Heal and Hale User guide

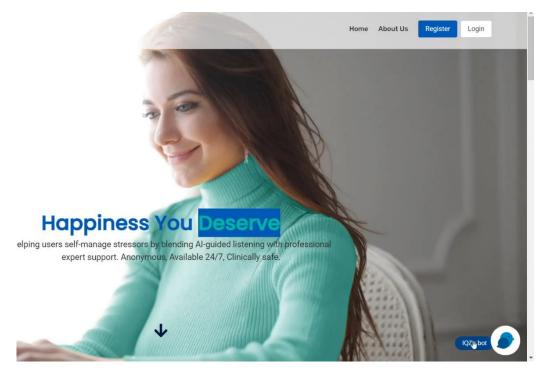
By IQZ Systems

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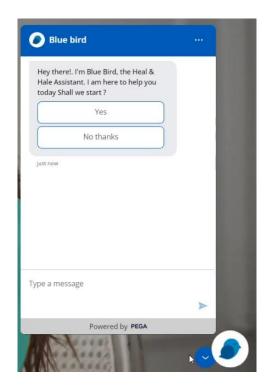
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Pega web Bot Interaction:

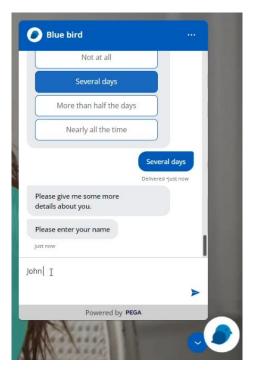
- Navigate to https://iqzplus.com/HealnHale/home
- Wait for IQZ's Bot to show up, click on the IQZ's bot text.



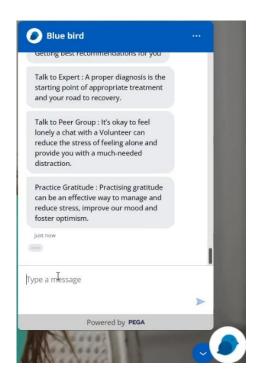
• Bot appears with the welcome message,

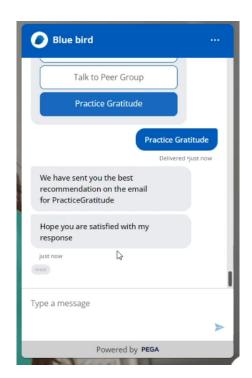


• Do interact with the Bot answering the questions. Answer the personal details.

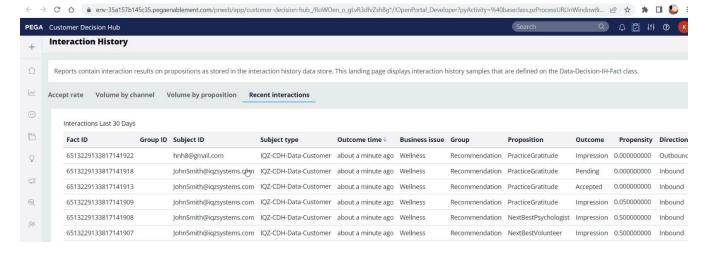


 Bot integrates with the Pega decisioning application to get the best recommendations (CDH ADM). Click on the recommendation.

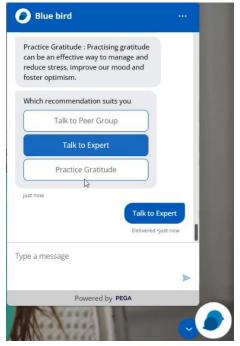




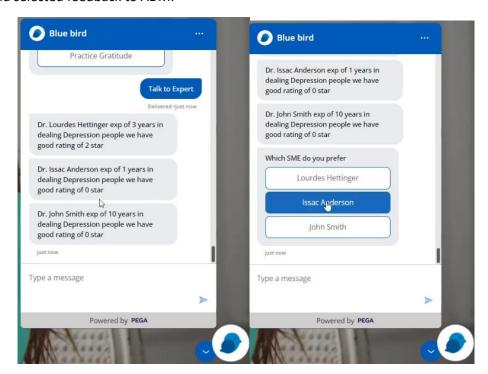
Bot sends the accepted response feedback to CDH.



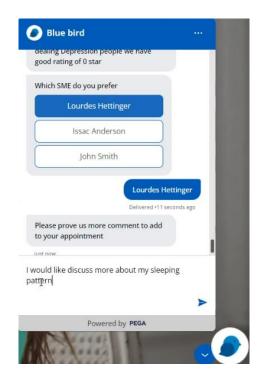
On selection of experts / peer groups:



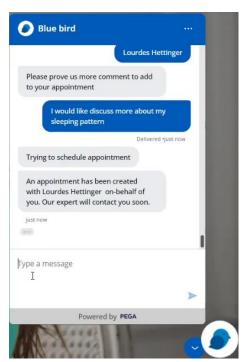
• ADM will fetch the best SME/ volunteer's profile to choose from, on selecting the profile, Bot send selected feedback to ADM.



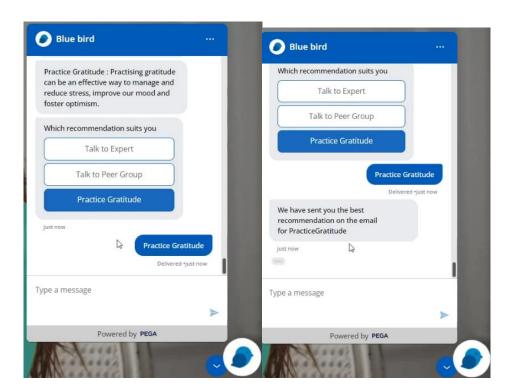
 Bot will ask for User comments to provide additional information for the appointment. This Comments will be fed to NLP for Topic and Sentiment Identification.



• 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.

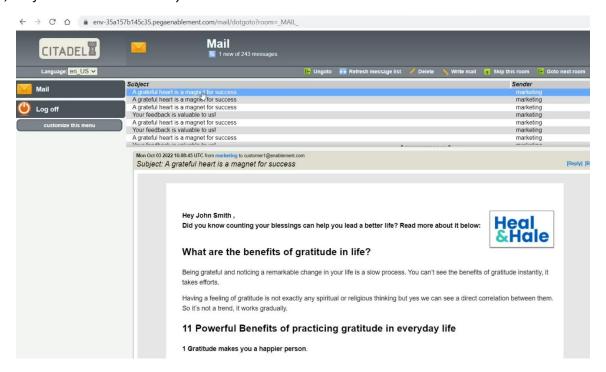


On selection of other recommendations:



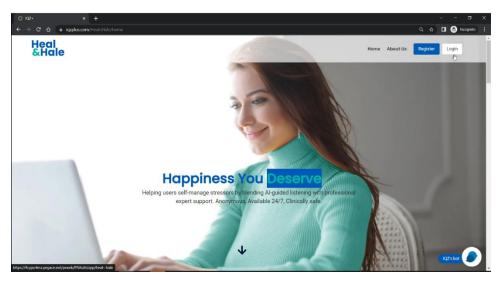
• Bot will send the accepted feedback to CDH and will send the email correspondence to the user regarding the details of the selected action.

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

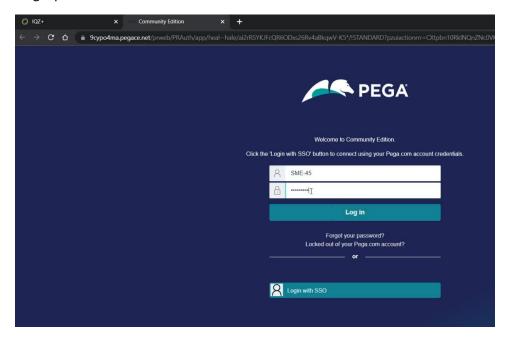


Pega Web Cosmos React portal – SME Login

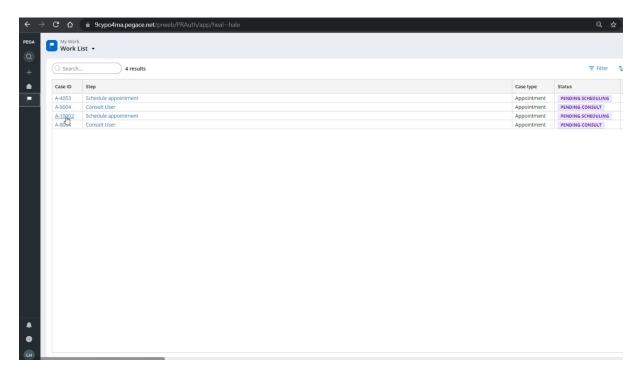
• Navigate to https://iqzplus.com/HealnHale/home



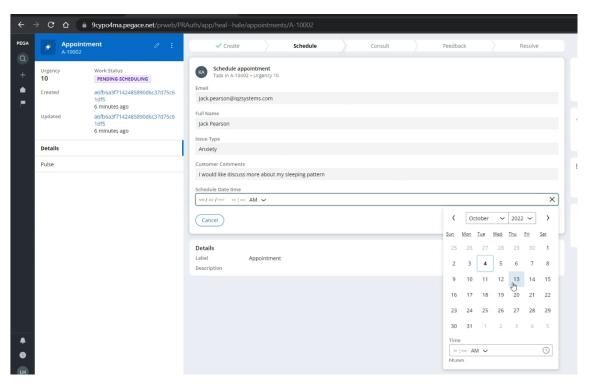
• Click login provide the details received via email.



• Click on the appointment case.



• 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.

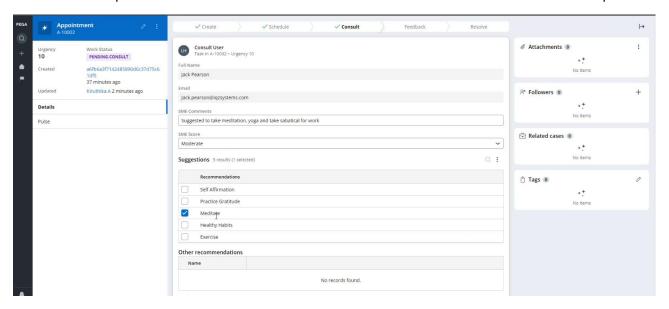


Appointment consultation

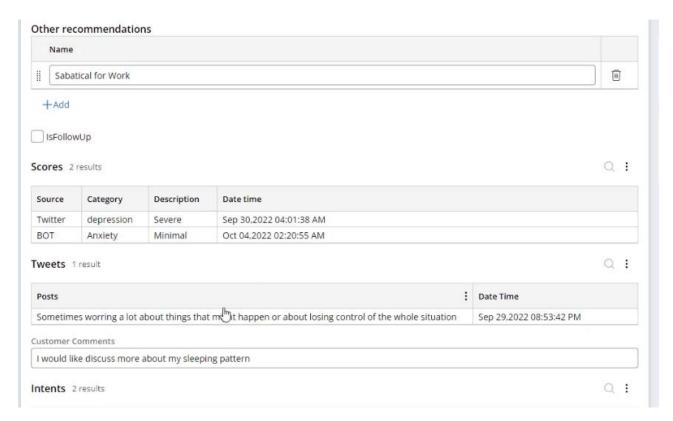
SME can open and review the case



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



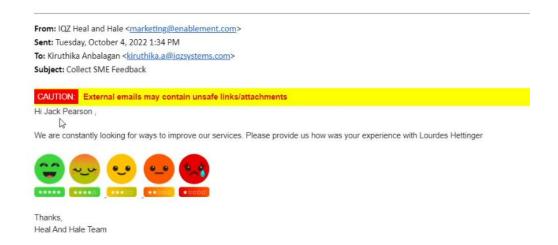
- Recommended actions by SME are collected and fed back to ADM for learning. Other suggested recommendations are collected in the table for future analysis.
- Optionally Follow up meeting can be scheduled.



• 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.



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



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 leaning.



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 ?



Thanks for your trust,

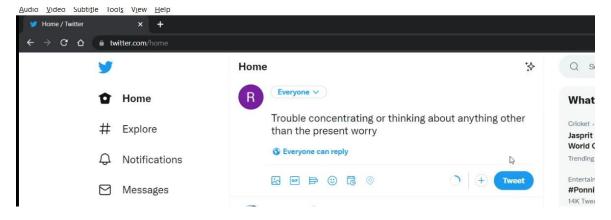
Team Heal & Hale

Social channel integration

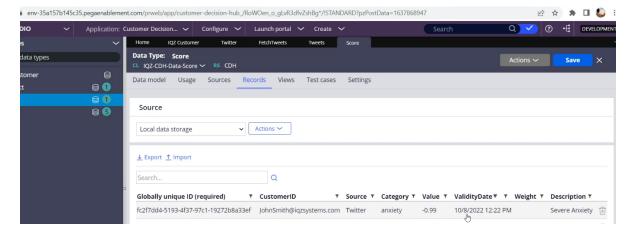
If the user shared the twitter ID, their posts will be fetched and sentiment analysis is done. Upon negative sentiment user receives the email on the next best recommendation.

Sample User credentials for Twitter login:

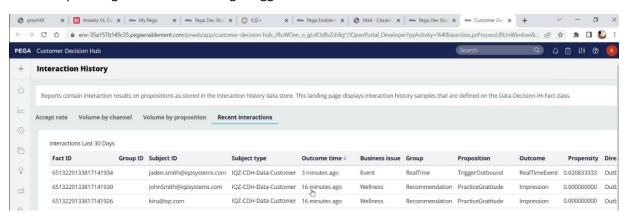
User name: HHCutomer Password: Rules@123

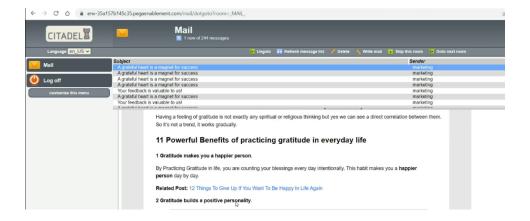


Pega job scheduler captures the post and processes it by text analyzer.



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



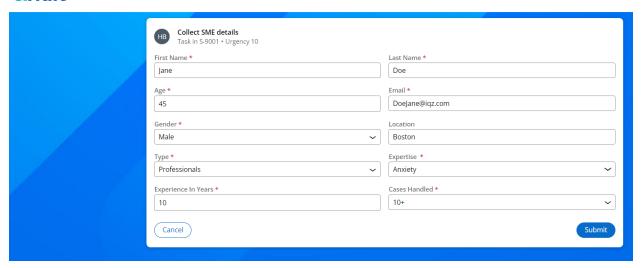


Pega Cosmos Web embed - Registration Flow

- Navigate to https://igzplus.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.

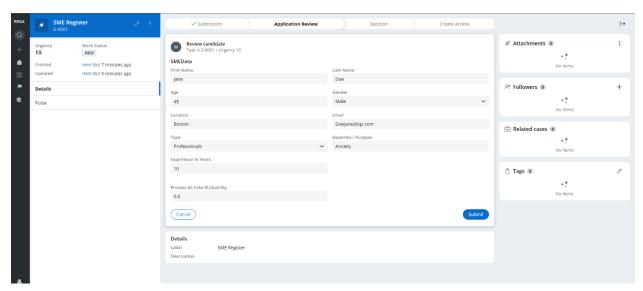




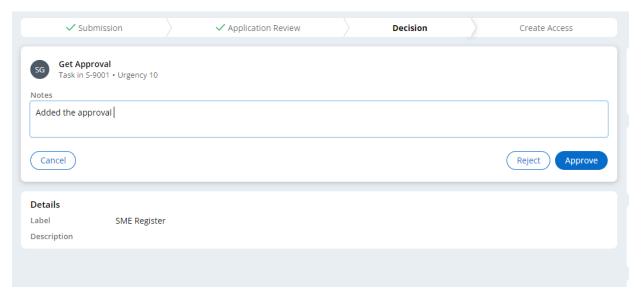


For Approving the Registered User, Login ad Manager.

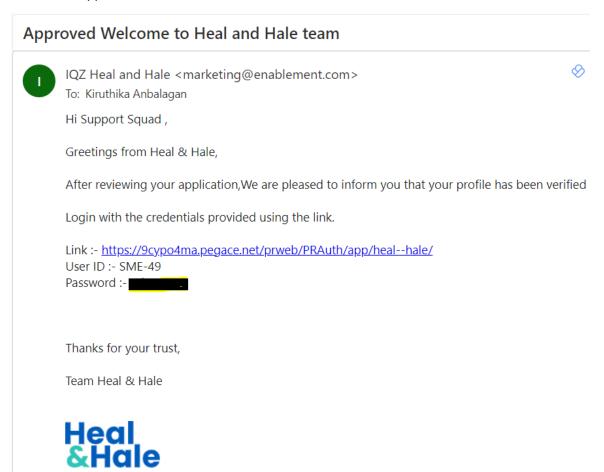
- Navigate to https://iqzplus.com/HealnHale/home
- Click on login
- Provide credentials Manager@HnH / rules@1234 to login
- Click the registration case from "My Work" Tab



• Review the form and click submit



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



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.

