# Teletask Two-Way Texting Resource for Local WIC Agencies

The North Carolina (NC) Nutrition Services Branch (NSB) is partnering with **Teletask Health Messenger** to provide two-way texting between local agencies and WIC participants. Currently, Teletask sends one-way text appointment reminders to participants using appointment data from Crossroads. When two-way texting is turned on, text appointment reminders will be sent to participants as usual but with the option for the participant to reply via text to local agency staff.

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.

- Teletask Health Messenger must only be used on agency-issued electronic devices and user accounts (no personal devices) and must be limited to the following communication:
    - scheduling or reminding participants of appointments,
    - inviting participants to classes,
    - 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).

- NSB 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.

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.
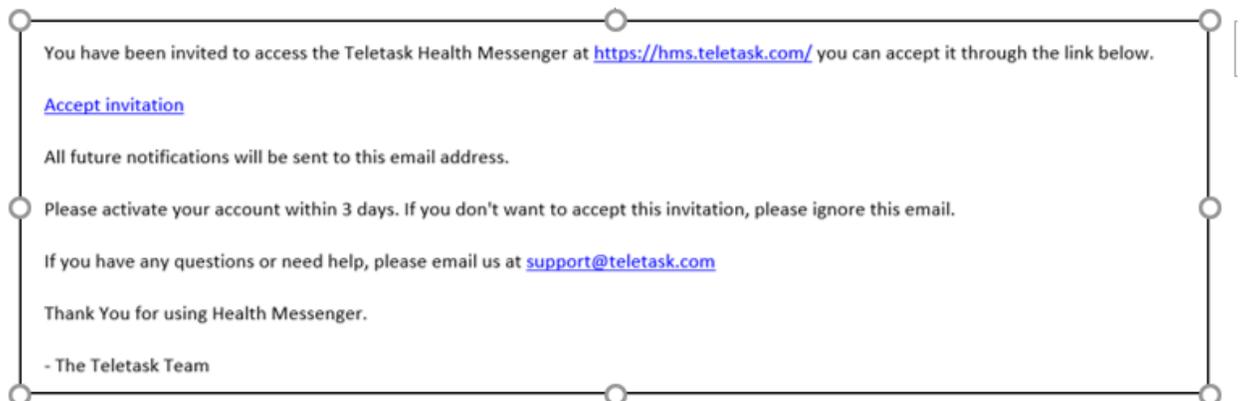
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This resource includes information on how to create a Teletask login profile and set a password, how to search for incoming text messages and how to reply to participant text messages.

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

## Creating a Login Profile

1) All local agency WIC employees will receive an email invitation from Teletask Health Messenger (<hello@teletask.com>) with a link to accept the invitation

> You have been invited to access the Teletask Health Messenger at https://hms.teletask.com/ you can accept it through the link below.
>
> Accept invitation
>
> All future notifications will be sent to this email address.
>
> Please activate your account within 3 days. If you don't want to accept this invitation, please ignore this email.
>
> If you have any questions or need help, please email us at support@teletask.com
>
> Thank You for using Health Messenger.
>
> - The Teletask Team

2) Click on **Accept Invitation** (please activate your account within 72 hours)
   Note: If the invitation is expired, let the *Nutrition Services Branch Customer Service Desk* 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 work email account
   b) Password = password of YOUR choice
   c) Confirm Password
   d) Select "Set my password"
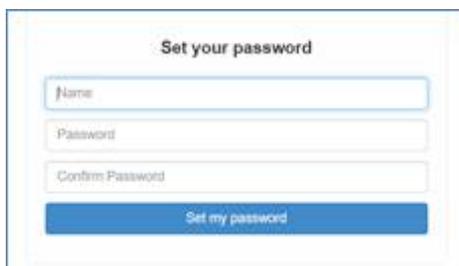
> Set your password
>
> Name
>
> Password
>
> Confirm Password
>
> Set my password

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 work email address and password.

**Searching for Incoming Text Messages**

After logging into *Teletask Health Messenger*, the user is brought to the **Dashboard** screen. The **Dashboard** displays counts for **Delivered Messages**, **Responses**, and **New Contacts** added from all outgoing messages over a specified time-frame. <u>Note:</u> Local users will only be able to see messages from the clinic(s) they have permissions for.

1. *Delivered Messages*: total number of messages delivered in the selected time frame.
2. *Responses*: total number of incoming Text messages that were received in response to outgoing messages.
3. *New Contacts:* total number of new participants or contacts that have been added to the system related to the outgoing messages.
4. **Time-Frame drop-down**: offers the ability to select Today, Last 7 Days or Last 30 Days and view the resulting counts of Delivered Messages, Responses, and New Contacts.
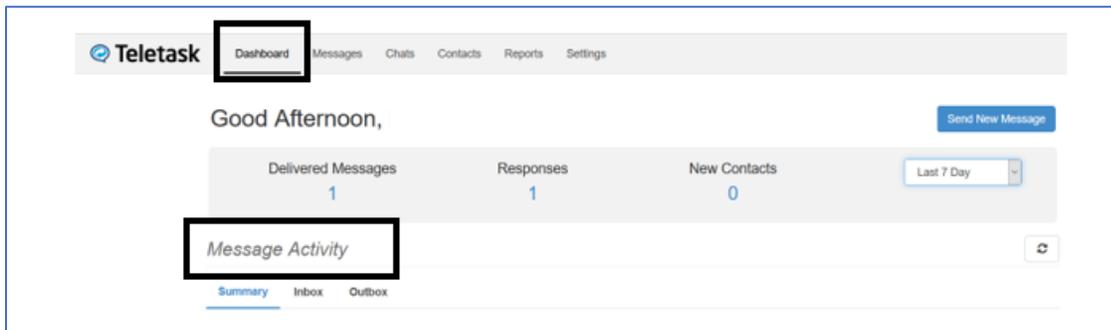


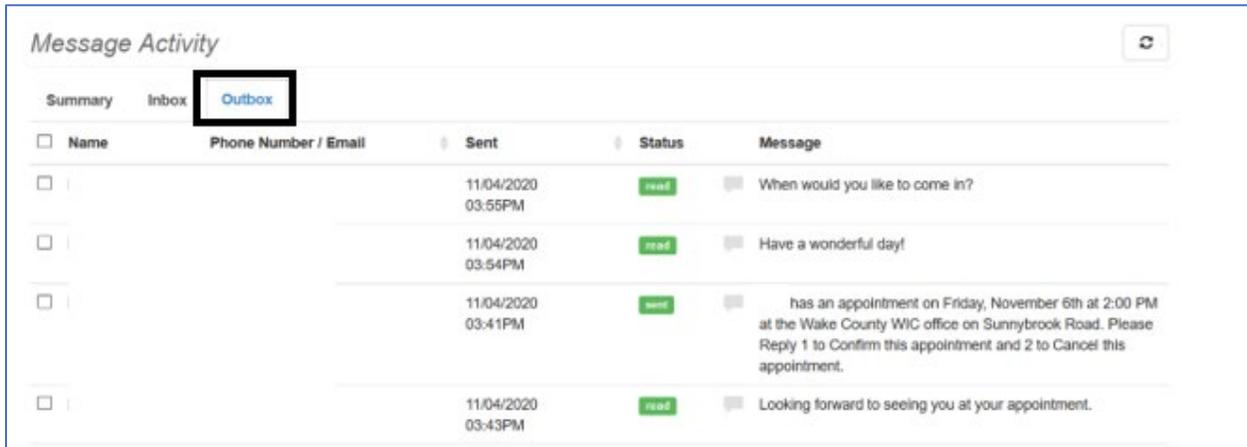The **Message Activity** section of the Dashboard contains a Summary, Inbox and Outbox
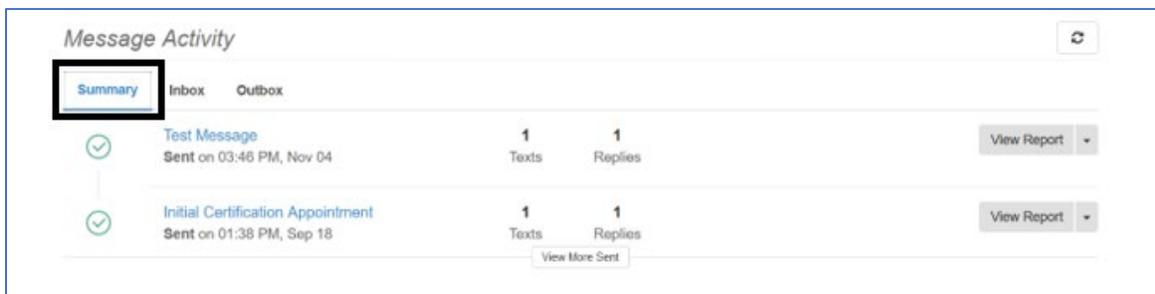


The **Inbox** displays the text messages *received* in the local agency from WIC participants.
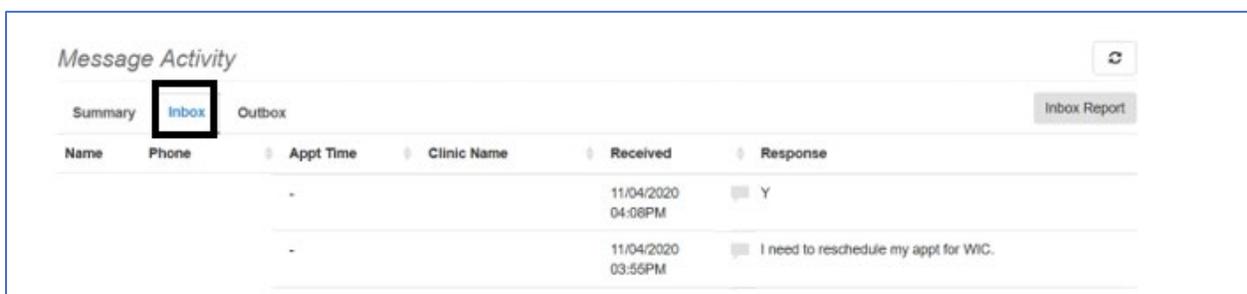
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The **Outbox** displays the text messages *sent* from the local WIC agency to WIC participants. These messages could include automated appointment reminders or replies to participant text messages.
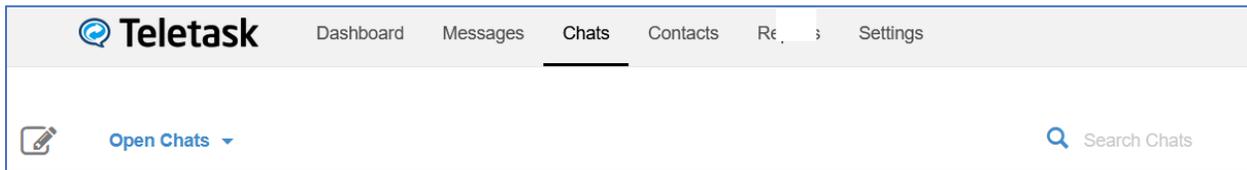


**How to Reply to Incoming Text Messages**

The **Chats feature** allows the local WIC agency user to reply to messages received by WIC participants.
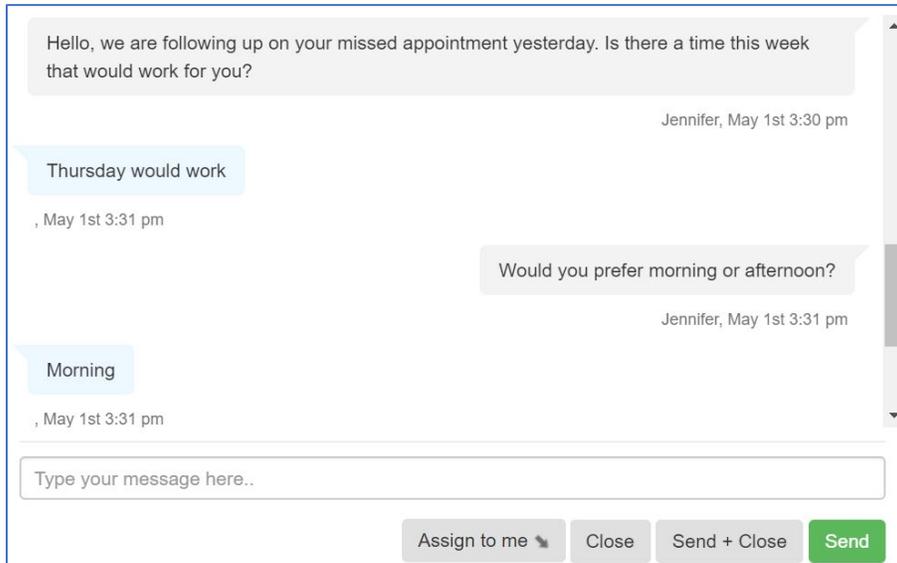
1) Click on **Chats** in the Teletask menu bar



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 **Open** status or close them to help keep your workspace clear.
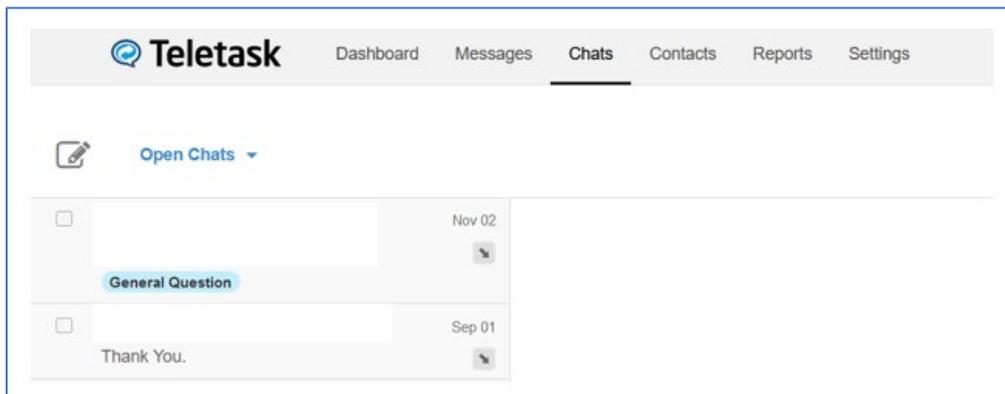
3) The local agency user will see a list of chats from WIC participants and be able to reply to those messages by typing in the space **"Type your message here"** and clicking **Send**. The original message and any replies will be stored in the **Open** folder.

   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.

   Hello, we are following up on your missed appointment yesterday. Is there a time this week that would work for you?

   Jennifer, May 1st 3:30 pm

   Thursday would work

   , May 1st 3:31 pm

   Would you prefer morning or afternoon?

   Jennifer, May 1st 3:31 pm

   Morning

   , May 1st 3:31 pm

   Type your message here..

   Assign to me ↘   Close   Send + Close   Send

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