

Enabling the VINSI Scheduling Assistant in your Epic environment

Configuration inside your existing Epic environment — no user licenses, no MyChart access, no software installation on your side.

VINSI is a backend SMART on FHIR application registered through Epic on FHIR (open.epic / fhir.epic.com). It uses OAuth 2.0 Backend Services (client credentials with signed JWT) to look up patients and assist with appointment scheduling on behalf of your organization's call center.

If any step is unfamiliar, your assigned **Epic Technical Services (TS) representative** can walk your team through it. Relevant Galaxy documentation topics are "*open.epic Client IDs*," "*SMART Backend Services Authentication*," and "*Appointment \$find and \$book*."

REFERENCE

What VINSI provides you

Application name	VINSI AI Scheduling Assistant
Production Client ID	dfad258d-8069-42bc-a500-b094d9d9bfa4
Non-Production Client ID	49d193bd-cb41-4856-b811-c246ce7d0f6c (use for TST / POC testing)
JWK Set URL — production	https://dashboard.vinsi.ai/api/epic/jwks-prod
JWK Set URL — non-production	https://dashboard.vinsi.ai/api/epic/jwks
Authentication	OAuth 2.0 Backend Services — RS384-signed JWT client assertion
APIs used	Patient.Read / Search (R4), Appointment.Read / Search (R4), Slot.Read (STU3), Appointment.\$find / \$book (STU3)

Because the app is registered on fhir.epic.com, the client record — including the API list and JWK Set URL for signature verification — syncs to your environment automatically. Your team does not enter key material manually.

STEP 1

Locate and activate the client record

Who: Epic client systems administrator / Interconnect administrator

1. In your Epic environment's client management tooling (App Market / open.epic client administration), refresh or download the latest client definitions from Epic. Apps marked ready for production on fhir.epic.com sync down automatically, typically within a day.
2. Search for the Client ID above and **activate it** for the target environment. Start with a **non-production environment** (TST or POC) using the Non-Production Client ID.
3. Confirm the client's authentication is set to backend OAuth 2.0 (JWT) and that the JWK Set URL from the synced record is present. Your Interconnect server must be able to reach `https://dashboard.vinsi.ai` outbound to fetch the public keys.

STEP 2

Enable the web services

Who: Interconnect administrator

Verify the FHIR resources listed above are enabled on the Interconnect instance that serves your FHIR endpoints. Patient and Appointment read/search are standard; the scheduling operations (\$find / \$book) may need to be switched on if your organization has not exposed them before.

STEP 3

Scheduling configuration (Cadence)

Who: Cadence (scheduling) analyst

This is the step that requires real decisions. Epic's Appointment.\$find operation returns openings based on your organization's scheduling build, so your Cadence team controls exactly what the VINSI assistant can see and book.

4. Decide which **departments, providers, and visit types** the assistant may schedule into (e.g., established-patient office visits at specific clinics; typically not procedures or new-patient specialty visits at first).

5. Configure or verify the automated scheduling build (decision trees / templates used by \$find) for those visit types.
1. Send VINSI the **service type codes (and their OID system)** for each bookable visit type. These are organization-specific and the assistant passes them in every \$find call.

STEP 4

Send VINSI your connection details

Reply to your VINSI contact (epic@vinsi.ai) with:

- ☐ FHIR base URLs for the test environment — R4 and STU3, e.g.
<https://epicproxy.yourhospital.org/FHIR-TST/api/FHIR/R4/>
- ☐ OAuth token endpoint URL for that environment
- ☐ Service type codes + OID system from Step 3
- ☐ A few test patients in the test environment (name, DOB, phone) we can use for lookup and booking validation
- ☐ A technical contact for the joint test session

STEP 5

Joint testing, then production

2. VINSI points its integration at your test environment and, together with your team, validates: patient lookup, appointment retrieval, slot search, and booking (including how booked appointments appear to your schedulers).
3. Once sign-off is complete, repeat Step 1 in your **production** environment using the Production Client ID, and send the production FHIR / token URLs.
4. Go-live is typically staged: read-only (lookup + appointment reminders) first, booking enabled after a monitored period.

FOR YOUR SECURITY REVIEW TEAM

Security notes

- **Authentication is asymmetric.** VINSI signs each token request with a private key; Epic verifies it against the public key at the JWK Set URL. No shared secrets or passwords exist.

- **Scoped access.** VINSI holds only the APIs listed above. Scheduling is further limited to the departments and visit types your Cadence team exposes in Step 3.
- **Standard audit trail.** All access is server-to-server over TLS and appears in your standard Epic web-service audit logs under this client ID.
- **BAA + documentation.** VINSI executes a BAA prior to any PHI access and provides its current security documentation on request.
- **Revocation.** You may deactivate the VINSI client ID in your Epic environment at any time. No further access is possible after revocation.

QUESTIONS

Reach out to epic@vinsi.ai for activation questions or security@vinsi.ai for security-review documentation.