# intiveo.

Introduction to Chat:
Two-Way Communication with Your Patients

This document is specific to Intiveo Enterprise product offering.

Intiveo Chat allows you to two-way communicate easily with your patients via SMS messaging. Patients can respond to SMS reminders, and your offices can directly message patients regarding their upcoming or past appointments.
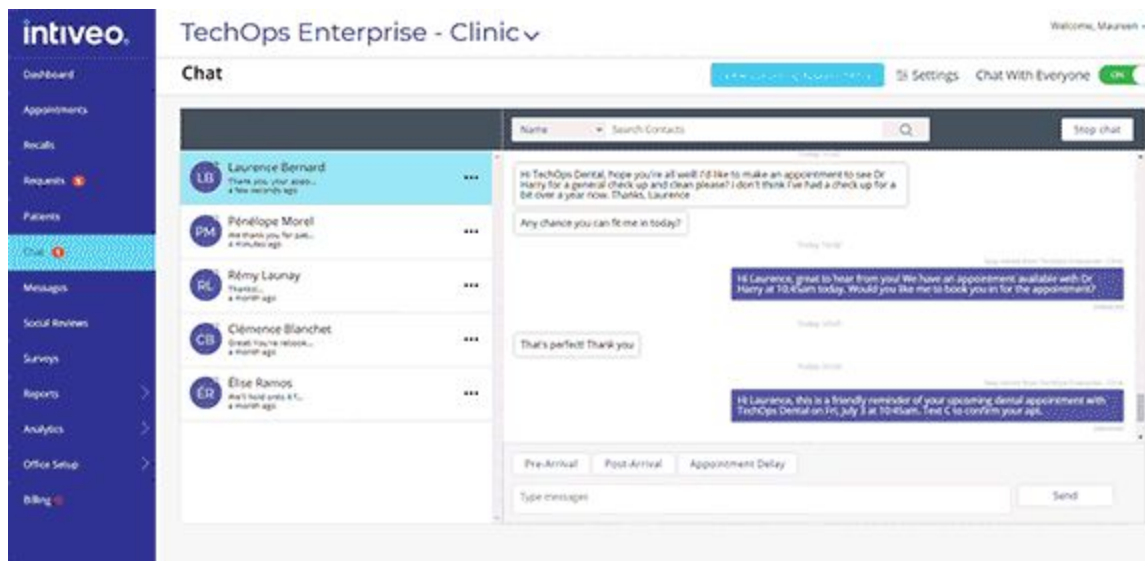
This informational document will give you a high level of the functionality of the Chat feature. We'll go through the following:

- [How to Setup Chat](#)
- [How to Use Chat](#)
- [Allowing Patients to Start Chat Conversations](#)
- [Browser and Email Notifications](#)
- [Customizing Chat Templates and Auto-Replies](#)
- [Associated Costs](#)

If you want to learn more, you can check out our [Help Center](#) for more in-depth setup and functionality information.

How to Setup Chat

Check with your Customer Success Manager to make sure **Chat** is activated on your account. Once that is complete, you'll have the ability to select which locations/clinics you want to use chat.

How to Use Chat

As an Administrator user, you'll be able to manage chats via the **Global Chat** menu option (via the Global Dashboard), or via the **Chat** menu option at the clinic level.

Users with access to multiple clinics will have access to the Global Chat menu option, while users with access to only one clinic will only have access to Chat at the clinic level.

Patients' chats will be sent to a specific clinic based on the *last message they received*. And at the Global Chat level, you'll see which clinic each patient is currently associated with.

Allowing Patients to Start Chat Conversations

Chat is most effective when you allow patients to initiate chats (i.e. when they respond to an SMS appointment reminder and it is not a confirmation response), and when you use the **Auto ON/OFF** functionality so that your Chat is **ON** at the start of your day and is **OFF** at the end of your day.

View Upcoming Appointments   Settings   Chat   ON

General Settings

Chat ON Automatically: ON
Chat OFF Automatically: ON
Allow Patients to Start Chat: ON
Auto Reply During Office Hours: OFF

Patients can initiate chats, and the clinic will get notified of the message, and respond to the patient. This reduces the need for time-consuming calls, and allows you to give quick information to the patient (ex. Requests for rescheduling or information on how to get to the office).

Browser and Email Notifications

Intiveo can help you stay on top of your chats and help you ensure you're responding to your patients within a reasonable time.

You can set up your browser to receive new chat notifications every time a patient submits a new chat. Depending on your permissions, you will receive notifications only for the specific clinics you have access to.
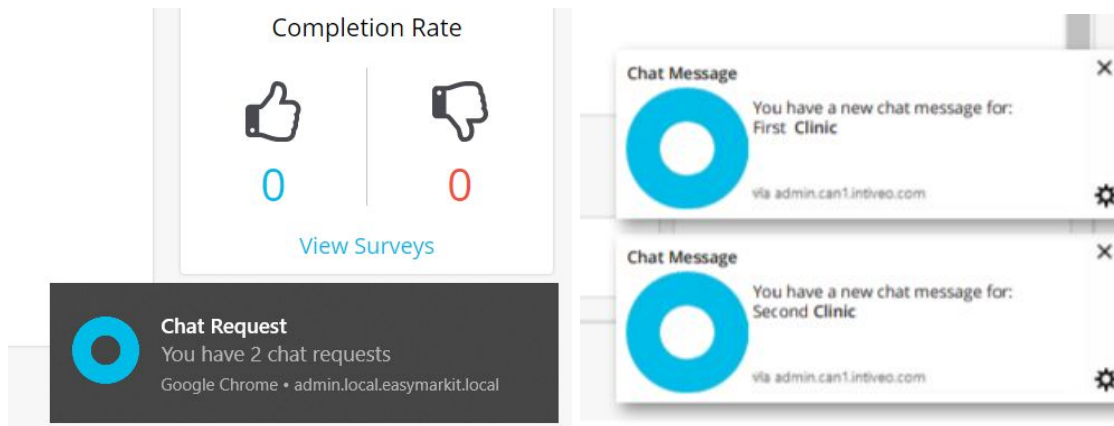
If unread chats are left unread for longer than 1 hour, you can set it up to receive an email notification that will remind you of unread chats that need to be addressed.

Chat Templates

You can create up to *eight* chat templates (customizable by clinic/office) to help you get repetitive information to your patients and reduce time typing the same information over and over again.

For example, if you require patients to call or text when they have arrived at the office, you can setup a template that allows you to quickly tell the patient that they can come into the office.

Chat Settings

Display Status	Title	Message
Displayed	Process Reminder	Due to COVID-19, we ask you to remain outside the office until we are ready to receive you. Remember... Show All
Displayed	Summon	Hi there. We are ready to receive you. Please proceed to the office.
Not Displayed	Chat Message Template 3	Please add the message that you would like to set up as a template
Not Displayed	Chat Message Template 4	Please add the message that you would like to set up as a template
Not Displayed	Chat Message Template 5	Please add the message that you would like to set up as a template
Not Displayed	Chat Message Template 6	Please add the message that you would like to set up as a template

Customizing Chat Auto-Replies

Intiveo will send specific auto-replies to your patients whether Chat is **ON** or **OFF**, whether you allow patients to initiate chats or not, and whether they messaged during your clinic business hours.

You can customize these auto-replies, so you have control over what is being sent to the patient based on your settings.

Chat Auto-Reply Settings

Title	Message	Edit
Auto-Reply During Office Hours	Thank you for your message. We will reply shortly. [Company Name]	✏️
Chat OFF	Thank you for your message. We are not currently available to reply to this message, but we will get... Show All	✏️
Patient Initiated Chat OFF	Sorry, [Company Name] does not respond to text messages, please call our office at [Telephone] for f... Show All	✏️

Associated Costs for Chat

Chat is already included as part of your Intiveo subscription.

You will see an increase of credit usage as the chat functionality uses SMS credits, and you can monitor your usage via the **Credits Report**.

Intiveo offers bulk credit packages at a lower cost per credit rate. Contact your Customer Success Manager to learn more about these options.

If you want to learn more, you can check out our Help Center for more in-depth setup and functionality information, or if you want to learn more about our Chat functionality or you're ready to start using it, contact your Customer Success Manager!