OHSC

Office of Health Standards Compliance

Ensuring quality and safety in health care

RFI FOR THE HEALTH OMBUD WHATSAPP AND CHATBOT INTEGRATION INTO HALO CRM

Contents

1. INTRODUCTION

The OHSC is seeking information from experienced service providers capable of integrating WhatsApp and a chatbot solution into our existing HaloITSM system. The purpose of this RFI is to identify suitable providers, evaluate potential solutions, and understand how vendors can help us achieve key objectives such as 24/7 availability, automation of routine inquiries, streamlining complaint lodging, and delivering instant confirmations and updates.

2. BACKGROUND

The Health Ombud Call Centre was established to receive complaints from users of health services related to breaches in norms and standards by health establishments.

The Health Ombud is comprised of the following units:

- Complaints Call Centre
- Complaints Assessment Unit
- Clinical Health Cases Unit
- Legal and NPM Unit

2.1. Complaints Call Centre (Ccc)

The Unit receives complaints from the public regarding breaches of norms and standards by health establishments through phone calls, walk-ins, emails and written letters. Complaints are registered in the HALO ITSM, screened, and risk-rated to determine how they will be managed at the CCC.

All low-risk rated complaints are managed at the CCC level, whereas Medium, High, and Extreme complaints are referred to the Complaints Assessment unit for further management.

2.2. Complaints Assessment Unit (Cau)

The purpose of this Unit is to screen the "Medium", "High", and "Extreme" risk-rated complaints. The CAU assesses /evaluates /investigates and disposes of the medium-risk rated complaints. Furthermore, the CAU will refer the "High" and "Extreme" risk-rated complaints to the Complaints Investigation Unit (CIU) for onsite investigation following the receipt of information from the Health Establishment and/or Complainant.

2.3. Clinical Health Cases Unit

The Clinical Health Cases Unit handles high-risk and extreme-risk cases involving clinical investigations. These cases often necessitate onsite visits and witness interviews to ensure a thorough and robust analysis and investigation process.

2.4. Legal And Npm Unit

The Legal and Npm Unit investigates legal-related complaints, such as complaints lodged by lawyers, difficult or unreasonable complaints, and complaints from Chapter 9 institutions.

The Unit is also responsible for executing the NPM functions of the Ombud, which is to monitor places of deprivation of liberty and examine the treatment of persons deprived of their liberty by conducting regular unannounced visits to places where persons are deprived of their liberty.

It also supports the Health Ombud and the three (3) Units, i.e. the Complaints Call Centre Unit, the Complaints Assessment Unit, and the Clinical Health Investigation Unit, with the provision of legal advice and legal decisions to protect and ensure the integrity of Ombud.

The Unit is also responsible for the following:

- To provide legal expertise to the Ombud.
- To liaise with the Legal Units in the Department of Health as well as in other Departments or institutions and
- To investigate high and extreme-risk-rated healthcare complaints referred from the Complaints Assessment Unit

3. BUSINESS OBJECTIVES

Given the rapid development of customer service channels, the OHO intends to integrate WhatsApp communication capabilities into the Halo CRM system, which will offer enhanced functionalities such as automated responses, 24/7 response capabilities, multilingual voice prompts, and integration with the HaloITSM system.

This advanced CRM will enable OHSC to provide its clients with higher quality, more efficient services while maintaining flexibility to adapt to future needs through frequent software updates and enhancements.

4. USER REQUIREMENTS SPECIFICATIONS

The OHSC is driven to enhance our services with cutting-edge technology as part of our commitment to innovation and continuous improvement. As part of this endeavour, we are excited by the prospect of introducing enhanced capabilities to our CRM system, including WhatsApp integration and chatbots for 24/7 automated responses and seamless HaloITSM integration. These advanced features will streamline our operations and elevate the quality and accessibility of our customer

service. By incorporating the latest technological advancements, we aim to serve our clients better, meet their evolving needs, and ensure that OHSC remains at the forefront of service excellence.

4.1. Use Case Description

This use case describes how integrating WhatsApp and a chatbot into the HaloITSM system enhances customer interactions by offering 24/7 availability, automating routine inquiries, streamlining complaint lodging, and providing instant confirmation and updates.
The system allows customers to engage directly via WhatsApp for common issues, inquiries, and complaints, with automated responses handled by the Chatbot. The Chatbot will guide the customer through various interactions while integrating with HaloITSM to create tickets, provide updates, and escalate issues when needed.

4.1.1. Basic Flow:

4.1.1.1. Complainant Initiates Contact:

The Complainant sends a message to OHSC via WhatsApp to ask questions, lodge a complaint, or request a service.

4.1.1.2. Chatbot Acknowledges and Assesses the Request:
The WhatsApp message is received by the Chatbot, which is available 24/7.
The Chatbot scans the message and determines the request type, routine inquiry, complaint, or service request.

4.1.1.3. Automating Routine Inquiries:
If the message is a common inquiry (e.g., "What are your operating hours the Chatbot responds immediately with pre-configured answers.
The conversation is logged and recorded in HaloITSM for reference.

4.1.1.4. Streamlining Complaint Lodging:
If the customer wants to complain, the Chatbot collects the necessary details (e.g., the nature of the complaint, affected service, etc.) through a series of automated questions.
Once all required information is gathered, the Chatbot creates a ticket in HaloITSM and assigns it to the appropriate department for review.
The system sends a confirmation message to the customer via WhatsApp, confirming that the complaint has been logged and providing a reference number.

4.1.1.5. Availability and Escalation:
If the issue is critical and needs immediate human intervention (e.g., a high-priority service outage), the Chatbot escalates the case to an on-call agent via HaloITSM, The agent receives a notification through HaloITSM and takes over the conversation if needed.

4.1.1.6. Instant Confirmation and Updates:
The customer receives instant confirmation that their request has been logged or their inquiry has been resolved.
The Chatbot provides status updates via WhatsApp as the issue progresses through different stages in HaloITSM (e.g., "Your complaint is being reviewed", "Your issue has been resolved", etc.).
When the ticket is closed, the customer receives a final update confirming the resolution.

5. ACCEPTANCE CRITERIA

5.1. 24/7 Availability

5.1.1. The WhatsApp-Chatbot integration must be available to customers 24/7, without downtime.
5.1.2. The Chatbot must be able to handle customer interactions at any time, including outside of regular business hours.
5.1.3. Urgent issues escalated by the Chatbot must trigger a notification to the on-call agent through HaloITSM at any hour.

5.2. Routine Inquiries

5.2.1. The Chatbot must respond to predefined routine inquiries (e.g., operating hours, ticket status) within 3 seconds of receiving the message.
5.2.2. At least 90% of routine inquiries must be resolved without human intervention by the Chatbot.
5.2.3. All routine inquiries and responses must be logged automatically in HaloITSM for tracking and reporting purposes.

5.3. Streamlining Complaint Lodging

5.3.1. The Chatbot must be able to collect relevant information for lodging complaints (e.g., issue description, affected service) through a step-by-step interaction.
5.3.2. Once the complaint details are captured, a ticket must be automatically created in HaloITSM with the correct information and assigned to the appropriate department.

5.3.3. The customer must receive a WhatsApp confirmation message containing a unique reference number for ticket creation.

5.4. Confirmation and Updates

5.4.1. After a request or complaint is submitted, the Chatbot must send an instant confirmation message to the customer.
5.4.2. The Chatbot must provide status updates via WhatsApp at key stages in the ticket lifecycle (e.g., ticket creation, investigation, resolution).
5.4.3. Upon ticket closure, a final WhatsApp message must be sent to the customer confirming the issue has been resolved and providing relevant details.

5.5. Non-functional Criteria

5.5.1. Scalability: The system must handle a minimum of 500 concurrent WhatsApp sessions without degradation in performance.
5.5.2. Security: All communication between WhatsApp, the Chatbot, and HaloITSM must be encrypted to ensure data privacy and compliance with regulatory standards.
5.5.3. Usability: The WhatsApp interface and chatbot conversation flow must be intuitive and user-friendly, requiring minimal effort from the customer to lodge a complaint or inquire.
5.5.4. Integration: The WhatsApp and chatbot system must seamlessly integrate with HaloITSM without introducing latency or data synchronisation issues.

6. CRITICAL DELIVERABLES

Interested service providers should detail their approach to the following deliverables:

6.1. WhatsApp Business API Integration

6.1.1. Explain how the proposed solution will integrate with HaloITSM.
6.1.2. Describe security, compliance, and scalability considerations.

6.2. Chatbot Functionality

6.2.1. Outline chatbot capabilities, including AI/NLP features and escalation to human agents.
6.2.2. Provide examples of past implementations in similar environments.
6.2.3. Automation & Workflow Optimization

6.2.4. Detail how automation will streamline ticketing, complaint handling, and user interactions.
6.2.5. Describe reporting and analytics features for tracking chatbot performance.

6.3. User Experience & Accessibility

6.3.1. Explain how the solution ensures a seamless experience for users.

6.3.2. Include language support, customization options, and accessibility features.
6.3.3. Support & Maintenance
6.3.4. Outline post-implementation support, updates, and service level commitments.

7. CONCLUSION

The WhatsApp and chatbot integration into HaloITSM will ensure that the system delivers on key objectives: providing 24/7 availability, automating routine inquiries, streamlining the complaint lodging process, and delivering instant confirmation and updates.

These enhancements will improve operational efficiency, elevate the customer experience, and ensure that the OHO Unit is equipped with advanced technological capabilities to meet the evolving needs of its clients. By integrating these features, OHSC will be better positioned to provide timely, accurate, and seamless support, setting a new standard for service delivery and customer satisfaction.