



Virtual Conversations Module User Guide



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Welcome to the Qliqsoft Virtual Conversations Module User Guide.

The purpose of this document is to provide our internal users with a comprehensive and focused explanation of how the Virtual Conversations Module functions. This document was prepared with the goal of providing QliqSOFT internal users the information to become fully competent in understanding what Virtual Conversations are, what purpose they serve in the QliqSOFT ecosystem, what each functionality does and how to configure them.

Disclaimer: Please be advised that the content covered in this document features all relevant information related to the Virtual Conversations Module. This part of the software is still under development, and any and all content is subject to change.

1: Introduction to Virtual Conversations

What is the Virtual Conversations Module, and what are its uses?

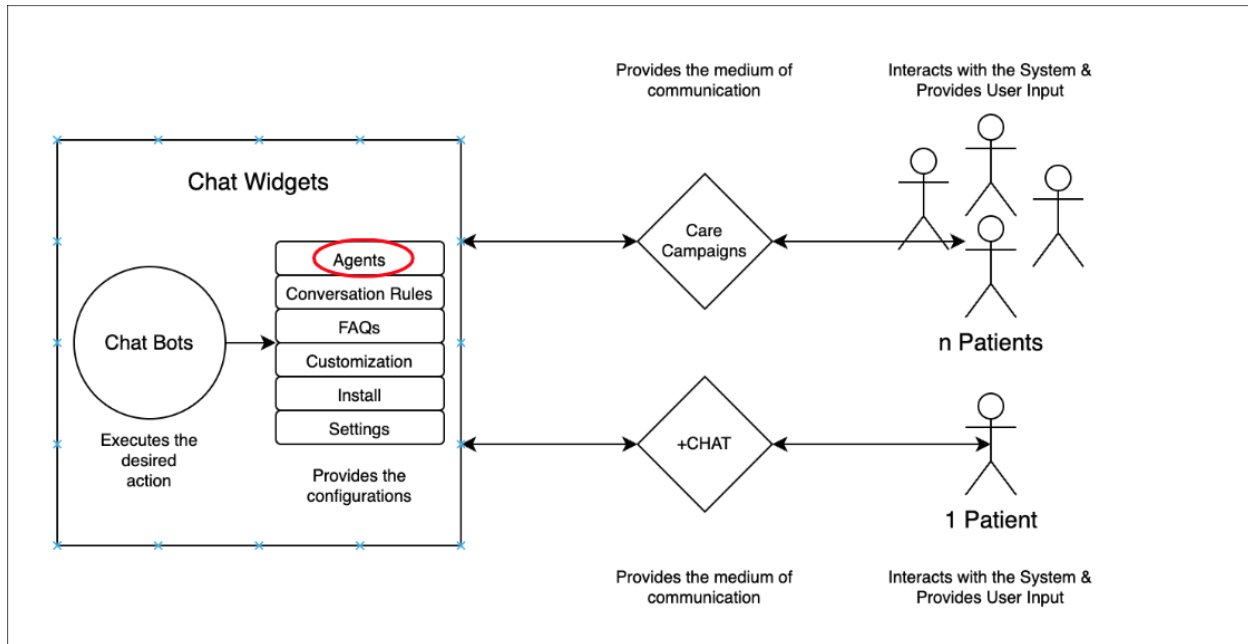
The Virtual Conversations Module provides the backbone for all one-to-one patient outreach in the QliqSOFT ecosystem. The core functions of Virtual Conversations is to connect an organization's Agents with their Patients and provide them with the necessary communication tools to solve each Patient's problems.

The Virtual Conversations Module is used to connect with Patients using the following modes of communication:

- Message-Based Chats
- Voice Call
- Video Chats

The following graph illustrates how the +CHAT (Virtual Conversations) is used to connect each Patient with the Chat Widget. When a Chat Widget has an assigned Agent who's responsible for connecting with Patients, it redirects Patients to the Agent when they either request to be transferred to an Agent (technical name: Escalate to Agent), or are automatically redirected to

an Agent due to the Chat Widget Configuration. Alternatively, an Agent may also conduct a manual takeover of the Virtual Conversation and reassign it to a bot after they are done.



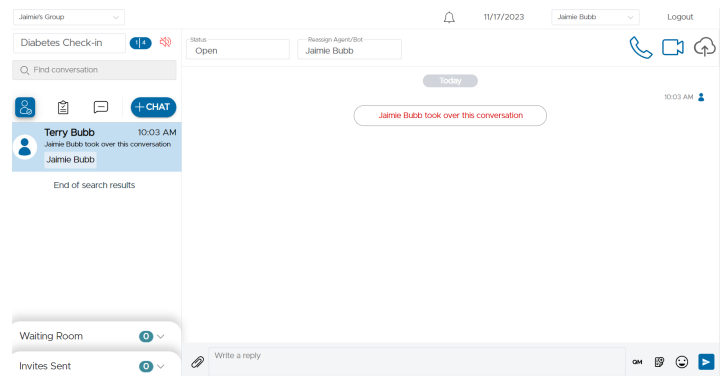
2: Functional Breakdown of the Virtual Conversations Module

1.Virtual Conversations Landing Page

The Virtual Conversations Landing Page is the first page users interact with when they navigate to the module. This page provides users with the necessary tools and information to connect with and fulfill the needs of Patients

The Virtual Conversations Landing Page Contains the following features:

- Conversation Management
 - Widget Selector
 - Notification Badge
 - Mute Conversation Chimes (Button)
 - Find Conversation (Search Bar)
- Virtual Conversations
 - Assigned to Me (Tab)



- Opened Conversations (Tab)
 - Closed Conversations (Tab)
 - +CHAT (Button)
 - Waiting Room (Subsection)
 - Invites Sent (Subsection)
- Virtual Conversation Configuration Panel
 - Conversation Status Selector
 - Reassign Agent/Bot Selector
 - Voice Call (Button)
 - Video Chat (Button)
 - Upload Conversation to EMR (Button)
- Conversation Details
- Messaging Options
 - Attach File (Button)
 - Message Text Box
 - Quick Message Selector
 - Quick Form Selector
 - Emoji Selector
 - Send Message (Button)

2. Virtual Conversations Overview & Application

The Virtual Conversation Overview & Application section will focus on providing information on the following subjects:

- **Overview:** Details of each functionality.
- **Application:** How to apply functionality information in creating a Virtual Conversation.

By analyzing and applying this information, all users should reach a level of understanding and competence in operating the Virtual Conversations Module.

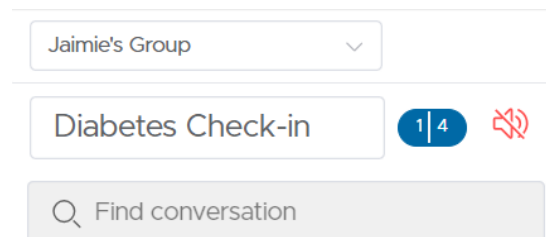
Note: The content covered in this document that is related to other Modules should be covered in conjunction with the user documentation of these modules. When necessary, this document will indicate which user guide to refer to obtain more information.

Conversation Management

Overview

The Conversation Management section provides users with the ability to perform the following actions:

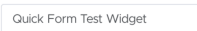
- Set the Chat Widget currently being used by the Virtual Conversations Module
- View notification badge-able to select to view (left number=Unread Messages, right number=New Assignments)
- Toggle Conversation Chimes on/off
- Search the Virtual Conversation records associated with the Chat Widget.



Actions

To perform all the following actions in the Conversation Management section, complete the following steps:

Set the Chat Widget

1. Identify the desired Chat Widget you'd like to switch to
2. Click the Widget Selector  and select your desired Chat Widget


Notification badge

1. Left side number indicates the number of Unread Messages. User can click on number to view these messages
2. Right side number indicates the number of New Assignments. User can click on number to view these messages.

Toggle Chimes on/off

1. Click on the  icon to toggle the conversation chime on/off

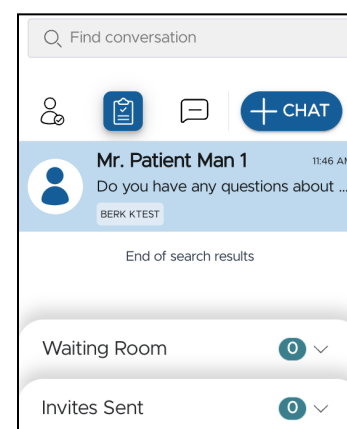
Search Virtual Conversations

1. Identify the Patient whose Virtual Conversation you'd like to view
2. Click on the  search bar, type the Patient's name and press enter.

Virtual Conversations

Overview

The Virtual Conversations section provides the user with the ability to perform the following actions:




- View all virtual conversations assigned to the user in the Assigned to Me Tab.
- View all virtual conversations in the All Conversations Tab.
- View all closed virtual conversations in the Closed Conversations Tab.
- Send a Patient Outreach request using the +CHAT button.
- View all Patients who are waiting to be assigned to an Agent in the Waiting Room subsection.
- View all Patient Outreach invites sent by the user using the Invites Sent subsection.

Actions


View All Virtual Conversations Assigned to the User

1. Click on the  button to display all the Virtual Conversations assigned to the Agent


View All Virtual Conversations in the Chat Widget

1. Click on the  button to display all the Virtual Conversations in the Chat Widget

View All Closed Virtual Conversations in the Chat Widget

1. Click on the  button to display all Closed Virtual Conversations in the Chat Widget

Send a Patient Outreach Request Using the +CHAT Button

1. Click on the  button to bring up the Search Patient Screen
2. Determine whether the Patient is a repeating customer or a first time visitor. If the patient is a visiting customer, use the search criteria toggle to search the Patient in the Patient database. For this tutorial, the Patient was identified in the database using their phone number. If a first time visitor, the user can click 'Create new' button to add a new patient. The comprehensive list of Patient search criteria are as follows:
 - Last Name
 - First Name
 - Email
 - Phone Number
3. Once the Patient is identified, click on the select button to highlight their Name with associated phone number (or email) to proceed with the Patient Outreach. If the user would like to email the patient,

Start a Conversation

Search for a patient

Jaimie Bubb

+13128239340

Create new

☐ Private Conversation ?

Start a Conversation

Search for a patient

Jaimie Bubb +13128239340

×

Create new

Jaimie Bubb +13128239340

Jaimie Bubb from Jaimie's Group would like to start a secure conversation with you. Please click the link to accept.

116 / 250

No PHI here - this will be sent over SMS

Jaimie Bubb will receive the above text message followed by a link.
 ⓘ When they click the link they will be redirected to a secure conversation with you.

Start Conversation

☐ Private Conversation ?

click on the patient's name/mobile number to toggle to email.

- Once the Patient information is confirmed, use the Outreach message to determine the mode of communication for the Patient Outreach.

If the user wants to contact the Patient via text message, then the user must make sure that the Chat Widget has an associated sender number configured to it in the Chat Widget Module>Settings>SMS Numbers *(For detailed information on this setting configuration, refer to the Settings Configuration in the Chat Widgets User Guide).*

Once the user has configured the Patient Outreach methods, they must then insert their organization's designated Patient Outreach messages into the Text subject box. After the Patient Outreach message has been configured, the user can choose to auto-translate the message to a target language that is accepted by the Chat Widget.

Note: While the QliqSOFT platform offers a large variety of languages to translate the Patient Outreach Message to, it must be noted that the Chat Widget will display the foreign languages that it is configured to operate in. However, this feature doesn't prevent the Agent from communicating with the patient in their desired language.

- When all configurations are finalized, click the **Start Conversation** button to initiate the Patient Outreach.

Note: It is possible to designate the conversation as a Private Conversation, making its contents confidential under HIPAA Standards. As this is the default setting, please note by marking as private, other agents will be unable to view these conversations.

Start a Conversation

Search for a patient

Jaimie Bubb +13128239340

☒ My Patients ?

English

Text subject

Jaimie Bubb from Jaimie's Group would like to start a secure conversation with you. Please click the link to accept.

116 / 250

No PHI here - this will be sent over SMS

Jaimie Bubb will receive the above text message followed by a link.

① When they click the link they will be redirected to a secure conversation with you.




Start Conversation



☐ Private Conversation ?

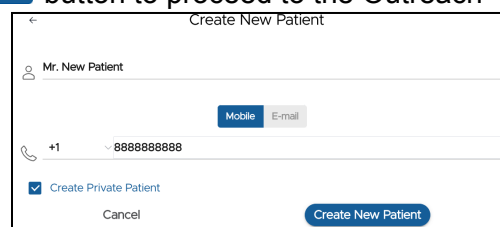
Creating a New Patient using the +CHAT Button

If the Patient the Patient Outreach will be sent to is going to be connecting with an Agent for the first time, then the user must first add them to the system.

To add a new Patient to the organization records, complete the following steps:

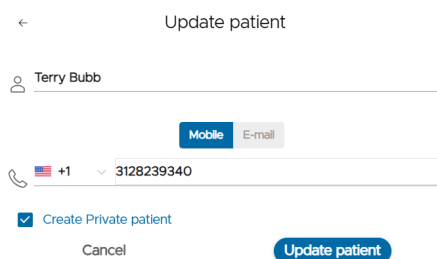
1. Click the  button in the Virtual Conversations section to bring up the Patient Search popup.
2. Click the  button to start adding a new Patient to the organization records.
3. Enter the new Patient's full name, their mobile number and their email (optional) in the Create New Patient popup. If the user wants to designate the new Patient as a Private Patient, they can do so by checking the  **Create Private patient** box
Note: It is possible to designate the patient as a Private patient. Please note by marking as private, other agents will be unable to search/converse for this patient.

4. Click the  button to save the patient credentials and proceed to the Patient confirmation on the Search Patient popup.
5. Confirm Patient Information by clicking the  button to proceed to the Outreach Message configuration screen.
6. Once the Patient information is confirmed, use the Outreach message to determine the mode of communication for the Patient Outreach.



The 'Create New Patient' popup form contains the following fields and options: a name field with 'Mr. New Patient', a contact type selector with 'Mobile' and 'E-mail' buttons, a phone number field with a dropdown for country code '+1' and the number '8888888888', a checkbox for 'Create Private Patient' which is checked, and 'Cancel' and 'Create New Patient' buttons at the bottom.

If the user wants to contact the Patient via text message, then the user must make sure that the Chat Widget has an associated sender number configured to it in the Chat Widget Module>Settings>SMS Numbers (For detailed information on this setting configuration, refer to the Settings Configuration table in p.18 of the Chat Widgets User Guide).



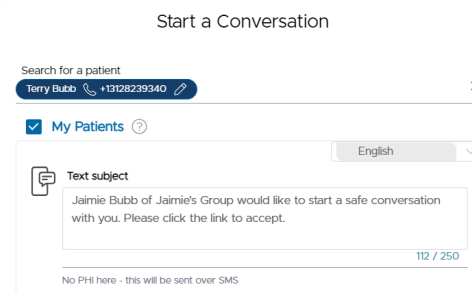
The 'Update patient' form shows a patient named 'Terry Bubb'. It includes a contact type selector with 'Mobile' and 'E-mail' buttons, a phone number field with a dropdown for country code '+1' and the number '3128239340', a checkbox for 'Create Private patient' which is checked, and 'Cancel' and 'Update patient' buttons at the bottom.

From the Update patient box, the user can toggle to either "Mobile" (text to phone) or "E-mail" if email is preferred.

Once the user has configured the Patient Outreach methods, they must then insert their organization's designated Patient Outreach messages into the

message boxes. After the Patient Outreach message has been configured, the user can choose to auto-translate the message to a target language that is accepted by the Chat Widget.

Note: While the QliqSOFT platform offers a large variety of languages to translate the Patient Outreach Message to, it must be noted that the Chat Widget will display the foreign languages that it is configured to operate in. However, this feature doesn't prevent the Agent from communicating with the patient in their desired language.



The 'Start a Conversation' popup shows a search bar with 'Terry Bubb' and '+13128239340'. Below the search bar is a checkbox for 'My Patients' which is checked. A dropdown menu shows 'English'. A text box contains the message: 'Jaimie Bubb of Jaimie's Group would like to start a safe conversation with you. Please click the link to accept.' At the bottom, it says '112 / 250' and 'No PHI here - this will be sent over SMS'.

- When all configurations are finalized, click the [Start Conversation](#) button to initiate the Patient Outreach.

Note: It is possible to designate the conversation as a Private Conversation, making its contents confidential under HIPAA Standards

View and Admit Patients into Virtual Conversations from the Waiting Room

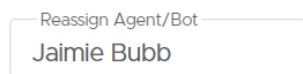
The Waiting Room section is used to admit Patients into conversations with Agents. While Patients are waiting, they can perform a number of tasks. They are as follows:

- Interact with an automatically prompted Quick Form
- Interact with a chatbot attached to the Chat Widget
- Wait to be admitted to a conversation with an Agent

There are a number of ways a conversation can be reassigned from a bot to an agent. These ways are as follows:

Manual Reassignment using the Reassign Agent/Bot

A conversation can be manually assigned to an agent by clicking on the



button and select an Agent to reassign the conversation to.

Manual Reassignment using the Takeover Button

A conversation can be manually reassigned to an Agent by clicking on the [Takeover](#) button on the black banner on top of the Conversation Details.

Patient Request for Agent Escalation

If a chatbot containing Patient Escalation in its workflow is attached to the active Chat Widget, a patient might request to speak to an Agent using the choices that lead to Agent Escalation.

Note: This option requires two preconditions that are used to trigger any Agent Escalation workflow.

- The Chat Widget must have a designated Chat Bot that has the Agent Escalation included in its workflow
- The Chat Widget must have an assigned Agent(s) who can engage with the customer when they are online. This will not be met if there are no agents to take over the conversation.

Invites Sent

The user is able to keep track of invites sent to patients using the Invites Sent subsection. The Invites Sent

Invitation sent to Mr. Patient Man - +19042231089 mrpatientman@mail.net				
		Resend Invite	Takeover	
Messages	SMS Timeline	SMS status	Email timeline	Email status
<p>Hello (FirstName), we would like to set up a Virtual Conversation with you.</p> <p>To start chatting with us, please click the link below to be redirected to an Agent:</p> <p>https://ktest.qliqsoft.com/bedist.p?k</p>	<p>a few seconds ago</p> <p>03/29/2023 04:19 PM</p>	SENT	<p>a few seconds ago</p> <p>03/29/2023 04:19 PM</p>	SENT

section also contains the conversation link that is used to open the Virtual Conversation on the Patient end if necessary.

In the Invites Section, users are also able to perform the following:


Resend Invites

The user is able to resend invites using the **Resend Invite** button.

Takeover Conversation

The user is able to manually take over the Agent responsibility using the **Takeover** button.

Cancel Invitation

The user is able to cancel the invitation using the  button.

The Invites Sent Section Contains the following information columns:

Messages	SMS Timeline	SMS Status	Email Timeline	Email Status
Contains the contents of the message sent to the user	Contains the timestamp of when the message was sent	Tracks the status of the SMS	Contains the timestamp of when the email was sent	Tracks the status of the Email

Virtual Conversation Configuration Panel

Overview


The Virtual Conversation Configuration Panel contains the Virtual Conversation tools that are used in connection with the Virtual Conversation, even though they're not directly relaying any information to the Patient.

The features covered under this section allow the user to perform the following actions:

- Set the Conversation Status using the Status selector
- Reassign the conversation to an Agent or a Chat Bot using the Reassign Agent/Bot Selector
- Initiate an Voice Call with the Patient using the Voice Call Button
- Initiate an Video Chat with the Patient using the Video Chat Button
- Upload Virtual Conversation Records to a Patient's Electronic Medical Records (EMR)

Actions



Reassign Agent/Bot

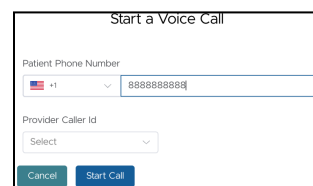
To configure the Virtual Conversation Reassignment, click on the  button to change the status. This section offer the following status assignments:

- **Open**
- **Close**

Voice Call

To engage in a Voice Call with a Patient, complete the following steps:



1. Click on the  button on the top-right corner of the screen and click  to proceed.
2. Enter the number the customer wants to be contacted in in the Patient Phone Number section. By default, the Patient's mobile number will populate this field.
3. Click on Start Call



The dialog box titled "Start a Voice Call" contains two input fields. The first field, "Patient Phone Number", has a dropdown menu showing a flag and "+1" and a text input field containing "8888888888". The second field, "Provider Caller Id", has a dropdown menu with "Select" and a "Start Call" button. There is also a "Cancel" button.






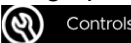
Video Chat

To engage in a Video Chat with a Patient, complete the following steps:

1. Click on the  button to bring up the Video Chat prompt and click .
2. Optional: If you wish to simulate a two-way conversation, use the Patient device or credentials to join the Video Chat as a Patient.

Note: if the Patient is connecting from their end, they will use a text/email link to join this conversation. If they are already connected to the Virtual Conversation, they will receive a prompt on their device, asking them to join the Video Chat.

Video Chat Settings and Controls

				
Connection Quality Indicator	Toggle Microphone	End Call	Toggle Camera	Controls
Indicates the user/patient's network quality.	Allows the user/patient to mute/unmute their microphone.	Allows the user/patient to end the conversation.	Allows the user/patient to turn their camera on/off.	Allows the user to bring up the  Controls Panel.

Video Chat Controls

The Video Chat Controls are as follows:

Microphone Select the device of your voice input	Camera Select the device of your video input
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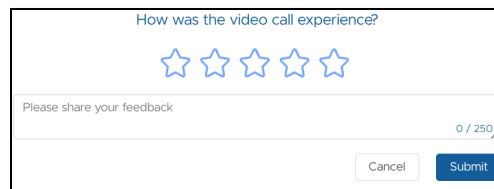
This section will display all available microphones that can be used as the voice input.

This section will display all available cameras that can be used as the video input.

Voice Call/Video Chat Feedback

After every voice or video conversation with Agents, Patients are given the option to rate their conversation experience and provide written feedback to the organization.

Note: It is possible to disable this via the Widget > Settings > General > Chat Widgets > Show post-session feedback for virtual visits



The customer feedback can be viewed by admins from Reports Module>Patient Outreach>Virtual Visits Activity.

Automatically Prompting Status Assignment Banner

Once an Agent concludes a conversation with a Patient, they can resume the conversation. However, if there is no longer the need to continue communicating with the Patient, Agents can

click **Yes** on the  popup banner to assign the conversation status as closed. This then closes the agent's conversation as well as closes it on the patient's device.