VMER SFDC-DRX Backend Flow Documentation

1. Onboarding of Insurer/TPA

- Business will onboard Insurer/TPA directly on Salesforce (SFDC).
- A functionality will be available to:
  - Create Business Account
  - Enter all necessary details
  - Upload test code mappings, relevant documents, and MER question sets

2. User Creation for PPMC Portal

- After onboarding, create users under three categories:
  - **Insurer**: View dashboards/reports for incidents/cases under their account
  - **Agent**: Create and view their own incidents/cases
  - **Admin**: Full access to all insurer-related incidents/cases

3 Bulk Case Creation by Agent

- Agents can bulk upload case data using a predefined sample format downloadable from the portal.

4. Build Use Cases

- The system supports:
  - a) Video MER / MER / Tele MER / Insta MER
  - b) MER + Lab Tests
  - c) Video/Tele/Insta MER + Lab Tests
  - d) Lab Tests only
- **Current scope is limited to Video MER only.**

5. Case Routing & Slot Confirmation

- MER Case created with:
  - Record Type = PPMC
  - Case Reason = Calling to be done

- Appointment Status = New
  - Case Status = New
- Routed to PPMC **Calling** queue
- Agents confirm slots with customer and doctor:
  - Use CTA: **Check Slots** → Calls DRx BE Slot API
  - Custom UI for agents to select slots

6. Appointment Booking Process

- After confirmation from both parties:
  - Mark Case Reason = Appointment Confirmed
  - Change Case & Appointment Status to "Working"
  - CTA: **Book/Reschedule/Follow up Appt** → Calls DRx BE API
- On success:
  - SFDC receives Appointment ID and Status
  - Updates Case Reason to "Appointment Booked"
  - Routes to queue: **Booked PPMC Appointments**

7. Appointment Cancellation

- If canceled by customer:
  - Case Reason = Appointment Cancelled
  - Cancellation Reason = Cancelled by customer
  - Status = Appointment Cancelled
  - Case is closed

8. Case Update Notifications

- SFDC sends update events to DRx BE
- A GET API is provided for status/data fetching

9. Appointment Rescheduling

- **Pre-Appointment Reschedule**:
  - Case Reason = Reschedule Requested → Return to queue
  - After reconfirmation: Case Reason = Reschedule Confirmed

- o   CTA initiates rescheduling via API
- **Post-Appointment Reschedule**:
  - o   If call not started → moved to list: "Pending Appointments"
  - o   If call started → status = "In Progress"
  - o   If not completed → status = "Incomplete" and moved to "Incomplete Appointments" list view/tab
  - o   Agent restarts the rescheduling process

10. Appointment Completion

- Doctor fills MER form → status: **MER Recorded**
- DRx generates Video URL & MER doc → sends via **PPMC File Upload Service API**
- Updates case:
  - o   Case Reason = Sent to QC
  - o   Moves to queue: **PPMC QC Queue**
- On failure: Case remains as "MER Recorded"

11. Quality Check (QC) Process

- QC can mark:
  - o   **QC Approved**: Closes case + triggers API callouts
  - o   **Referred to Doctor**: Event sent to DRx BE
- QC cannot approve unless all responses are positive

12. Referred to Doctor Flow

- Doctor reviews QC comments, updates MER form or requests follow-up
  - o   On update: New form sent → repeats steps from **Appointment Completion**
  - o   On follow-up: Case moves to Agent queue
    - ▪   Case Reason = Follow Up Scheduled
    - ▪   CTA calls API with intent = Follow Up
    - ▪   DRx stamps new appointment ID
    - ▪   Follow-up proceeds like new appointment

Apex Classes Used

- PPMCBeforeUpdateIterator
- PPMCCaseUpdateManager
- PPMCGetCaseDetails
- PPMCIncidentHandler
- PPMCOwnerAssignmentController
- PPMCRecordsController
- PPMCSlotHandler

Lightning Web Components (LWC)

- PPMCDetailsPage
- PpmcQCSection