This document outlines the required and optional steps to enable patients and other external entities to initiate a secure text with QuincyCHAT.

Administrator Setup

1. Navigate to the widget that you want to accept inbound messages
2. In the Settings/SMS numbers tab confirm that the widget has a dedicated phone number. Add it, if it is missing. The widget must have a dedicated phone number so that when the visitor sends a text, they can be directed to the right resources.
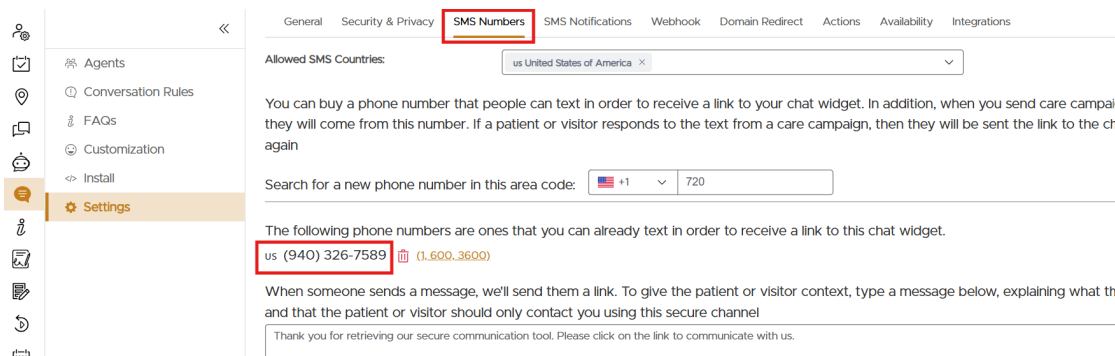

3. Next navigate to the security and privacy tab and activate "Allow visitors to start a conversation"
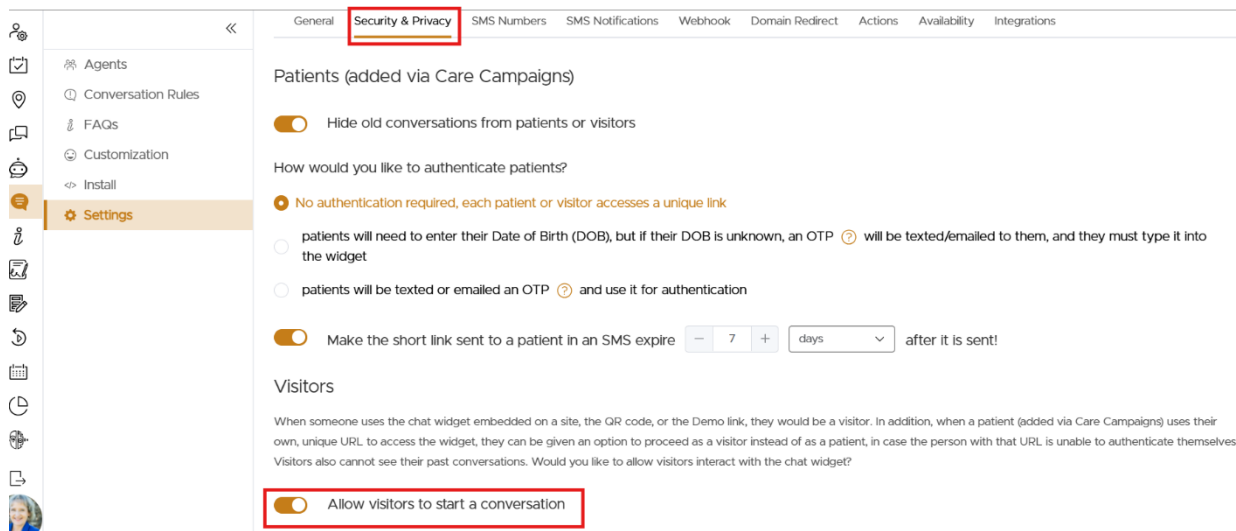
4. Navigate to the General tab. Here you have a decision. When the visitor texts you, do you want them limited to one conversation where their outreach will be added to an open conversation thread or would you prefer that they can have multiple conversation threads at the same time? Set the 'Limit each patient or visitor to one open conversation to match your decision. If you activate this feature, patients and visitors who text will be added to a conversation in QuincyCHAT or Virtual Visits if it is open.
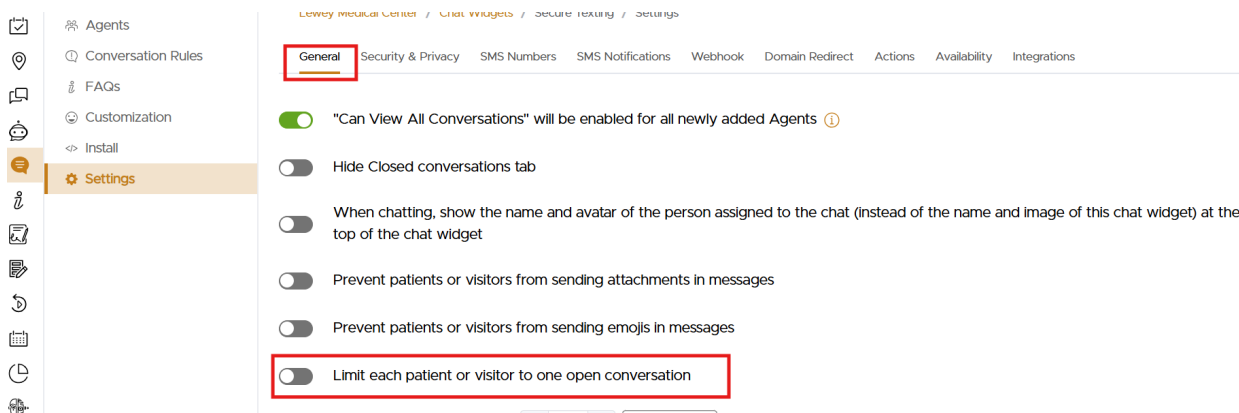
If you do not limit the visitor to one conversation, you can limit how often one visitor can initiate conversations by setting the Time Lapse between conversations. In the example below, the visitor is limited to starting one new conversation every 5 minutes. If the visitor attempts to start a new conversation in less than 5 minutes, and there is an open conversation, it will redirect the user to the open conversation and add their message.
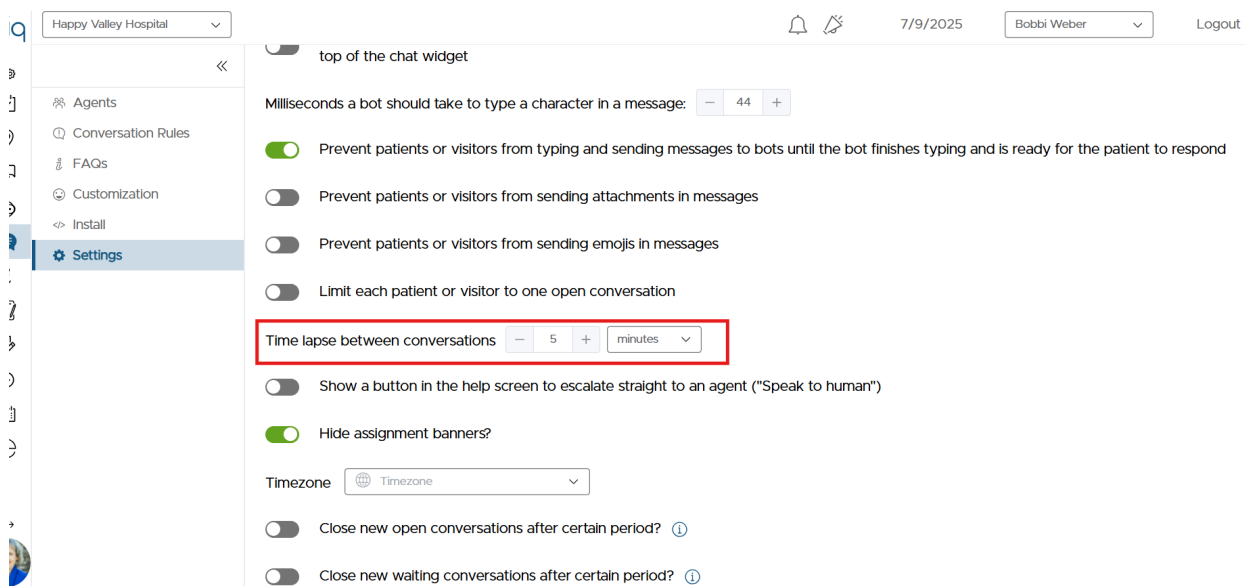
At this point the patient or visitor may text the number to connect to the agent. There are three options the administrator can choose from to enable the visitor to initiate a conversation:

1. QR code: To do this, navigate to the widget and select install. Click on "Generate QR code".
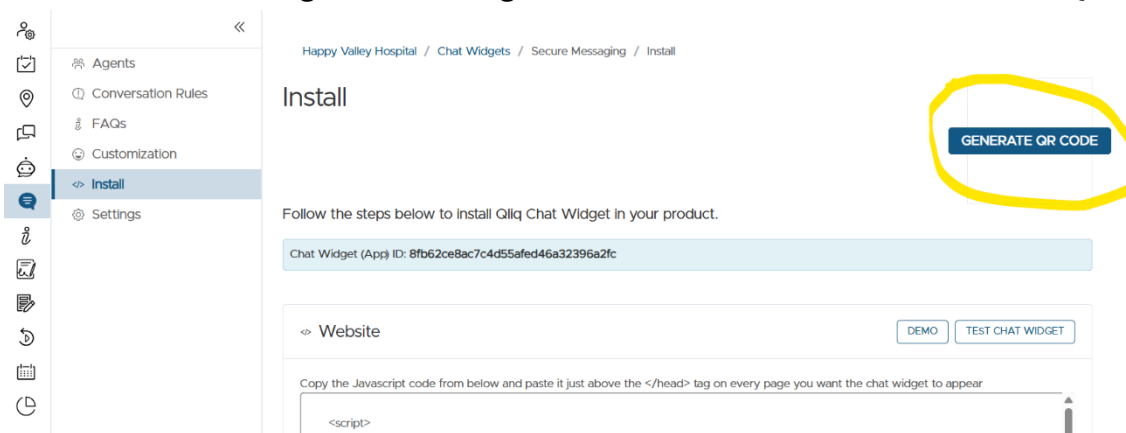
2.

Flag the QR code as published. Copy the code to the website or document for the patient or visitor to use.

Note: you can opt for recipients to come in as visitors without identifying them or you can use a chatbot to validate the patient identity so that you know who is requesting the secure chat.


3. Administrators may also embed a link. To do this, right click on the demo button and select "copy link address" and embed the link on your website.
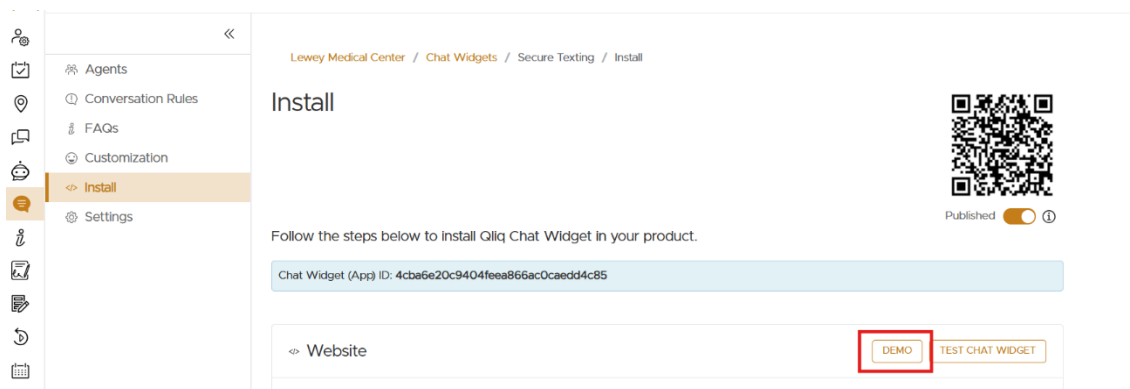
4. Provide the patient with the widget number to text directly.
5. Copy the code for the widget and paste it on the website.
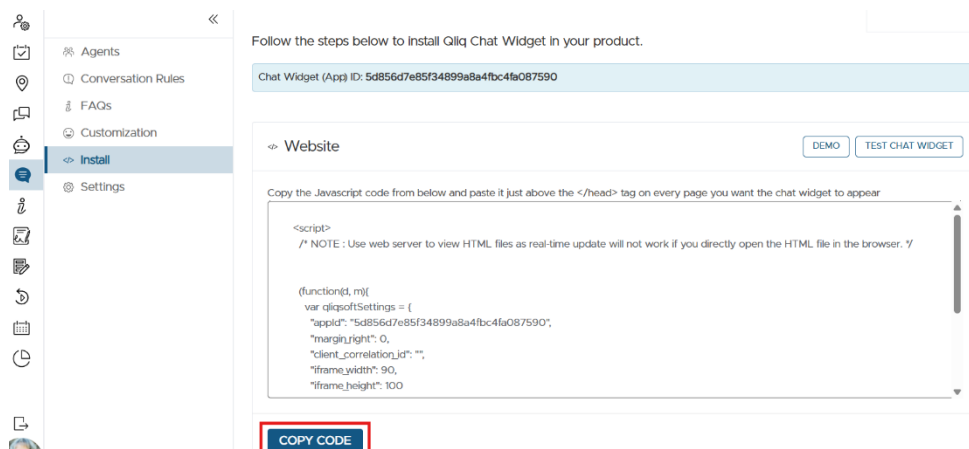
Optional: **Set up hours of availability**. When you start sending campaigns that include escalation to an agent or providing ways for patients to contact your organization, you may consider configuring hours of availability.
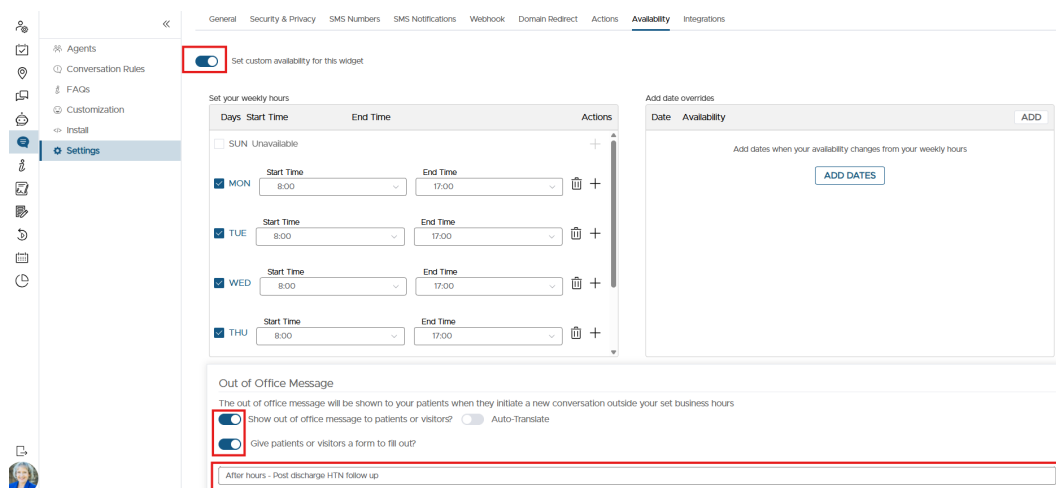
- Go to the widget, select Settings and Availability.
- Enable Set Custom Availability for the Widget
- Enter the hours that agents are available
- Activate the Show Out of Office Messages to Patients and Visitors
- Activate Give Patients or Visitors a Form to Fill Out.
- Attach an after-hours form (see example Quick Form below)

If you have additional questions, please contact support at Support@QliqSOFT.com or 866-295-0451.

QuincyCHAT agent view

When a patient or visitor whose phone number is in the patient database texts, the app will identify the patient by name and they will appear here. The patient or visitor will receive a secure link in their mobile phone.
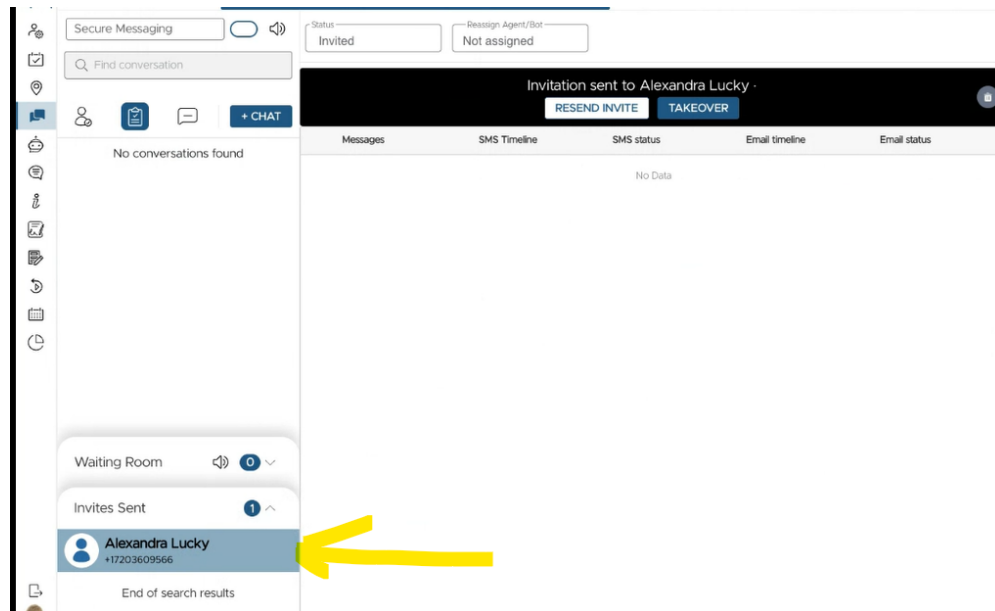
When the patient clicks on the secure link, they will show up in the patient list to start an interaction assigned to the agent(s) as set up in the widget.