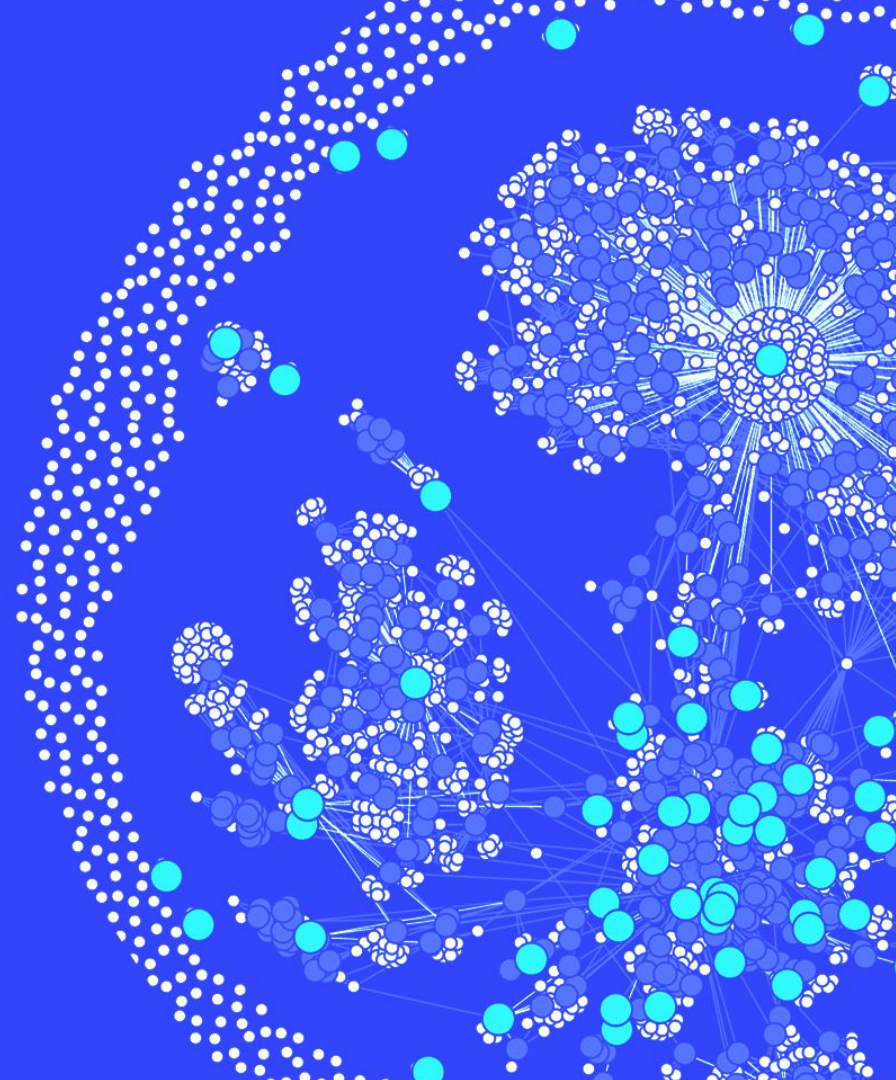


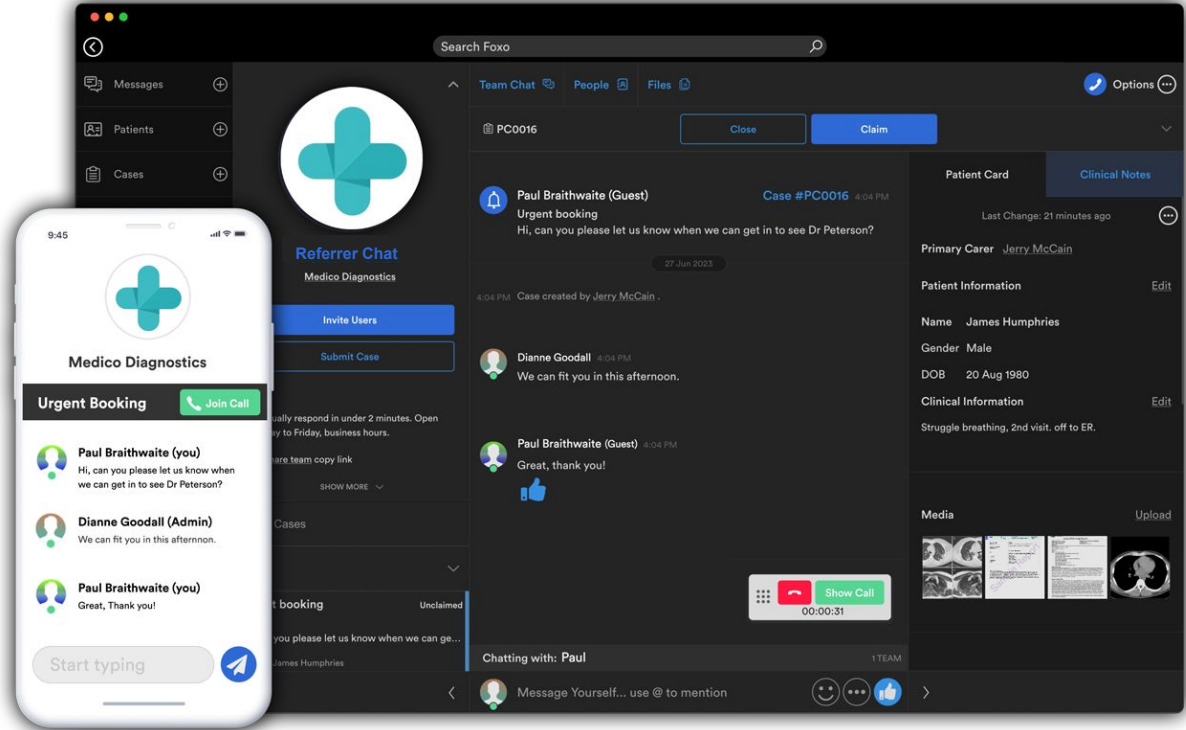


Referrer Connect



foxo Secure Referrer Communication

- ✓ No Setup
- ✓ Simple & Secure File Upload
- ✓ 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

MediCo HOSPITAL
SAMPLE DISCHARGE SUMMARY

Facility
MediCo Hospital
123 Street, Address, 4000
Phone: 1234 56789
Fax: 1234 56789
Chat live: [Click Here](#)

Episode Details
Consultant: [Redacted]
Regime: [Redacted]
Facility Unit: [Redacted]
Administration: [Redacted]
Date: [Redacted]

Reason for Admission
Principal Diagnosis: [Redacted]
Medical History: [Redacted]
Impaired Clinical Management: [Redacted]
Procedures Performed: [Redacted]

Discharge details
[Redacted]

Referrer Connect
Open Business Days, 9-5pm
Thanks for contacting us. We usually respond in under 3 minutes. In the meantime, please let us know how we can help.

Dr West 12:34
Hi, I need to know what scan to book for my patient please.

Try it out

Have a question about this discharge?
Chat live with us here.

Launched from website / viewer / report / QR code

Foxo Enabled Enterprise

Referrer Concierge

Case #	Status	Created	Creator	Patient	Labels
RC0020	Unclaimed	Nov 04 2024 at 4:59 PM	John Doe	None	MRI, Or add label here
RC0019	My Case	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	Claimed	Sep 24 2024 at 5:04 PM	John Doe	None	None
RC0012	Unclaimed	Sep 24 2024 at 4:52 PM	John Doe	None	None

Video Chat
00:00:32 1 participant

Invite to Foxo

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. This will generate a link.

Link & Launch



The link can be embedded in your website, reports, viewers or shared as a QR code.


Setup


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

Team Name (visible to guests)

Description (for internal use, not visible to guests)

Availability (visible to guests)

Files 

**Medico Health**
Medico Health

General Guests Reports

Team Name *

Description *

Availability

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

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

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

*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, login details etc.) Each category can have a custom automatic response.

The screenshot shows the 'Guests' tab of a setup interface. At the top are three tabs: 'General', 'Guests' (selected), and 'Reports'. The 'Guests' tab contains several settings:

- Guest Team Type**: A section header.
- Referrer Connect**: A toggle switch that is turned on. Below it, text says 'Allow guests to chat with team members by creating guest cases.'
- Patient Connect**: A toggle switch that is turned off. Below it, text says 'Allow patients to chat with team members by creating guest cases.'
- Guests can create case via the following link:** A text field containing a URL: <https://guest-staging.foxo.com/chat/5479883e-57f2-4fae-a224-130dcccdaeb0f/new>. There is a 'copy' icon to the right.
- Invite guests through email**: A section header with an 'INVITE VIA EMAIL' button.
- Automatic Response**: A toggle switch that is turned on. Below it, text says 'Send an automatic response when new Cases are created.'
- Automatic Response Message ***: A text area containing the message: 'Thanks for contacting us! Please type your message below. 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.'
- Disclaimer**: A toggle switch that is turned on. Below it, text says 'Enable a Disclaimer prompt at guest login.'
- Disclaimer ***: A text area containing the message: 'We monitor this service during business hours and typically respond in under 10 minutes.' There is a 'Preview Prompt' link to the right.
- Hide Closed Cases**: A toggle switch that is turned off. Below it, text says 'Hide guest user's previously closed cases from them.'
- Outbound Cases**: A toggle switch that is turned off. Below it, text says 'Allow outbound guest cases to be sent to contacts not yet on Foxo.'
- Case Categories**: A section header with a 'MANAGE' button. Below it, text says 'Allow guests patients to choose from a set of categories when creating cases.'
- Preview**: A text field containing 'Select Category'.
- Referrer Connect Template Identifiers**: A section header with a 'MANAGE' button. Below it, text says 'You can have all new cases start with these Identifiers.'
- Provider Number**, **N/A**, **Patient Name**, **N/A**, **Location**, **N/A**, **Name**, **N/A**, **Phone**, **N/A**: A row of input fields.

At the bottom of the form is a large blue button labeled 'Save Changes'.

Guests Tab

Referrer Connect Toggle

Referrer Connect URL

Use this link to create a QR code or embed in your website, reports etc.

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

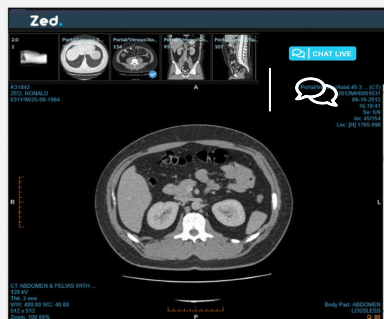
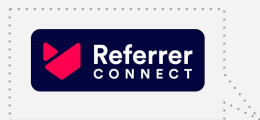
A browser window showing the Medico Health Referrer Concierge login page. The page has a dark blue header with a logo and the text "Medico Health Referrer Concierge Mo - Fr, 9am - 5pm". A red-bordered box in the center contains the text: "We monitor this service during business hours and typically respond in under 10 minutes." Below this is a red "OK" button. The login form includes a "Mobile" checkbox, a field for "AU 0449833479", a "Remember Me" checkbox, and a "Next" button. At the bottom, it states: "The passcode may take up to 1 minute to arrive. By submitting this form, you agree to Foxo's Terms and Conditions".

A browser window showing the Medico Health Referrer Concierge chat interface. The chat header shows "Referrer Concierge, Medico Health, Mo - Fr, 9am - 5pm". The chat content includes a "Report" section with a timestamp "18 Sep 2024" and a message: "Case created by John Doe .". Below this is a message from "Referrer Concierge" dated "12:24 PM" saying: "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." The chat form section is titled "Please provide the following information" and includes fields for "Provider Number *", "Location", and "Phone" (with "AU 449833479" entered). A "Save" button is at the bottom right. The chat status at the bottom is "PENDING RC0010".

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.myclinic.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

The screenshot displays the 'Referrer Concierge' interface for managing incoming guest cases. The interface includes a sidebar with navigation options (Messages, Notes, Patients, Cases, Medico Health, Admin Team, Patient Chat, and Referrer Concierge), a main table of cases, and a right-hand sidebar for team chat and activity log. Annotations highlight key features: filtering by case category, reordering columns, hovering over icons to show categories, hovering over 'Claimed' status to reveal the claimer, and the team chat/activity log section.

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.

Case #	Status	Created	Creator	Patient	Labels
RC0020	Unclaimed	Nov 04 2024 at 4:59 PM	John Doe	None	MRI, Or add label here
RC0019	My Case	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	Claimed	Sep 24 2024 at 5:04 PM	John Doe	None	None
RC0012	Unclaimed	Sep 24 2024 at 4:52 PM	John Doe	None	None

Manage Incoming Guest Cases

Claiming Cases

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

Team Chat People Files Options

RC0011

Claim

IDENTIFIERS

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

18 Sep 2024 - Case created

John Doe
Missing report

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

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

Chatting with: John (guest)

Message John... use @ to mention

Case chat with the guest user

Case identifiers provided by the guest user.

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

Manage Identifiers

Provider Number 123456 required

Name Value

Phone AU 0449833479

Label Value Add Identifier

With 1 identifier selected Ask Done

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

Missing report

Dom Stuart 1:45 PM 18 Sep 2024

CHANCER COMMONS REPORT

Uploaded oncology-report.jpg

Dom Stuart 1:45 PM

Hi Dr John. Here is the report.

Please provide the following information

Provider Number * 123456 Required

Message Dom...

06 Sep 2024 2:00 PM Dom Stuart (Referrer Concierge) has claimed this case.

RC0001

Chatting with: Sarah

Message Sarah... use @ to mention

Manage Incoming Guest Cases

Closing Cases

The screenshot displays the Foxo interface for managing incoming guest cases. At the top, there are tabs for 'Team Chat', 'People', and 'Files'. A red arrow points to the 'Close' button, which is highlighted with a red box. To the right of the 'Close' button is an 'Abandon' button. Below these buttons, there is a section for 'IDENTIFIERS' with fields for 'Provider Number' (123456), 'Location' (N/A), 'Name' (John Doe), and 'Phone' (.....479). A blue callout box explains that clicking 'Abandon' will notify other team members that the case is available for claiming again. In the center, a 'Close Case' dialog box is open, featuring a text area for 'Add final notes (optional)' and 'Cancel'/'Close' buttons. A blue callout box notes that an optional closing note can be added, which won't be visible to the external guest user. The background shows a chat window with a message from 'John Doe' and a status 'CLAIMED' with a 'GUEST' icon. The bottom of the screen shows a chat input area with a placeholder 'Message John... use @ to mention' and a '1 TEAM' indicator.

Team Chat People Files Options

RC0009

Close Abandon

CLAIMED GUEST

IDENTIFIERS

Provider Number 123456 Location N/A Name John Doe Phone479

John Doe Report

18 Sep 2024 -

18 Sep 2024

1:36 PM John Doe changed identifiers. SHOW DETAILS

Chatting with: John (guest) 1 TEAM

Message John... use @ to mention

You can also Abandon the Case which will notify other team members that this Case is available for claiming again.

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

Manage Incoming Guest 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 Foxo interface for managing incoming guest cases. At the top, there are tabs for 'Team Chat', 'People', and 'Files'. On the right, there is an 'Options' menu with a 'Print Case' option highlighted by a red box and a red arrow pointing to the 'Print Options' dialog box. The main chat area shows a conversation with 'Sarah' (Referrer Concierge) and 'Dom Stuart' (Referrer Concierge). The chat history includes messages about creating the case, claiming it, and sending a report. The 'Print Options' dialog box is open, showing a checkbox for 'Case Thread' which is checked. The dialog has 'Cancel' and 'Print' buttons. The bottom of the interface shows a chat input area with a placeholder 'Message Sarah... use @ to mention' and icons for emojis, more options, and a thumbs up.

Team Chat People Files Options

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

Print Case

Request Response
Team Settings
My Team Preferences
Manage Identifiers

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

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.

Dom Stuart Closing Notes

2:03 PM 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 1 TEAM

Message Sarah... use @ to mention

Questions?



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



app.foxo.com



help@foxo.com

