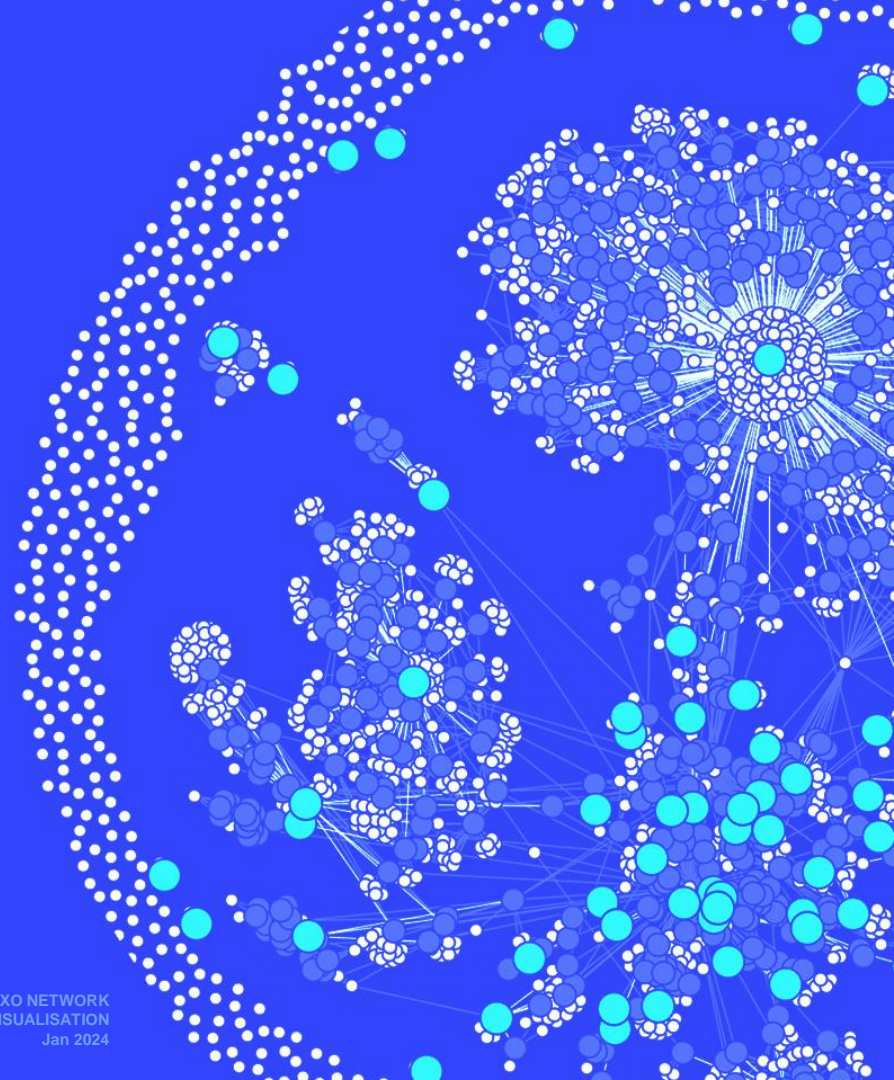




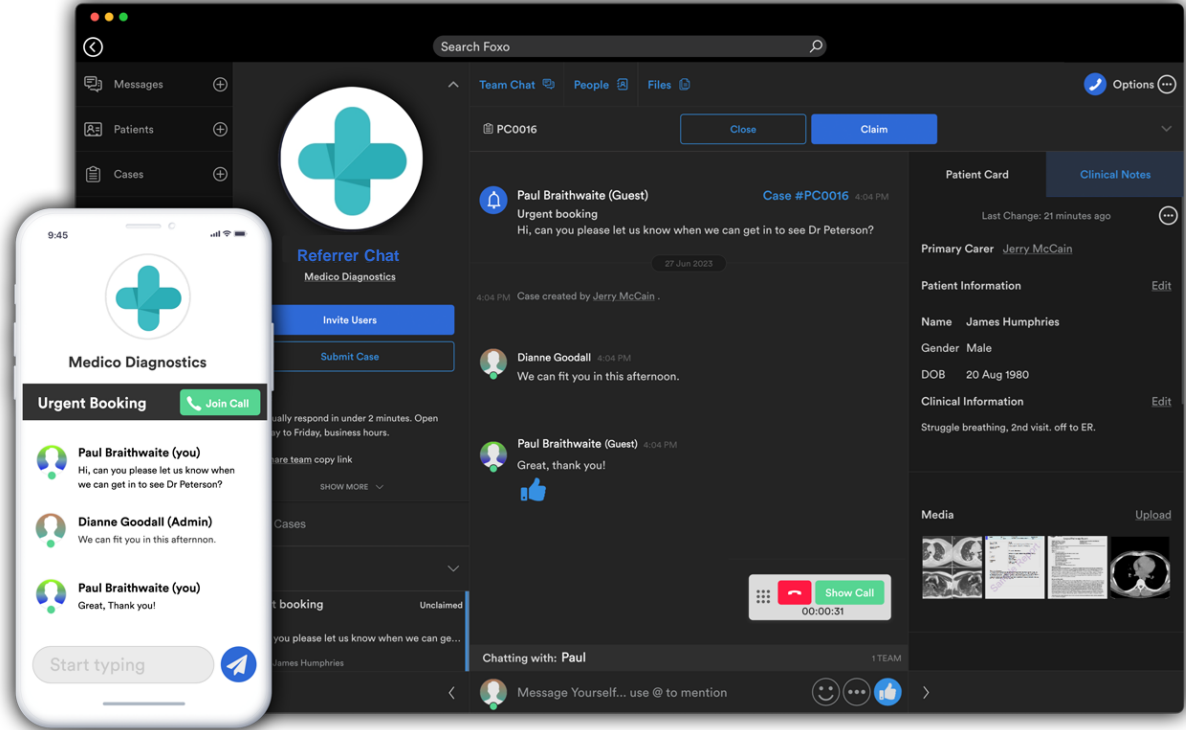
Referrer Connect



FOXO NETWORK
VISUALISATION
Jan 2024

foxo Secure Referrer Communication

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



How it Works

Simply toggle on the Referrer 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 external network can initiate a secure chat with your Team from any device, anytime. Your Team responds at their convenience.

Quick. Easy. Compliant.

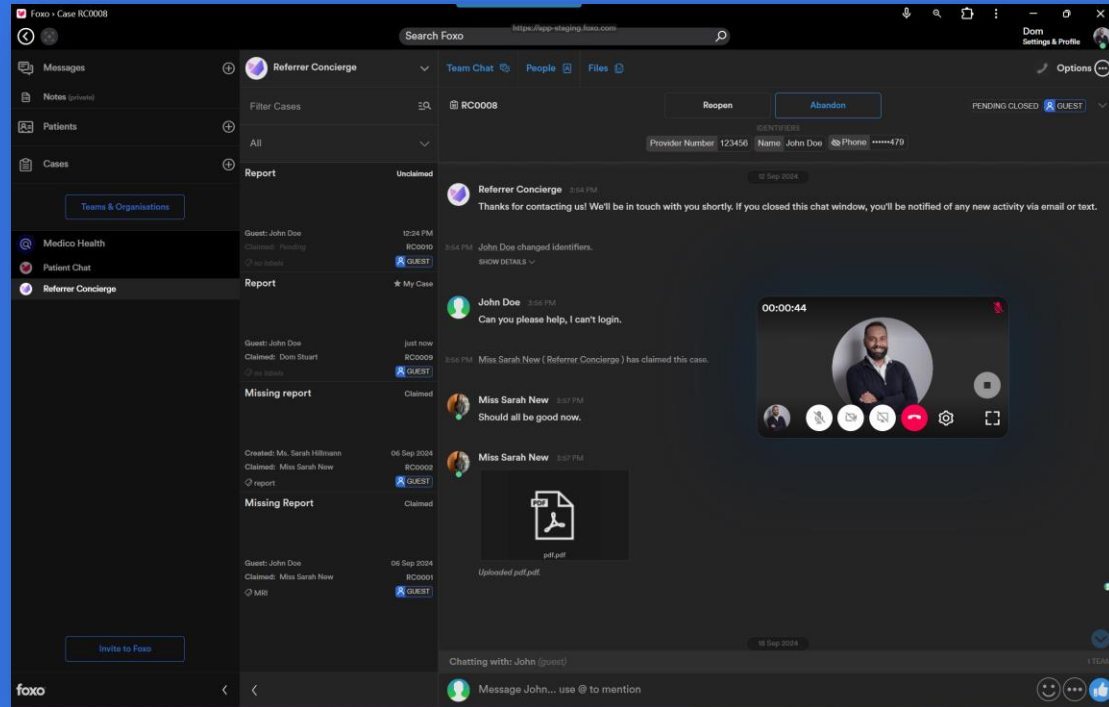
Secure Referrer Communication

Referrer



Launched from website / viewer / report / QR code

Foxo Enabled Enterprise



Direct communication line into your clerical or clinical Team

3 Steps to Referrer Connect

Teams



Create the Team that will respond to the incoming Referrer Cases, e.g. Referrer Concierge.

Setup



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

Link & Launch



The link can be embedded in website, reports, viewers or launched via QR code.

Setup

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

The screenshot shows the 'Team Settings' page for 'Medico Health'. The interface is dark-themed. At the top, there are tabs for 'Team Settings' (highlighted with a blue box) and 'My Team Preferences'. In the top right corner, there is an 'Options' menu (three dots) with a blue box and arrow pointing to it, containing 'Team Settings' (with a gear icon and description 'Edit team profile & settings') and 'My Team Preferences' (with a gear icon and description 'Notifications, Active state etc.'). A blue box on the right side of the image states: 'Only Team Administrators have access to the Team Settings'. Below the team name and logo, there are tabs for 'General' (highlighted with a blue box) and 'Guests'. The 'General' tab contains the following fields: 'Team Name' (with a red asterisk) containing 'Referrer Concierge', 'Description' (with a red asterisk) containing 'Referrer Concierge', 'Availability' section with a toggle for 'Show additional information for Team availability.' (turned on) and a text field containing 'Mo - Fr, 9am - 5pm', and 'Privacy' section with a toggle for 'Hide my Team from search results.' (turned on) and the text 'Always visible to organisation members.'.

People Files

Options

Team Settings Edit team profile & settings

My Team Preferences Notifications, Active state etc.

Only Team Administrators have access to the Team Settings

Team Name (visible to guests)

Description (for internal use, not visible to guests)

Availability (visible to guests)

Team Settings

My Team Preferences

Medico Health
Medico Health

General

Guests

Team Name *

Referrer Concierge

Description *

Referrer Concierge

Availability

Show additional information for Team availability.

Visible to Case creators and Team preview.

Mo - Fr, 9am - 5pm

Privacy

Hide my Team from search results.

Always visible to organisation members.

*To find out more about the other Team settings under the General tab, please visit our [Help Hub](#)

Setup

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

Automatic Response

Sent to guest after a few seconds of starting the chat

Case Categories

Click on Manage to create subject categories for guests to choose from (e.g. report, clinical enquiry etc.)

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://quest-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 *

We monitor this service only during business hours.

Preview Prompt

Outbound Cases

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

☐

Case Categories

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

MANAGE

Preview

Select Category

Referrer Connect Template Identifiers

You can have all new cases start with these Identifiers.

MANAGE

Provider Number

N/A

Location

N/A

Name

N/A

Phone

N/A

Guests Tab

Referrer Connect Toggle

Referrer Connect URL

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

Disclaimer Toggle

Enables a prompt at guest login. Guest confirms with Ok

*Coming soon

Case identifiers are unique pieces of information (e.g. provider number etc) that verify the guest's identity

The Referrer Experience

The screenshot shows the initial onboarding screen of the Medico Health Referrer Concierge app. At the top, there's a dark blue header with a white magnifying glass icon. Below it, the text "Medico Health" and "Referrer Concierge" is displayed, followed by the hours "Mo - Fr, 9am - 5pm". A prominent red-bordered box in the center contains the text: "We monitor this service during business hours and typically respond in under 10 minutes." with a red "OK" button. Below this, there's a form with a "Mobile" label, a dropdown menu showing "AU", and a text input field containing "0449833479". A "Remember Me" checkbox is also present. A blue "Next" button is at the bottom right. At the very bottom, a small disclaimer states: "The passcode may take up to 1 minute to arrive. By submitting this form, you agree to Foxo's Terms and Conditions".

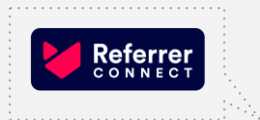
The screenshot shows the chat interface of the Medico Health Referrer Concierge app. At the top, there's a dark blue header with a white magnifying glass icon and a "New Chat" button. Below it, the chat title "Referrer Concierge, Medico Health, Mo - Fr, 9am - 5pm" is displayed. A "Report" button is visible. The chat history shows a message from "Referrer Concierge" dated "18 Sep 2024" that says: "Case created by John Doe." and "Your messages are encrypted." Below this, a message from "Referrer Concierge" dated "18 Sep 2024" says: "Thanks for contacting us! We'll be in touch with you shortly. If you closed this chat window, you'll be notified of any new activity via email or text." Below the chat history, there's a section titled "Please provide the following information" with a dropdown arrow. It contains three input fields: "Provider Number" (marked as required), "Location", and "Phone" (with a dropdown menu showing "AU" and a text input field containing "449833479"). A blue "Save" button is at the bottom right. At the bottom of the screen, there's a blue bar with a white magnifying glass icon, the text "Message Team...", and a "Close Chat" button. The status "PENDING RC0010" is displayed at the bottom right.

Launch Points

Decide on a launch point. How will referrers access the chat?

The link can be embedded in your website, reports, viewers or launched as a stand-alone link (e.g. www.medico.chat).

Please contact us for report and image integrations.



Viewer / PMS



Live link



Report

Launch Campaign

How will you communicate the new service to your referrers?

Once you're ready to launch, we recommend you develop launch collateral such as posters, business cards, merch (mouse pads, posters etc) for your external network and follow up with on-site visits to introduce and promote your new service. You can also include a link in your website or inform your referring network during the phone setup. This comprehensive approach will help ensure a successful and impactful launch.

Manage Incoming Guest Cases

Viewing Cases

Inbox of all Guest Cases

Referrer Concierge

Team Chat

People

Files

Options

Filter Cases

All

Report

Unclaimed

Guest: John Doe

Claimed: Pending

no labels

12:24 PM

RC0010

GUEST

Report

My Case

Guest: John Doe

Claimed: Dom Stuart

no labels

12:39 PM

RC0009

GUEST

Missing report

Claimed

Created: Ms. Sarah Hillmann

Claimed: Miss Sarah New

report

06 Sep 2024

RC0002

GUEST

Missing Report

Claimed

Guest: John Doe

Claimed: Miss Sarah New

MRI

06 Sep 2024

RC0001

GUEST

3:54 PM

GUEST

PENDING CLOSED

Case #RC0008

3:56 PM

Miss Sarah New has claimed RC0008

4:00 PM

John Doe has closed this case. RC0003

12:23 PM

GUEST

CLAIMED

Add Label

Case #RC0009

12:24 PM

John Doe

Report

GUEST

UNCLAIMED

Add Label

VIEW

12:39 PM

Dom Stuart has claimed RC0009

12:39 PM

Dom Stuart has claimed RC0008

12:39 PM

Case close requested by Dom Stuart : RC0008

12:57 PM

Dom Stuart

Can someone take this? @all 2 (edited)

Team Chat

Start typing... use @ to mention

Team Chat with other members of your Team

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

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

foxo.com

11

Manage Incoming Guest Cases

Claiming Cases

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

Claim

IDENTIFIERS

Provider Number 123456 Location CBD Name John Doe Phone *****479

Case identifiers provided by the guest user.

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

Case chat with the guest user

Referrer

Team Chat People Files

Options

Filter Cases

RC0011

GUEST

All

Missing report Unclaimed

Guest: John Doe just now
Claimed: Pending RC0011
no labels GUEST

Report ★ My Case

Guest: John Doe 1:05 PM
Claimed: Dom Stuart RC0010
no labels GUEST

Report ★ My Case

Guest: John Doe 12:39 PM
Claimed: Dom Stuart RC0009
no labels GUEST

Missing report Claimed

Created: Ms. Sarah Hillmann 06 Sep 2024
Claimed: Miss Sarah New RC0002
report GUEST

John Doe Missing report

18 Sep 2024 - Case created

18 Sep 2024

1:37 PM Case created by John Doe .

Your messages are encrypted.

Referrer Concierge 1:37 PM

Thanks for contacting us! We'll be in touch with you shortly. If you closed this chat window, you'll be notified of any new activity via email or text.

1:37 PM John Doe changed identifiers.
SHOW DETAILS

Chatting with: John (guest)

Message John... use @ to mention

1 TEAM

Manage Incoming Guest Cases

Actioning Cases

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

The screenshot displays the 'Referrer Concierge' interface. A 'Manage Identifiers' modal is open, showing fields for 'Provider Number' (123456), 'Name' (Value), and 'Phone' (AU 0449833479). The modal also includes a 'Prefill from login name' section and a 'Label' field. A red arrow points from the 'Manage Identifiers' link in the chat window to the modal. Another red arrow points from the 'Ask' button in the modal to the chat window. A blue arrow points from the 'Message Sarah... use @ to mention' button in the chat window to the modal.

Manage Identifiers

Provider Number: 123456 (required)

Name: Value

Phone: AU 0449833479

Prefill from login name

Label: Value

Add Identifier (+)

With 1 identifier selected

Ask

Done

Chat Window:

Referrer Concierge, Medico Health, Mo - Fr, 9am - 5pm

Missing report

Dom Stuart 1:45 PM 18 Sep 2024

Hi Dr John. Here is the report.

Please provide the following information

Provider Number * 123456 Required

Message Dom...

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

Manage Incoming Guest Cases

Closing Cases

The screenshot displays the 'Referrer Concierge' interface. At the top, there are tabs for 'Team Chat', 'People', and 'Files'. A red box highlights the 'Close' button, with a red arrow pointing to it. A blue callout box explains: 'You can also Abandon the Case which will notify other team members that this Case is available for claiming again.' Below the 'Close' button is the 'Abandon' button. The main area shows a list of cases, with the first one being 'RC0009'. A modal titled 'Close Case' is open, featuring a text input field for 'Add final notes (optional)' and two buttons: 'Cancel' and 'Close'. A blue callout box points to the 'Close' button in the modal, stating: 'When closing the Case, you can add an optional closing note, which won't be visible to the Patient.' The bottom of the screen shows a chat area with a message from 'John Doe' and a text input field for replying.

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.

Referrer Concierge

Filter Cases

All

Report

Guest: John Doe
Claimed: Dom Stuart

Report

Guest: John Doe
Claimed: Dom Stuart

Missing Report

Guest: John Doe
Claimed: Miss Sarah New

Team Chat

People

Files

Reopen

Abandon

RC0002 | Missing report

Created: Ms. Sarah Hillmann
Claimed: Dom Stuart Referrer Concierge

GUEST PENDING CLOSED report Provider Number 123456 Name N/A Phone 479

4:11 PM Ms. Sarah Hillmann changed identity
SHOW DETAILS

4:11 PM Ms. Sarah Hillmann 4:11 PM
Can you please send report for

4:12 PM Miss Sarah New (Referrer Concierge)

2:00 PM Dom Stuart (Referrer Concierge) has claimed this case.

06 Sep 2024
RC0001
GUEST

2:03 PM Dom Stuart
Report uploaded to PMS

2:03 PM Dom Stuart (Referrer Concierge) 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: Sarah

Message Sarah... use @ to mention

Options

Print Case

Request Response

Team Settings

My Team Preferences

Manage Identifiers

Print Options

Include additional Case information

☒ Case Thread

Cancel Print

Questions?



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



app.foxo.com



help@foxo.com

