alternative Flows:

- [E1] The user inputs invalid information and is prompted to try again.
- [E2] The comment is empty and the text “No Comment” (without link) is displayed instead of the “Read Comment” link.
- [E3] The date for the appointment is in the past, an error message is displayed and the appointment is not edited.
- [E4] The user inputs the MID of a patient who is deceased and is prompted to try again.

#### 22.5 Logging

Transaction Code	Verbose Description	Logged In MID	Secondary MID	Use Case(s) Involved	Type of Transaction	Additional Information	Patient Viewable
2200	Add Appointment Type Listing	Admin	[empty]	22	Add	None	No
2201	View Appointment Type Listing	Admin	[empty]	22	View	None	No
2202	Edit Appointment Type Listing	Admin	[empty]	22	Edit	None	No
2210	Schedule Appointment	LHCP	Patient	22	Add	None	Yes
2211	View Scheduled Appointment	LHCP Patient	Patient LHCP	22	View	None	Yes
2212	Edit Scheduled Appointment	LHCP	Patient	22	Edit	None	Yes
2213	Delete Scheduled Appointment	LHCP	Patient	22	Delete	None	Yes
2220	View Scheduled Appointments	LHCP Patient	[empty]	22	View	None	Yes
2230	Schedule conflict override	LHCP	Patient	22	Edit	None	Yes
2240	Appointment Request submitted	Patient	LHCP	22	Add	None	Yes

2250	Appointment Request approved	LHCP	Patient	22	Edit	None	Yes
2251	Appointment Request rejected	LHCP	Patient	22	Edit	None	Yes

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