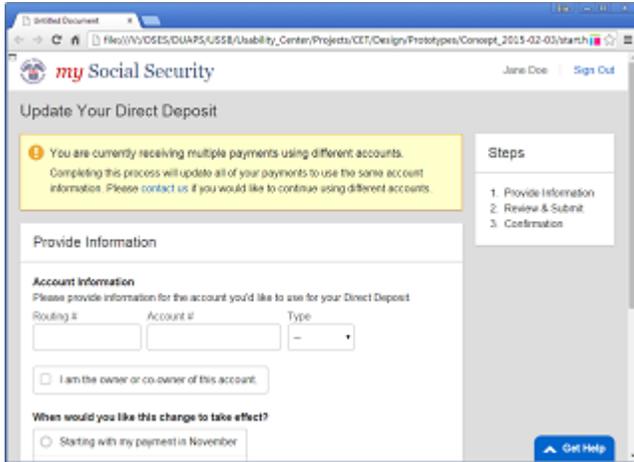
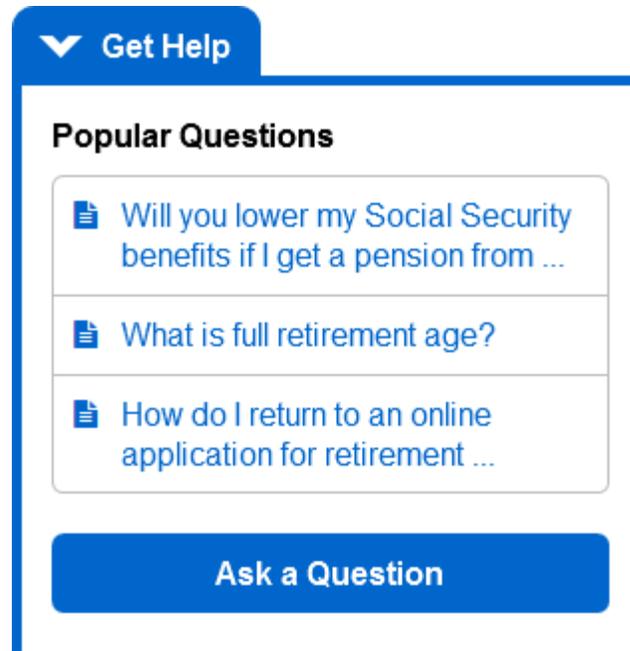


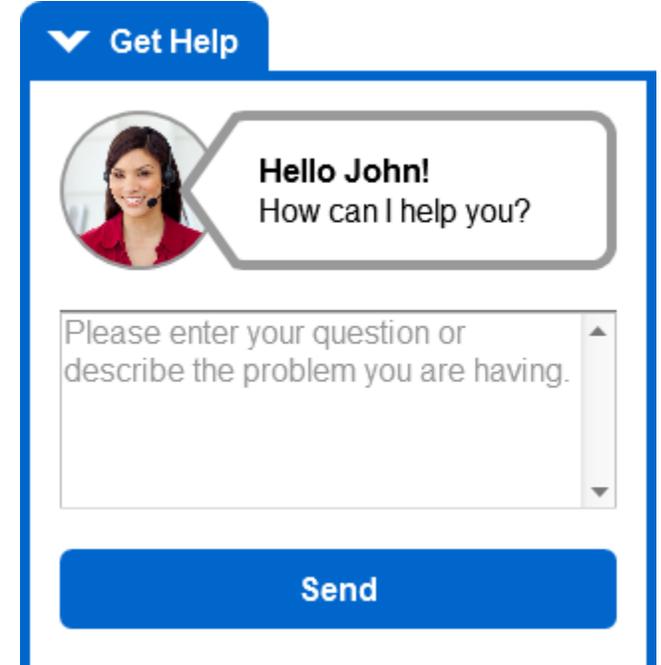
Dynamic Help and Chat Menu Screen Package



1 The Dynamic Help Button is fixed to the bottom right hand corner of screen. Selecting the button displays the Help Menu.



2 If there are preselected articles available for the page where the Menu is invoked, they are first displayed to the user. The user may select an article for viewing or indicate that they wish to ask their own question. **If there are no preselected articles, skip directly to step 3.**



3 The Menu prompts user to enter their question or problem statement. Menu also gathers page and user context as part of their help request. **If the user returns to this prompt from step 4, the avatar should say "Alright! What's your question?"**

Dynamic Help Menu (Release 1): Customer Storyboard (page 2)

The storyboard consists of three panels illustrating the user's experience with a dynamic help menu. Each panel has a blue header with a 'Get Help' button and a dropdown arrow.

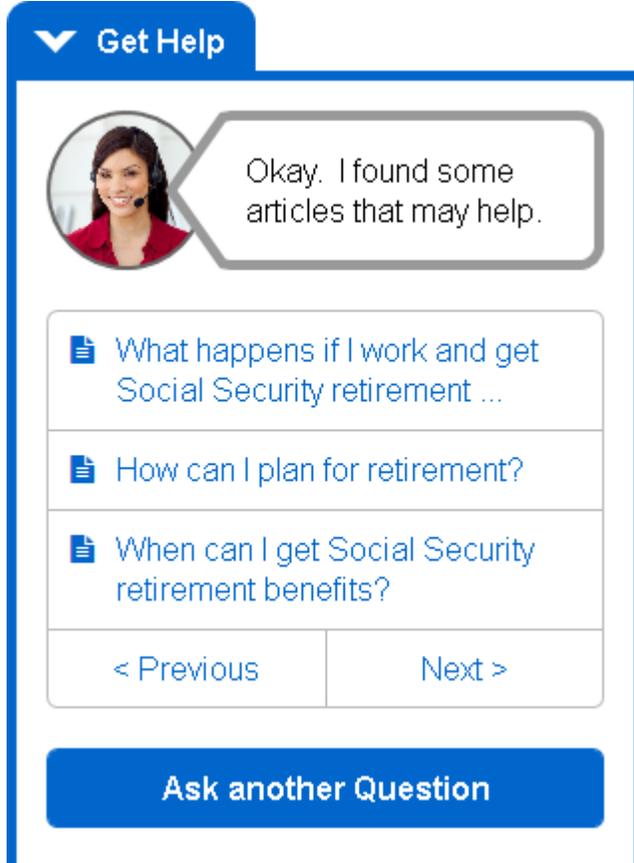
- Panel 1 (Left):** A user profile picture is shown next to a speech bubble containing the text: "Okay. I found some articles that may help." Below this is a list of three search results, each with a document icon and a blue link: "What happens if I work and get Social Security retirement ...", "How can I plan for retirement?", and "When can I get Social Security retirement benefits?". At the bottom of the list is a "Next >" link, and below the entire panel is a large blue button labeled "Ask another Question".
- Panel 2 (Middle):** A blue header contains a "< Back" link. The main content area displays the title "How can I get a benefit verification letter?" followed by a paragraph of placeholder text: "If you need proof you get Social Security benefits ... Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet. Proin gravida dolor sit amet lacus accumsan et viverra justo commodo. Proin sodales pulvinar tempor. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus." Below this is another paragraph: "Nam fermentum, nulla luctus pharetra vulputate, felis tellus mollis orci, sed rhoncus sapien nunc eget odio. Aenean euismod bibendum laoreet. Proin".
- Panel 3 (Right):** A user profile picture is shown next to a speech bubble containing the text: "Sorry! I couldn't answer that. Can you reword your question?". Below this is a text input field containing "[user's previous entry]". At the bottom of the panel is a large blue button labeled "Send".

4 Menu queries knowledgebase using the users' question or problem statement and returns a list of matching help articles. Additionally, the user may paginate through the list (step 4.1) or ask another question (step 3). **If the query returns no articles, go to 4B.**

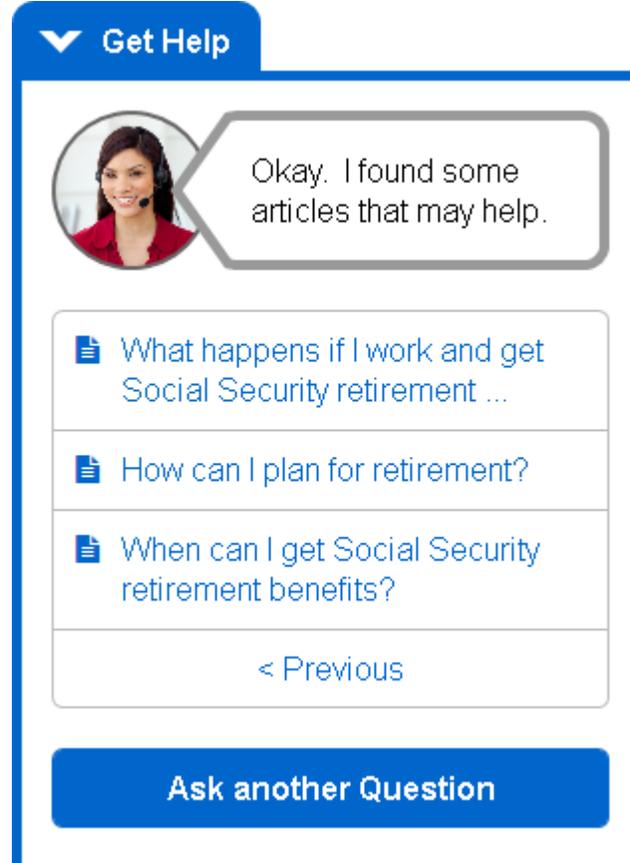
4A Selecting a knowledgebase article displays its contents within a scrollable region in the Menu interface. A "Back" control should remain in a fixed position to allow the user to exit the article interface and return to the article index (step 4).

4B If the query returns no results, Menu displays the user's previous entry and instructs them to reword their question. **If the new query returns articles, go to 4. If no articles, redisplay 4B.**

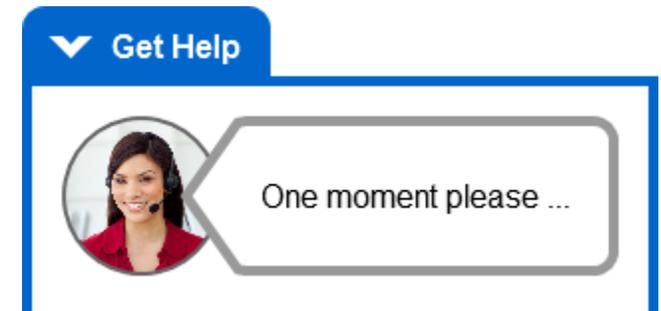
Dynamic Help Menu (Release 1): Customer Storyboard (page 3)



4.1 Demonstrates display controls when user navigates beyond first page of article list. If user reaches end of list, skip to step 4.2.

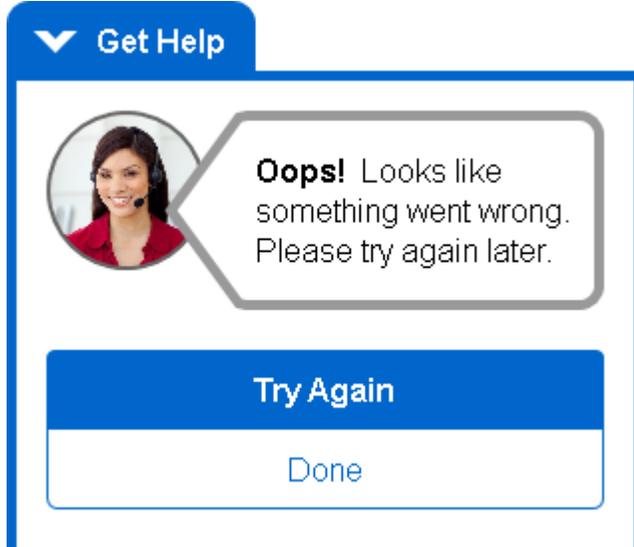


4.2 Demonstrates display controls when user has reached end of paginated article list.



* Menu should display a loading state when making queries to the knowledgebase.

Dynamic Help Menu (Release 1): Customer Storyboard (page 4)



** If system is unable to connect to Parature (initial load/query or article retrieval), display error response. The user may Try Again (resubmit previous request) or select Done (close and reset menu).

1.Controls Dashboard

Click to Chat

Home Technician Administrator Management Information **Controls**

Global Configuration Settings

<h4>Click to Chat Availability</h4> <p>Turn Click to Chat On or Off Globally</p> <p><input checked="" type="radio"/> On <input type="radio"/> Off Save</p>	<h4>Click to Call Back Availability</h4> <p>Turn Click to Call Back On or Off Globally</p> <p><input checked="" type="radio"/> On <input type="radio"/> Off Save</p>
<h4>Dynamic Help Availability</h4> <p>Turn Dynamic Help On or Off Globally</p> <p><input checked="" type="radio"/> On <input type="radio"/> Off Save</p>	<h4>Dynamic Help System Initiated Time</h4> <p>Set Dynamic Help System Initiated Time</p> <p><input type="text" value="3"/> Minutes Save</p>
<h4>Click to Chat Percentage Access</h4> <p>Set the percentage of MySSA users that have access to Click to Chat</p> <p><input type="text" value="50"/>% Save</p>	

Technician Chat Interface

Click to Chat

Chat Controls	Chatting with Diana Prince - Retirement or Medicare	Personal Information
Transfer Chat to a Queue	Joe Technician 5/10/2017 - 10:20 am Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet.	Social Security Number (SSN) 123-12-1234
Transfer Chat to a Manager	Diana Prince 5/10/2017 - 10:21 am Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet.	Phone Number 410-123-1234
Create Notes	Joe Technician 5/10/2017 - 10:22 am Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet.	Email Address dprince@gmail.com
Search	Diana Prince 5/10/2017 - 10:23 am Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet.	Banned Status None
Exit Current Chat	Joe Technician 5/10/2017 - 10:24 am Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet.	Citizenship USA - Citizen
	Diana Prince 5/10/2017 - 10:25 am Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet.	Proof of Citizenship Birth Certificate
		Electronic Services Address 123 New St New York City, New York 21207 USA
		Mailing Address 123 New St New York City, New York 21207 USA
		Parent/Mother's Name at Her Birth Theo Smith
		Parent/Father's Name Zeus Smith
		Date of Birth November 10, 1977
		Place of Birth New York City, New York USA

Response to Customer
(6400 characters maximum)

B ***I*** [List Icons]

Characters remaining: 6000

[Send](#) [Exit](#)

Click to Chat

Search History

Search History by Social Security Number

123-12-1234

Select Topic(s)

All Topics

Account Assistance

Retirement or Medicare

Disability or SSI

Online Application

Other Issue

Select Date Range

Start Date

End Date

Chat History Results

Click to Chat

Diana Prince

Search History

Diana Prince, SSN#: 123-12-1234

Search Chat History by Social Security Number

123-12-1234

Select Topic(s)

All Topics

Account Assistance

Retirement or Medicare

Disability or SSI

Online Application

Other Issue

Select Date Range

Start Date

End Date

[Search](#) [Create New Note](#)

Diana Prince

<u>Technician</u> [?]	<u>Topic</u>	<u>Created</u>	<u>Channel</u>	<u>View</u>
Mark Simon	Retirement	2/23/2016	CTC	Transcript
Leland Lynch	Retirement	3/24/2016	CTC	Transcript
Abraham Williams	Retirement	4/25/2016	CTC	Note - Lost Documents
Benny Morris	Retirement	5/26/2016	CTC	Note - Update Submitted
Julia Quinn	Retirement	6/27/2016	CTC	Note - Supplemental

[Close](#)

Chat - Create New Note

Click to Chat

Diana Prince

Create Note

Create Note for Diana Prince,SSN#: 123-12-1234:

Title:

Enter Note Contents

B *I*         

Lorem ipsum dolor sit amet, consectetur adipiscing elit. In viverra orci a eros elementum, eget facilisis odio commodo. Aliquam dictum leo eleifend ex vulputate, sed blandit magna laoreet. Sed varius ante egestas tortor lobortis, ut consectetur tortor elementum. In auctor ultrices dolor, non ullamcorper tellus mattis quis.

Quisque finibus lacinia massa sed ullamcorper. Pellentesque nulla dolor, finibus eu diam ut, vestibulum venenatis nulla. Vestibulum gravida est sit amet nunc mattis, nec placerat lacus elementum. Morbi non ultricies lorem, eu posuere arcu. Fusce feugiat convallis odio vitae iaculis. Maecenas ullamcorper, ante placerat pretium gravida, nibh metus suscipit lectus, eget posuere mauris nunc eget lorem. Praesent vitae nibh vehicula, cursus quam a, consectetur nulla.

Characters remaining: [500]

Save Note

Chat - View Note

Click to Chat

Diana Prince

Note

Diana Prince,SSN#: 123-12-1234

Title: Lost Documents Created On: 3/12/2015 - 10:00am Topic: Disability
Created by: Mark Simon

Lorem ipsum dolor sit amet, consectetur adipiscing elit. In viverra orci a eros elementum, eget facilisis odio commodo. Aliquam dictum leo eleifend ex vulputate, sed blandit magna laoreet. Sed varius ante egestas tortor lobortis, ut consectetur tortor elementum. In auctor ultrices dolor, non ullamcorper tellus mattis quis. Quisque finibus lacinia massa sed ullamcorper. Pellentesque nulla dolor, finibus eu diam ut, vestibulum venenatis nulla. Vestibulum gravida est sit amet nunc mattis, nec placerat lacus elementum. Morbi non ultricies lorem, eu posuere arcu. Fusce feugiat convallis odio vitae iaculis. Maecenas ullamcorper, ante placerat pretium gravida, nibh metus suscipit lectus, eget posuere mauris nunc eget lorem. Praesent vitae nibh vehicula, cursus quam a, consectetur nulla.

Phasellus ligula tellus, vulputate ac congue efficitur, sollicitudin vel sem. Morbi lobortis massa nisi, vitae lobortis urna efficitur a. Nulla ultricies facilisis diam, quis sollicitudin diam fringilla nec. Vestibulum dolor libero, efficitur quis tristique quis, bibendum vitae lectus. Cras molestie ante elit, ut consequat dui ornare ut. Donec viverra a sem in tristique. Vestibulum posuere ex felis, faucibus porttitor diam tincidunt non. In hendrerit ultricies enim, ac mattis urna aliquet sed. Suspendisse mauris dolor, porta at augue vitae, elementum porttitor magna.

Close

Print