# foxo

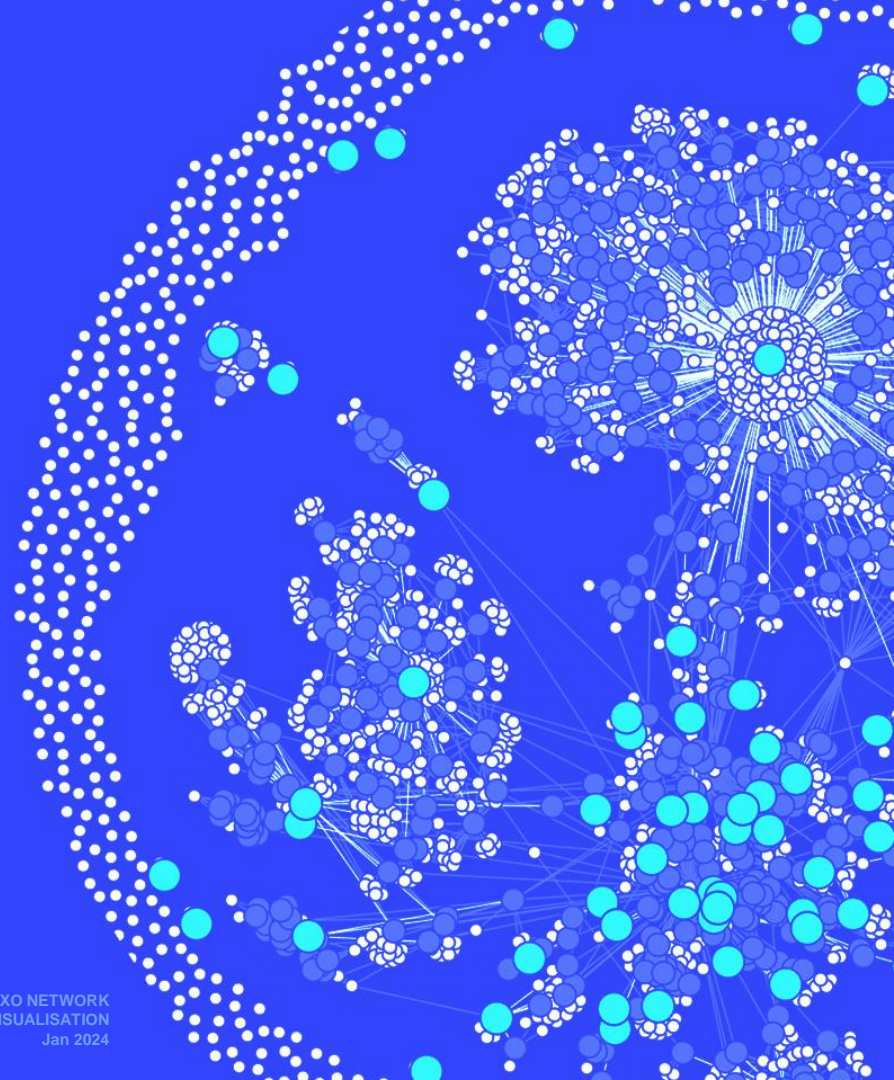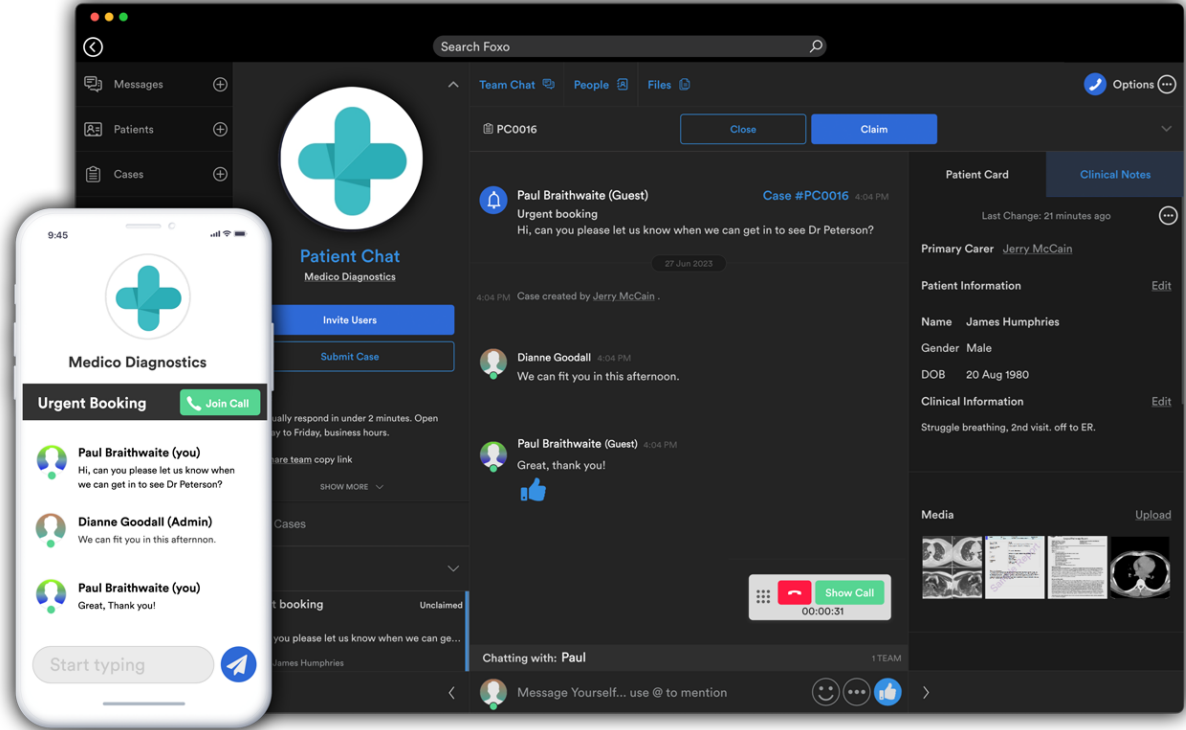## Patient Connect

FOXO NETWORK
VISUALISATION
Jan 2024

foxo **Secure Patient Communication**

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

## 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 Patient Connect

## Teams

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.

## 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.

# Setup

*Create the Team and save, then go to Options in the top right corner.*

Only **Team Administrators** have access to the Team Settings

Team Settings ⚙
Edit team profile & settings

My Team Preferences ⚙
Notifications, Active state etc.

Medico Health
Medico Health

| General | Guests |
|---------|--------|

**Team Name** (visible to guests)

Team Name *
Patient Chat

**Description** (for internal use, not visible to guests)

Description *
Patient Chat

Availability

**Availability** (visible to guests)

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.

# Setup

Go to the Guests tab to enable the Patient Connect toggle.

**Guests** Tab

**Patient Connect** Toggle

**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 guest login. Patient confirms with Ok

**Case Categories**
Click on Manage to create subject categories for patients to choose from (e.g. referral, clinical enquiry etc.)

**\*Coming soon**

**Case identifiers** are unique pieces of information (e.g. Medicare number, DOB etc) that verify the patient's identity

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General | Guests

Guest Team Type

Referrer Connect
Allow guests to chat with team members by creating guest cases.

Patient Connect
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
Send an automatic response when new Cases are created.

Automatic Response Message *
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.

Disclaimer
Enable a Disclaimer prompt at guest login.

Disclaimer *                          Preview Prompt
In case of an emergency, call an ambulance on 000 or present to an emergency department.

Outbound Cases
Allow outbound guest cases to be sent to contacts not yet on Foxo.

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

Preview
Select Category

Patient Connect Template Identifiers  MANAGE
You can have all new cases start with these Identifiers.

DOB  N/A   Medicare Number  N/A   Preferred Location  N/A   Name  N/A   Phone  N/A

No Changes

# Setup

*Patient Identifier Setup*

## Template Identifiers

You can have all new cases start with these Identifiers.

**MANAGE**

| Name | N/A | Phone | N/A | DOB | N/A | Medicare Number | N/A | Preferred Location | N/A |

### No Changes

Down...

Downl...

**Case identifiers** are unique pieces of information (e.g. DOB, Medicare number etc) that verify the patient's identity.

## Manage Identifiers                    Help    ✕

| Name | Value | 🗑 |

Description
Prefill from login name

| Phone | AU | _____ | 🗑 |

Description
Prefill from login phone                                    required ⚪

| DOB | Day | Month | Year | 🗑 |

Date of Birth                                    Ask ⚪ required ⚪

| Medicare Number | Value | 🗑 |

10 Digits (no spaces)                                    Ask ⚪

| Preferred Location | Value | 🗑 |

Description                                    Ask ⚪ required ⚪

⊕

The **Ask** option will display the chosen identifiers on Case Creation.    **Done**

For more information on how to set up patient identifiers, go to:
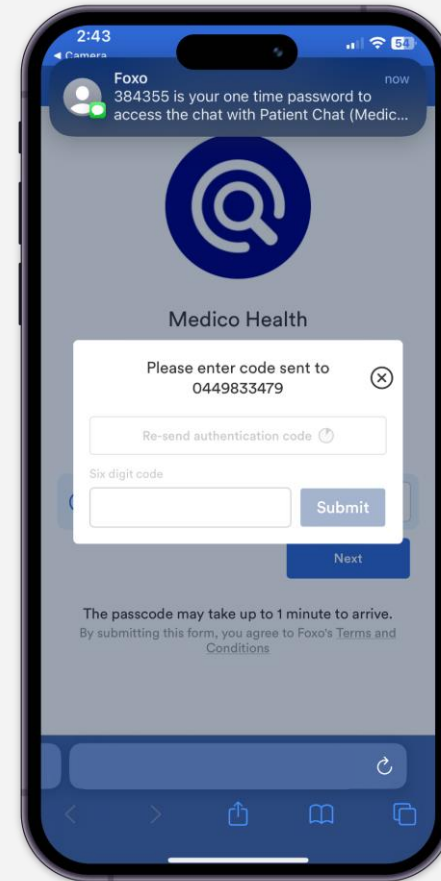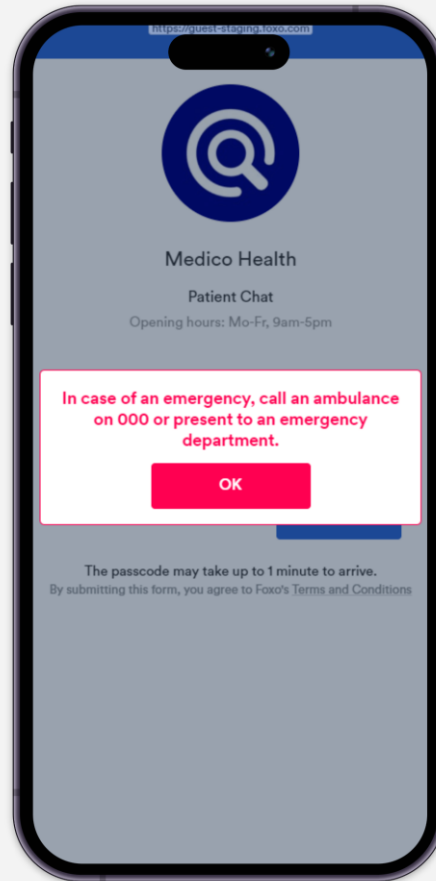https://help.foxo.com/manage-case-identifiers

**Ask:** The patient will be prompted to fill in this field.
**Required:** The patient will need to fill in the field before they can proceed with the chat

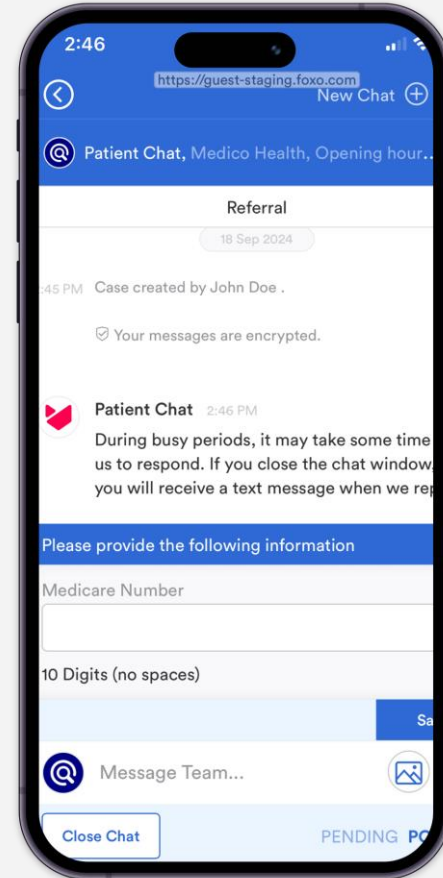You can create as many identifiers as needed via the **plus icon.**

# The Patient Experience

# The Patient Experience



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# Manage Incoming Patient Cases

## Viewing Cases



Patient Chat

Team Chat | People | Files | Options

Filter Cases

All

**Referral** — Unclaimed

Guest: John Doe — 1:45 PM
Claimed: *Pending* — PC0027
no labels — PATIENT

**Hello** — Unclaimed

Guest: John Doe — 23 May 2024
Claimed: *Pending* — PC0026
no labels — PATIENT

**US** — Claimed

Guest: Daniel Lee — 09 May 2024
Claimed: Emily Stuart — PC0023
no labels — PATIENT

**Appointment** — ★ My Case

Start typing... use @ t

**Inbox of all Patient Cases**

12 Jun 2024

1:30 PM — Ms. Sarah Hillmann has claimed PC0013
1:30 PM — Case close requested by Ms. Sarah Hillmann : PC0013
1:30 PM — Ms. Sarah Hillmann has claimed PC0025
1:30 PM — Case close requested by Ms. Sarah Hillmann : PC0025
1:41 PM — Ms. Sarah Hillmann has claimed PC0001

**John Doe** — Case #PC0027

Referral

PATIENT  UNCLAIMED — Add Label — VIEW

**Ms. Sarah Hillmann** 1:49 PM
Can someone please take this?

1:51 PM — Sam Harris has requested to join the team. — ⚙ MANAGE TEAM
1:51 PM — Sam Harris has been added to the team by Ms. Sarah Hillmann .

**Sam Harris** 1:52 PM
I can take this @Ms. Sarah Hillmann

**Team Chat**

**Access incoming Cases from here or via the inbox on the left-hand side.**

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

**Team Chat with other members of the Team**

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10

# Manage Incoming Patient Cases

## Claiming Cases

Once claimed, you can find all your claimed Cases under the filter **"My Cases"**.

Case identifiers provided by the patient.

**Automatic Response to the Patient**
(message can be customised by Team admins under the Team's Settings)

Case Chat with Patient

### Patient Chat

Chat    People    Files

Options

Filter Cases

All

**PC0027**                    Claim                    PATIENT

IDENTIFIERS
Name  John Doe    Phone  ******833    DOB  25 Mar 1986    Medicare Number  1234567891    Preferred Location  CBD

Referral                    Unclaimed

☑ Your messages are encrypted.                    12 Jun 2024

Guest: John Doe              1:45 PM
Claimed:  Pending           PC0027
🏷 no labels                 PATIENT

Patient Chat  1:45 PM

Hi!

To make an appointment, please provide the information below and upload your referral.

We will respond during business hours (9am-5pm, Mon-Fri).
If you close this window, you'll receive an email notification.

Hello                       Unclaimed

Guest: John Doe              23 May 2024
Claimed:  Pending           PC0026
🏷 no labels                 PATIENT

1:48 PM  John Doe changed identifiers.
SHOW DETAILS ⌄

US                          Claimed

John Doe  1:48 PM

CANCER COMMONS REPORT

Guest: Daniel Lee            09 May 2024
Claimed:  Emily Stuart      PC0023
🏷 no labels                 PATIENT

Appointment                 ⭐ My Case

Chatting with: John (guest)                    1 TEAM

Message John... use @ to mention

11

# 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 | 🗑 | ☐ |
Prefill from login name

|  | Phone | AU | 449833479 | 🗑 | ☐ |
required
Prefill from login phone

|  | DOB | 25 | 3 | 1986 | 🗑 | ☐ |
Date of Birth                                                required

|  | Medicare Number | 1234567891 | 🗑 | ☐ |
10 Digits (no spaces)

|  | 👁 Preferred Location | Value | 🗑 | ☑ |

⊕

With **1** identifier selected          DESELECT  ⊘    Ask **1**

1 👁 identifier revealed to user  Hide Identifier      **Done**

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

Manage Identifiers | Add Label

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.

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12

# Manage Incoming Patient Cases

Closing Cases



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

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# Manage Incoming Patient Cases

## Printing Cases

**Print Case** allows you to save the Case chat, including any shared images, as a PDF file, which can then be uploaded into a clinical system.

Patient Chat

Team Chat | People | Files | Options

Print Case

Request Response

Team Settings
Edit team profile & settings

My Team Preferences
Notifications, Active state etc.

Reopen | Abandon

PC0027 | Referral

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

Teams with access
Patient Chat

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

Medicare Number 1234567 | Manage Identifiers

### Print Options

Include additional Case information

☑ Case Thread

Cancel | Print

Uploaded oncology-report.jp...

1:58 PM Ms. Sarah Hillmann ( Patie...
1:59 PM Ms. Sarah Hillmann chang...
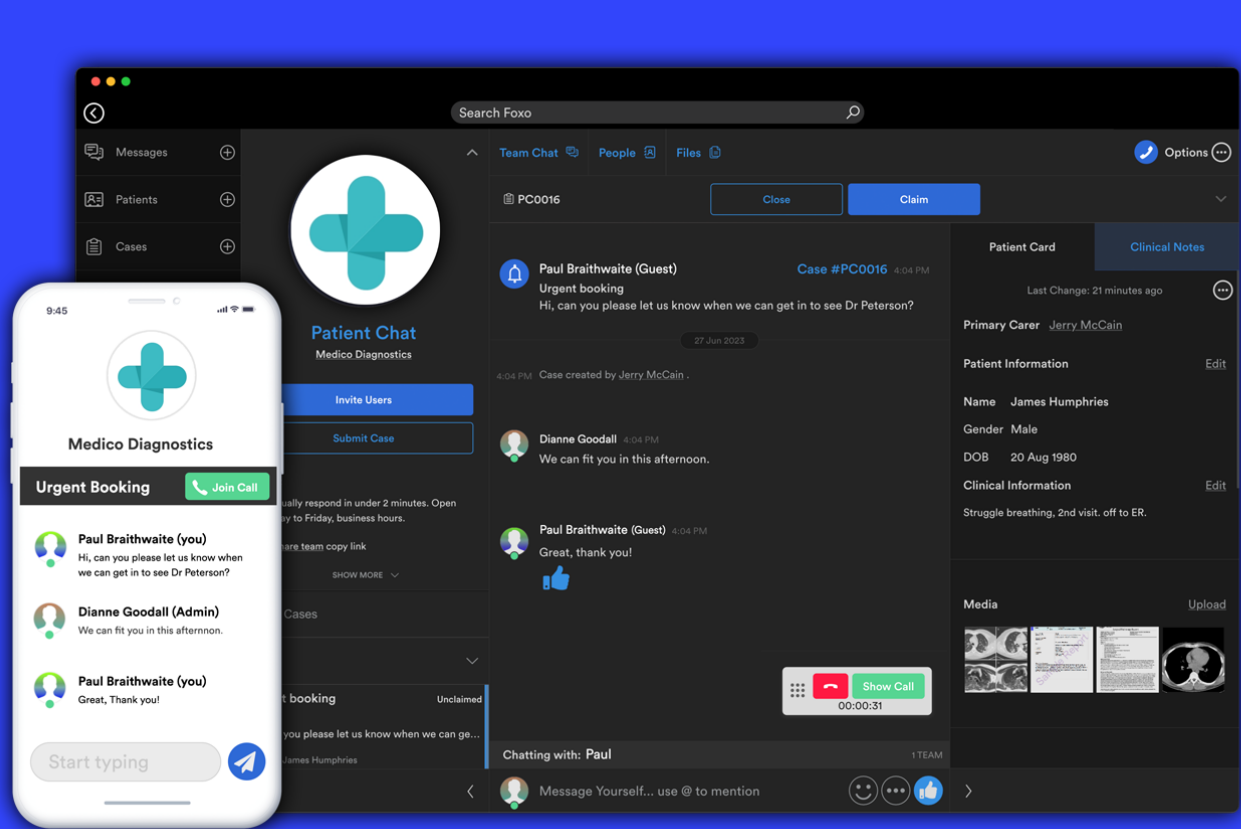SHOW DETAILS ⌄

Ms. Sarah Hillmann | Closing Notes
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

### Filter Cases

All

**Hello** — Unclaimed
Guest: John Doe | 23 May 2024
Claimed: Pending | PC0026
no labels | PATIENT

**US** — Claimed
Guest: Daniel Lee | 09 May 2024
Claimed: Emily Stuart | PC0023
no labels | PATIENT

**Appointment** — ⭐ My Case
Guest: Tim Elkins | 1:41 PM
Claimed: Ms. Sarah Hillmann | PC0001
no labels | GUEST

# 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

✉ app.foxo.com

✉ help@foxo.com