What is kept, what is out of reach

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Fictional document

> **Fictional document — demonstration example**
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> **Fictional document**, produced for demonstration. **Clinical content is not kept because it is not accessible** — an installation choice, not an unticked box.

Item	Kept?	Why
Appointment requests and what followed	**Yes**	Administrative follow-up
Missing administrative documents	**Yes**	**Chasing and fixing the form**
Letters awaiting attachment	**Yes**	Not losing them
Emergency stops, time and wording	**Yes**	**The practice must be able to reread**
Slots offered	**Yes**	Avoiding pointless calls
Medical record content	**Out of reach**	**Access not opened to the agent**

Item	Kept?	Why
Reason for consultation	**Out of reach**	**Same**
Ranking of patients by priority	**Impossible**	**Would be a medical act**
Statistics per clinician	**No**	**Unrelated to the organisation**

> **Emergency stops are the only exchanges where the agent interrupts a patient.** That is why they are kept word for word: the practice must be able to check what was said and that the call back happened.

What the monthly summary contains

Content	What it indicates
Most frequent administrative reasons	What could be self-service
Documents most often missing	**A form to revisit**
Emergency stops and what followed	**That the circuit worked**

To be set by the practice

Retention period for administrative requests: _____ months

Retention period for emergency stops and what followed: _____ months

These periods sit within the health-data hosting arrangements chosen by the practice, and they are not proposed by default.

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Request a demo with your own documents

This document is a fictitious example. To see the agent work on your own documents, request a demo from its page.

https://bluelemonagent.ai/en/entreprises/cas-usage/agent-ia-secretariat-medical

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