

☒ PATIENT PERSONA CARD #1: The "New Insurance" Oversight

Patient Name: Robert Caldwell **Current Demeanor:** Friendly, but in a rush.

Your Role (Actor Instructions): You are having a good day but you have a meeting to get back to right after this appointment. When you approach the desk, hand the administrator your driver's license and an insurance card.

- **The Catch:** If they ask if your insurance is the same, just say "Yes." However, the insurance card you handed them is expired (from your old job).
- **If they catch it (Audit Phase):** Say, *"Oh! You know what, my company switched providers on the 1st. Let me find the new one on my phone."*
- **If they don't catch it:** Allow the role-play to finish, then point it out during the feedback phase.

Expected Administrator Action: The administrator must actively **Audit** the physical insurance card against the EHR screen, notice the mismatched Group ID/Expiration Date, successfully prompt you for the new information, and update the EHR sandbox.

☒ PATIENT PERSONA CARD #2: The Frustrated Waiter

Patient Name: Sarah Jenkins **Current Demeanor:** Highly agitated, stressed, and visibly annoyed.

Your Role (Actor Instructions): You have been stuck in clinic traffic and had trouble finding parking. Approach the desk with a heavy sigh. Do not immediately say hello.

- **Your Opening Line:** *"I'm late, I know. Traffic was a nightmare. Am I going to lose my appointment? I really can't reschedule this."*
- **The Catch:** You forgot to fill out your mandatory annual consent forms online.
- **When asked for forms/co-pay (Acquire Phase):** Push back slightly. *"Can't I just do that after? I need to get back there before the doctor leaves."*

Expected Administrator Action: The administrator must successfully use a scripted de-escalation tone during the **Acknowledge** phase to calm you down. They must stand their ground professionally during the **Acquire** phase to get the necessary signatures before moving to the **Advance** step, while reassuring you about your appointment status.

☒ PATIENT PERSONA CARD #3: The "Silent Mover"

Patient Name: David Ortiz **Current Demeanor:** Quiet, compliant, and brief with answers.

Your Role (Actor Instructions): You are a very straightforward patient. Hand over your ID and insurance card immediately when you walk up to the desk.

- **The Catch:** You moved apartments two weeks ago.
 - **If the admin asks, "Is all your information the same?":** Just nod and say, "Yep."
 - **If the admin actively asks, "What is your current address?" (Audit Phase):** Tell them your new address: "445 West Elm Street, Apt 2B." **Expected Administrator Action:** This tests the administrator's phrasing during the **Audit** step. They must ask an open-ended demographic question rather than a yes/no question. If asked correctly, they must navigate the EHR to update the demographic fields.
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☒ PATIENT PERSONA CARD #4: The Distracted Multitasker

Patient Name: Emily Chen **Current Demeanor:** Distracted, talking loudly on a cell phone, slightly dismissive.

Your Role (Actor Instructions): Approach the desk while holding your phone to your ear, actively having a fake conversation about dinner plans.

- **The Catch:** You slide your ID across the desk but keep talking on the phone, ignoring the administrator's initial greeting. You also have a \$50 past-due balance on your account.
- **If the admin tries to interrupt you:** Hold up a single finger (the "one minute" gesture) and keep talking for another 10 seconds before putting the phone down with an annoyed, "Hold on, the receptionist needs something. Yes? What do you need?"

Expected Administrator Action: The administrator must maintain professional composure and eye contact during the **Acknowledge** phase, waiting for your attention without becoming visibly frustrated. They must successfully navigate the EHR to find the \$50 balance and diplomatically collect it during the **Acquire** phase.

☒ PATIENT PERSONA CARD #5: The Missing Identity

Patient Name: Michael Vance **Current Demeanor:** Apologetic and slightly embarrassed.

Your Role (Actor Instructions): Walk up to the desk and start digging through your pockets/bag frantically.

- **The Catch:** You left your physical wallet at home. You do not have your physical Driver's License or Insurance Card.

- **Your Opening Line:** *"I am so sorry. I left my wallet on my kitchen counter. I have my insurance card on my provider's mobile app, but I don't have my photo ID. Can we just skip that? I've been coming here for five years, you guys know me."*

Expected Administrator Action: The administrator must adhere strictly to the **Authenticate** protocol. They must professionally explain that a photo ID is required for medical identity safety. They must navigate the EHR to check if a valid photo is already securely on file to verify against your face, or utilize the clinic's approved contingency script for missing IDs, without breaking protocol just because you are a "regular."