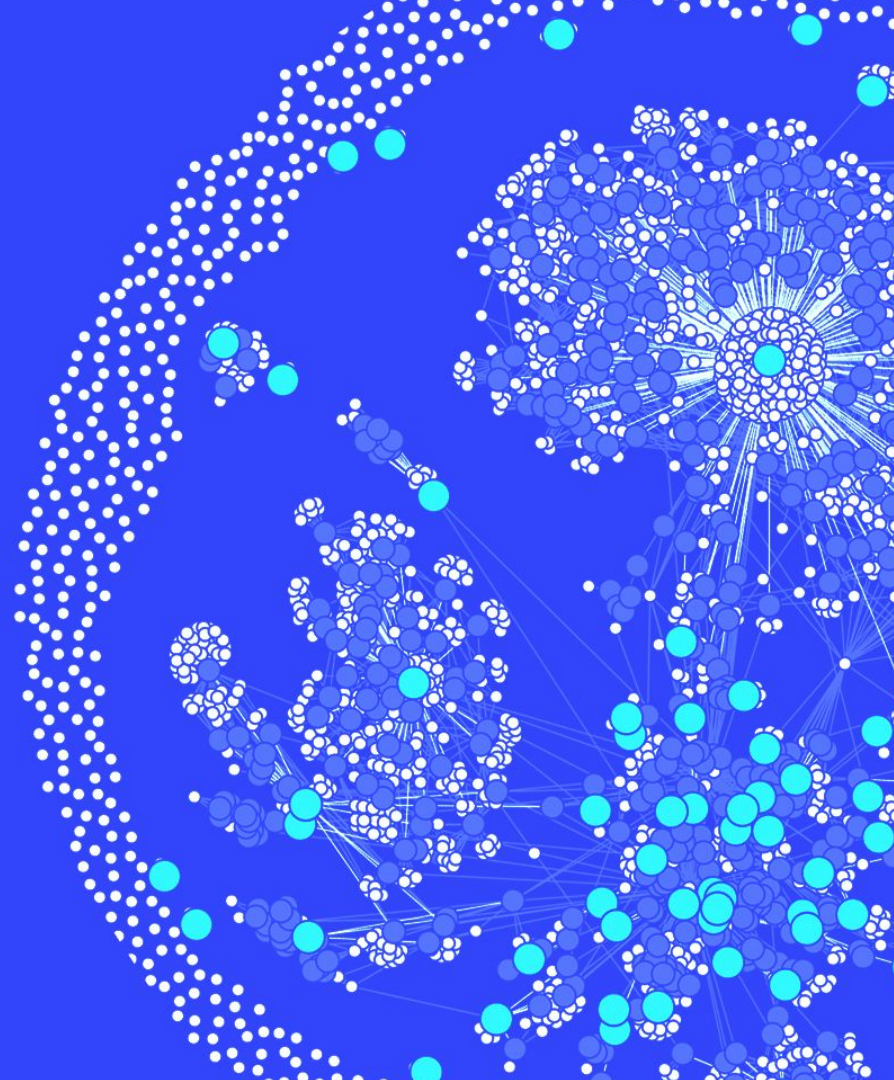


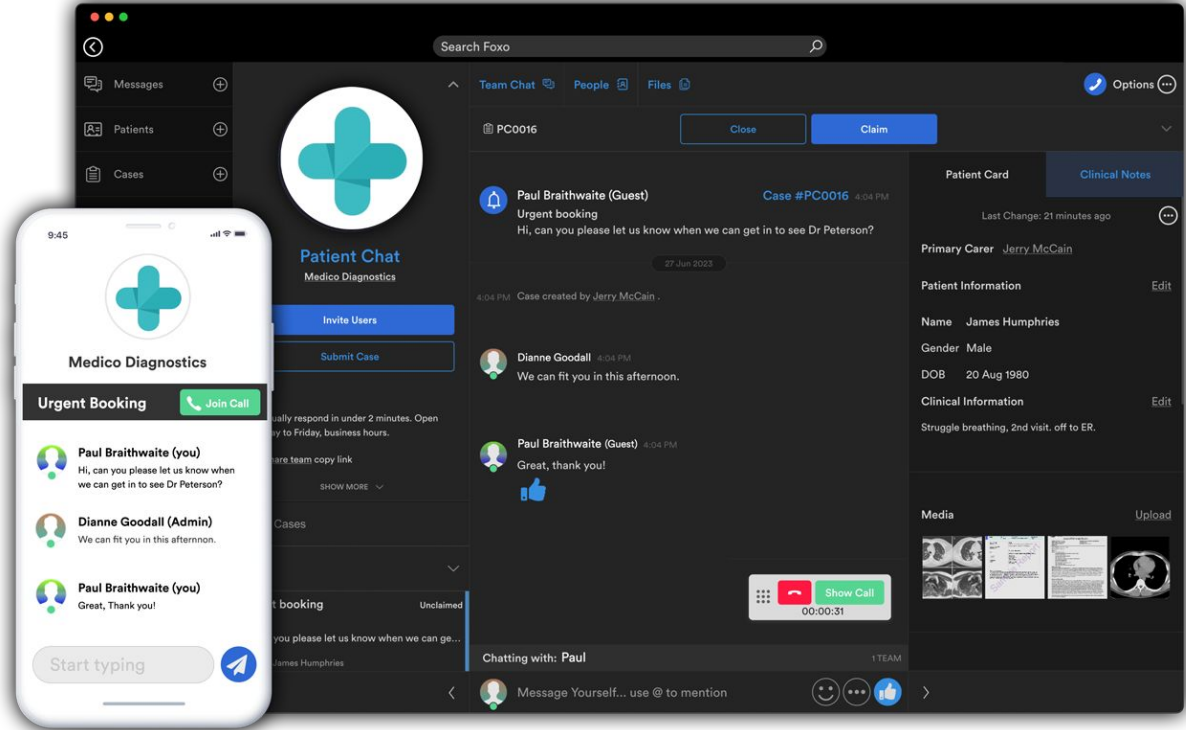


Patient Connect



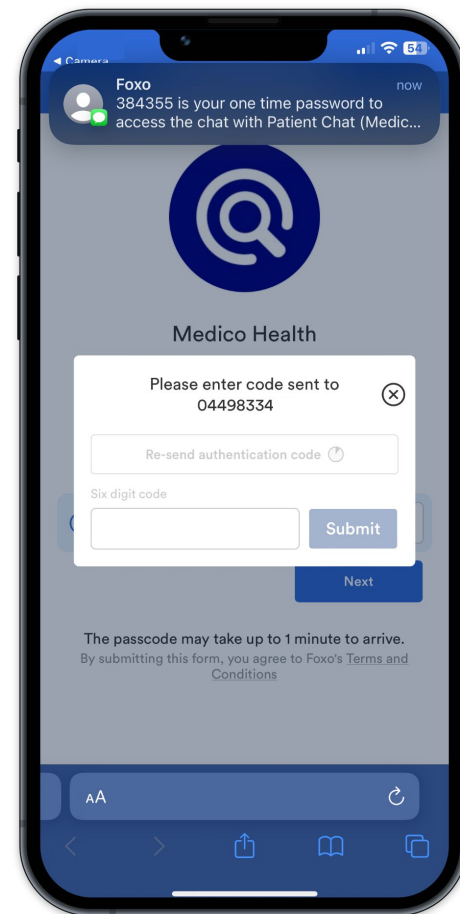
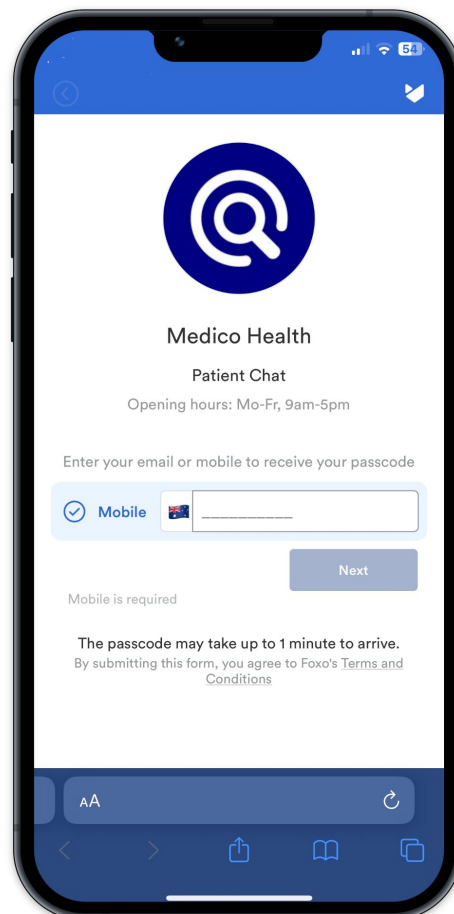
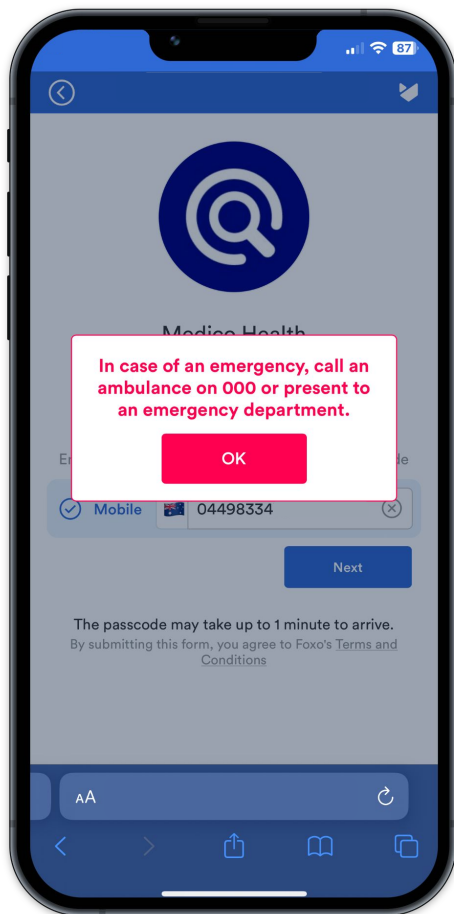
foxo Secure Patient Communication

- ✓ No Setup for Patients
- ✓ Simple & Secure Referral Upload
- ✓ Quick Information Request
- ✓ Synchronous & Asynchronous
- ✓ Integration with MS Teams



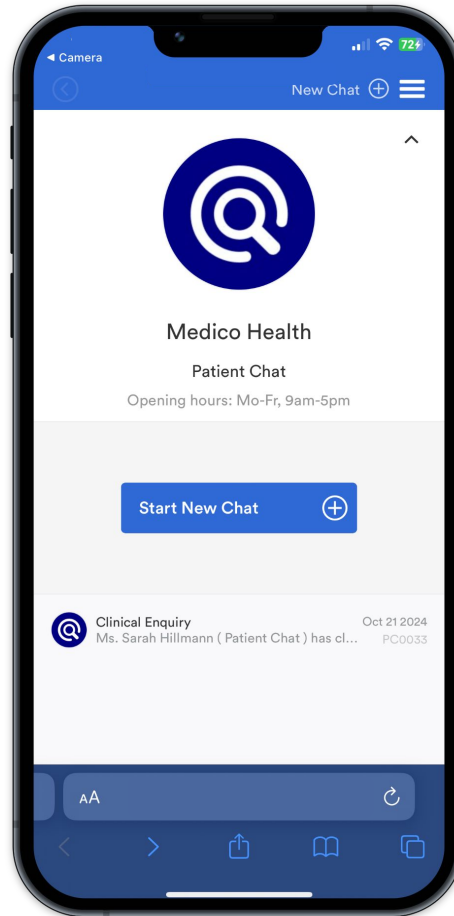
The Patient Experience

Disclaimer and Secure Register



The Patient Experience

Initiate Chat & Select from Chat Categories



The Patient Experience

Identity Verification and Chat

New Chat +

Patient Chat, Medico Health, Opening hour...

Referral

Patient Chat 4:23 PM

During busy periods, it may take some time for us to respond. If you close the chat window, you will receive a text message when we reply.

Please provide the following information

DOB *

DD MM YYYY

Nov 05 1903 to Nov 04 2024 (Age 0 to 120)

Required

Date of Birth

Medicare Number

Save

Provide information to chat

PENDING PC0039

New Chat +

Patient Chat, Medico Health, Opening hour...

Referral

John Smith 5:05 PM

eReferral

Signature

Uploaded image.jpg.

Ms. Sarah Smith 5:06 PM

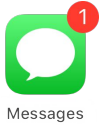
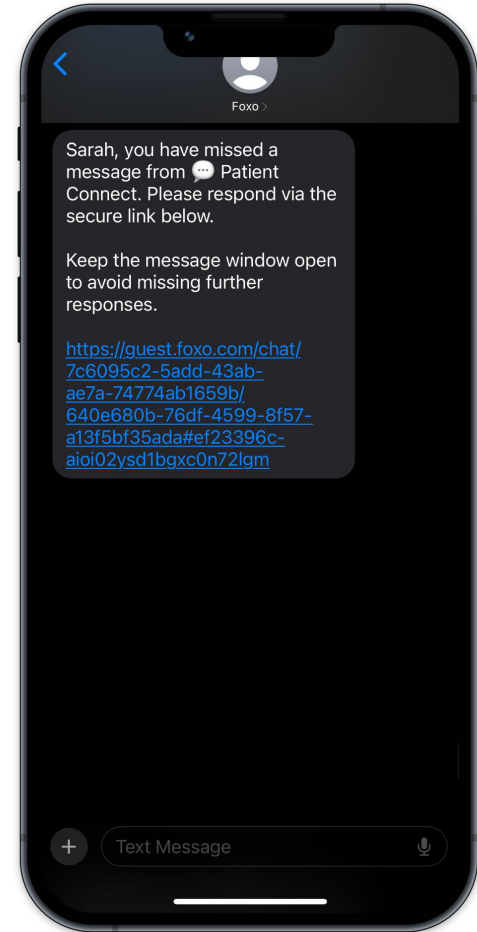
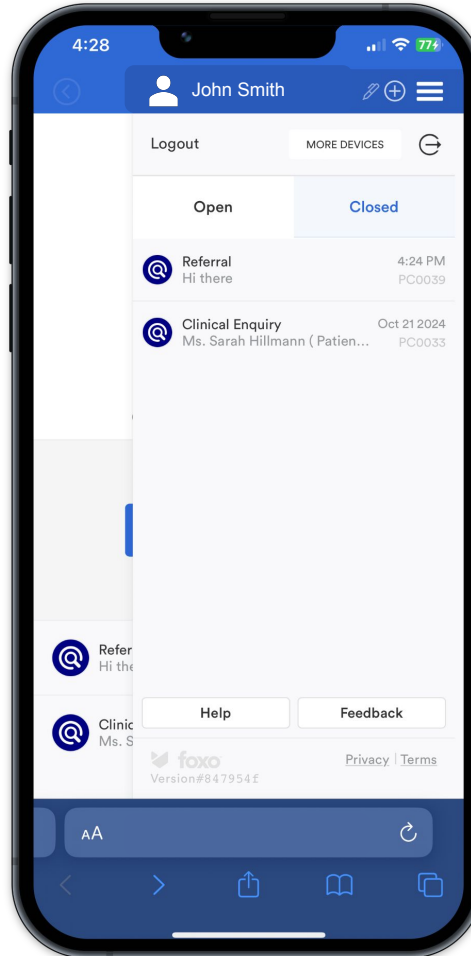
Thanks for providing your referral.

Message Team...

PENDING PC0039

The Patient Experience

Access to Chat History + Notification



How it Works

Simply toggle on the Patient Connect setting and embed the provided link on your website, in reports or promote a QR code published across marketing assets (like business cards or flyers) to provide quick access. Your patients can initiate a secure chat with your Team from any device, anytime. Your Team responds at their convenience.

Quick. Easy. Compliant.

3 Steps to set up Patient Connect

Team



Create the Team that will respond to the incoming Patient Cases.

Setup



Toggle on the Patient Connect feature in the Team's settings, which will generate a link and decide on the settings.

Link



The link can be directed to a URL domain of your choice (e.g. myclinic.chat) or embedded in your website, shared as a QR code, etc.

Team Settings

General Tab

Team Name (visible to guests)

Description (for internal use, not visible to guests)


Availability (visible to guests)

If enabled, the Team is private and not searchable / visible to other Foxo users on the network.

Not relevant for external facing Teams.

Spreadsheet style Case view list (see next slide)

Files

 Medico Health
Medico Health

General

Guests

Reports

Team Name *

Patient Chat

Description *

Patient Chat

Availability

Show additional information for Team availability.
Visible to Case creators and Team preview.

Opening hours: Mo-Fr, 9am-5pm

Privacy

Hide my Team from search results.
Always visible to organisation members.

Include this Team in the Team member's integrations.

New Members

Invite Only
All members must be invited to join this Team unless pre-approval is enabled below.

Pre-Approval
Organisation members can join this team without approval.

Powerlist

Allow Team Admins to enable Powerlist.

Powerlist changes the display of cases in Teams to a large data list.

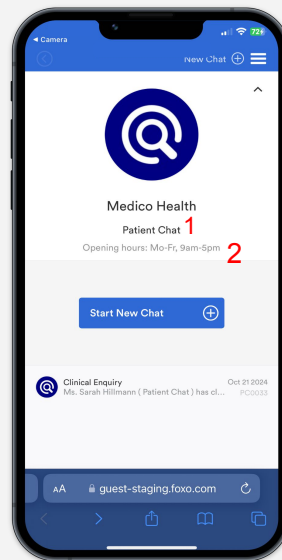
Save Changes

Options

Team Settings
Edit team profile & settings

My Team Preferences
Notifications, Active state etc.

Only Team Administrators have access to the Team Settings



If enabled, Foxo users can only join the Team if they have been invited. When 'Pre-approval' is enabled, anyone from your Organisation can join this Team without requiring approval.

Case View

The Team has two case display options to choose from. Please note that when changing the view it applies to the whole Team.

Case Inbox

The Case Inbox view displays a list of cases on the left sidebar and a detailed view of the selected case in the main panel. The sidebar shows a list of cases with filters like 'All', 'Help', 'Missing report', 'ASAP', and 'Referrer Portal Access'. The main panel shows the details of the selected case, including the patient name, case number, status, and a list of messages.

Case #RC0017
Miss Sarah New
Important
UNCLAIMED
Add Label VIEW

Case #RC0018
Miss Sarah New
Missing report
UNCLAIMED
Add Label VIEW

Case #RC0019
URGENT CLAIMED
Add Label

Case #RC0020
John Doe
Discuss Urgent Result
URGENT GUEST UNCLAIMED
Add Label VIEW

Powerlist

The Powerlist view displays a table of cases with columns for Case #, Status, Created, Creator, Patient, and Labels. The table lists several cases with their respective details.

Case #	Status	Created	Creator	Patient	Labels
RC0020	Unclaimed	Nov 04 2024 at 4:59 PM	John Doe	None	None
RC0019	Claimed	Nov 04 2024 at 4:57 PM	John Doe	None	None
RC0018	Unclaimed	Oct 29 2024 at 4:14 PM	Miss Sarah New	None	None
RC0017	Unclaimed	Oct 29 2024 at 4:13 PM	Miss Sarah New	None	None
RC0016	Unclaimed	Oct 29 2024 at 2:30 PM	Adam Morris	Michael Mohan	None
RC0015	Unclaimed	Oct 29 2024 at 2:29 PM	Adam Morris	John Test	None
RC0013	My Case	Sep 24 2024 at 5:04 PM	John Doe	None	None
RC0012	Unclaimed	Sep 24 2024 at 4:52 PM	John Doe	None	None

Team Settings

Guests Tab

Patient Connect URL

Use this link to create a QR code or embed in your website

Automatic Response

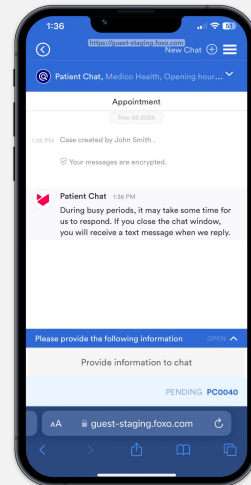
Sent to patient after a few seconds of starting the chat

Disclaimer Toggle

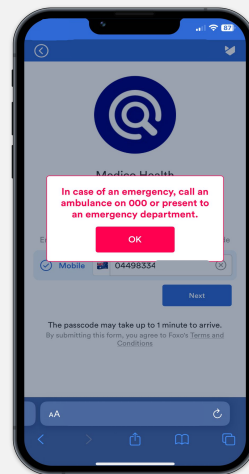
Enables a prompt at patient login. Patient confirms with Ok

General	Guests	Reports
Guest Team Type		
Referrer Connect		<input type="checkbox"/>
Allow guests to chat with team members by creating guest cases.		
Patient Connect		<input checked="" type="checkbox"/>
Allow patients to chat with team members by creating guest cases.		
Guests can create case via the following link:		
https://guest-staging.foxo.com/chat/4144c8d8-a6c1-4b08-9dfc-e78eb2f22c25/patient		copy
Invite guests through email		INVITE VIA EMAIL
Automatic Response		<input checked="" type="checkbox"/>
Send an automatic response when new Cases are created.		
Automatic Response Message *		
<p>During busy periods, it may take some time for us to respond. If you close the chat window, you will receive a text message when we reply.</p>		
Disclaimer		<input checked="" type="checkbox"/>
Enable a Disclaimer prompt at guest login.		
Disclaimer *		Preview Prompt
<p>In case of an emergency, call an ambulance on 000 or present to an emergency department.</p>		
Hide Closed Cases		<input checked="" type="checkbox"/>
Hide guest user's previously closed cases from them.		
Outbound Cases		<input type="checkbox"/>
Allow outbound guest cases to be sent to contacts not yet on Foxo.		

Patient Connect Toggle



Auto Response



Disclaimer

Team Settings

Case Categories & Template Identifiers

Case Categories

Click on Manage to create subject categories for patients to choose from (e.g. referral, clinical enquiry etc.). Each category can have a custom automatic response.

Case Categories

Allow guests patients to choose from a set of categories when creating cases.

MANAGE

Preview

Select Category

Patient Connect Template Identifiers

You can have all new cases start with these Identifiers.

MANAGE

DOB

N/A

Medicare Number

N/A

Preferred Location

N/A

Patient Name

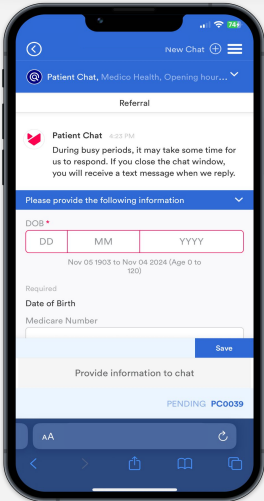
N/A

Phone

N/A

Save Changes

Case identifiers are unique pieces of information (e.g. DOB, Medicare number etc) that verify the patient's identity. **For more information** on how to set up patient identifiers, check out the Help Hub



Manage Incoming Patient Cases

Viewing Cases



Filter based on case categories

Drag and drop the columns to reorder

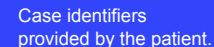
Hovering over icon displays case category

Hovering over 'Claimed' reveals who has claimed the case.

Team Chat & Activity log: all team activity, incoming Patient Cases, read receipts, and messages from team members can be viewed here.

Patient Chat				Filter Cases	People	Team Files	Options	
Case #	Status	Created		All	Labels		Patient	
▶ PC0043	Unclaimed	Nov 14 2024		★ My Cases	None		None	
⚠ PC0042	Unclaimed	Nov 14 2024		🕒 Claimed	None		None	
⚠ PC0041	Claimed	Nov 07 2024		🕒 Unclaimed	None		None	
⚠ PC0040	Unclaimed	Nov 06 2024		🕒 Closed	None		None	
▶ PC0039	Unclaimed	Nov 05 2024		📅 Appointment	None		None	
▶ PC0038	Unclaimed	Nov 05 2024		📅 Clinical Enquiry	None		None	
⚠ PC0033	Claimed	Sep 12 2024		📅 Referral	None		None	
▶ PC0023	Unclaimed	May 09 2024		📅 Scripts	None		None	
▶ PC0001	Claimed	Jun 14 2023 at 11:44 AM	Tim Elkins	📅 Other	None		None	

Claiming Cases



Automatic Response to the Patient

(message can be customised by Team admins under the Team's Settings)

Case Chat with Patient

Manage Incoming Patient Cases

Managing Cases

If the patient didn't provide one of the (optional) fields, the Case Claimer can request it during the chat.

Manage Identifiers

Help

Name

John Doe

ALL

Prefill from login name

Phone

AU

449833479

required

Prefill from login phone

DOB

25

3

1986

required

Date of Birth

Medicare Number

1234567891

10 Digits (no spaces)

Preferred Location

Value

With 1 identifier selected

DESELECT

Ask 1

Done

1 identifier revealed to user

Hide Identifier

The Manage Identifier field will only be visible once the Case is claimed..

Manage Identifiers

The patient will now be prompted to fill in the fields. The Case Claimer will be notified once the patient has provided the requested details.

Options

0027 Referr

Teams with access

Patient Chat

CLAIMED

*****833

DOB 25 Mar 1986

Medicare Number 1234567891

12 Jun 2024

Information below and u

Mon-Fri).

otification.

Provides the following information:

Location

Save

Message Sarah...

CLAIMED POWER

1 TEAM

Chatting with: John (guest)

Message John... use @ to mention

Manage Incoming Patient Cases

Closing Cases

When closing the Case, an optional closing note can be added, which won't be visible to the Patient.

The screenshot shows a 'Close Case' dialog box overlaid on a patient management interface. The dialog box has a title bar with a close button (X). Below the title bar is a text input field labeled 'Add final notes (optional)'. At the bottom of the dialog are two buttons: 'Cancel' and 'Close'. The background interface shows a patient case for 'John Doe' with a 'Close' button highlighted by a red rectangle. The case details include 'Guest: John Doe', 'Claimed: Ms. Sarah Hillmann Patient Chat', and various patient identifiers. A chat history on the left shows messages from 'Ms. Sarah Hillmann (Patient Chat)'.

Close Case

Add final notes (optional)

Cancel Close

Manage Incoming Patient Cases

Printing Cases

Print Case enables the download of a Case chat as a PDF, including any shared images, chat history etc which can then be uploaded into a clinical system.

The screenshot displays the 'Patient Chat' interface. At the top, there are tabs for 'Team Chat', 'People', and 'Files'. On the right, an 'Options' menu is open, showing a red box around the 'Print Case' button. Below the 'Options' menu, there are buttons for 'Reopen' and 'Abandon'. The chat content shows a case for 'John Doe' with a 'Referral' status. A 'Print Options' dialog box is overlaid on the chat, showing a checkbox for 'Case Thread' and 'Print' and 'Cancel' buttons. The chat history shows a message from 'Ms. Sarah Hillmann' with the text 'Patient booking confirmed'.

Team Chat People Files Options

Reopen Abandon

PC0027 Referral

Guest: John Doe
Claimed: Ms. Sarah Hillmann Patient Chat

PATIENT PENDING CLOSED Name: John Doe Phone: *****833 DOB: 25 Mar 1986

Medicare Number 1234567

Print Options

Include additional Case information

☒ Case Thread

Cancel Print

Ms. Sarah Hillmann Closing Notes

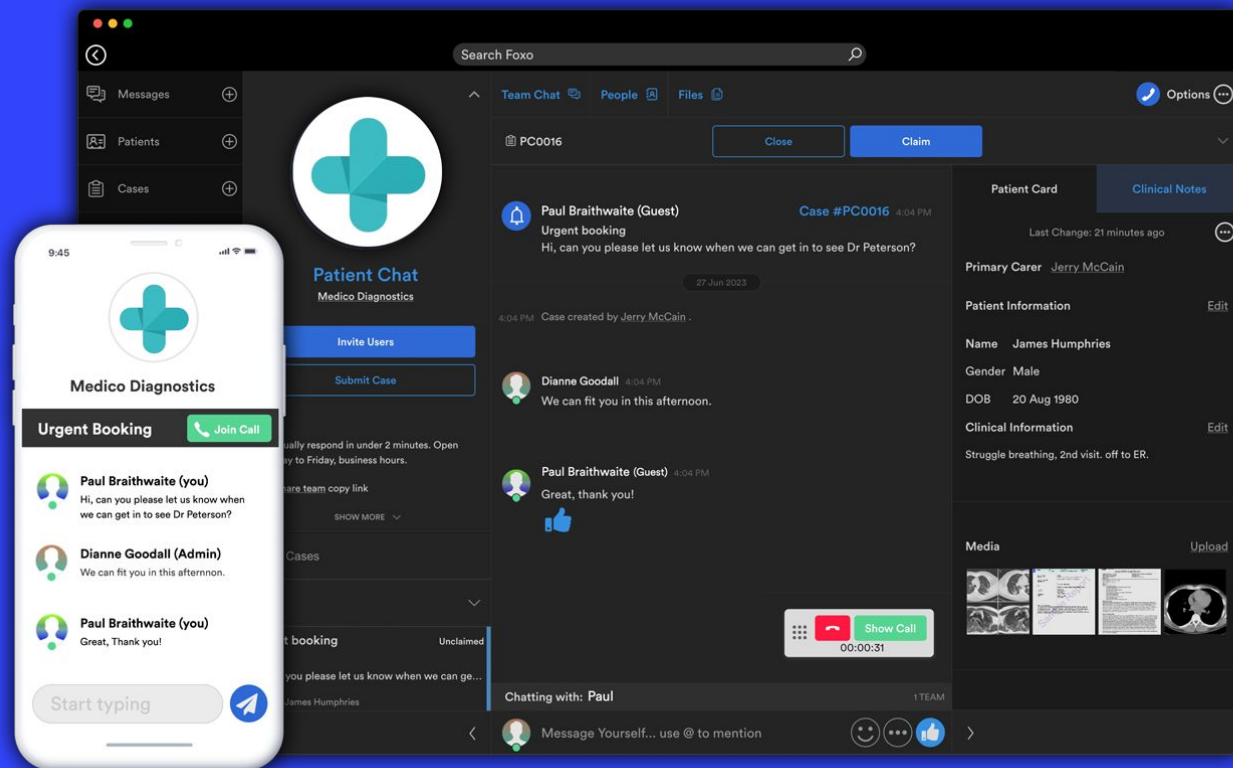
3:03 PM Patient booking confirmed

3:03 PM Ms. Sarah Hillmann (Patient Chat) has requested this case to be closed. This case will be automatically closed in 7 days unless its creator reopens it during this time.

Chatting with: John (guest) 1 TEAM

Message John... use @ to mention

Patient Connect - Testimonial



"Patient Chat has brought a new level of innovation to our patient communication by offering our patients an easy-to-use and secure live chat to make a booking, request information and upload their referral. By implementing Foxo we wanted to align with our patients' preference to make appointments online while ensuring security and privacy of sensitive patient data. They can now simply upload a photo of their referral and either chat with us live or leave a message at their convenience - all in a secure chat window."

Chief Radiographer

R. Chaffer

Questions?



[Help.foxo.com](https://help.foxo.com)



app.foxo.com



help@foxo.com

