Engagement Center

Introduction

The [COMPANY] Engagement Center application, built on the Salesforce Health Cloud, helps hospitals and health systems manage campaign responses, register Callers for events, schedule patient appointments, provide physician and facility referrals, and create follow-up phone calls to manage post-discharge care.

Engagement Center provides a highly configurable and intuitive user interface for processing Caller inquiries and servicing patients, consumers, and providers in healthcare-related transactions.

Engagement Center has one hub that centralizes information about previous patient interactions, provider profiles, utilization data, detailed patient profile information, and consumer data.

Engagement Center Agents can easily respond to inquiries across multiple channels, improving the overall patient engagement experience, while servicing all patient and consumer needs on a single call.

Insight into key information about a Caller, including personal and household data, and a complete activity and interaction history gives Agents a comprehensive, 360-degree view of the Caller.

Using Engagement Center, Agents can:

- Manage inbound and perform outbound outreach.
- Manage general information inquiries.
- Log Complaints and Compliments feedback.
- Record campaign responses and handle campaign inquiries.
- Register patients for both free and fee-based events.

- Request appointments on behalf of patients or providers.
- Provide physician, practice, and facility referrals.
- Locate the providers and facilities that best meet patient needs.
- Track scheduled appointments generated from referrals.
- Live chat with Callers.

Engagement Center User Interface

You must use a **Google Chrome®** browser to access [COMPANY] Solutions.

Engagement Center is hosted on the Salesforce platform. recently, Salesforce introduced a user interface (UI) called Lightning. The original interface is now referred to as Classic Salesforce.

The screens used in Engagement Center and the entire platform are based on this Lightning UI feature.

What's in This Guide

This User Guide was written for Engagement Center users to explain how to use Engagement Center features to engage with Callers in a call center environment.

It is organized as follows:

- **Learning and Using Engagement Center** (This section explains how to access and navigate the Engagement Center console and covers general features such as **Knowledge Base**, **Start Call**, and **Guided Conversation**.)
- **Caller Records** (This section describes how to access, use, and create new records.)
- **Engagement Center Modules** (These sections describe Engagement Center modules and the procedures for using the features associated with each.)

Julie McNaught | **artfreehand@aol.com** | Nashville, TN | **artfreehand.com**

- **Reports and Dashboards** (This section explains how to create and use the Reports and Dashboards that are available in the Engagement Center.)

[COMPANY] Engagement Center Cisco Finesse® Integration

Cisco Finesse® is a next-generation, 100% browser-based Agent and Supervisor thin-client desktop that enhances the Consumer/Call Center Agent experience by integrating traditional call center functions via a web 2.0 interface, with no client-side installations required. The single, customizable interface gives customer care providers quick and easy access to multiple assets and information sources to assist customers.

[COMPANY] Engagement Center delivers effortless integration with Cisco Finesse®. Follow the simple instructions below to leverage this functionality.

Connect to Cisco Finesse® from Engagement Center

- From the **Console**, click on the **Engagement Center** tile.
- Ensure that you are not connected to Cisco Finesse® through any other browser or session. If you are, then log out of the session.
- Once you are in the Engagement Center application, in the utility bar on the bottom left corner, click on **CTIConnect**.
- Click on the **Connect to Finesse®** button.
- If you are accessing Cisco Finesse® for the first time through Engagement Center, you will receive a message that asks, “*Allow Access to External Application?*” Click on **Allow**.
- If you have previously accessed Cisco Finesse® from Salesforce, you will be taken to the Cisco Finesse® Authentication screen.
- Once you enter the credentials and successfully log in to Cisco Finesse®, the Engagement Center **CTIConnect** widget will display your **Agent Name**. This confirms that Cisco Finesse® and Engagement Center are now connected.

Julie McNaught | **artfreehand@aol.com** | Nashville, TN | **artfreehand.com**

Logout from Cisco Finesse®

- ***IMPORTANT:*** Do not close the Cisco Finesse® Browser without signing out of Finesse® first.
- After you log out, confirm the CTIConnect widget in Engagement Center displays the **Connect to Finesse®** button.

Adobe AI-generated Mockup Screen Depicting CTI Connectivity

Julie McNaught | **artfreehand@aol.com** | Nashville, TN | **artfreehand.com**

Launch the Cisco Finesse® login screen.

Adobe AI-generated Mockup Screen Depicting login screen

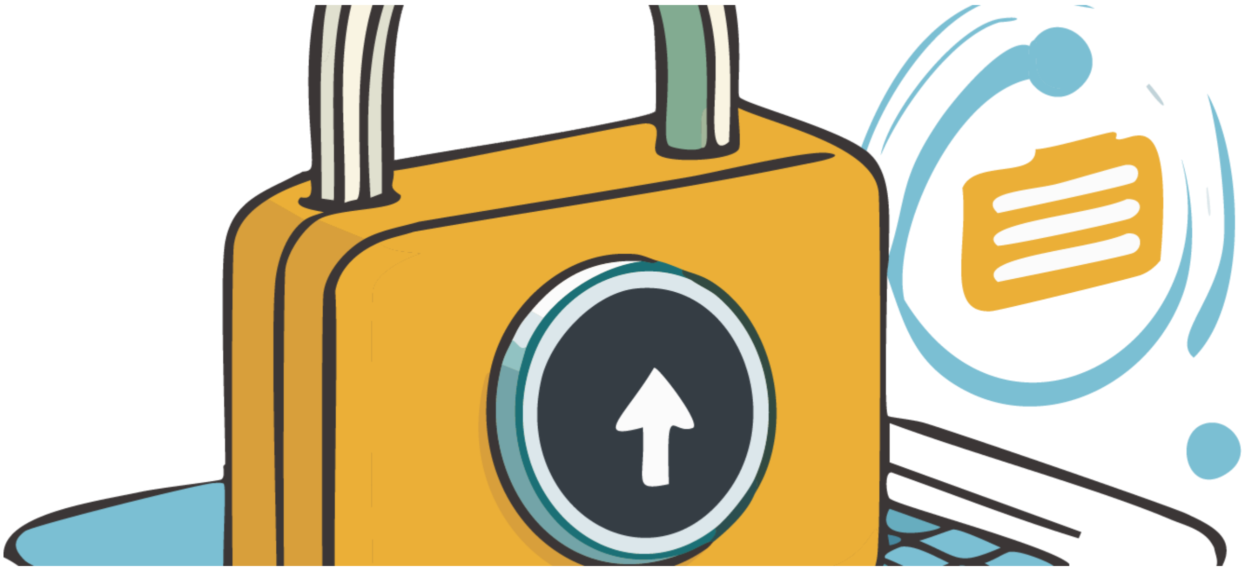
Julie McNaught | **artfreehand@aol.com** | Nashville, TN | **artfreehand.com**

The Agent status in Engagement Center changes to *Logged in to Finesse*®, represented by the display of the Agent name in the CTI widget. at this stage, the Agent is ready to take calls in Finesse® and the record pop will display in Engagement Center.

Adobe AI-generated Mockup Screen Depicting Record Pop

Julie McNaught | **artfreehand@aol.com** | Nashville, TN | **artfreehand.com**

Log out of Finesse®.



Adobe AI-generated Screen Depicting Logging Out of Finesse®

Julie McNaught | **artfreehand@aol.com** | Nashville, TN | **artfreehand.com**

The Agent state in Engagement Center changes to Logged out of Finesse® and the Connect to Finesse® button displays.

Adobe AI-generated Screen Depicting Connect to Finesse® Button

Session Timeout

The Salesforce platform has a session timeout setting that is configured to prevent accidental use of the system. This setting will log the user out of the application upon a predefined period of inactivity. The session timeout will reset if the user is getting calls delivered to the Engagement Center through the Cisco Finesse integration or if the user performs some activity.

Salesforce also notifies the user when the timeout limit is approaching by popping the following alert on the desktop, irrespective of which application they are currently using.

Julie McNaught | **artfreehand@aol.com** | Nashville, TN | **artfreehand.com**

Adobe AI-generated Screen Depicting Timeout Limit Alert

Click on the notification to be taken to the Salesforce screen where you can click on the **Continue Working** button as shown below.

Adobe AI-generated Screen Portraying the Continue Working Button

If you miss the notification and are timed out, perform the following actions to recover.

- Log out of Cisco Finesse
- Login to Engagement Center
- Connect to Cisco Finesse

If you are logged out and receive a call before you complete these actions, record pop will not be available, so do the following to recover.

- Perform a Manual Search to locate the Caller.
- Perform a Manual Search to locate the campaign.
- Attribute the Campaign from Search Results as outlined in the Campaigns section.
- Post the call logout of Finesse.
- Login to Engagement Center.
- Connect to Cisco Finesse.

Navigating Engagement Center

Engagement Center person records are displayed in an easy-to-read dashboard that provides an overview of current and historical Caller information.

To access any Engagement Center feature, you must first select a profile of the Caller or person you are performing the work for. If you are using Computer Telephony Integration (CTI), or another softphone application to accept incoming calls, the Caller record will automatically display if the information matches what is in the platform based on the incoming phone number.

To access any Engagement Center feature, you must first select a profile.

All profiles associated with a phone number display, such as family members who have the same phone number. If the profile record does not automatically open, the **Person** search screen is the default display. Search for and select the appropriate person. If there is no record, you can create a person record using the **New** button at the top-right of the **Person Search** results grid view area.
An existing profile record gives you a complete picture of the Caller, with demographic data, appointments, referrals, campaigns, and a timeline of past activities.

The tabs in the center of the screen display.

Julie McNaught | **artfreehand@aol.com** | Nashville, TN | **artfreehand.com**

- **Details** (Double-click on any field to edit it. Be sure to save additions or edits to the displayed information using the **Save** button at the lower part of this screen, otherwise, changes will not be saved when you move to another screen or tab.)
- **Inquiries**
- **Marketing**
- **Appointments**
- **Timeline**

The left panel contains the **Patient Summary**, or "Snapshot". The "Snapshot" is a convenient way to quickly view the three most recent activities under each category. Categories may include the following.

The categories described in this section are configurable by your organization and may differ from the examples described here.

- **Patient Summary**
  - **Birthdate**
  - **Primary Phone**
  - **Primary Email**
  - **Portal Status**
  - **Portal Activation Date**
  - **Portal Last Login Date**
  - **Privacy Code**
  - **Communication Preference, Time of Day**

- **Alerts (#)**
  - **Do Not Call**
  - **Email Opt Out**
  - **Fax Opt Out**
  - **SMS Opt Out**

"Snapshot" displays the three most recent activities under each category.

Julie McNaught | **artfreehand@aol.com** | Nashville, TN | **artfreehand.com**

- **Appointments (#)** (Active and historical listings with details and links related to appointments)
  - **Name of Provider** (Specialty)
  - **Address**
  - **Appointment Date, Time, and Status, whether *Booked* or *Completed***

- **Feedback (#)** (**Case Number**, link to the **Case** screen, **Details** tab feedback type, whether *Complaint* or *Compliment*. The **Case** screen also has a **Related** tab.)
  - *Comment*
  - *Date/Time and time zone*

- **General Information (#)** (Active and historical listings with details and links about programs, events, community resources, directions, etc., and inquiries such as chart adoption, directions, facility information, physician information, etc.)

- **Events (#)** (Active and historical listings with details and links)

The bottom of the screen is called the **Utility Bar**. The **Knowledge Utility** provides access to all Knowledge Articles that are published in the system and can be searched. The CTIConnect link is also available in this bar.

Receiving an Inbound Call

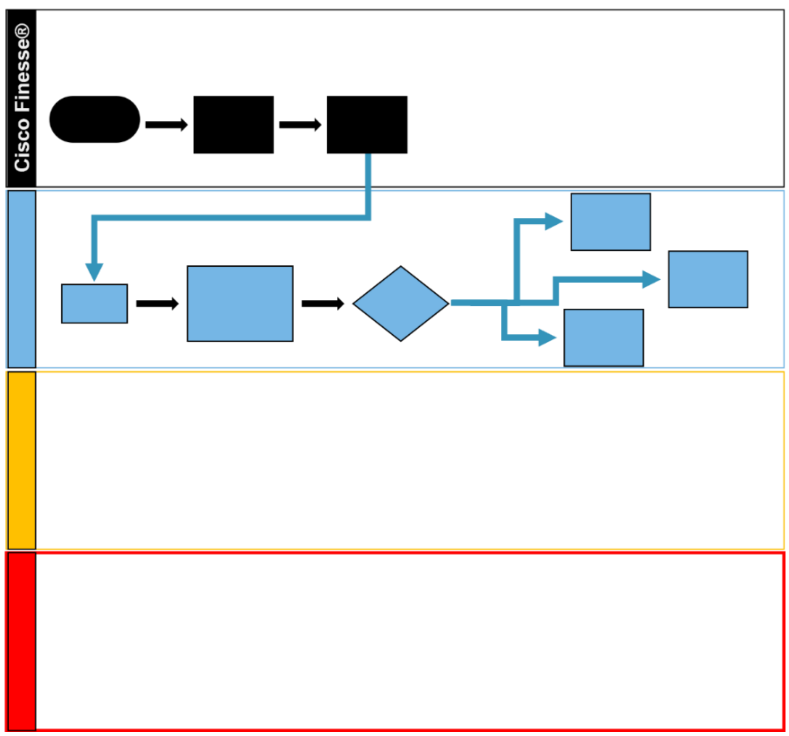
Computer Telephony Integration (CTI) searches for a Caller based on the incoming telephone number and opens the record. If an *existing* profile is calling from a different number, you can use **Person Search** to locate the Caller.

The **Person Search** screen is available from the main tab selector menu at the top-left of the console. If the Caller is a new patient/consumer and does not have a record in your system, you can create a new record, as outlined in the **Adding a New Person Account** section of this guide.

Julie McNaught | **artfreehand@aol.com** | Nashville, TN | **artfreehand.com**

CTI Record Pop / CTI Search

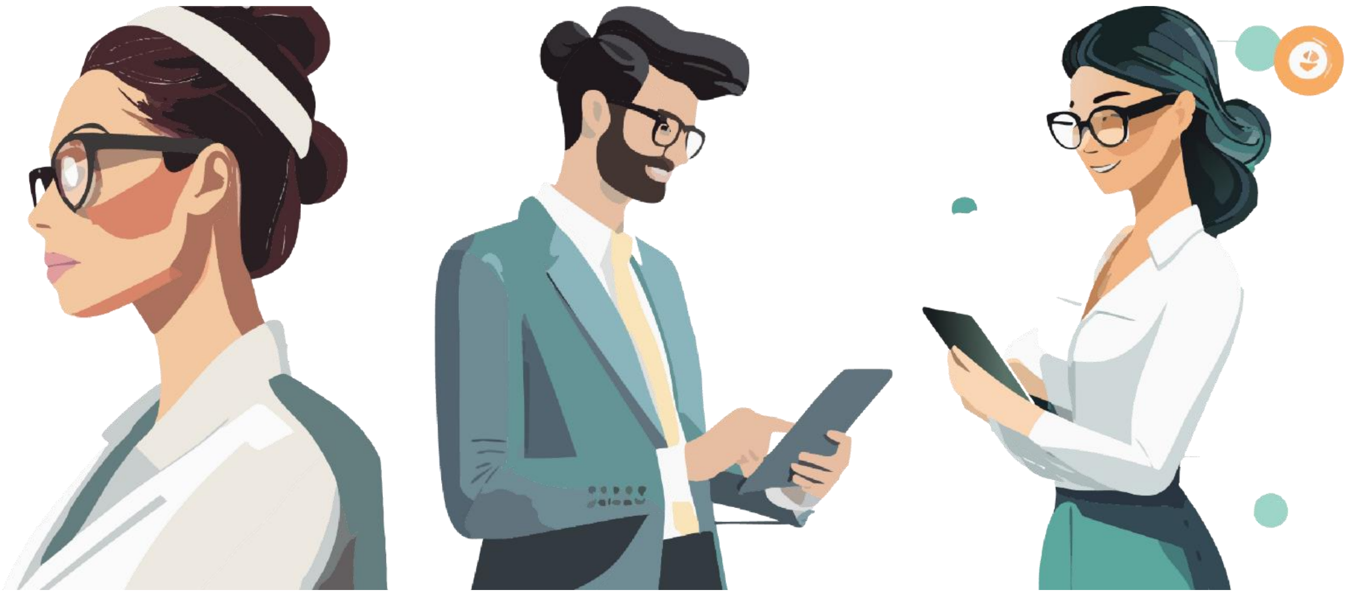
- Receive a call on the Agent's phone.
- Once you answer the call you will receive a record pop in Engagement Center.
- There are three scenarios for the record pop:
    - Single Record match
    - Multiple Records match
    - No Records match



PowerPoint Flowchart Mockup

- In scenarios "a" and "b", a **View Record(s)** button displays. Click this button to open the **Record Verification** screen.
- In scenario "c" you will a **Search** button displays. Click this button to open the **Person Search** screen.

Julie McNaught | **artfreehand@aol.com** | Nashville, TN | **artfreehand.com**



Single Record Match, Multiple Records Match, and No Record Match

Likely Caller Intent and Objective

- The CTI widget will search the Engagement Center database for matches based on the Incoming Phone and Dialed Phone Number.
- “Who” is calling will be displayed based on the Incoming Phone number.
- “What” are they calling about will be displayed, based on the Dialed Phone number.
- The Dialed Phone number will be set up against a Campaign Tactic.
- The **Likely Caller Intent** displays the text *Responding to* followed by the matched **Campaign Name**.
- **Objective** displays the objective that is set up against the tactic. The various examples pertinent to Engagement Center are **Appointment Request** and **Event Registration**.

Julie McNaught | **artfreehand@aol.com** | Nashville, TN | **artfreehand.com**