

Teletask Two-Way Texting Resource for Local WIC Agencies

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Teletask Two-Way Texting Resource for Local WIC Agencies

Overview

The **Teletask Health Messenger** platform provides two-way texting between local agencies and WIC participants. This resource includes information on how to create a login profile, set a password and an overview of two-way texting (or **Chat**) functionality. For information about how to create and send group messages, see the resource **Teletask Health Messenger: Messaging**. Local users will only be able to see reminders, texts and messages from the clinic(s) they have permissions for.

IMPORTANT: Teletask Health Messenger does **NOT** work correctly when **Internet Explorer** is used; please choose an alternative web browser such as Microsoft Edge, Mozilla Firefox or Google Chrome.

Local agency WIC employees who will use Teletask for text messaging must follow the guidelines below. If the local agency has a communication policy that the WIC Program follows, these guidelines must be included.

- Personal Health Information (PHI) is not included in auto-generated Teletask appointment reminders. Local agency staff **must not** send any PHI during communications with participants.
 - Two-way text messages *from* participants that contain PHI such as names, addresses, DOB, etc. must be treated as confidential.
- Before engaging in two-way text communication, WIC participants are to be informed that:
 - the utilized texting platform (Teletask) is HIPAA compliant and follows health care industry security standards.
 - the information sent and received by the clinic is secure on the clinic side. However, the local agency cannot ensure information on the participant's phone (sent or received) is secure.
- The NC Community Nutrition Services Section (CNSS) strongly recommends that each WIC participant/parent/guardian/caretaker be advised of the following:
 - appointment reminders will be sent as text messages and the participant can respond to these messages to reach WIC staff,
 - data and messaging rates may apply, and
 - WIC staff are only available during business hours and may send an out-of-office reply instead of a personal response.
- Teletask Health Messenger must only be used on agency-issued electronic devices and user accounts (no personal devices) and must be limited to accurate and straightforward communication including use of proper punctuation, spaces, only easily understood abbreviations included on the local agency's approved abbreviation list, and not using images or icons (i.e., emojis).

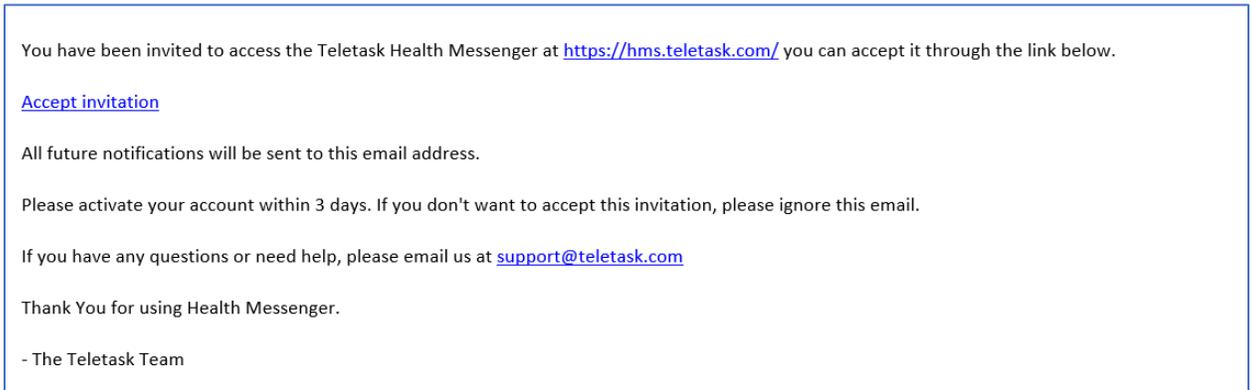
Please note: Teletask functionality does not include an option of receiving either a one-way text reminder OR two-way texting. For participants who opt-in, the local agency user must check the **Auto Dialer and Text** box on the **Family Demographics** screen in Crossroads. If a participant chooses to opt out of two-way texting, they are also opting out of appointment reminders. For participants who opt out, the local user must uncheck the **Auto Dialer and Text** box on the **Family Demographics** screen in Crossroads. Opt-out instructions for participants and support, if needed:

- "Reply STOP to opt out" – you will no longer receive appointment reminders or texts
- "Reply HELP for help" – a WIC staff member will call you within 2 business days to help you troubleshoot.

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Creating a Login Profile

- 1) To add employees to Teletask Health Messenger, send their name and email address to the CNSS Customer Service Desk (CNS.CustomerService@dhhs.nc.gov). The employee(s) will receive an email invitation from Teletask Health Messenger (<hello@teletask.com>) with a link to accept the invitation:



- 2) Click on **Accept Invitation** (please activate your account within 72 hours)
Note: If the invitation is expired, let the CNSS CSD know and they will send you a new invitation.
- 3) You will be directed to the **Accept Invitation** screen of Teletask to **Set Your Password:**
 - a) Name= your email account
 - b) Password= password of YOUR choice
 - c) Confirm Password
 - d) Select "Set my password"

Set your password

Name

Password

Confirm Password

Set my password

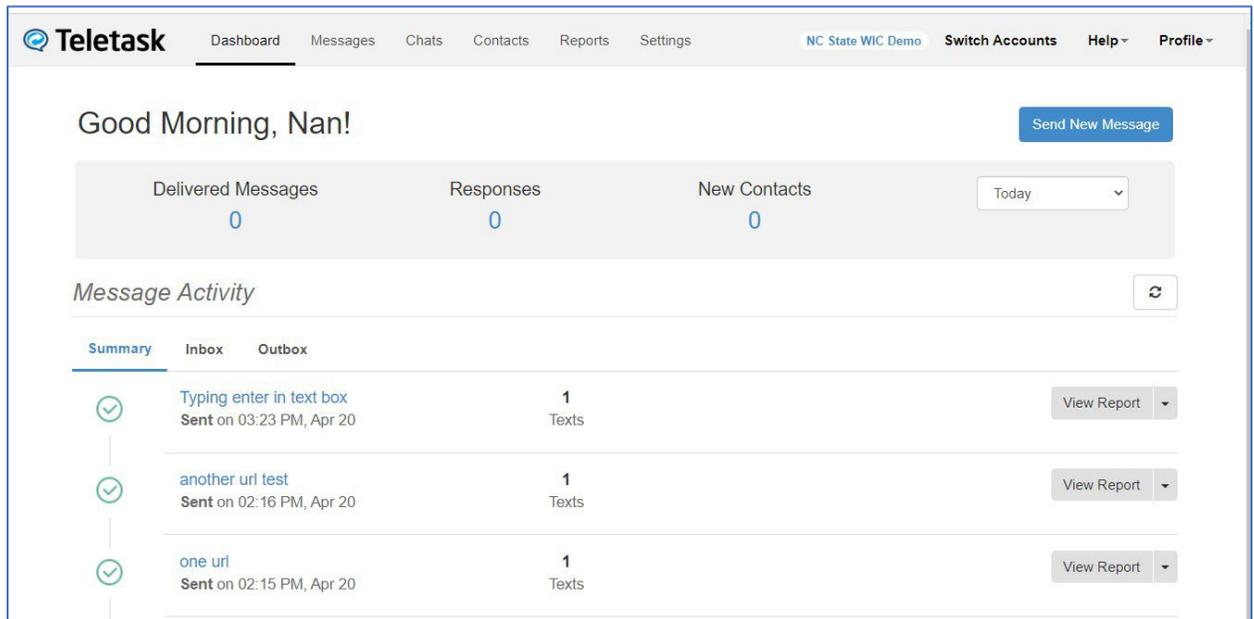
- 4) After your password is set, you will be taken to the Teletask **Dashboard** and will see a status message, "Your password was set successfully. You are now signed in."
- 5) To logout, click **Profile** on the upper right corner of the Teletask screen and then click **Logout**.
- 6) To login again, return to the Teletask Health Messenger <https://hms.teletask.com/> and enter your email address and password.

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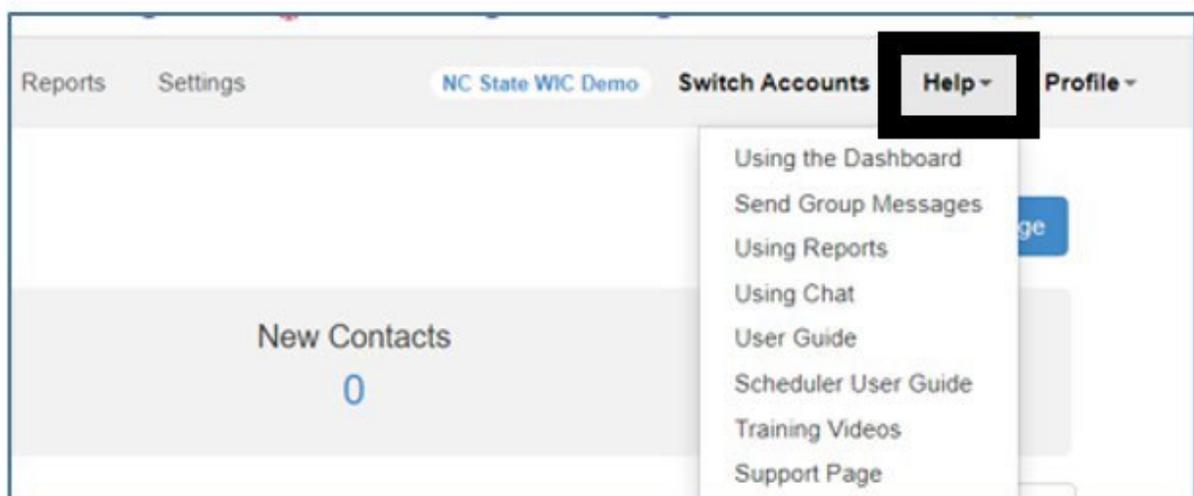
Teletask Health Messenger Dashboard

After logging into **Teletask Health Messenger**, the user is brought to the **Dashboard** screen. The Dashboard (example shown below) contains:

- **Main Menu** including Messages, Chats, Contacts and Reports
- **User Menu** including Help and Profile
- **Send New Message** button
- **Message Activity** summary

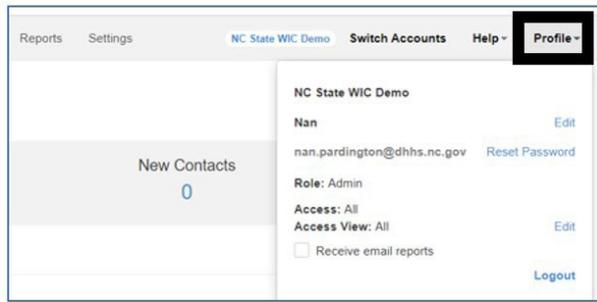


Help connects the user to Teletask’s Help Guide and User Support.



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Profile contains user functionality such as editing your username or resetting your password.



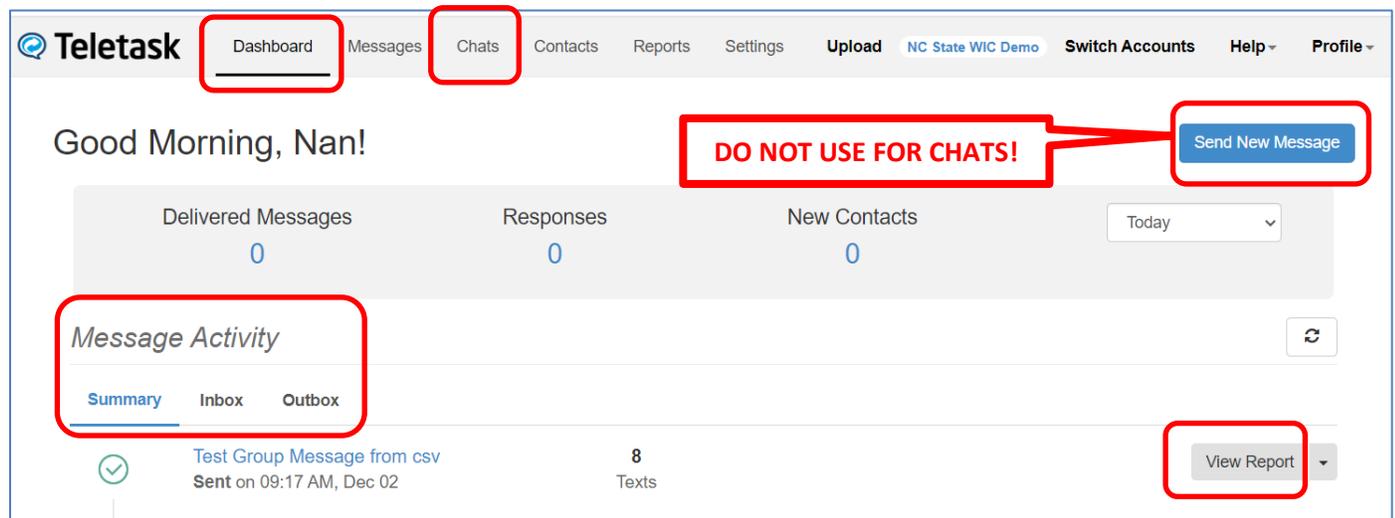
Message Activity

The **Message Activity** section on the Dashboard displays counts for **Delivered Messages**, **Responses**, and **New Contacts** added from all outgoing messages over a specified timeframe. This section also contains a **Summary**, **Inbox**, **Outbox** and access to **Reports**.

- **Delivered Messages:** total number of messages delivered in the selected time frame.
- **Responses:** total number of incoming messages received in response to outgoing messages.
- **New Contacts:** total number of new participants or contacts that have been added to the system.
- **Timeframe drop-down:** offers the ability to select Today, Last 7 Days or Last 30 Days.
- The **Summary** is a total of all Inbox and Outbox numbers.
- The **Inbox** displays the text messages *received* in the local agency from WIC participants.
- The **Outbox** displays the text messages *sent* from the local WIC agency to WIC participants. These messages could include automated appointment reminders or replies to participant text messages.
- **Reports** are described on pages 17 and 18.

IMPORTANT! Do NOT use the **Send New Message** button on the Dashboard screen to send messages to Individuals. **Send New Message** is for Group Messaging to multiple people ONLY. Instead:

- Click on **Chats** in the Teletask menu bar
- **Select the Create Chat button** to start a new chat. See page 8 for more details.

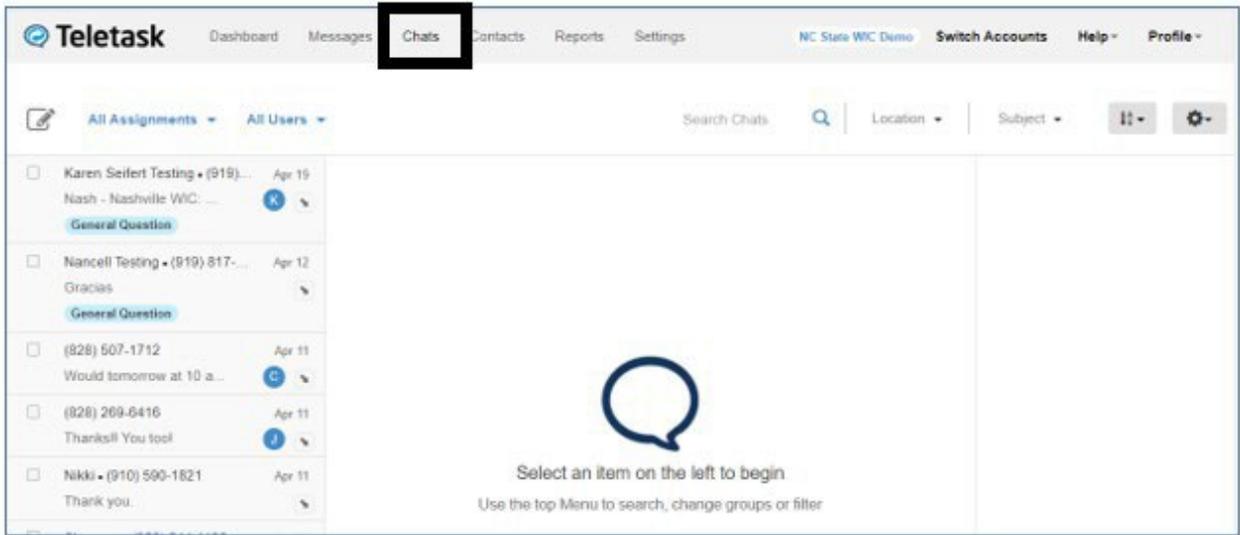


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Teletask Health Messenger: Chats Feature

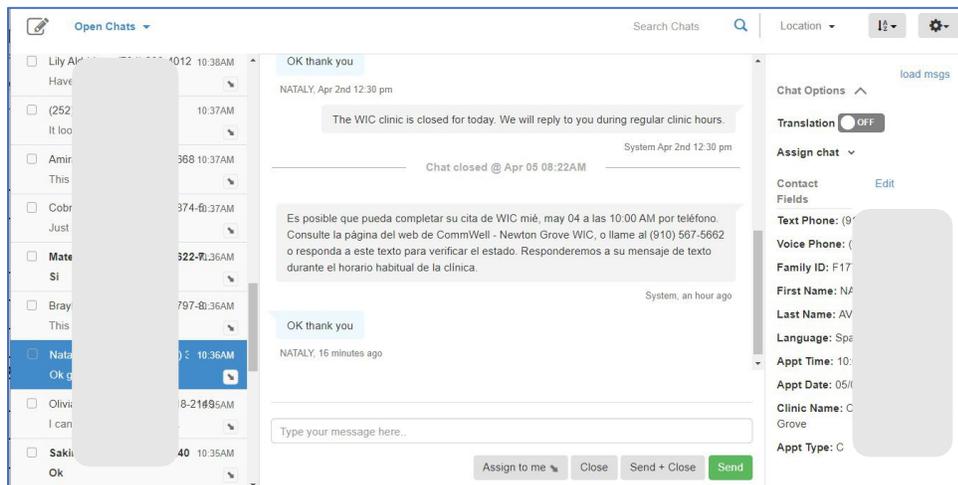
The **Chats feature** allows the local WIC agency user to send text messages to a participant through their mobile phone's SMS Texting capability. This two-way communication allows a faster response time while maintaining records of the conversation. The **Chats screen** (example shown below) contains:

- Main menu and User menu
- Create Chat button
- Filters for All Assignments, All Users, and Location
- Search Chats feature
- Sort button
- Chat options button
- List of chats received



If you select a text message in the list on the left, the **Chats screen** (example shown below) shows:

1. the **Chat History** with the participant
2. additional **Chat Options** including: Translation (on/off), Assign Chat dropdown, Contact Fields options, and participant information such as Family ID.



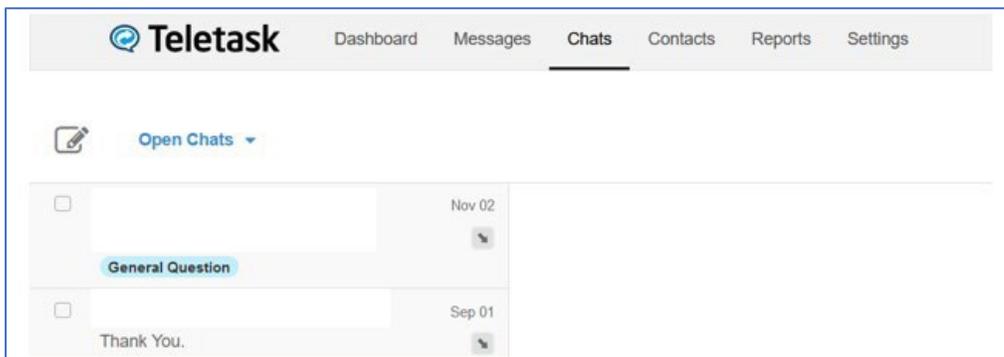
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How to Reply to Incoming Text Messages

- 1) Click on **Chats** in the Teletask menu bar

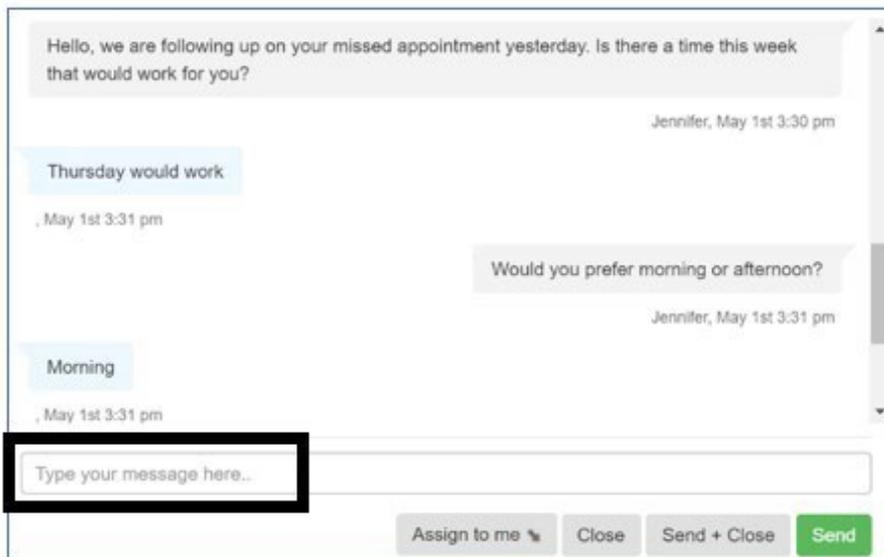


- 2) A list of **Open Chats** will be displayed on the left side of the screen. This view allows you to see all open messages that are either unread, unassigned, or assigned to yourself. You can leave chats in the **Open** status or close them to help keep your workspace clear.



- 3) The local agency user will see a list of chats from WIC participants and be able to reply to those messages by typing in the space **“Type your message here”** and clicking **Send**. The original message and any replies will be stored in the **Open** folder.

Another option is to click **Send + Close** which will move the chat from the **Unread** folder to the **Closed** folder. If the participant replies again, the chat will re-open and be in the unread status. This will help organize incoming text messages that have been answered by the local agency staff.



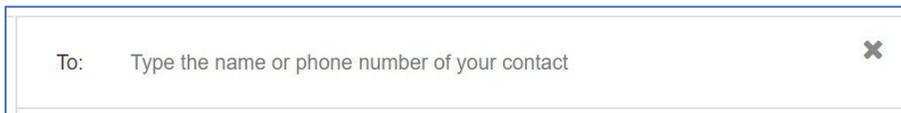
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How to Create a Chat

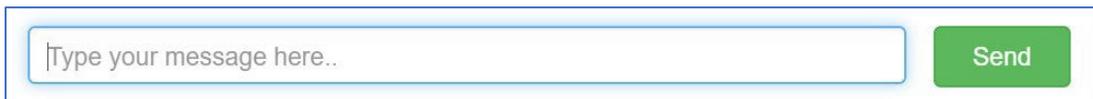
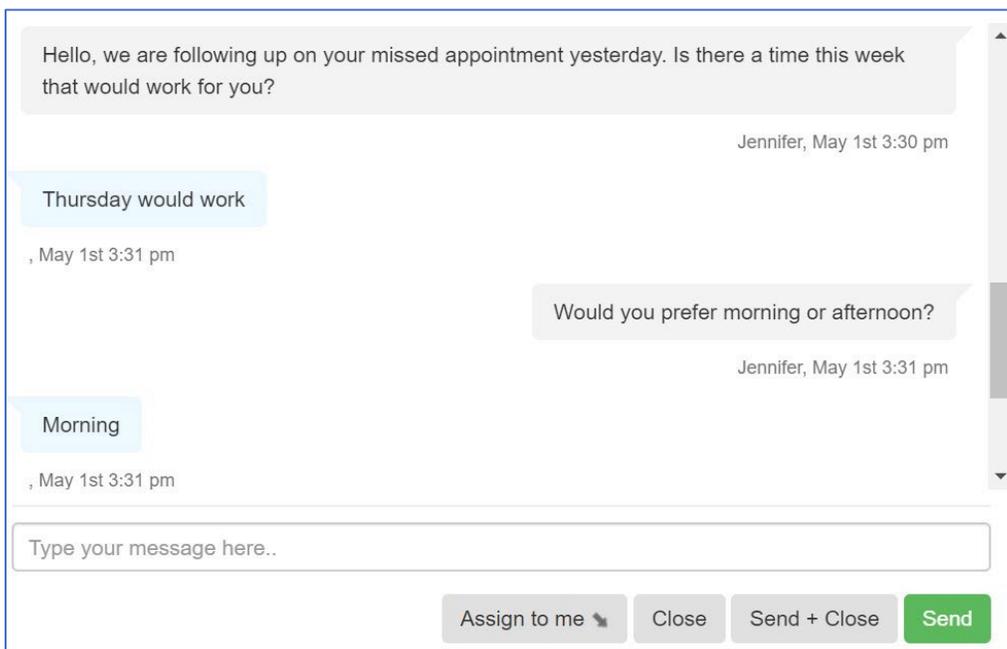
- 1) Click on **Chats** in the Teletask menu bar
- 2) Select the **Create Chat button**  to start a new chat.



- 3) In the *To:* field **type** the name or phone number of your contact.

A screenshot of the 'To:' field in the chat creation interface. The field contains the placeholder text 'Type the name or phone number of your contact' and a close button (X) on the right.

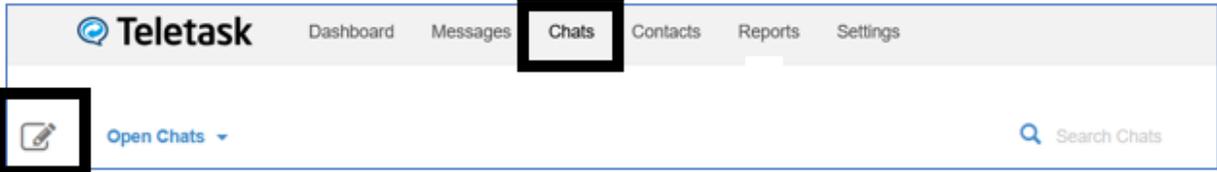
- 4) To start the chat conversation, **enter your message** in the text box and then **press** Send. The participant will receive the text and be able to respond.

A screenshot of the message input area. It features a text box with the placeholder 'Type your message here..' and a green 'Send' button to its right.

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How to Schedule a Chat

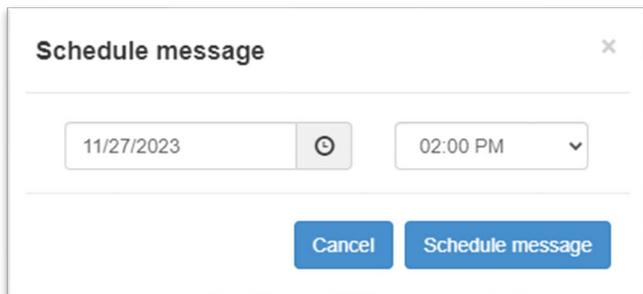
- 1) Click on **Chats** in the Teletask menu bar
- 2) Select the **Create Chat button**  to start a new chat.



- 3) **Create** a new Chat Message (Please refer to: **How to Create a Chat** on page 8)
- 4) **Enter** your message in the text box and then press the arrow on the right of the **Send** button. This will pop-up the option to **Schedule** the time you wish your message to go out.



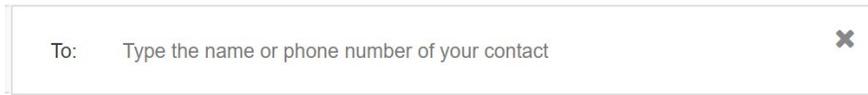
- 5) Click on **Schedule**, and a window will pop-up where you can schedule the time you wish to send the message. Once you have selected the date and time you wish your chat message to send, click **Schedule Message**.



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How to Add a Contact on the Chats Screen

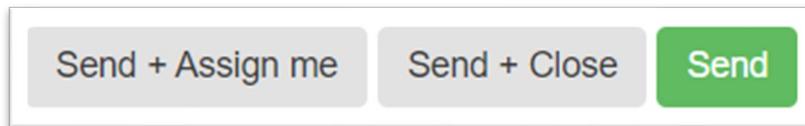
- 1) Click on **Chats** in the Teletask menu bar
- 2) **Select** the New Chat icon  in the upper left-hand corner.
- 3) In the *To:* field **type** the phone number you are wanting to add (no need to add a leading 1 or dashes).



- 4) In the *Type your message here...* field, **type** your message.



- 5) **Choose** either *Send + Assign me*, *Send + Close*, or the *Send* button to send the message. **Note:** The *Send + Assign me* option allows you to receive notifications when the client responds to the message.



- 6) In the *Confirmation!* box that appears, **choose** *Yes* to add the new contact.

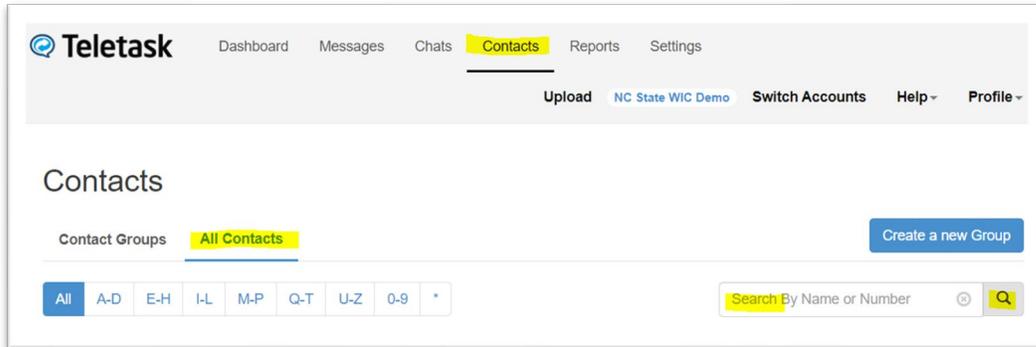


- 7) The message will now be sent and the phone number will be added as a contact.
- 8) **IMPORTANT!!!** Navigate to Contacts and add the Clinic Name to the new contact. This field is **very important** to **many** Teletask functions.

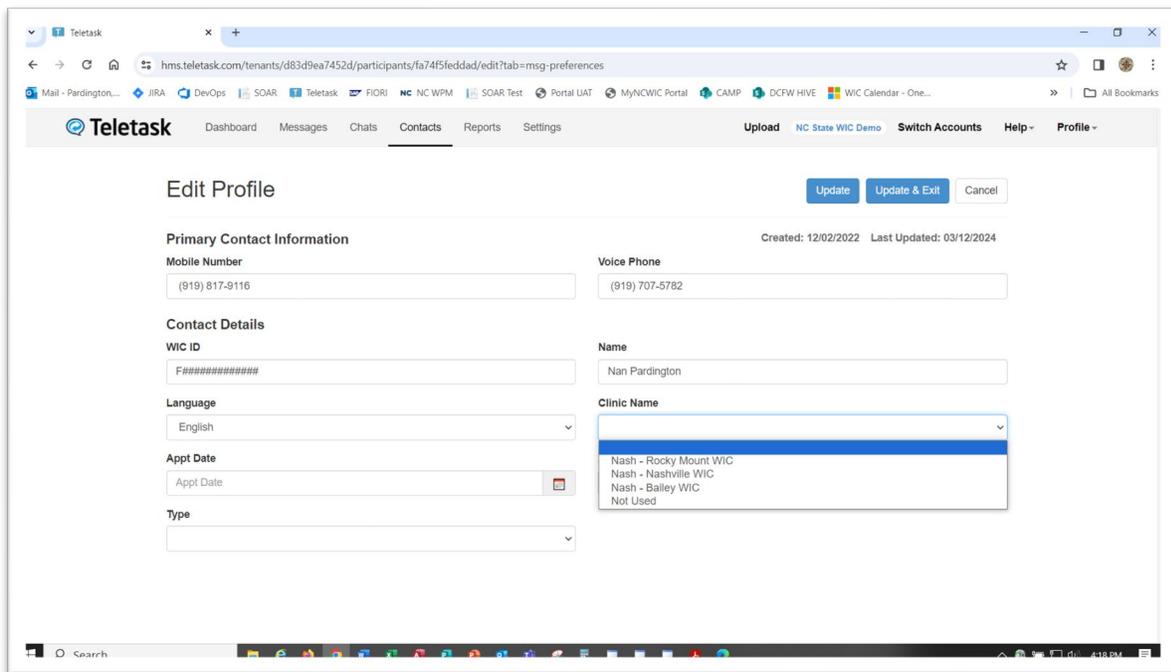
See NEXT PAGE for more steps.

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- 9) Navigate to **Contacts** in the Teletask Menu bar. Select **All Contacts**. Enter the new contact's full name or number in the search field and press Enter or select the magnifying glass icon to search.



- 10) Choose the participant's Crossroads clinic from the **Clinic Name** dropdown. Add the Crossroads Family ID to the **WIC ID** field. Edit other details as needed. Select **Update** to save (or **Update and Exit**).

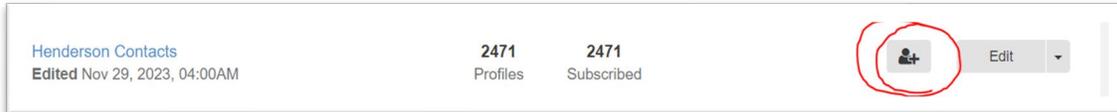


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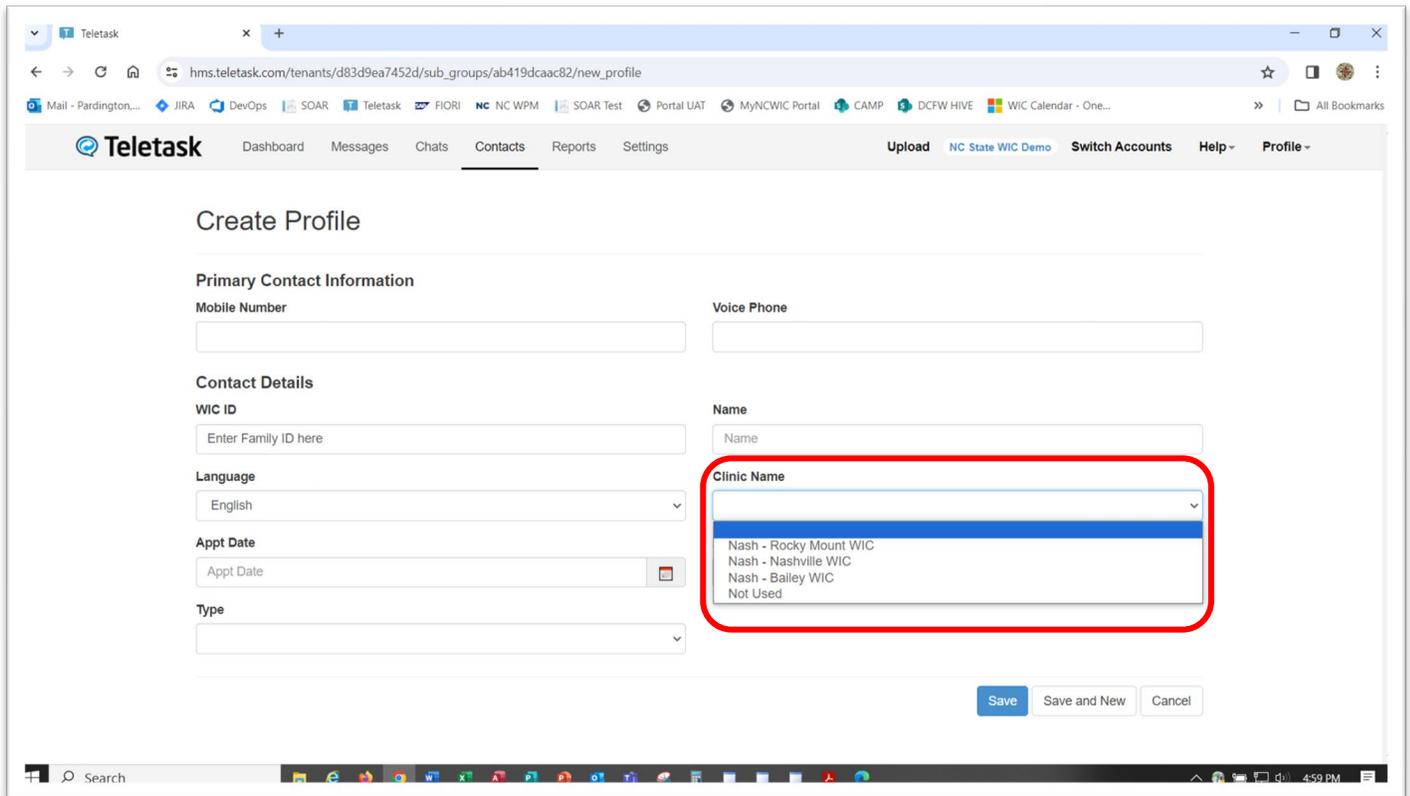
How to Add a Contact on the Contacts Screen

Adding a contact on the Contacts screen will be possible in the near future. This resource will be updated at that time.

- 1) Navigate to the **Contacts** page in Teletask and click on a contact group or select Create a New Group (and then Add contact later). Select the icon with the plus sign:



- 2) Teletask takes you to the **Profile** screen.
Fill in the information for the family including Family ID.
Choose the participant's Crossroads clinic from the **Clinic Name** dropdown. This field is **very important to many** Teletask functions.
Select **Save** (or **Save and New** to add additional new contacts).



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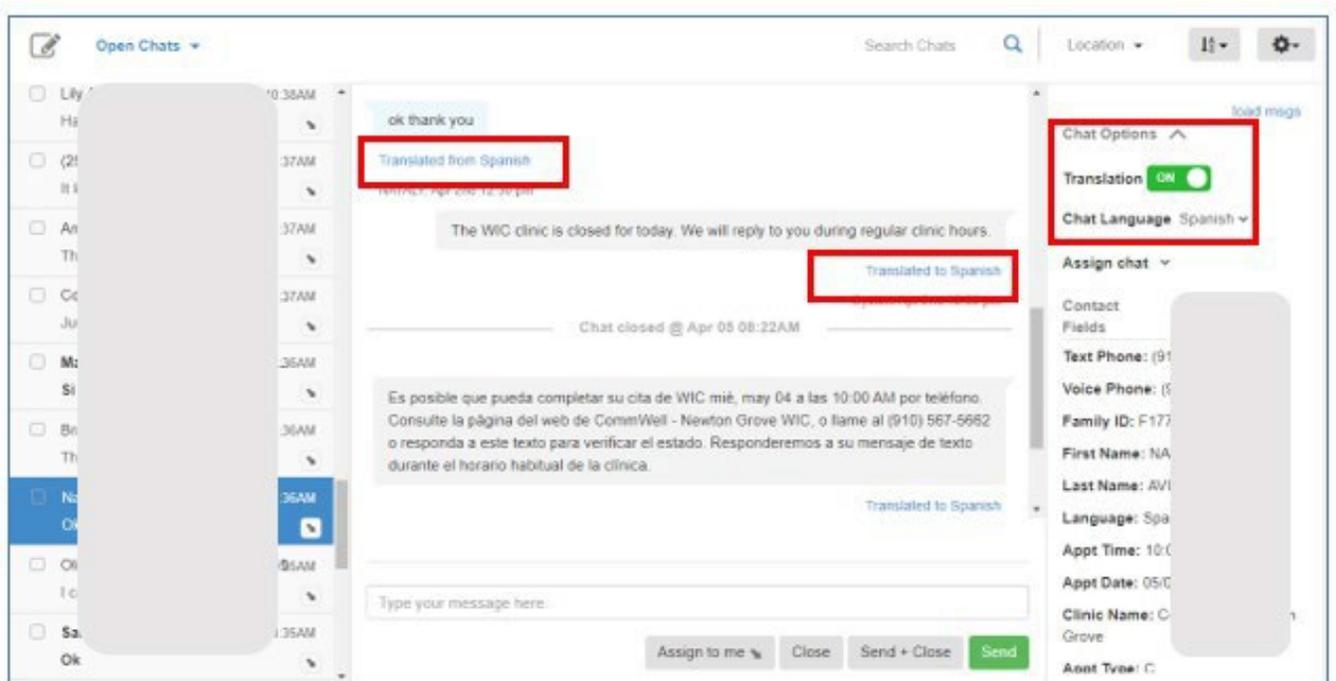
How to Use Translation for Chats

Language Spoken (on the Participant Demographics screen in Crossroads) determines the language of the text message or voice call appointment reminder delivered to participants. If the language spoken is anything other than Spanish, the text message or voice call appointment reminder will be in English.

The Teletask Health Messenger translation feature allows all replies to appointment reminders from an individual contact to be auto-translated to English or Spanish. It also auto-translates the messages you send to the contact. This feature translates chats in real time using Google Translate.

To enable auto-translations for a contact, select an open chat in the list on the left side of the **Chats** screen, then switch the **Translation** switch under **Chat Options** to *On*. Then, select **Chat Language**.

During a translated conversation, you can click on the **language links** beneath the chat to view the Translated/Untranslated versions. **Note:** The *first chat* sent does not have the translation feature.



Teletask Two-Way Texting Resource for Local WIC Agencies

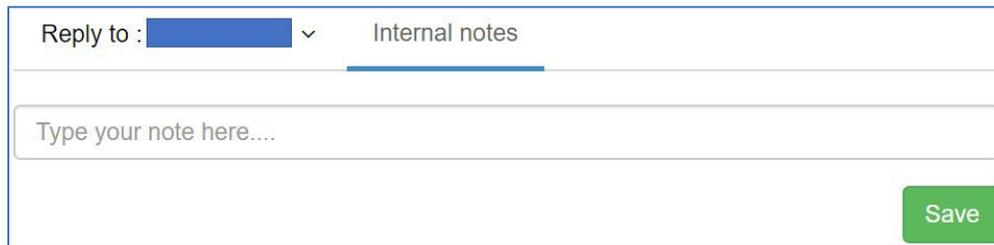
How to Use Chat Notes

Chat Notes allow you to add a quick internal note to a chat. **Notes can be viewed by all staff who can see the chat.** Chat Notes can be used to note a phone call, describe special circumstances, or describe steps that need to be taken. Please note that **Chat Notes** can not be used for documentation purposes related to Crossroads.

- 1) Click on **Chats** in the top menu bar.



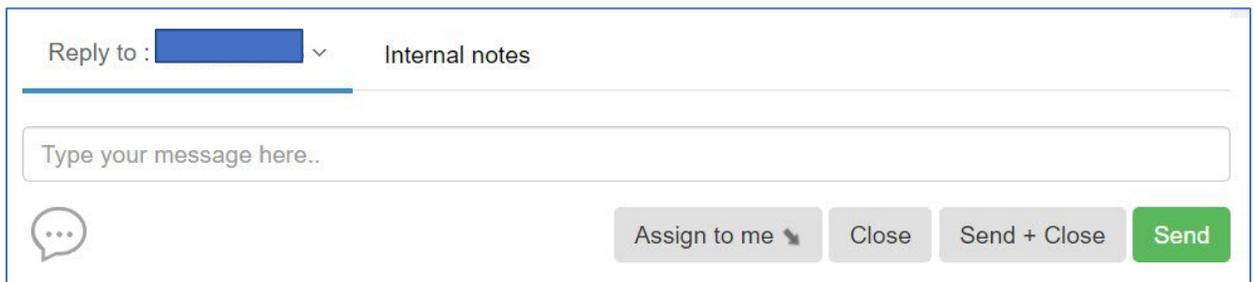
- 2) **Select** a chat from the list to the left. Click on **Internal Notes** in the bottom center of the screen. Internal notes will be underlined in blue and the chat box will say *Type your note here...* Enter the Internal Note and select **Save**.



The Internal Note will be added to the chat. Internal Notes have a yellow icon.



IMPORTANT: Make sure that you select **Reply To:** if you want to reply to the participant after making an Internal Note, or you will keep making Internal Notes instead of replying to the participant! Notice in the screenshot below that Reply to: is underlined in blue, the chat box says *Type your message here..* and there are four buttons including **Send**.

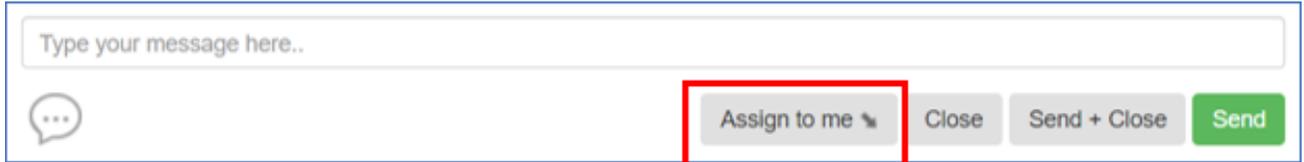


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How to Assign Chats to Users

The **Assign Chats** feature allows users to assign chats to themselves or to others.

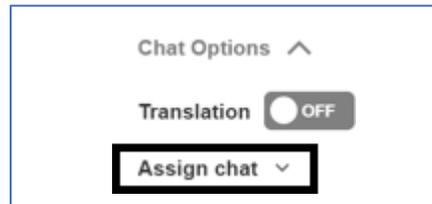
- 1) **Quick Assign to Self:** You can assign a chat to yourself by pressing the **Assign to me** button within a chat itself. The chat is now assigned to you and is viewable under My Assignments in the chat filter.



- 2) **Quick Assign from list of chats:** Click on **Chats** in the top menu bar. **Locate** the chat that you want to assign to yourself from the list to the left. **Select** the **Assign to me**  arrow. The chat is now assigned to you and is viewable under *My Assignments* in the chat filter.
- 3) **Assigning chats to a specific user or doing bulk assignments:** These can be both for yourself or for other users in the clinic.

Assign each Chat Individually

Click on **Chats** in the top menu bar. **Select** the chat that you want to assign to a user. In the right-hand panel click the **Chat Options** to view the additional options.



Select Assign Chat and a drop-down list of your users will appear. **Pick** the user who you would like the chat assigned to. The chat is now assigned to the user and is viewable under *My Assignments* in the chat filter.

Bulk Assignment

Click on **Chats** in the top menu bar. In the left-hand panel **locate** the chat that you want to assign and then **check the box** next to that message.

Note: You can check more than one box to assign multiple messages at once.



A new set of options will appear at the top of the page.



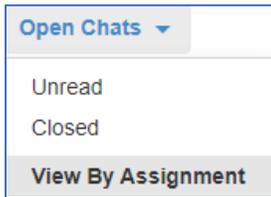
When you **select** the **Assign** option, you will be given a list of your current users. **Choose** the **User** that will be assigned to the message. The chat is now assigned to the user that you selected and is viewable under *My Assignments* in the chat filter.

Teletask Two-Way Texting Resource for Local WIC Agencies

How to Filter Chats by Clinic

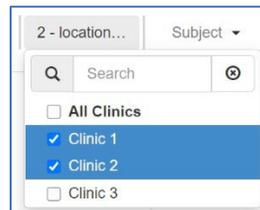
Chats can be filtered by status (Open, Closed, Read, Unread) or by Assignment, as well as by Location. Filtering Chats by location allows the user to see messages from one or multiple clinics at a time.

- 1) Select the primary filter you would like to use.



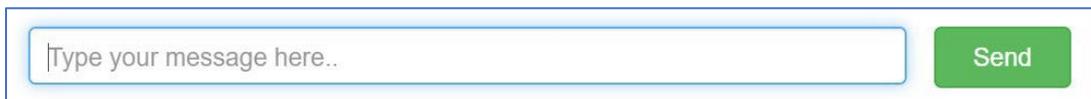
- 2) Click on **Location** from the drop-down menu and **check the boxes** next to the locations that you would like to use.

Note: By default, it will select all locations. The chats that are displayed in the left-hand panel are only those associated with the selected locations.



How to Include URLs or Links to Websites in a Chat

A URL can be added to a **Chat** by typing the URL in the message box. URLs in chats cannot be shortened.



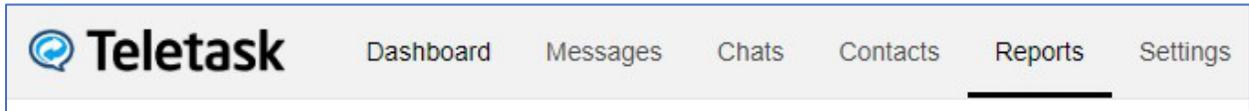
For more information about using chats visit: <https://desk.zoho.com/portal/teletask/en/kb/articles/chats-overview>

For more information about chat filters and assignments visit: <https://desk.zoho.com/portal/teletask/en/kb/articles/how-to-utilize-filters-in-chat>

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Reports

To generate a report of message results and responses, navigate to **Reports** in the top menu bar:



1. Select **On Demand** as your report type.
2. Select a Message Type: select the type of message to report on: **Voice** or **Text**. (**Voice** is selected by default. Most NC messages are **Text**.)
3. Select a message group or choose **All** messages. (**All** is selected by default.)
4. Select a report based on **Message** sent date or **Appointment** date.
5. Select a starting and ending date.
6. Select a clinic name. **All** is selected by default.
7. Select **Generate Report**: This will create the report based on the parameters set. The report can be viewed on screen, printed, or downloaded as a .csv file.
8. Best practice is to download as a .csv file using the download icon,  an excel spreadsheet and filter/print reports as needed.

Example:

Reports

On Demand Automated Chats Inbox Edit History Usage

Message Type: Voice Text

Message Group: All

Date Range: Message Appointment Starting: 03/14/2022 Ending: 03/14/2022

Clinic Name: Cumberland - Fayetteville

Change Report Columns Add Filter

Generate Report Schedule Report



Totals	
Not Yet Sent	0 0%
Received	68 93%
Responses	15 21%
Undelivered	5 7%
Opted-Out	0 0%
Errors	0 0%
Stopped	0 0%
Clinic Name Closed	0 0%
Invalid Numbers	0 0%
Total Messages	73 100%

First Name	Last Name	Sent Time	Appt Date	Appt Time	Language	Message Group	Clinic Name	Results	Det
		03/12/2022 09:56AM	03/14/2022	12:00 PM	English	COVID-19 SMS Certification Appointment	Cumberland - Fayetteville	sent	

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Results:

Result	#	%	Explanation
Not Yet Sent	0	0%	Texts that are unsent for this date range.
Received	68	93%	Texts received successfully by participants.
Responses	15	21%	Number of participants who have responded by text for messages sent in this date range.
Undelivered	5	7%	Number of undelivered texts. Teletask then attempts to deliver the message by voice. Generate a Voice report to see these results.
Opted-Out	0	0%	The participant has texted back the word STOP and will no longer receive messages from Teletask. To re-opt-in to receive messages they would need to text UNSTOP to the same phone number.
Errors	0	0%	Text was not received successfully. Reasons may include phone is disconnected, out of minutes, not accepting texts or the text has been marked as spam. Investigate these numbers/put an alert in the Crossroads record to follow up with the participant.
Stopped	0	0%	Voice messages that were stopped because the text message was sent successfully.
Clinic Name Closed	0	0%	Clinic or agency has opted out of two-way texting.
Invalid Numbers	0	0%	The number was invalid such as a number that cannot exist (999- 999-9999), a number with a country code, or a number that does not have the required 10 digits. Investigate these numbers.
Total Messages	73	10%	

Reports can also be *viewed but not downloaded or printed* by selecting the **View Report** button in the Message Activity container of the Dashboard. Users can view either Messages (which includes Responses) or Responses only.

