

Heal and Hale User guide

By

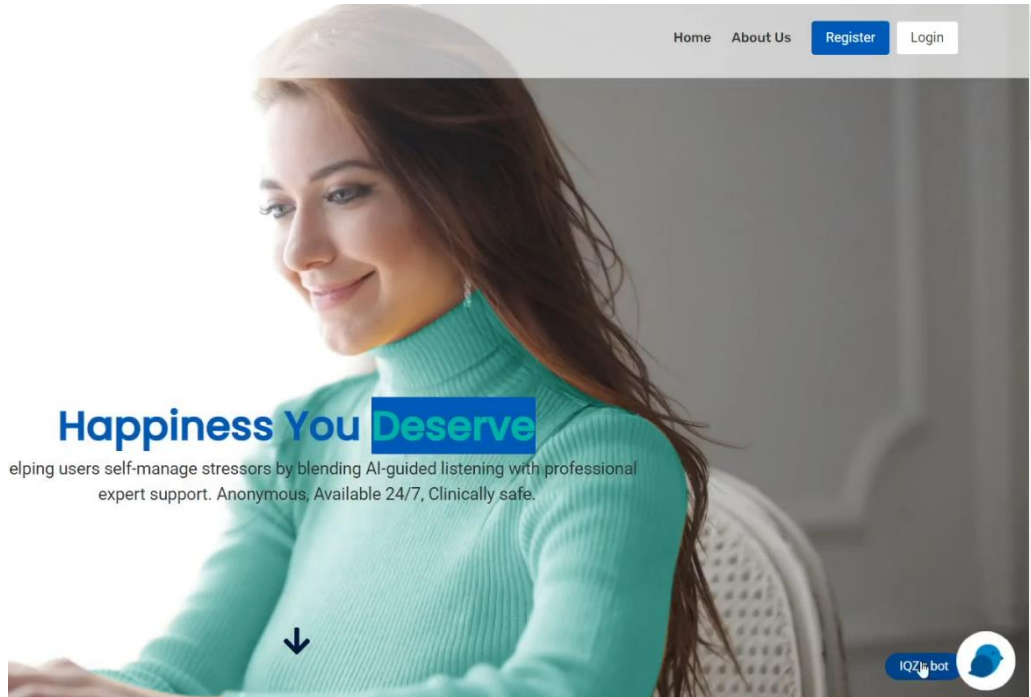
IQZ Systems

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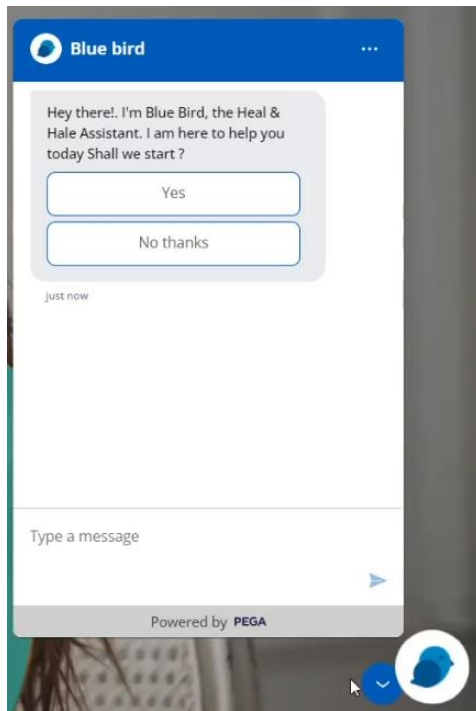
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Pega web Bot Interaction:

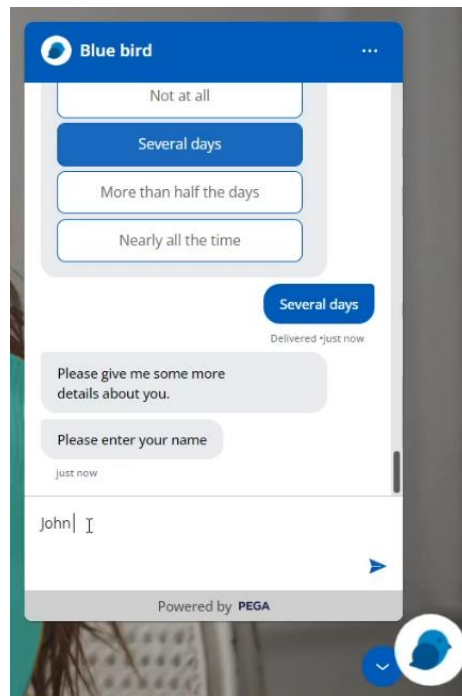
- Navigate to <https://iqzplus.com/HealnHale/home>
- Wait for IQZ's Bot to show up, click on the IQZ's bot text.



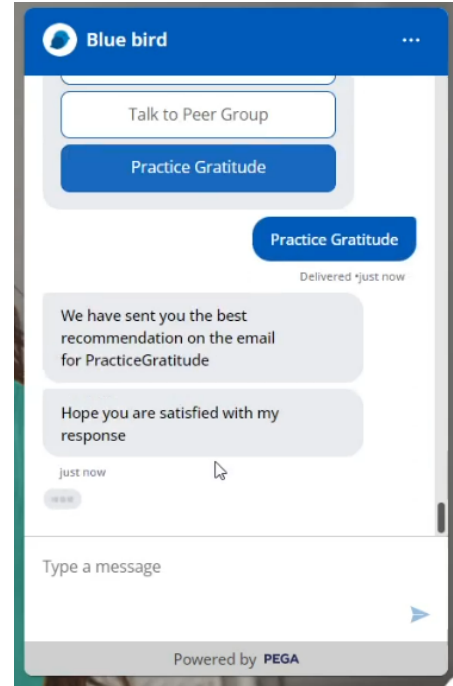
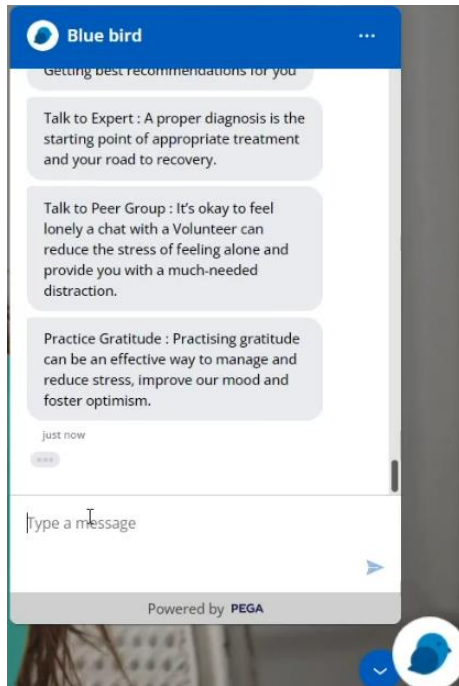
- Bot appears with the welcome message,



- Do interact with the Bot answering the questions. Answer the personal details.



- Bot integrates with the Pega decisioning application to get the best recommendations(CDH ADM). Click on the recommendation.



- Bot sends the accepted response feedback to CDH.

env-35a157b145c35.pegaenablement.com/prweb/app/customer-decision-hub/_RoWOen_o_gLvR3dfvZshBg*/!OpenPortal_Developer?pyActivity=%40baseclass.pzProcessURLInWindow&...

PEGA Customer Decision Hub

Search

Interaction History

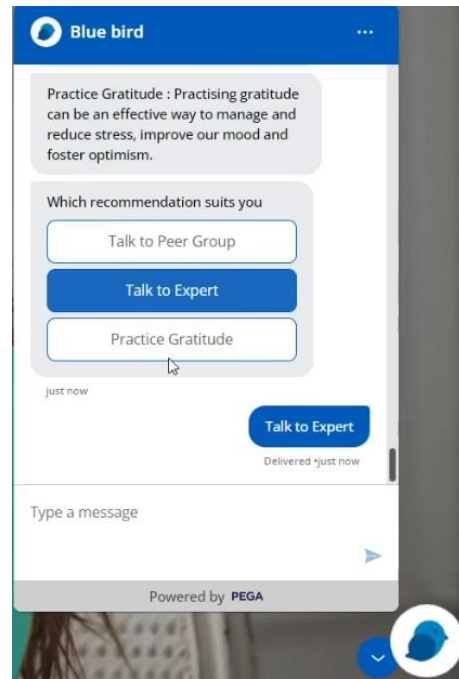
Reports contain interaction results on propositions as stored in the interaction history data store. This landing page displays interaction history samples that are defined on the Data-Decision-IH-Fact class.

Accept rate Volume by channel Volume by proposition Recent interactions

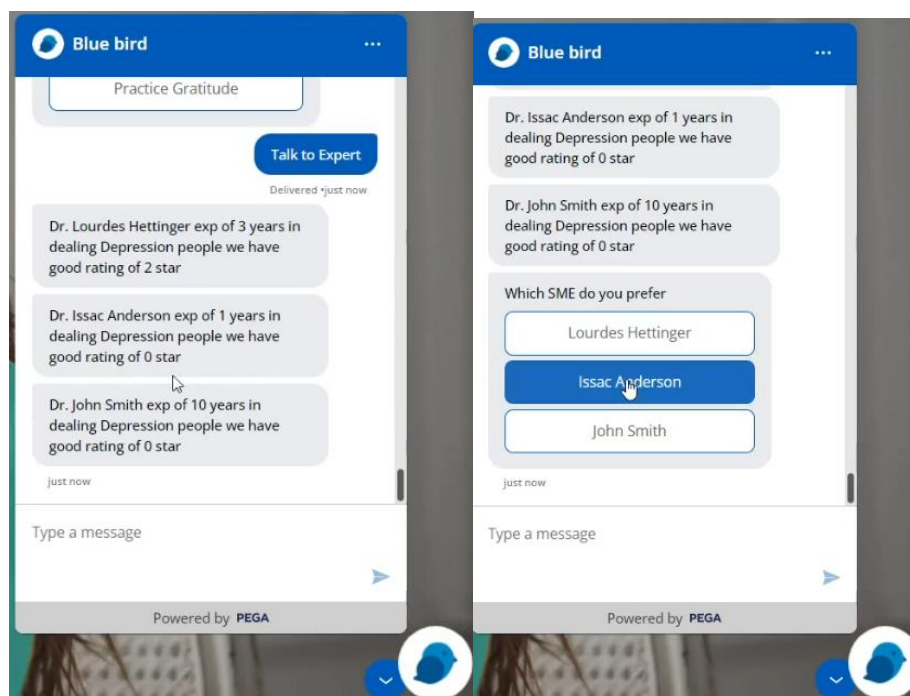
Interactions Last 30 Days

Fact ID	Group ID	Subject ID	Subject type	Outcome time	Business issue	Group	Proposition	Outcome	Propensity	Direction
6513229133817141922		hnh8@gmail.com	IQZ-CDH-Data-Customer	about a minute ago	Wellness	Recommendation	PracticeGratitude	Impression	0.000000000	Outbound
6513229133817141918		JohnSmith@iqzsystems.com	IQZ-CDH-Data-Customer	about a minute ago	Wellness	Recommendation	PracticeGratitude	Pending	0.000000000	Inbound
6513229133817141913		JohnSmith@iqzsystems.com	IQZ-CDH-Data-Customer	about a minute ago	Wellness	Recommendation	PracticeGratitude	Accepted	0.000000000	Inbound
6513229133817141909		JohnSmith@iqzsystems.com	IQZ-CDH-Data-Customer	about a minute ago	Wellness	Recommendation	PracticeGratitude	Impression	0.050000000	Inbound
6513229133817141908		JohnSmith@iqzsystems.com	IQZ-CDH-Data-Customer	about a minute ago	Wellness	Recommendation	NextBestPsychologist	Impression	0.500000000	Inbound
6513229133817141907		JohnSmith@iqzsystems.com	IQZ-CDH-Data-Customer	about a minute ago	Wellness	Recommendation	NextBestVolunteer	Impression	0.500000000	Inbound

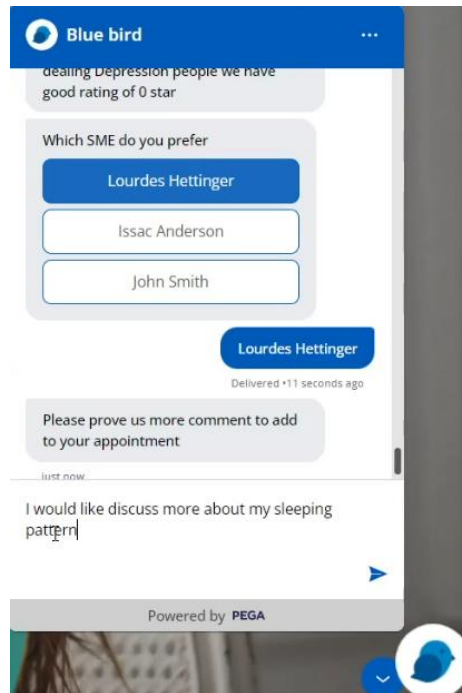
On selection of experts / peer groups:



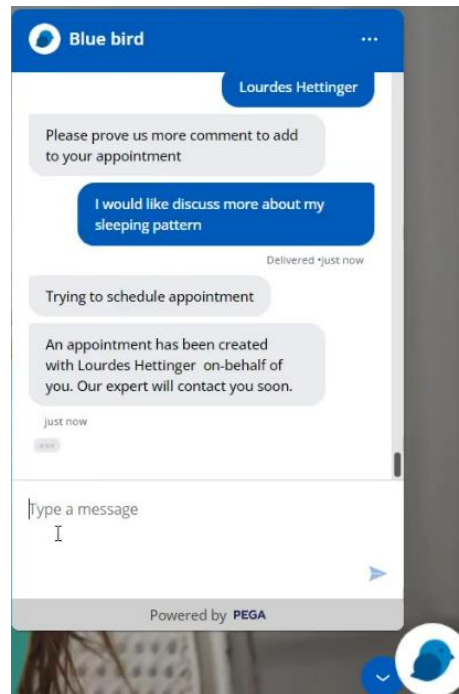
- ADM will fetch the best SME/ volunteer's profile to choose from, on selecting the profile, Bot send selected feedback to ADM.



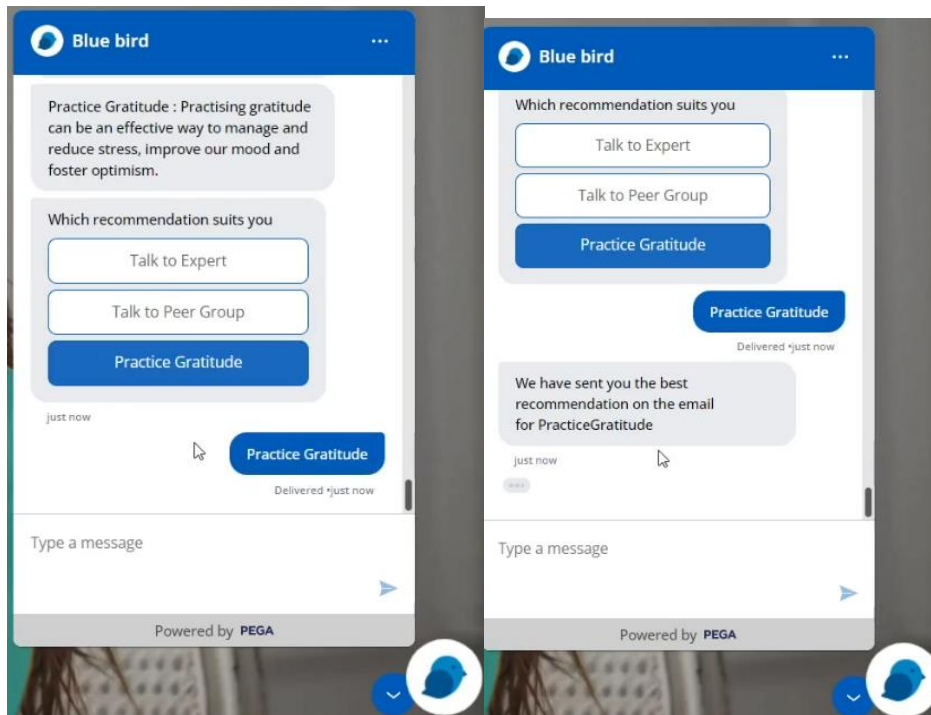
- Bot will ask for User comments to provide additional information for the appointment. This Comments will be fed to NLP for Topic and Sentiment Identification.



- Bot will initiate a appointment case in backend, with the User parameters provided in the Conversation flow and the case will be assigned to the corresponding SME profile.

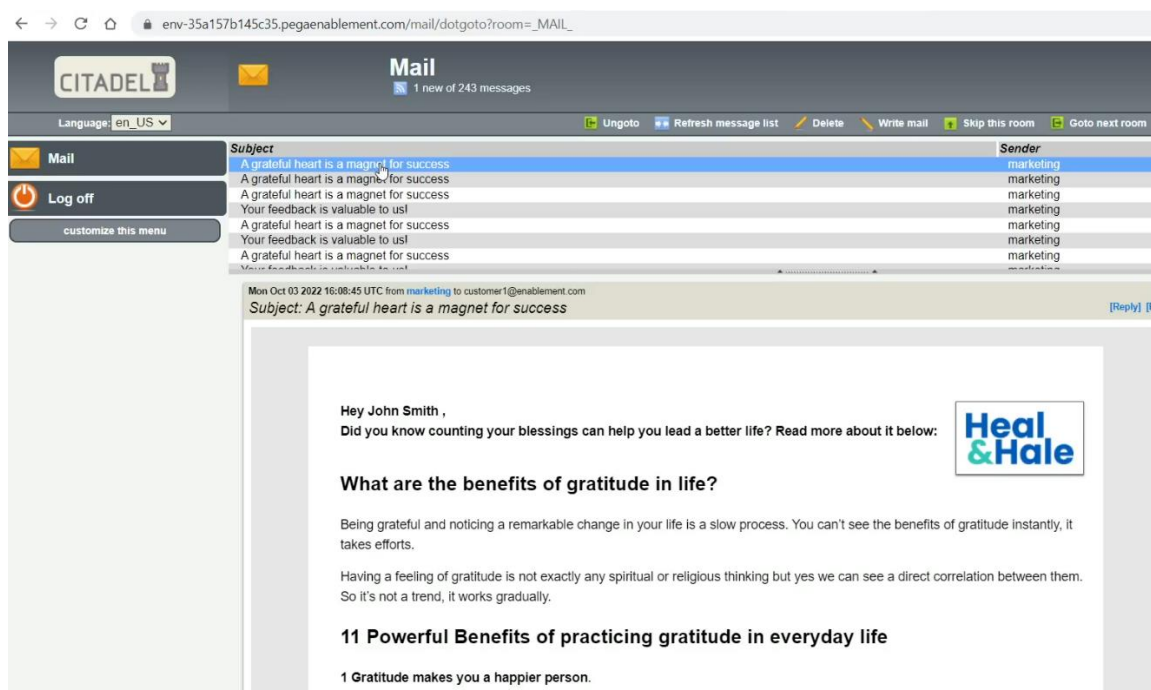


On selection of other recommendations:



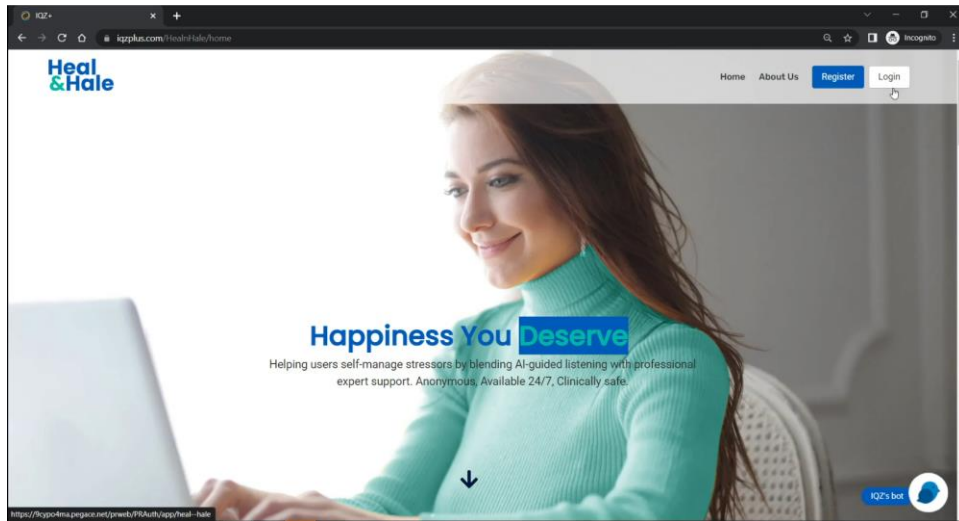
- Bot will send the accepted feedback to CDH and will send the email correspondence to the user regarding the details of the selected action.

Limitation: Due to security reason CDH enablement instance does not send email outside of the system. So, verification can be done only via "CITADEL".

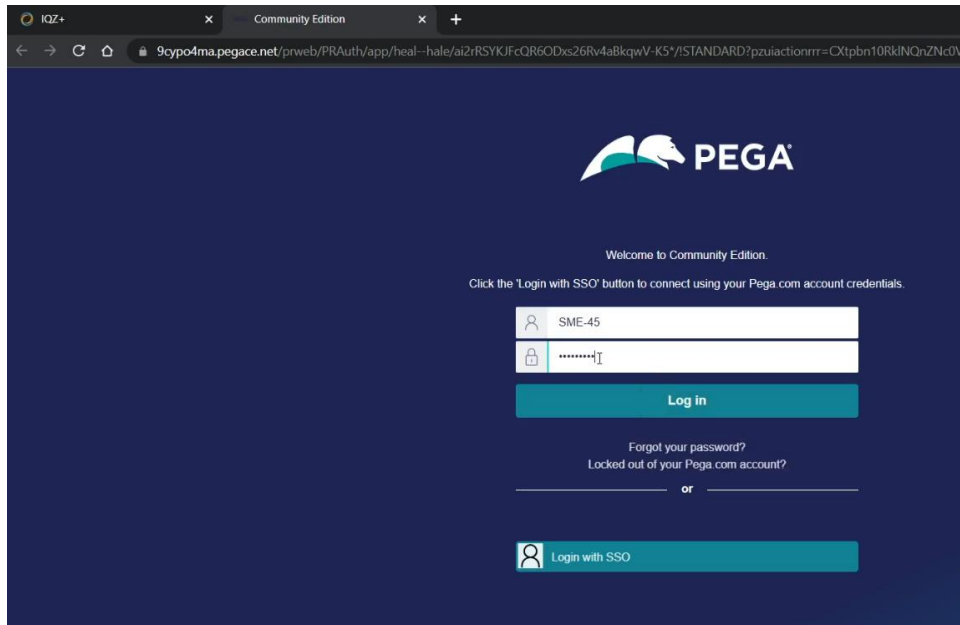


Pega Web Cosmos React portal – SME Login

- Navigate to <https://iqzplus.com/HealHale/home>



- Click login provide the details received via email.



- Click on the appointment case.

My Work
Work List

Search... 4 results

Case ID	Step	Case type	Status
A-4053	Schedule appointment	Appointment	PENDING-SCHEDULING
A-9004	Consult User	Appointment	PENDING-CONSULT
A-10002	Schedule appointment	Appointment	PENDING-SCHEDULING
A-8004	Consult User	Appointment	PENDING-CONSULT

- Details of the customer are filled in the Appointment from the Chat Conversation Flow, SME can schedule the call on their desired date and time.

Appointment
A-10002

Urgency: 10
Work Status: PENDING-SCHEDULING

Created: a6fb6a3f7142485890d6c37d75c61df5, 6 minutes ago

Updated: a6fb6a3f7142485890d6c37d75c61df5, 6 minutes ago

Details

Pulse

KA Schedule appointment
Task in A-10002 • Urgency 10

Email: Jack.pearson@iqzsystems.com

Full Name: Jack Pearson

Issue Type: Anxiety

Customer Comments: I would like discuss more about my sleeping pattern

Schedule Date time: MM/DD/YYYY HH:MM AM

Cancel

Details

Label: Appointment

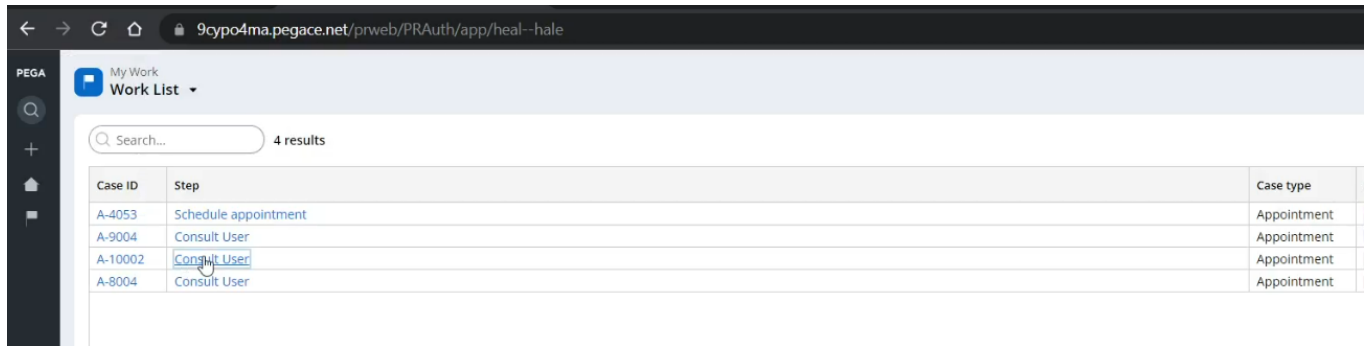
Description:

Calendar view showing October 2022. The date 13 is selected.

Time: HH:MM AM

Appointment consultation

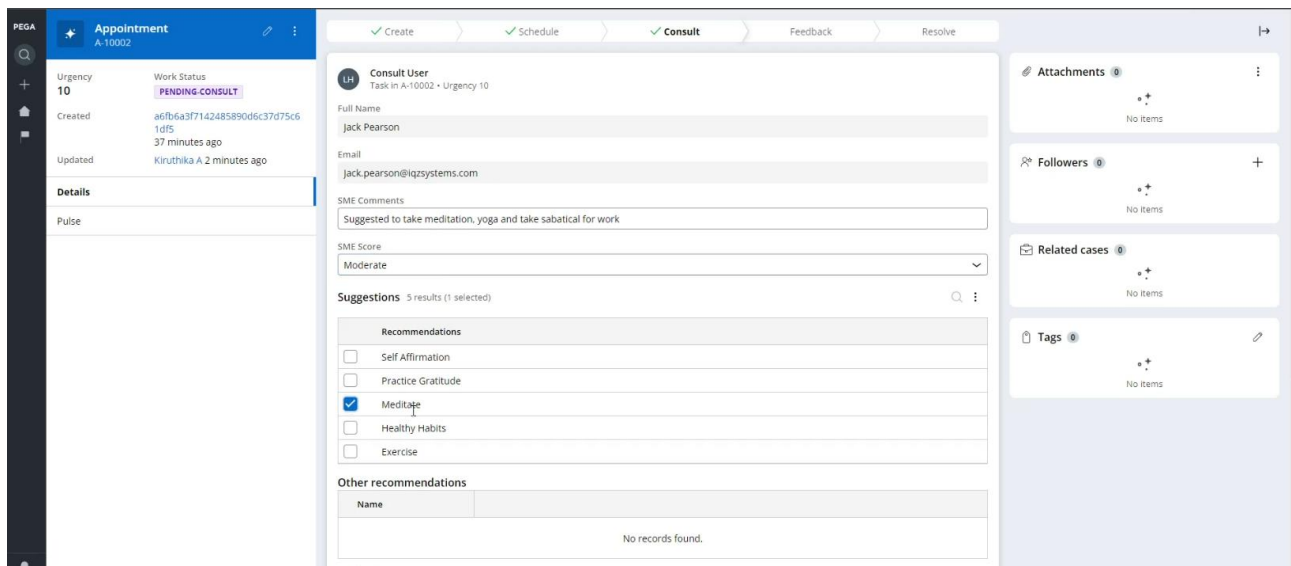
- SME can open and review the case



The screenshot shows the PEGA Work List interface. At the top, there's a search bar with "4 results". Below it is a table with columns: Case ID, Step, and Case type.

Case ID	Step	Case type
A-4053	Schedule appointment	Appointment
A-9004	Consult User	Appointment
A-10002	Consult User	Appointment
A-8004	Consult User	Appointment

- SME can provide his Comments and scores. Collected scores will be send to CDH as ADM input.



The screenshot shows the PEGA Case Detail view for 'Appointment A-10002'. The interface includes a left sidebar with navigation options, a main content area with a progress bar (Create, Schedule, Consult, Feedback, Resolve), and a right sidebar with sections for Attachments, Followers, Related cases, and Tags.

Case Details:

- Urgency: 10
- Work Status: PENDING CONSULT
- Created: a6fb6a3f7142485890dc37d75c6 1dF5 37 minutes ago
- Updated: Kiruthika A 2 minutes ago

Consult User Details:

- Full Name: Jack Pearson
- Email: jack.pearson@iqzsystems.com
- SME Comments: Suggested to take meditation, yoga and take sabbatical for work
- SME Score: Moderate

Suggestions: 5 results (1 selected)

Recommendations
<input type="checkbox"/> Self Affirmation
<input type="checkbox"/> Practice Gratitude
<input checked="" type="checkbox"/> Meditate
<input type="checkbox"/> Healthy Habits
<input type="checkbox"/> Exercise

Other recommendations:

Name
No records found.

- Recommended actions by SME are collected and fed back to ADM for learning. Other suggested recommendations are collected in the table for future analysis.
- Optionally Follow up meeting can be scheduled.

Other recommendations

Name	
Sabatical for Work	

+Add

☐ IsFollowUp

Scores 2 results



Source	Category	Description	Date time
Twitter	depression	Severe	Sep 30,2022 04:01:38 AM
BOT	Anxiety	Minimal	Oct 04,2022 02:20:55 AM

Tweets 1 result



Posts	Date Time
Sometimes worrying a lot about things that might happen or about losing control of the whole situation	Sep 29,2022 08:53:42 PM

Customer Comments

I would like discuss more about my sleeping pattern

Intents 2 results



- Scores are collected from different sources (like BOT, Twitter, SME) and are collected in CDH. The scores of the particular user are displayed for experts to get better history of the user.

Scores 2 results



Source	Category	Description	Date time
Twitter	depression	Severe	Sep 30,2022 04:01:38 AM
BOT	Anxiety	Minimal	Oct 04,2022 02:20:55 AM

Tweets 1 result



Posts	Date Time
Sometimes worrying a lot about things that might happen or about losing control of the whole situation	Sep 29,2022 08:53:42 PM

Customer Comments

I would like discuss more about my sleeping pattern

Intents 2 results



Name	Confidence Score
Complain	0.63
Wish	0.33

- Once the consultation is completed User will receive rating for the expert / group. Rating will be stored along with the SME profile.

From: IQZ Heal and Hale <marketing@enablement.com>
Sent: Tuesday, October 4, 2022 1:34 PM
To: Kiruthika Anbalagan <kiruthika.a@iqzsystems.com>
Subject: Collect SME Feedback

CAUTION: External emails may contain unsafe links/attachments

Hi Jack Pearson ,

We are constantly looking for ways to improve our services. Please provide us how was your experience with Lourdes Hettinger



Thanks,
Heal And Hale Team

ADM learning response feedback

Outbound campaign

- Outbound email will be triggered to get the user feedback on the Heal and Hale interactions which will be used back for ADM learning.



How did we do?

Hi HnHCustomer1 ,



Thanks for actively using Heal & Hale.

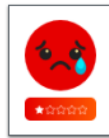
As one of our preferred customers, your feedback is very important to us. We are constantly striving to provide a flawless experience for our customers, and your input helps us do so.

That being said, if you could take a minute to share your feedback, we would really appreciate it.

What's your experience like for our suggestion PracticeGratitude ?



Amazing



Terrible

Thanks for your trust,

Team Heal & Hale

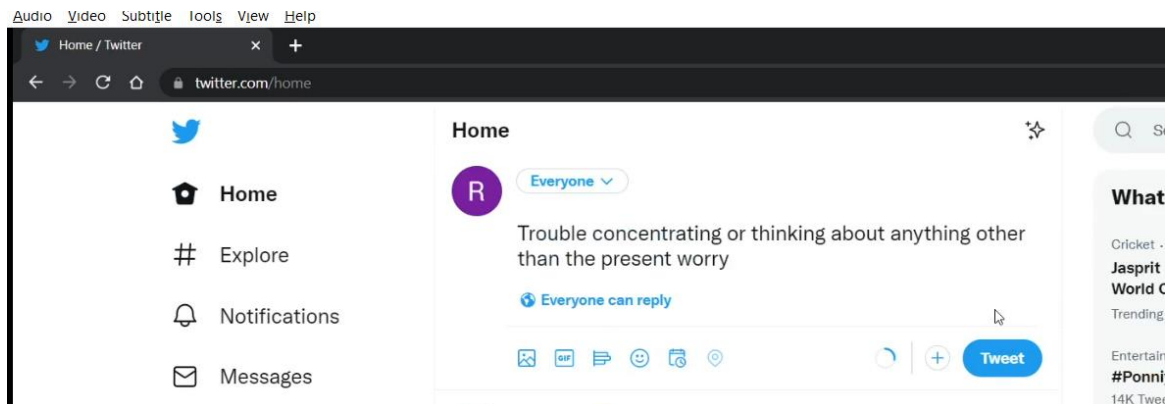
Social channel integration

If the user shared the twitter ID, their posts will be fetched and sentiment analysis is done. Upon negative sentiment user receives the email on the next best recommendation.

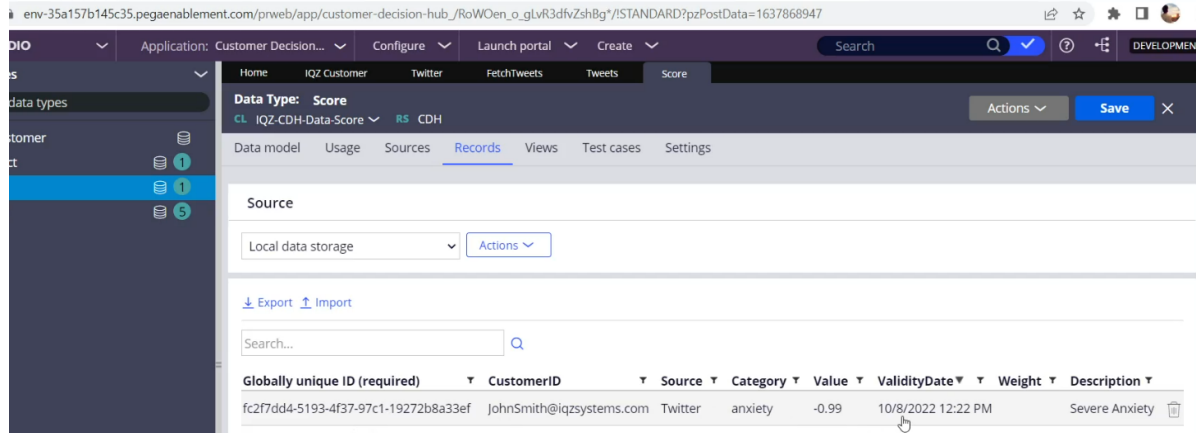
Sample User credentials for Twitter login:

User name: HHCutomer

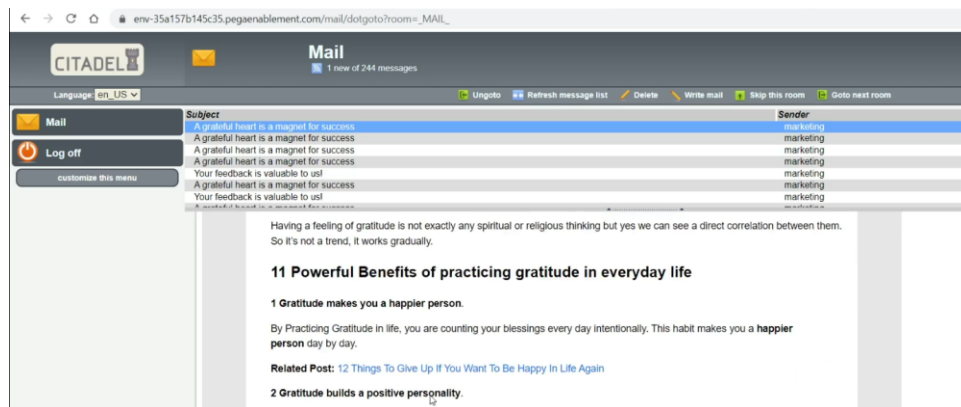
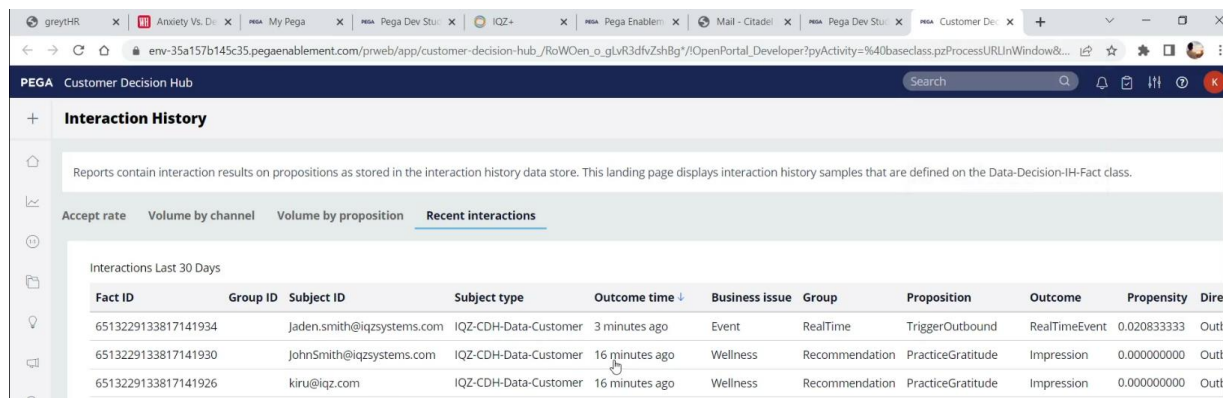
Password: Rules@123



- Pega job scheduler captures the post and processes it by text analyzer.



- Up on negative sentiment Pega triggers real time event and sends next best action for the users.



Pega Cosmos Web embed - Registration Flow

- Navigate to <https://iqzplus.com/HealnHale/home>
- Click Register Button on top, it takes to Terms and condition page click Register.
- Cosmos Web embed registration form will be displayed
- Fill in the form with basic details and submit.

Collect SME details
 Task in S-9001 • Urgency 10

First Name *

Last Name *

Age *

Email *

Gender *

Location

Type *

Expertise *

Experience In Years *

Cases Handled *

For Approving the Registered User, Login ad Manager.

- Navigate to <https://iqzplus.com/HealInHale/home>
- Click on login
- Provide credentials Manager@HnH / rules@1234 to login
- Click the registration case from “My Work” Tab

PEGA

SME Register
 S-9001

Urgency
 10

Work Status
 NEW

Created
 HnH Bot 7 minutes ago

Updated
 HnH Bot 5 minutes ago

Details

Pulse

Submission

Application Review

Decision

Create Access

Review candidate
 Task in S-9001 • Urgency 10

SMEData

First Name
 Jane

Last Name
 Doe

Age
 45

Gender
 Male

Location
 Boston

Email
 Doejane@iqz.com

Type
 Professionals

Expertise / Purpose
 Anxiety

Experience In Years
 10

Process At: Fake Probability
 0.0

Attachments 0

Followers 0

Related cases 0

Tags 0

Details

Label
 SME Register

Description

- Review the form and click submit

✓ Submission
✓ Application Review
Decision
Create Access

Get Approval
 Task in S-9001 • Urgency 10

Notes

Added the approval |

Cancel
Reject
Approve

Details

Label	SME Register
Description	

- Add decision comment Approve / Reject
- On approval email notification details will be sent

Approved Welcome to Heal and Hale team



IQZ Heal and Hale <marketing@enablement.com>

To: Kiruthika Anbalagan

Hi Support Squad ,

Greetings from Heal & Hale,

After reviewing your application, We are pleased to inform you that your profile has been verified

Login with the credentials provided using the link.

Link :- <https://9cypo4ma.pegace.net/prweb/PRAuth/app/heal--hale/>

User ID :- SME-49

Password :- XXXXXXXXXX

Thanks for your trust,

Team Heal & Hale



Pega Process AI – Automatic case rejection

If the process AI probability threshold is greater than 0.8 then the registration case will be automatically rejected. A mail notification with Rejection Notes will be sent.

