Product Release Notes

Release Date: July 22, 2025

Important Notes for Affected Users

Impacted Products & Features

Click the link to those features with updates

Quincy
- Virtual Visits / QuincyCHAT
- Chatbots
- Chat Widgets
- Quick Sign
- Quick Forms
- Care Campaigns
- FAQs

QliqCHAT
- Desktop App
- Mobile App
- OnCall Scheduling
- Visit Path
- Fill & Sign
- Qliq-Assisted Calling

Admin Features
- Bug fixes
- Integration & APIs
- Reporting
- User Management
- QliqSTOR
- QliqDIRECT

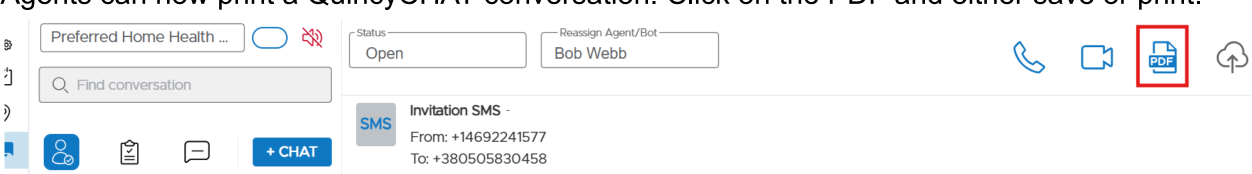
Quincy

Version 1.552.0

Virtual Visits / Quincy Chat

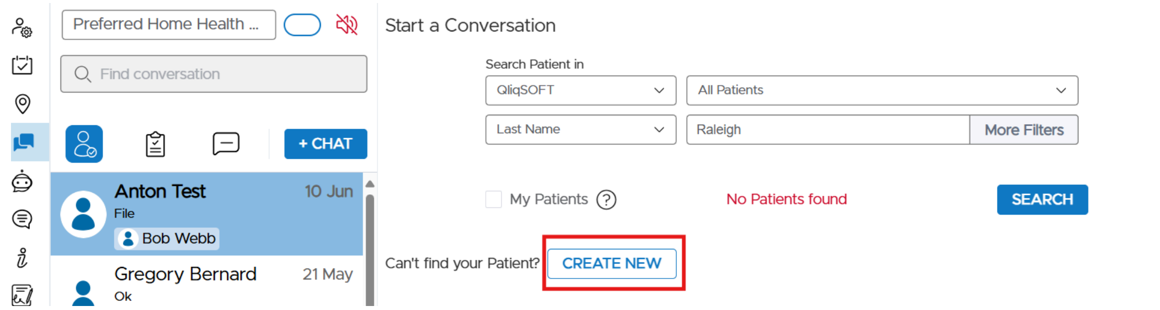
What's New

- Agents can now print a QuincyCHAT conversation. Click on the PDF and either save or print.

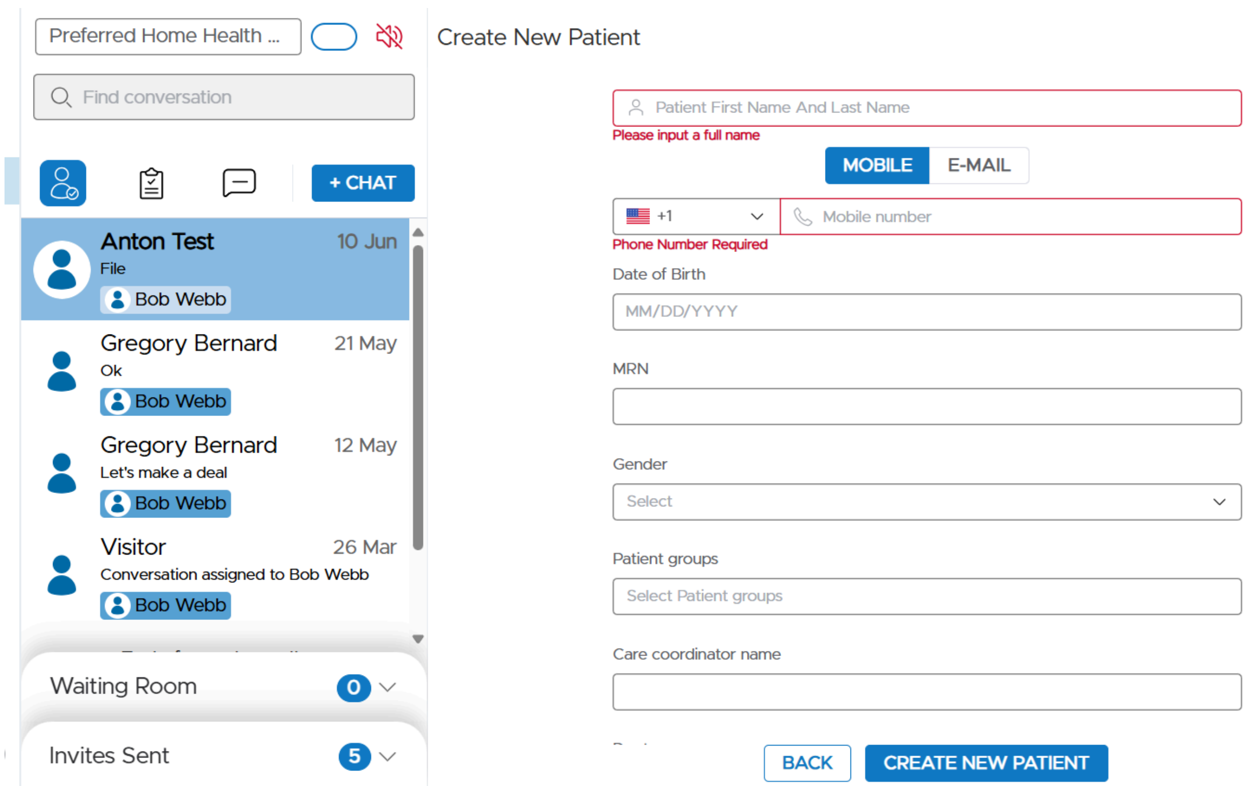


Improvements

- Agents have expanded fields when they create/edit patients via the +CHAT interface. When a patient is not found, click on Create New. The add patient pop up now includes additional fields such as Date of Birth, MRN, Sex at Birth, and any custom fields added by the client.



These additional fields mirror the standard and custom fields set up by the administrators and are all optional.



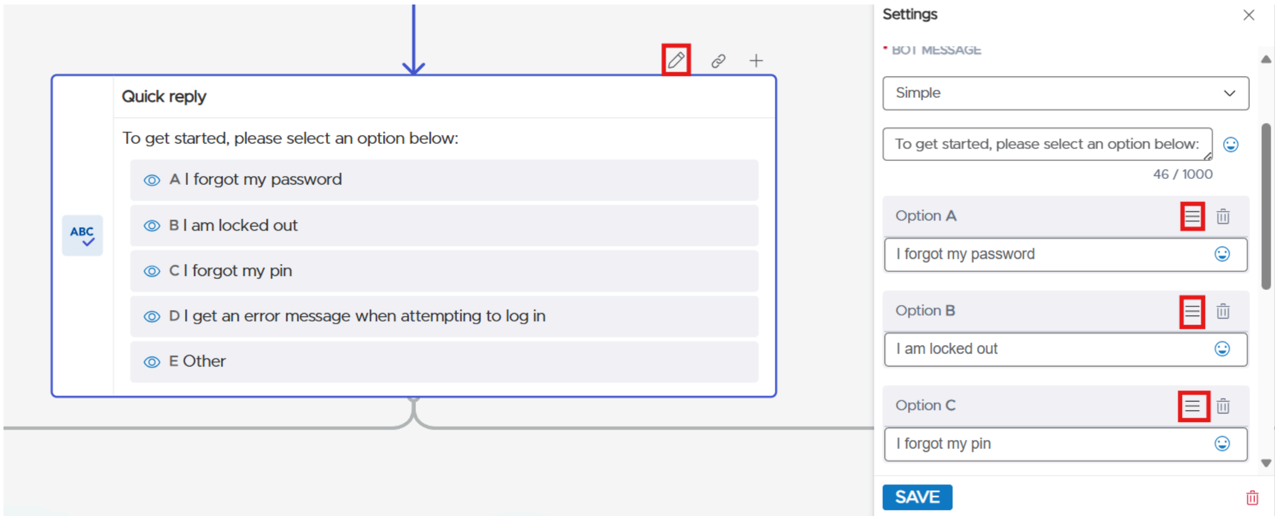
Bug Fixes

- Screen Sharing now remains active in Firefox.
- Long display names now display correctly in Screen Share UI.
- Patient control button now functions as a small movable overlay in Picture in Picture (PiP) mode
- Agent name and icon now centered in Picture in Picture (PiP) screen share
- Timestamps now appear in downloaded conversation PDFs

Chatbots

Improvements

- Quick replies in bot design now support drag-and-drop reordering. To do this navigate to the chatbot design studio. Navigate to the Quick Reply message that you want to edit. Click on the pencil icon to open the Settings dialog box and then grab the hamburger buttons to drag and drop the answer options to rearrange them.



Bug Fixes

- Quick replies no longer display the selection multiple times when clicking rapidly.

Chat Widgets

Bug Fixes

- The default chat widget color code tooltip now displays the correct value.

Quick Sign

What's New

- **Send, Track & Manage Signatures with +Sign**

  Simplify document signing and take control of your workflows - all within the same platform.

  We're excited to introduce **+Sign**, a powerful new feature that lets you send documents for signature, monitor progress, and automate follow-ups without leaving your dashboard. Whether you're collecting patient consents, onboarding forms, or approvals, +Sign makes it seamless.

- **What is +Sign?**

  +Sign is a lightweight, secure digital signature experience built directly into your Quick Sign interface. It allows admins and agents to send documents for e-signature, customize the flow, and track recipient actions without creating conversations or relying on third-party tools.

- **Why you'll love it**

  - **Faster Turnaround:** Send signable forms instantly with just a few clicks.
  - **Clear Visibility:** Track who received, opened, and signed the document.
  - **Fewer Drop-offs:** Built-in nudges help ensure recipients complete the process even if they stall.
  - **Custom Workflows:** Automate document requests in campaigns with dedicated +Sign nodes and smart nudging logic.
  - **Consistent Experience Across Teams:** Inherit workflows and widgets across groups with easy cloning options.
  - **Admins control** which agents have permission to generate and sign documents
  - The best part? *This expanded capability is complementary to clients already licensing QuickSign.*

Quick Forms

What's New

- **Scored Forms – Turn Responses into Meaningful Insights**

  Instantly calculate, classify, and act on patient form data - no spreadsheets required.

  We're introducing Scored Forms, a smarter way to capture structured feedback and automate next steps. Whether you're assessing risk, qualifying patients, or segmenting leads, Scored Forms turn your Quick Form responses into real-time scores and visual insights - right out of the box.

- **What is it?**

  Scored Forms allow you to assign points to key question types (checkboxes, radio buttons, ratings, dropdowns, and yes/no answers). Based on a recipient's responses, the form automatically calculates a total score, classifies it into categories (like Low / Medium / High risk), and gives a full breakdown - all accessible from the admin dashboard.

  Recipients interact with forms and do not see scores or score groupings

- **What can we do with it?**

  Score and Classify Recipient Answers Automatically: Configure scores in the form builder and classify submissions into categories that matter to your organization.

Send using every channel that you can send forms today: via campaigns, chatbots, and by an agent in Virtual Visits and QuincyCHAT

Get Actionable Analytics: See a visual breakdown of submissions, average scores, and trends - all out of the box.

Recipient Details: Click into any submission to view how the score was calculated and what the patient answered - field by field.

Track Statuses: Monitor submission progress across stages like opened, completed, uploaded, and more.

Export & Share: Generate PDFs or view submission logs in a click. Perfect for care coordination or compliance review.

Integrate with the EHR: automatically upload scored document results into the medical record

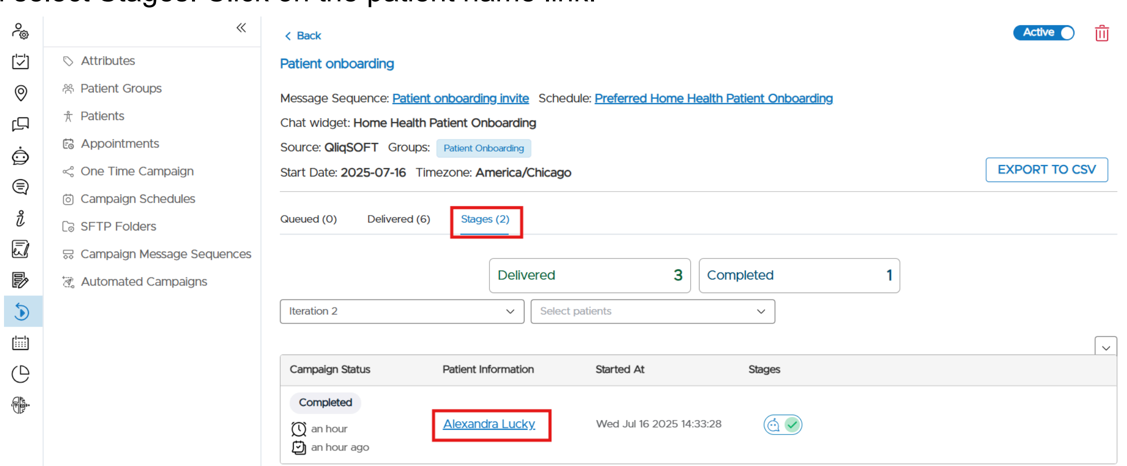
- **Is this a paid feature?**

  Yes, there will be a webinar in August that will demonstrate administrator set up, sample use cases, and how users interact with this new capability. You can also contact your account manager or support for more information.

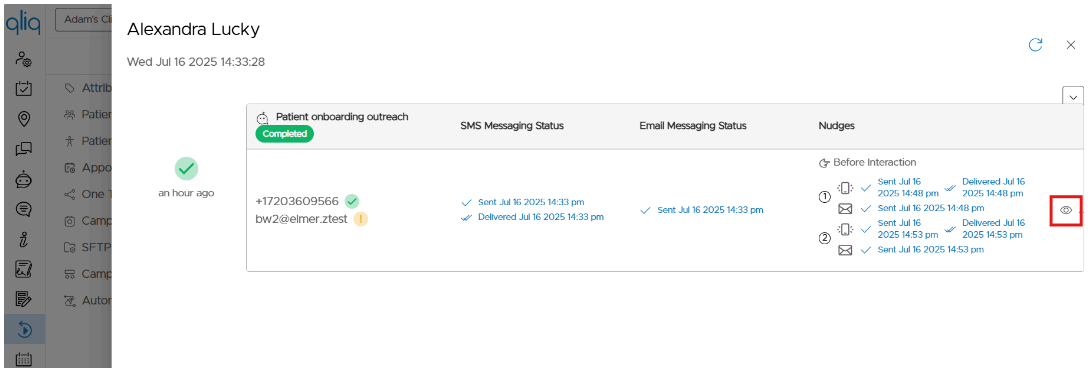
Care Campaigns

What's New

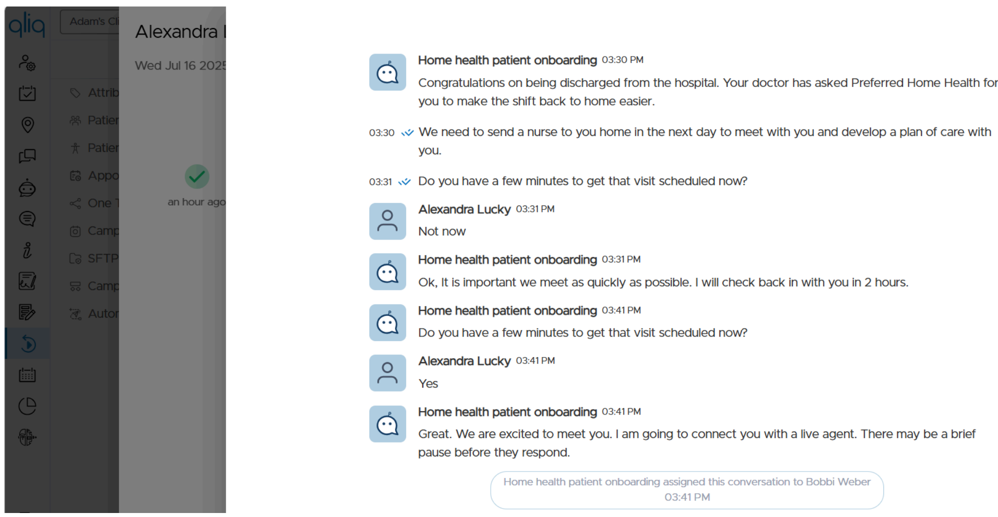
- Administrators can now add a Quick Sign document to a Message Sequence flow in Automated Care Campaigns without needing a chatbot.
- Users can now view specific patient chatbot conversations from Automated Campaign Reports when a bot message is part of the message sequence. To access this select the campaign and then select Stages. Click on the patient name link.



Once you click on the patient name, this window displays showing message sent and nudge details.



Click on this eye to see details of the actual conversation.



Improvements

- The administrator now receives a confirmation popup if they create a nudge and then attempt to navigate away from the budget before saving it.
- Appointments now display data based on the next appointment date and time, with added filters to view past or upcoming appointments.

Bug Fixes

- The date filter now shows the correct number of booked appointments.
- Long patient group names are now fully visible in the patient section.
- Message sequences now display center arrows correctly after download.

FAQs

Bug Fixes

- Tags now persist when turning off the multiple steps option.

QliqCHAT
Version 2.5.210

Desktop App

Bug Fixes

- Users who are disabled, then reenabled now receive messages in subgroups.

Mobile App

Bug Fixes

- The conversation page in QuincyCHAT now refreshes automatically when returning from the background.
- Users who are disabled, then reenabled now receive messages in subgroups.

OnCall Scheduling

Visit Path

What's New

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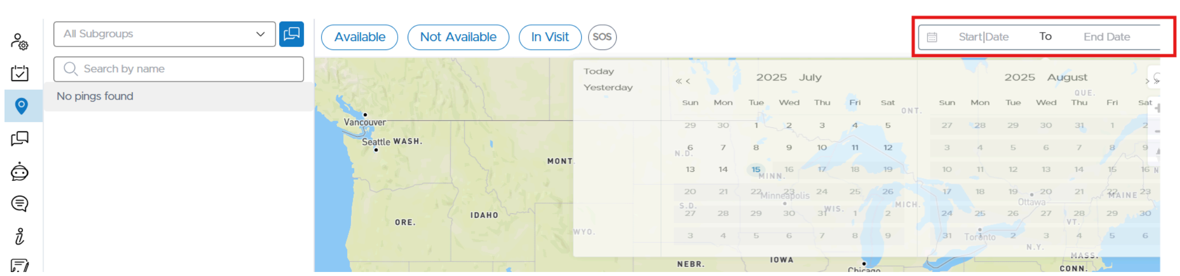
Improvements

- **Smoother Filtering, Sharper Search, and Clearer Routes**

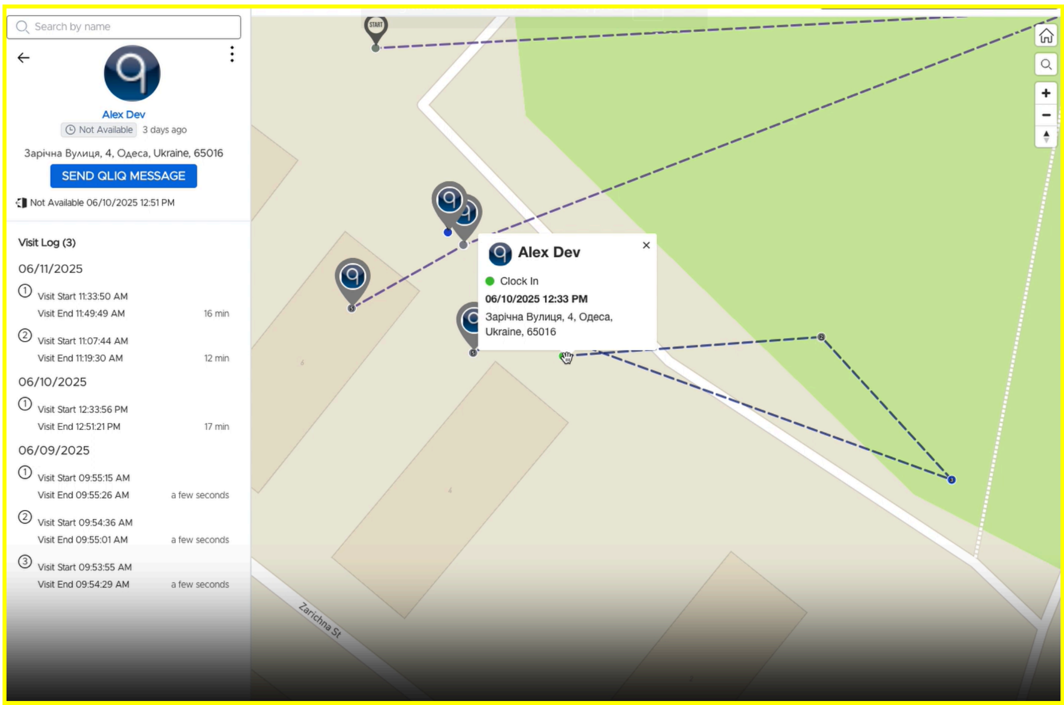
  We've refined how you navigate Visit Path, so you can manage caregivers' movements with greater clarity and control.

  What's improved?

- **Unified Filter Panel:** Date and status filters are now grouped at the top of the map for easier access and cleaner workflows. Filtering feels faster, more consistent, and more intuitive.



- **Smarter Filter Behavior:** Status filters now apply only to today, ensuring you're always seeing accurate real-time data. Past dates will display full route history without status-based filtering noise.
- **Context-Aware Search:** Whether you're monitoring live activity or reviewing past visits, the new search logic adapts to your view - showing location, route, or list results depending on your context.
- **Clearer Route Visualization:** Overlapping paths are now easier to interpret, with each user represented by unique colors, better layering, and route popups showing timestamps, visit details, and SOS events. Pop ups summarize key milestones in the user's route.
- **New Route Details on Click:** Click on any user's route to see who it belongs to, when their visit started/ended, and if any SOS was triggered - making audits or live coordination simpler than ever.



Fill & Sign

Bug Fixes

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Qliq-Assisted Calling

Admin Features

Bug Fixes

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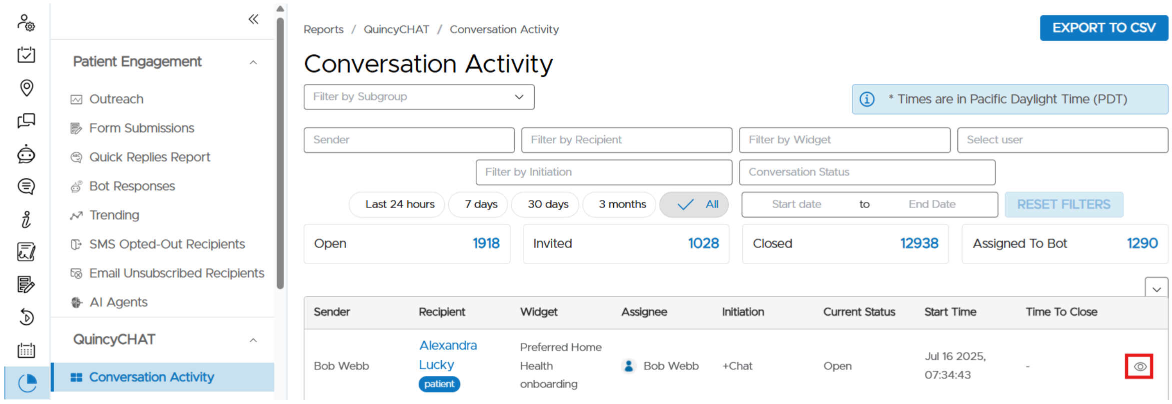
Integration & APIs

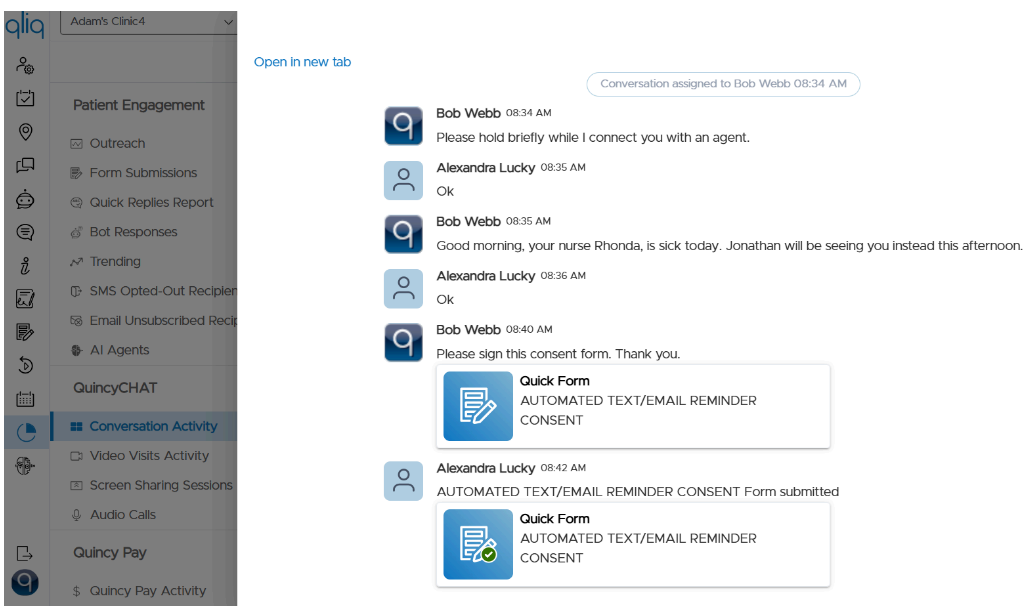
Reporting

Improvements

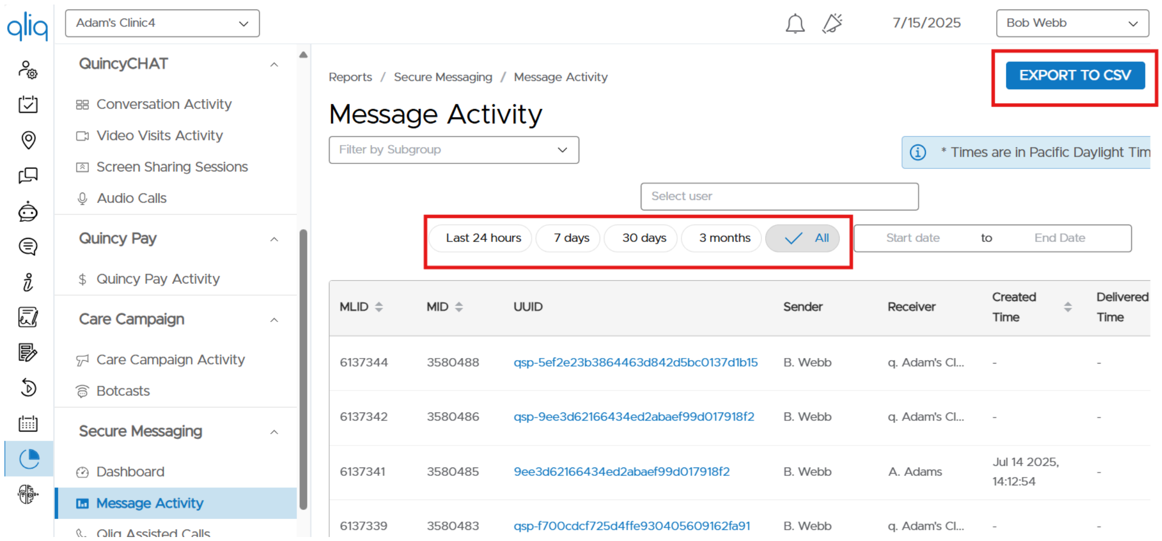
- Users now have the ability to view Chatbot and QuincyCHAT conversations in Conversation Activity. To see the conversation, click on the eye in the far right column.



Clicking on the eye opens a window where the user can see the full conversation and any forms that were exchanged. To view the actual forms, the user must use the existing forms capabilities.



- Date filters and the ability to export the report as a CSV are now available in the Message Activity report.



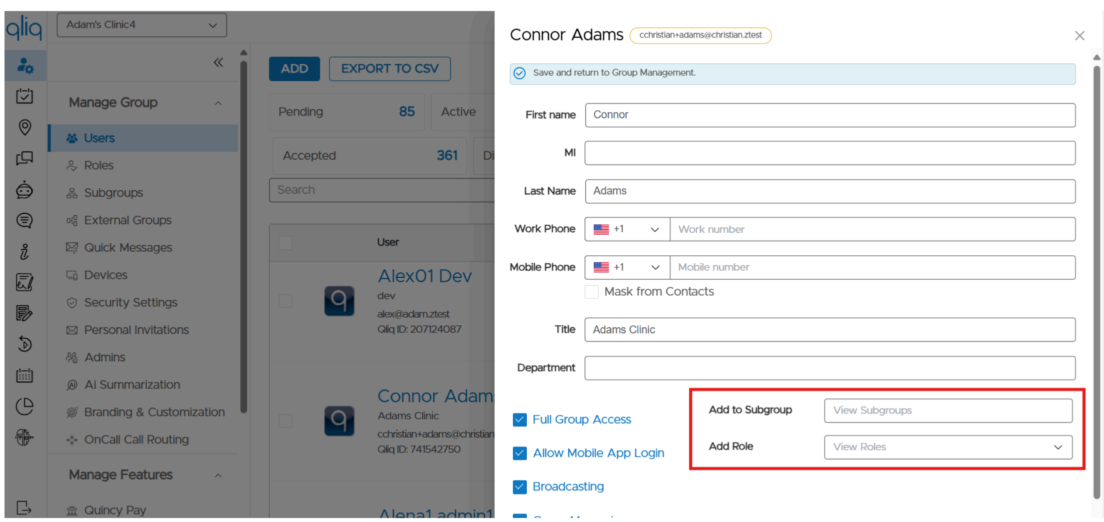
Bug Fixes

- 504 error no longer occurs in Secure Message Dashboard and Message Activity.

User Management

Improvements

- When editing a user record, the Subgroup and Add Role fields have been expanded to better view long group names.



Bug Fixes

- The address input now saves correctly when creating a new group.

QliqSTOR

QliqDIRECT