



USING LIVE CHAT ON THE MY HEALTH RECORDS MOBILE APP

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INTENDED AUDIENCES

- Clients

1. INTRODUCTION

This guide explains how to use the **Live Chat** feature within the **My Health Records** mobile application on your iOS or Android device. By following the steps below, you will be able to start a new conversation with your clinic, review previous chats, manage attachments, and understand how notifications and after-hours messages are handled — all from your mobile device.

Navigation:

- **Live Chat**
My Health Records App → Dashboard → **Live Chat** Tile

Modules and Browsers Supported

Following is the list of browsers that support this feature:

- Google Chrome
- Microsoft Edge
- Mozilla Firefox
- Safari

Following is the list of modules that support this feature:

- My Health Records App

2. ACCESSING LIVE CHAT FROM THE HOME DASHBOARD

- Open the **My Health Records** app on your iOS or Android device and log in with your credentials.
- On the **Home Dashboard**, locate the **Live Chat** tile. It is displayed alongside other tiles such as **My Health Records**, **Message Center**, and **Patient Forms**, and is identified by a chat bubble icon labeled "**Live Chat**".

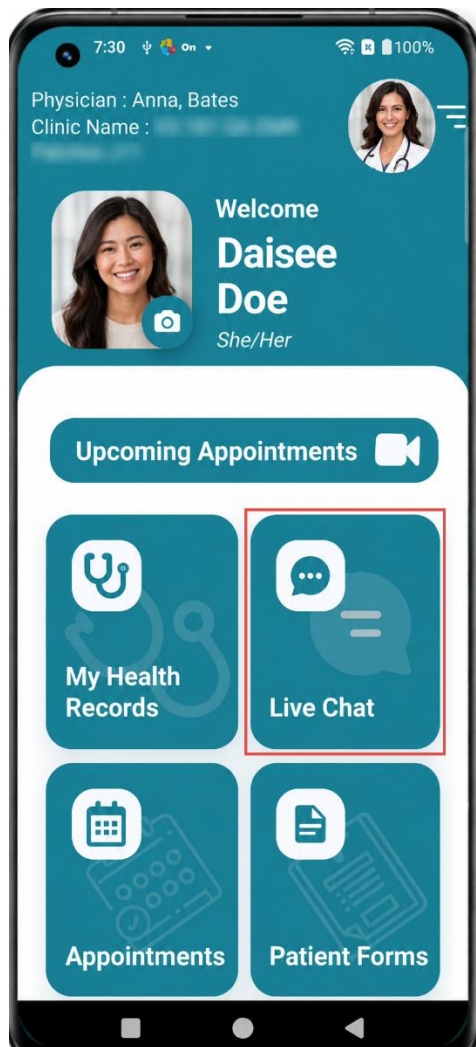


Figure: *Live Chat Tile on My Health Records App*

- If you have any unread messages, a red badge showing the unread message count will appear in the top right corner of the **Live Chat** tile.

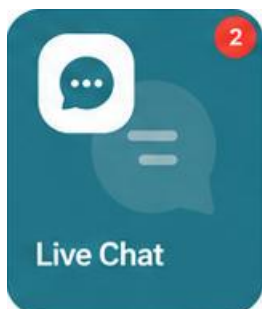


Figure: *Live Chat Tile with unread messages badge*

- Tap the **Live Chat** tile to proceed. The app will direct you to one of the following screens, depending on your chat history:
 - The **Chat Inbox** — if you have existing active or recent conversations.

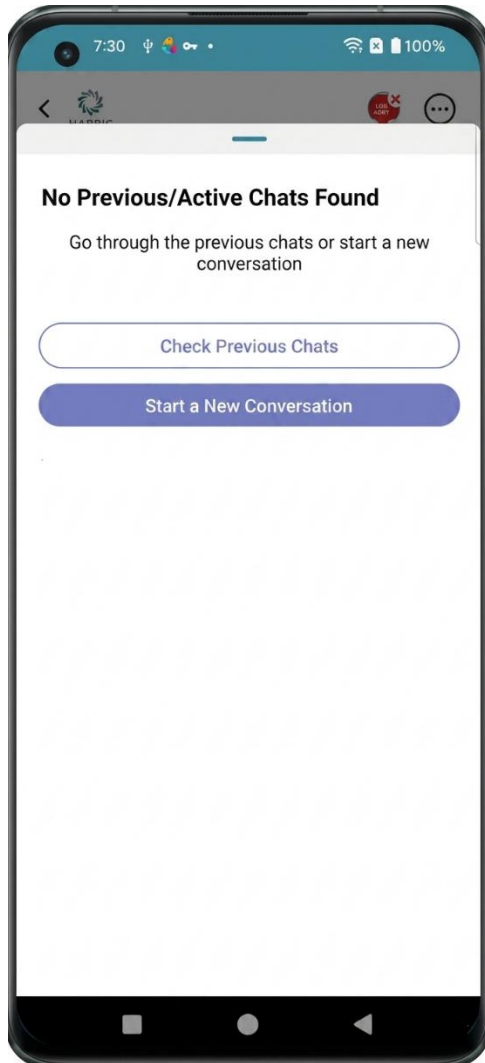


Figure: Buttons for Check Previous Chats and Start a New Conversation

- The **Category Selection** screen — if you are starting a conversation for the first time or have no existing conversations.

3. SELECTING A CATEGORY TO START A NEW CONVERSATION

- If you are directed to the **Category Selection** screen, review the list of available categories displayed as large, tappable cards.

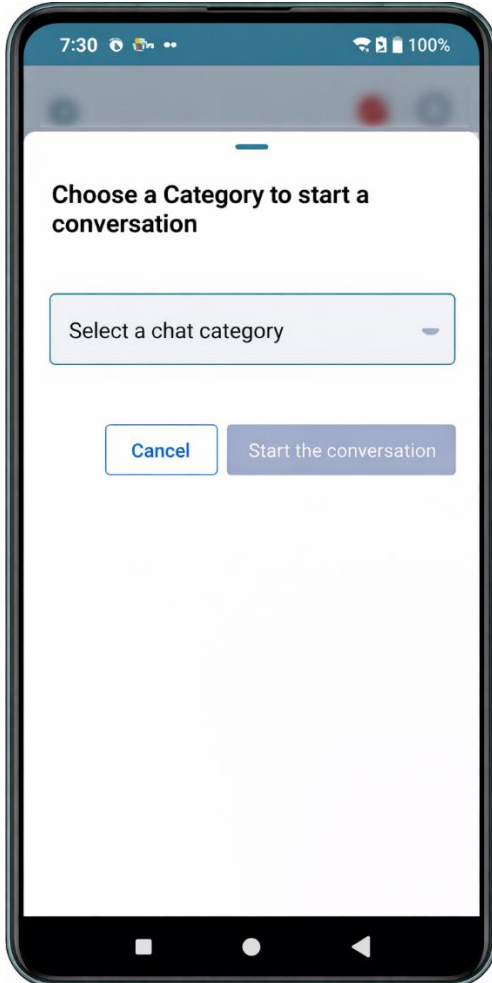


Figure: *Category Selection popup on the My Health Records App*

- Categories may include:
 - General Inquiry
 - Appointment Request
 - Prescription Refill
 - Billing/Insurance
 - Medical Records Request
 - Other

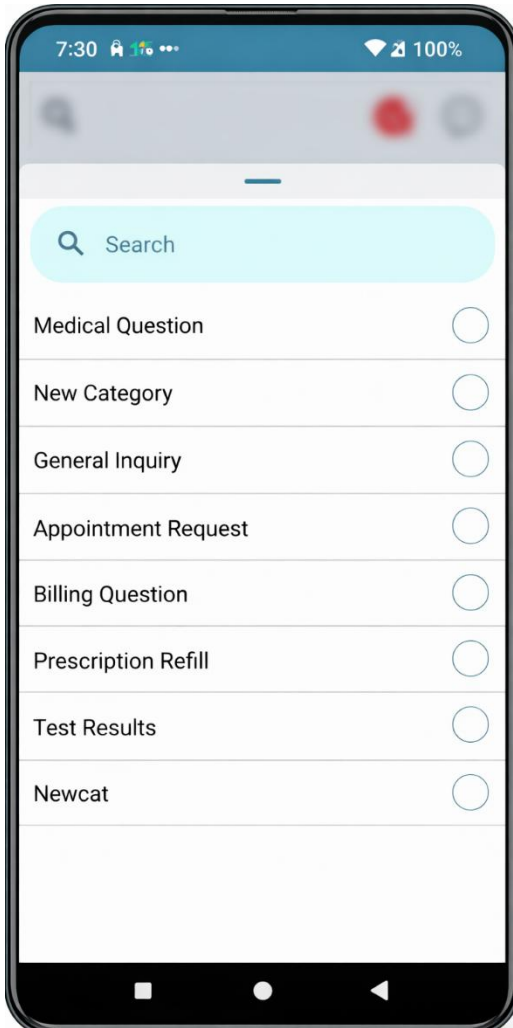


Figure: *Category options for selection on the My Health Records App*

- Any additional categories configured by your clinic
- Tap the category that best describes the reason for your message. You must select a category before you can begin composing your message.
- If your clinic has multiple locations and you are permitted to choose a preferred location, a location selection dropdown will also appear on this screen. Tap the dropdown and select the appropriate location before continuing.
- Once you have made your selection, the app will navigate you directly to the active chat interface, where your chosen category will be displayed at the top of the conversation.

4. SENDING AND RECEIVING MESSAGES IN THE CHAT INTERFACE

- In the active chat screen, all messages are displayed in chronological order within color-coded speech bubbles:

- Your messages appear on the right side of the screen.
- Clinic staff messages appear on the left side of the screen.
- Each message displays the sender's name or role and a timestamp.

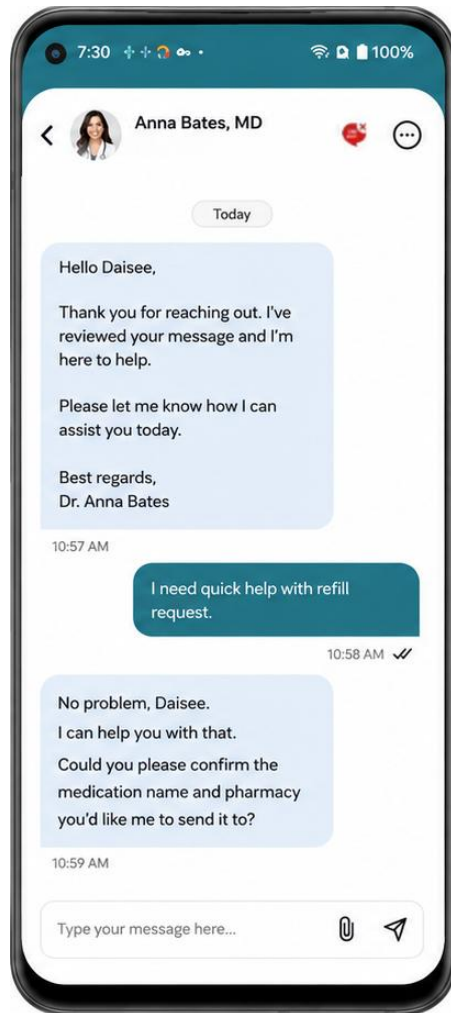




Figure: Conversation between Patient and Clinic User on My Health Records App

- To type a message, tap the text input field located in the fixed bar at the bottom of the screen. This input bar remains visible even when your device's keyboard is open.
- Once you have composed your message, tap the **Send**  icon to deliver it. New messages from clinic staff will appear instantly in the conversation thread, and the screen will automatically scroll to the most recent message.
- To send an attachment, tap the **Attach**  icon (paperclip) in the input bar, then select the file or image you wish to share. Once sent or received:
 - Images will appear as a thumbnail directly within the conversation thread.
 - Documents will appear as a tappable file link within the conversation thread.


- To close an active chat (if this option has been enabled by your clinic), tap the **Close Chat**  option on the active chat screen. A confirmation popup will appear asking: **"Do you want to close this chat?"** Tap **Confirm** to close the conversation. The chat will become read-only and will move to the **Previous Chats** section.



Figure: Message to confirm if the Patient should end chat on My Health Records App

5. VIEWING YOUR APPOINTMENT DETAILS

- While in an active chat, you can view your appointment information by tapping the **Additional Details** or **Info** icon, or by swiping upward from within the chat screen.
- An **Appointment Details** panel will slide up as a bottom sheet overlay. This panel displays:
 - Your next upcoming appointment (date, time, and type).
 - Today's appointment, if applicable.

- Your last completed appointment.
- To dismiss the panel and return to your active chat, drag the bottom sheet downward to close it.

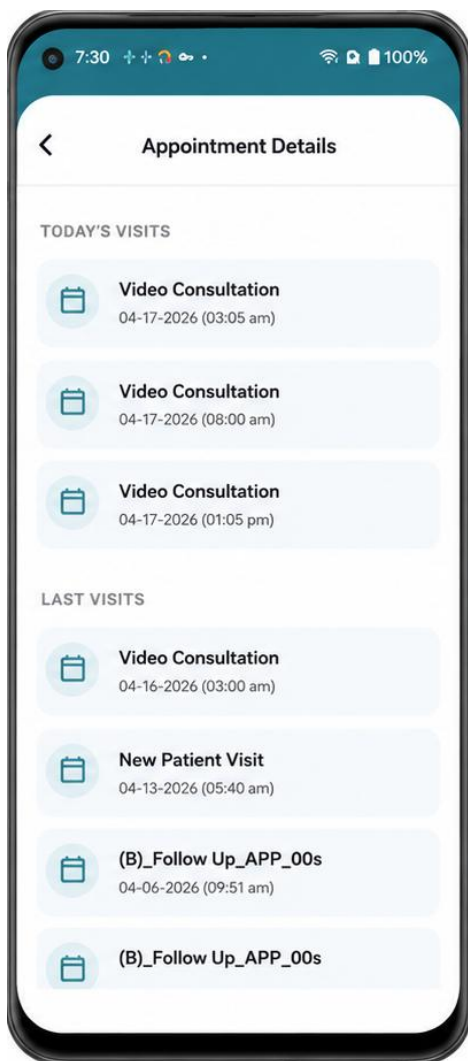


Figure: Appointment Details panel

6. ACCESSING YOUR PREVIOUS CHATS

- To view past conversations, tap the **Previous Chats** tab or link available within the **Live Chat** section of the app, or access it via the swipe-up bottom sheet within the active chat interface.

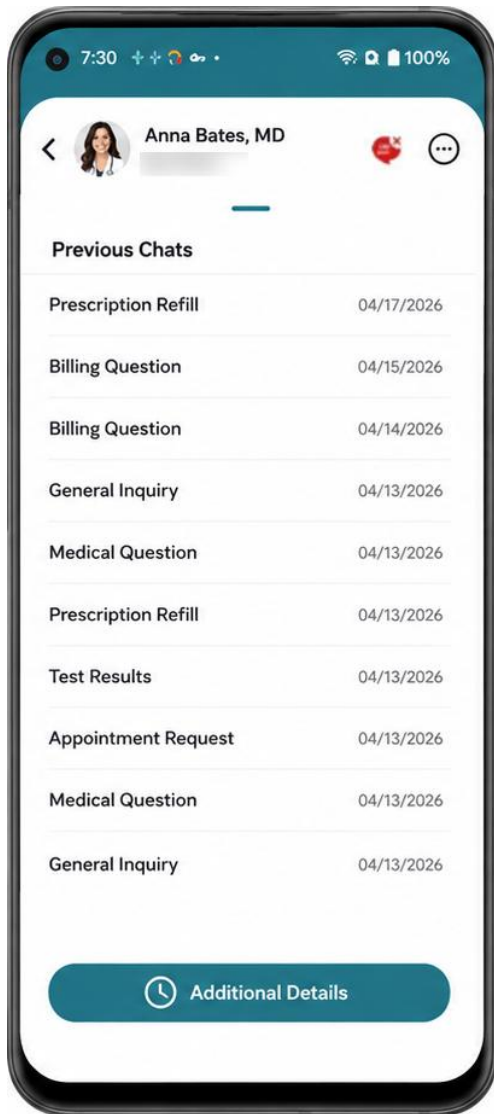


Figure: *Previous Chats* section on My Health Records App

- The ***Previous Chats*** list displays the category or subject and the completion date for each past conversation. If no previous chats exist, the message ***"There are no records to be displayed."*** will appear.




Figure: *No records present under Previous Chats*

- Tap any conversation in the list to open and review it. Previous chats are displayed in read-only mode — the message input area is disabled, but the full message history, original timestamps, and sender names remain visible.
- Tap the **Back** button to exit the read-only view and return to the active chat or your inbox.
- To permanently delete a previous chat, tap the **Delete** icon next to the conversation. A confirmation prompt will appear before the conversation is removed. Please note that all deletions are recorded in the system's audit trail.

7. MESSAGING OUTSIDE OF BUSINESS HOURS

- If you send a message when your clinic is closed, an automated response will appear immediately in your chat thread: ***"Our team is currently offline. We'll reply during business hours."***
- Your message is safely stored in the system and will be delivered to clinic staff the next time they log in. You do not need to resend your message.

8. MANAGING PUSH NOTIFICATIONS

- When the ***My Health Records*** app is closed or running in the background, you will receive a push notification on your device whenever your clinic sends you a new message. The notification will display:
 - Your clinic's name as the sender.
 - The message: ***"A new message has been received from [Clinic Name]."***
-  **Note:** For your privacy and security, push notifications will never contain your health information or any personal health data.
- Tap the notification to open the app. If you are not currently logged in, you will be directed to the login screen. Once you have signed in, the app will navigate you directly to the relevant chat thread.