OCSE Federal Parent Locator Service

FPLS Portal InterAct

Guide to Navigating InterAct

Version 1.0
August 6, 2015

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This document was prepared for the United States Department of Health and Human Services, Office of Child Support Enforcement under Contract Number HHS-N26-3999-900033I by Lockheed Martin, Information Systems & Global Solutions, Incorporated (LM IS&GS). The work was authorized in compliance with the following specific prime task order:

Delivery Order Number:	HHS-P23-3201-175055W
Delivery Order Title:	FPLS Portal InterAct
Document Date:	August 6, 2015
Document Number:	H3-F409B.81.01

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1. INTRODUCTION

The purpose of this guide is to help you use the Federal Parent Locator Service (FPLS) Portal InterAct messaging service (InterAct), accessible via the Child Support Portal (Portal), formerly the State Services Portal.

Note: The web pages in InterAct will display the former name until we update Portal applications to display Child Support Portal.

1.1 Why Develop InterAct?

In 2012, the federal Office of Child Support Enforcement (OCSE) initiated an examination of gaps among existing interstate child support tools available. After extensive discussions, states identified the key issue as the lack of a method to quickly converse with workers in other states in a secure environment.

Current methods (phone, e-mail, fax, and U.S. mail) have major limitations in timeliness and the ability to reach the correct person with knowledge of the case at hand. To fill this gap, OCSE decided to develop a secure communication channel (InterAct) for state workers to exchange case-related messages with other state workers in real-time or near real-time.

1.2 What Can I Do Using InterAct?

InterAct allows authorized users to:

- Invite another authorized user to a one-on-one chat
- Invite multiple authorized users to a chat
- Share personally identifiable information (PII) and other sensitive information securely

1.3 How Do I Access InterAct?

InterAct is accessible via the Portal. Users can launch it independently or from any application on the Portal.

Each state authorizes and authenticates its own users. For questions about how to access InterAct, see your supervisor or your state's network or Portal administrator. Authorized users can take advantage of all functions available in InterAct.

1.4 Important Guide Information

This section details important information and functions available on each of the InterAct web pages.

Important notations used in this document:

- Fields with an asterisk require you to enter information
- All actions you need to take on pages are bold, for example, **OK**, **Submit**, or **Apply**

- Pointing to a person's name on a contact list or a label on a page will show a short description

Navigating with hyperlinks in the text:

There are two ways to go to a hyperlinked cross-reference (figure, chart, or section), depending on the preferences you set in Microsoft Word:

- Press CTRL, and then click the hyperlink. (Word's default)

OR

- Click the hyperlink.

To go back to the original page, press the ALT and left arrow keys on your keyboard.

2. HOW DO I REGISTER TO USE INTERACT?

You can use InterAct to chat with users in states participating in InterAct when you are in any Portal application. The link to open InterAct appears in the navigation panel on the left of the Portal Welcome page, Figure 2-1. Once you register, you use the InterAct icon in the bottom right corner on any page of a Portal application to open InterAct.

Figure 2-1: FPLS State Services Portal Welcome Page

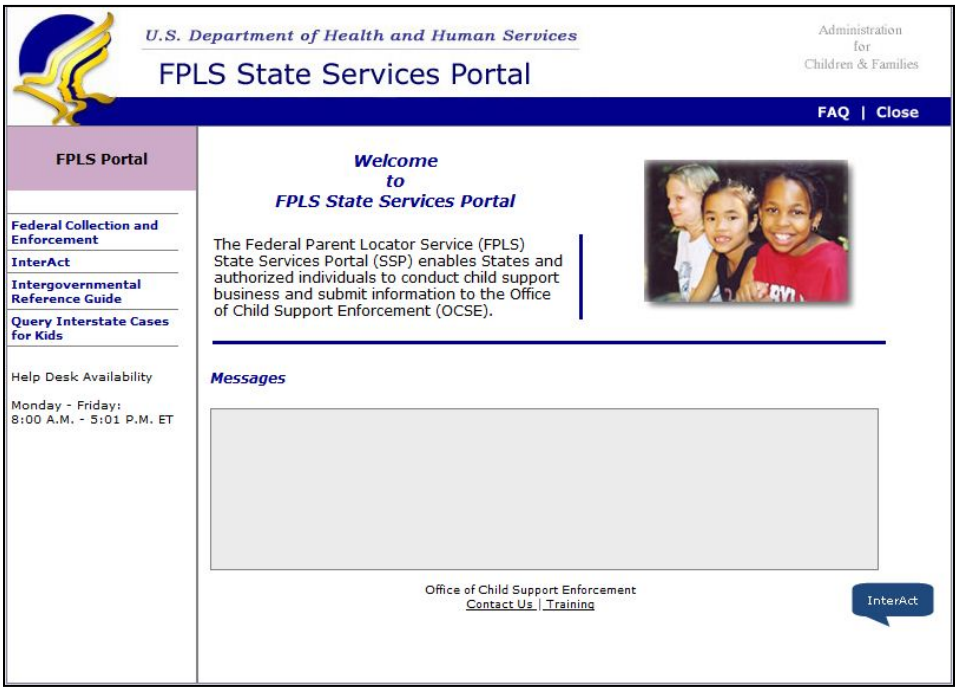


CHART 2-1: STATE SERVICES PORTAL WELCOME PAGE DESCRIPTION	
Element	Description
FPLS Portal Navigation Panel	• Lists the Portal applications to which your state granted you access, including InterAct • You must use this InterAct link the first time you open the InterAct application to register **Note**: You may not have access to some of the applications listed in Figure 2-1, if your state has not granted you access to them
Messages	Contains broadcast messages of interest to all Portal users from the Portal administrator

CHART 2-1: STATE SERVICES PORTAL WELCOME PAGE DESCRIPTION	
Element	Description
InterAct Icon	• Opens InterAct after you have registered • If you click the icon before registering, you will receive a message indicating you need to register, Figure 2-2 • Once you've registered, you use the icon to open the InterAct Home page, Figure 3-2

Figure 2-2: InterAct Registration Required Message

The first step to access InterAct is to register. During registration, you create a profile that other InterAct users will be able to view.

To start the registration process:

Click **InterAct** in the navigation panel. (The InterAct Welcome page appears, Figure 2-3, displaying the link User Registration in the navigation panel.)

Figure 2-3: InterAct Welcome Page

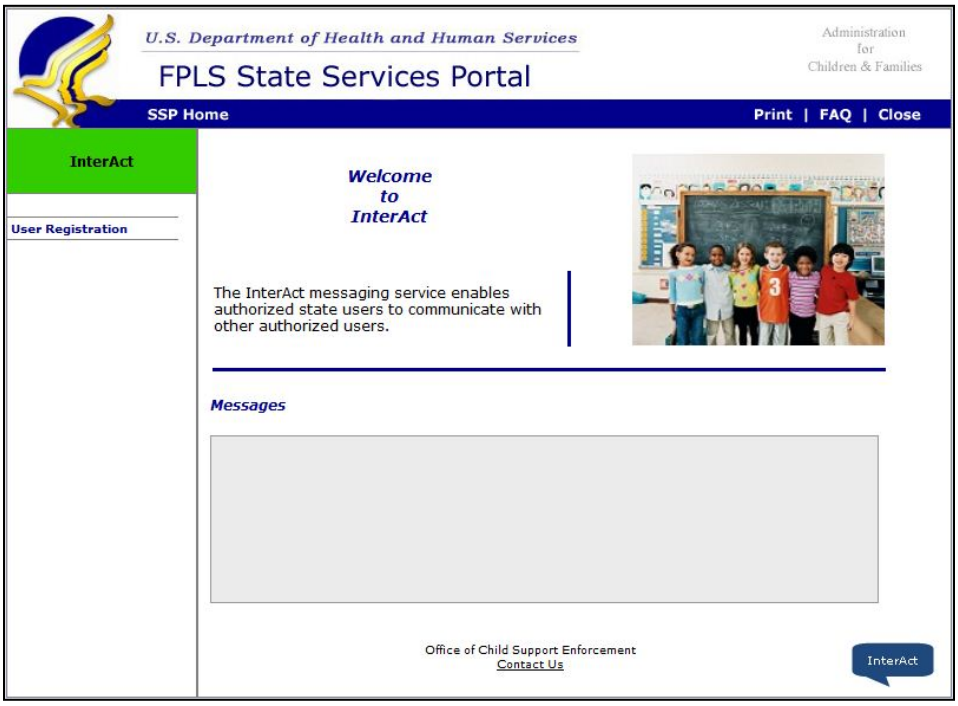


CHART 2-2: FPLS PORTAL InterAct WELCOME PAGE DESCRIPTION	
Element	Description
SSP Home	Returns you to the Portal Welcome page
Print	Prints a document containing data from the page being viewed
FAQ	Opens the Frequently Asked Questions page
Close	Closes the page
User Registration	Opens the Register User page
Messages	View messages of general interest, such as a new state using InterAct or changes to the InterAct application
Contact Us	Opens a list of contacts for the Portal applications
InterAct Icon	• Opens InterAct after you have registered • If you click the icon before registering, you will receive a message indicating you need to register, Figure 2-2 • Once you've registered, you use the icon to open the InterAct Home page, Figure 3-2

To register:

Click **User Registration** in the navigation panel. (The Register User page appears, Figure 2-4.)

2.1 User Registration

Complete the information on this page to create your profile. Chart 2-3 includes descriptions of the fields on this page. An asterisk identifies a required field.

Figure 2-4: Register User

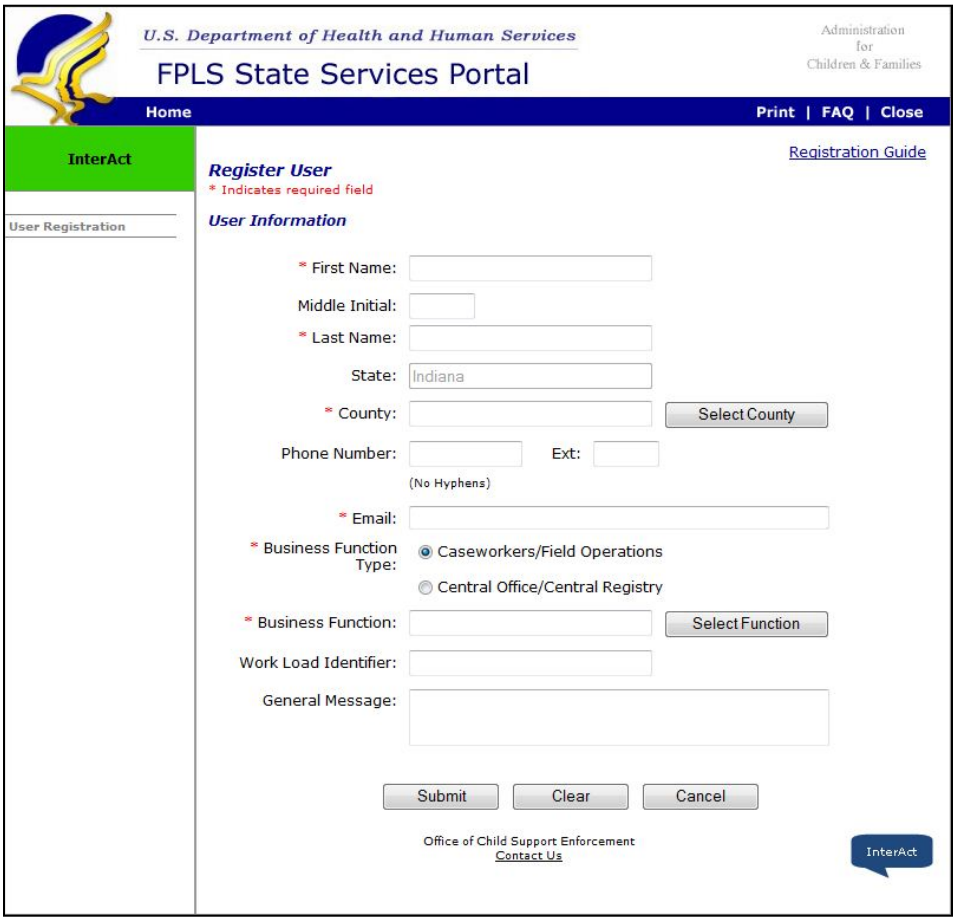


CHART 2-3: REGISTER USER PAGE DESCRIPTION	
Element	Description
Registration Guide	Opens the Registration Guide page with instructions for completing the InterAct registration form
* First Name	Your first name
Middle Initial	Your middle initial

CHART 2-3: REGISTER USER PAGE DESCRIPTION	
Element	Description
* Last Name	Your last name
State	• The name of the state that authorized you for InterAct (the system pre-fills with your state's name) • For example, Figure 2-4 shows the worker is from Indiana
* County	Displays the counties you select from the Select County list • Displays the number selected, for example, "1 selected" or "4 selected" • Click **Select County** a second time to view the selections **Note**: InterAct will display the county names you select on the Confirm Registration page, Figure 2-10, for you to verify your selections
Select County	Opens a list of county names and associated county FIPS codes See section 2.1.1 for details
Phone Number	Your contact phone number (Recommended)
Ext	Your extension number, if applicable
* Email	Your business e-mail address, so you can receive notices of messages received while you were offline **Important**: Do not use a personal e-mail address
* Business Function Type	Select either: • Caseworkers/Field Operations (selected by default) • Central Office/Central Registry
* Business Function	Displays the business functions you select: • Displays the number you selected, for example, "1 selected" or "4 selected" • Click **Select Function** a second time to view the selections • **Note**: InterAct will display the business functions you select on the Confirm Registration page, Figure 2-10, for you to verify your selections
Select Function	Opens a list of functions specific to the business function type you selected See the following sections for details: • Caseworkers/Field Operations, section 2.1.2 • Central Office/Central Registry, section 2.1.3

CHART 2-3: REGISTER USER PAGE DESCRIPTION	
Element	Description
Work Load Identifier	• Type a brief description of your caseload breakdown • For example: Intake A–K by NCP Last Name
General Message	• Enter a general message for other registered InterAct users to view • For example: Your office hours and time zone
Submit	Saves your registration information and opens the Confirm Registration page, Figure 2-10
Clear	Clears all information you entered
Cancel	Cancels your entries and returns to the InterAct Welcome page, Figure 2-3
Contact Us	Opens the list of contacts for the Portal applications
InterAct Icon	• Opens the InterAct Home page after you have registered • If you click the icon before registering, you will receive a message indicating you need to register, Figure 2-2 • Once you've registered, you use the icon to open the InterAct Home page, Figure 3-2

2.1.1 SELECT COUNTY

Clicking **Select County** opens a list of counties in your state with their respective Federal Information Processing Standards (FIPS) codes, Figure 2-5. You may select more than one county. (The county information comes from a periodic extract from the Intergovernmental Reference Guide.)

Figure 2-5: List of County Names and Associated FIPS Codes

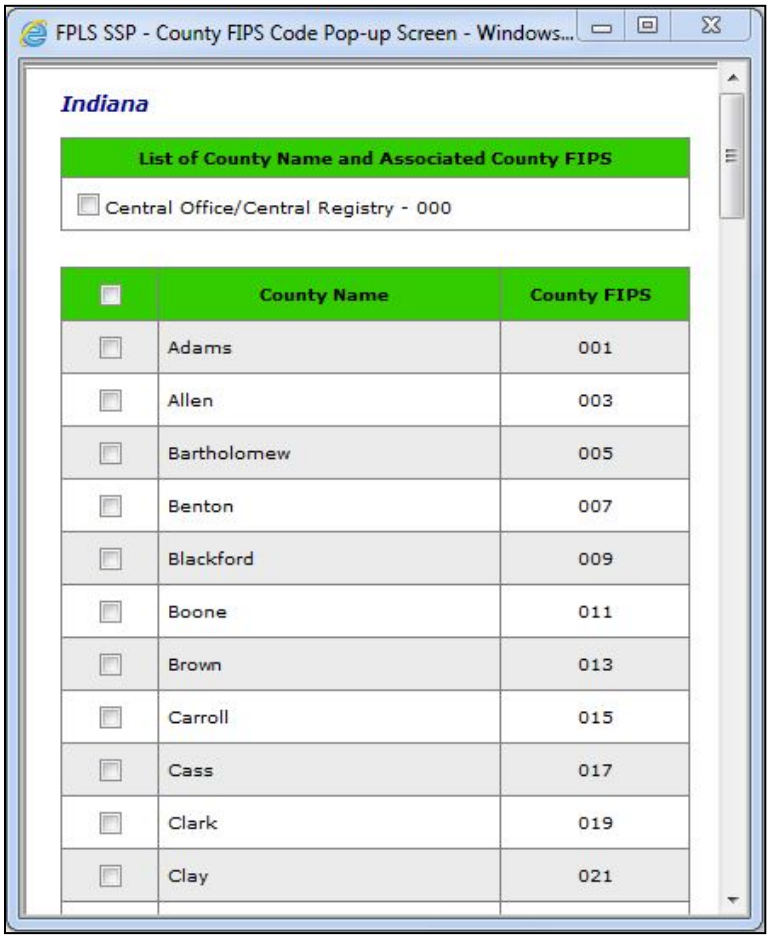


CHART 2-4: LIST OF COUNTY NAMES AND ASSOCIATED FIPS PAGE DESCRIPTION	
Element	Description
Central Office/Central Registry – 000 Check Box	Click if you are a Central Office or Central Registry staff member (Selecting county or counties is not applicable)
County Name Check Box	• Click to select all counties • To de-select all, click again
Check Box	Click to select a county
County Name	• Lists the names of counties for your state • When you click the heading, up and down arrows appear that you can click to reverse the order

CHART 2-4: LIST OF COUNTY NAMES AND ASSOCIATED FIPS PAGE DESCRIPTION	
Element	Description
County FIPS	• Lists the FIPS code for each county When you click the heading, up and down arrows appear that you can click to reverse the order
Apply (Not shown)	Saves the selected counties (Scroll to the bottom of the page)
Clear (Not shown)	Clears all selections you made (Scroll to the bottom of the page)

To select one or more counties:

1. Click **Select County** on the Register User page. (The List of County Names and Associated County FIPS page appears, Figure 2-5.)
2. Click the check box next to the county name.
3. Click **Apply** to save your selection. (The Register User page appears, Figure 2-4.)

To de-select the selected county or counties, click **Clear.**

2.1.2 SELECT BUSINESS FUNCTION – CASEWORKERS/FIELD OPERATIONS

If you select Caseworkers/Field Operations as the business function type, clicking **Select Function** opens a list of business functions, Figure 2-6 and Figure 2-7. You may select more than one business function.

Figure 2-6: List of Caseworkers/Field Operations Business Functions – Top

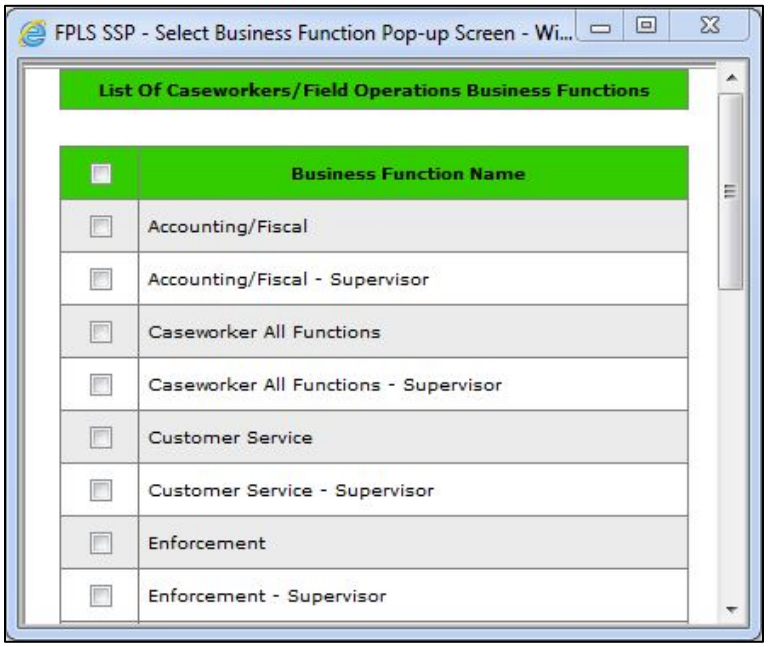


Figure 2-7: List of Caseworkers/Field Operations Business Functions – Bottom

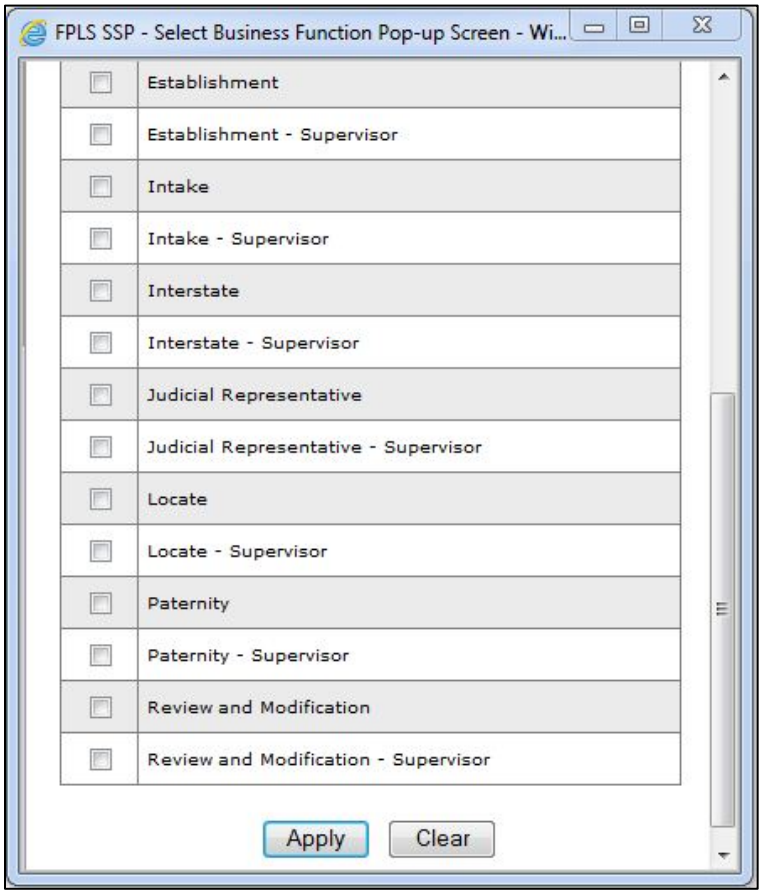


CHART 2-5: LIST OF CASEWORKERS/FIELD OPERATIONS BUSINESS FUNCTIONS PAGE DESCRIPTION	
Element	Description
Business Function Name Check Box	• Click to select all business functions • To de-select all, click again
Check Box	Click to select the business function
Business Function Name	Identifies the business function
Apply	Saves the selected business functions
Clear	Clears all selections you made

To select one or more business functions for Caseworkers/Field Operations staff:

1. Click **Select Function** on the Register User page. (The List of Caseworkers/Field Operations Business Functions page appears, Figure 2-6 and Figure 2-7.)
2. Select the check box next to the business function name.
3. Click **Apply** to save your selection. (The Register User page appears, Figure 2-4.)

To de-select the selected business functions, click **Clear**.

2.1.3 SELECT BUSINESS FUNCTION – CENTRAL OFFICE/CENTRAL REGISTRY

If you select Central Office/Central Registry as the business function type, clicking **Select Function** opens a list of business functions, Figure 2-8. You may select more than one business function.

Figure 2-8: List of Central Office/Central Registry Business Functions

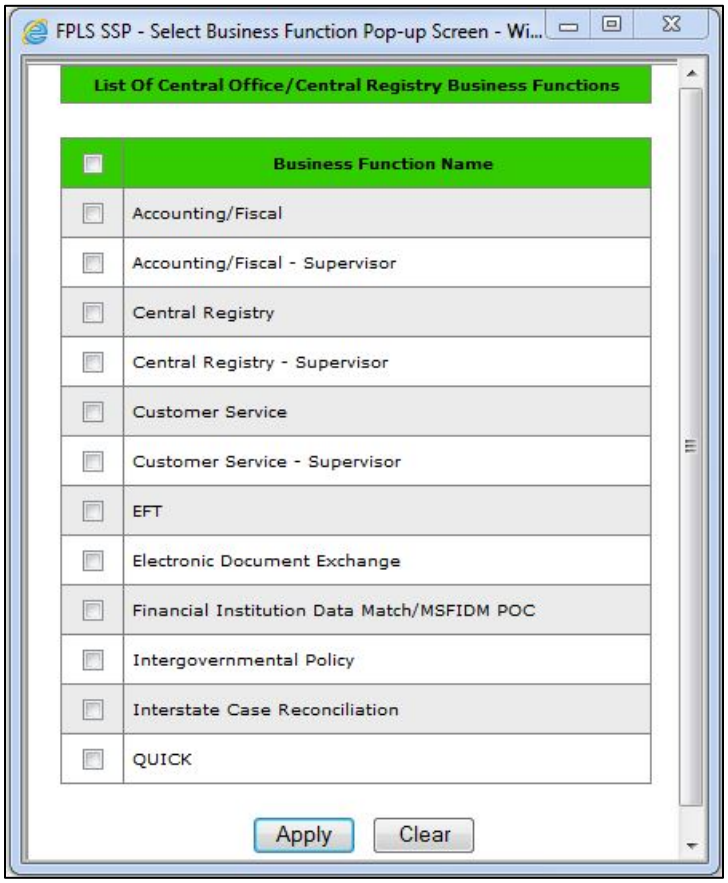


CHART 2-6: LIST OF CENTRAL OFFICE/CENTRAL REGISTRY BUSINESS FUNCTIONS PAGE DESCRIPTION	
Element	Description
Business Function Name Check Box	• Click to select all business functions • To de-select all, click again
Check Box	Click to select the business function
Business Function Name	• Identifies the business function • When you click the heading, up and down arrows appear that you can use to reverse the order • In the future, additional business functions may be added, which will make this function helpful for navigating the list
Apply	Saves the selected business functions
Clear	Clears all selections you made

To select one or more business functions for Central Office/Central Registry staff:

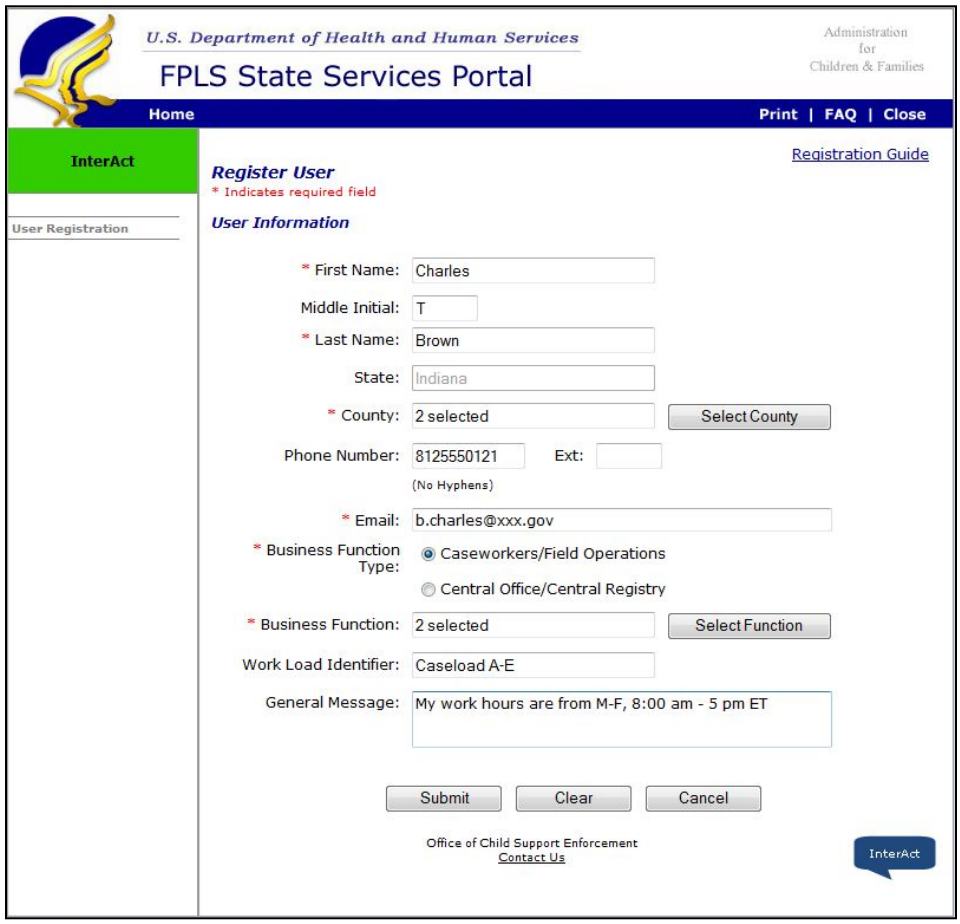
1. Click **Select Function** on the Register User page. (The List of Central Office/Central Registry Business Functions page appears, Figure 2-8.)
2. Select the check box next to the business function name.
3. Click **Apply** to save your selection. (The Register User page appears, Figure 2-4.)

To de-select the selected business functions, click **Clear**.

2.2 Complete Your Registration

Figure 2-9 shows a completed user profile on the Register User page.

Figure 2-9: Completed Profile on the Register User Page



Once you've filled out your profile information, click **Submit**. (InterAct validates the data you entered. See note on the next page.)

Note: If you enter some of the data in an incorrect format, for example your phone number, InterAct notifies you so you can correct the entry. If you need help, click the link to the Registration Guide in the upper right corner of the Register User page for additional information.

2.3 Confirm Registration

If your entries are valid, InterAct displays the Confirm Registration page, Figure 2-10. Note that if you selected multiple counties or business functions, InterAct displays the names so you can confirm them.

Figure 2-10: Confirm Registration

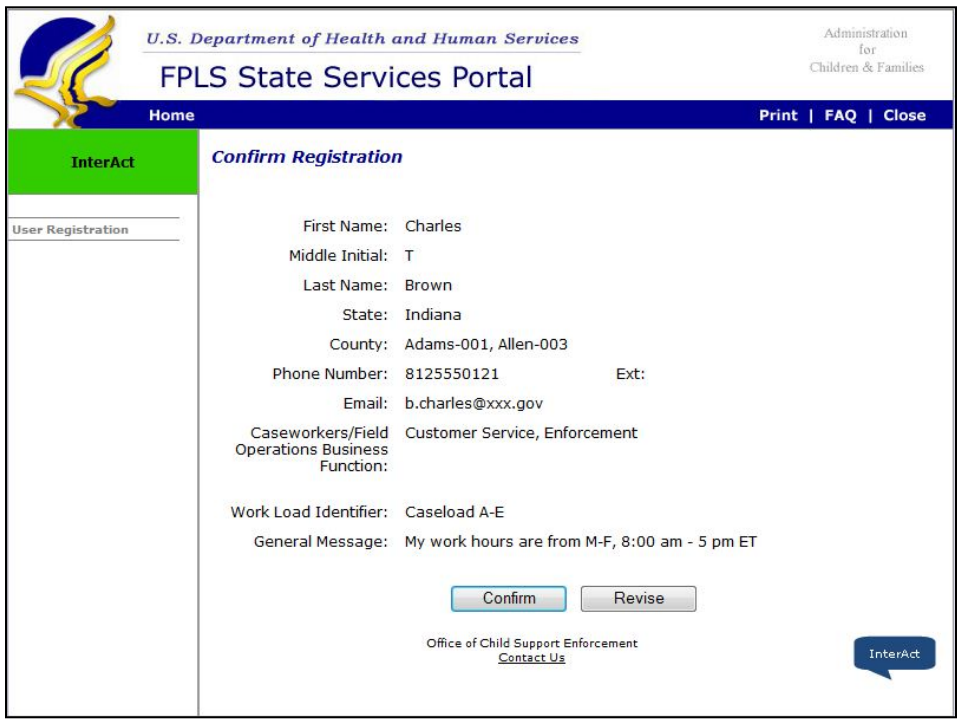


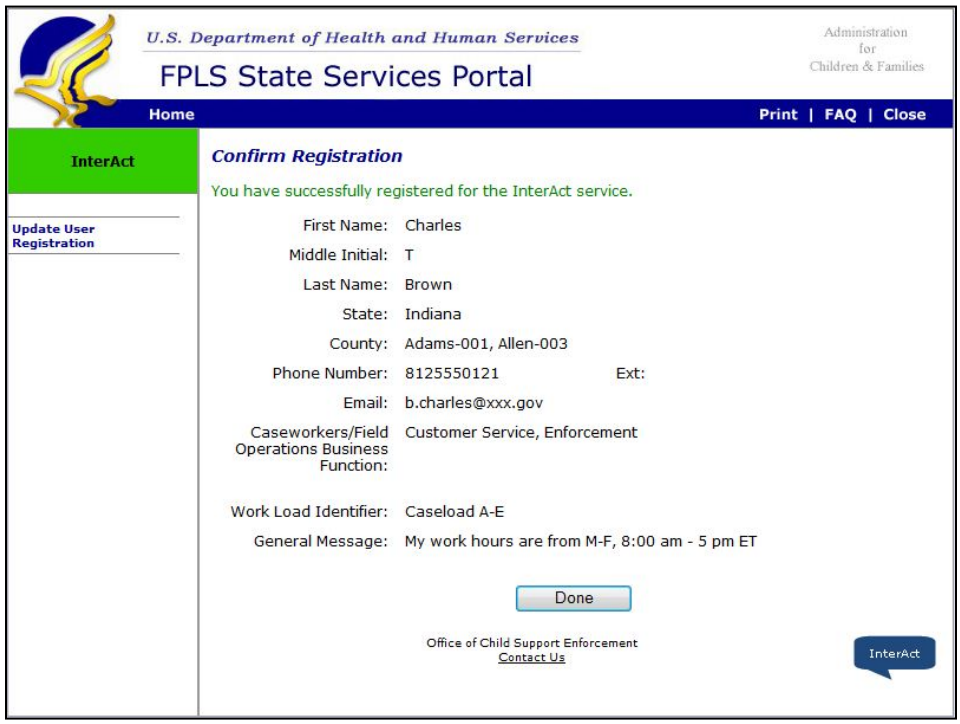
CHART 2-7: CONFIRM REGISTRATION PAGE DESCRIPTION	
Element	Description
Confirm	Saves your profile entries
Revise	Opens the Register User page for you to make changes
Contact Us	Opens the list of contacts for the Portal applications

CHART 2-7: CONFIRM REGISTRATION PAGE DESCRIPTION	
Element	Description
InterAct Icon	• Opens the InterAct Home page after you have registered • If you click the icon before registration is complete, you will receive a message indicating you need to register, Figure 2-2 • Once you've registered, you use the icon to open the InterAct Home page, Figure 3-2

To complete your registration:

1. Click **Confirm**. (The system displays the message, Figure 2-11, "You have successfully registered for the InterAct service.")

Figure 2-11: Confirm Registration – Confirmation Message

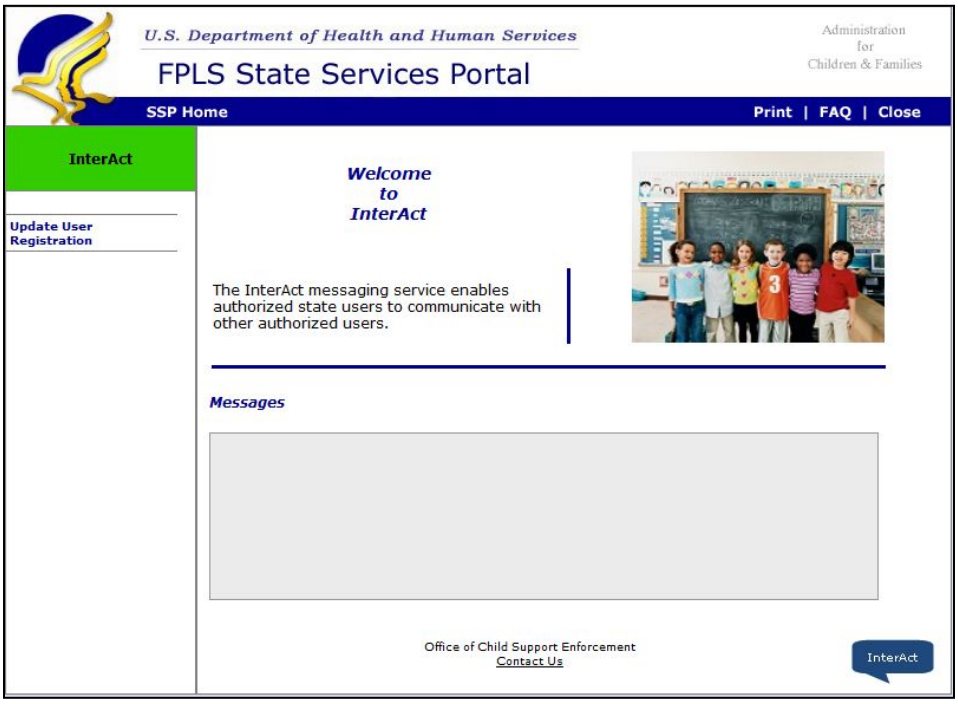


2. Click **Done** to return to the InterAct Welcome page, Figure 2-3. (The link in the navigation panel now reads Update User Registration, Figure 2-12.)

To change your information:

1. Click **Revise**, and then make your changes.
2. Follow steps 1 and 2 for completing registration (see above).

Figure 2-12: InterAct Welcome Page – Link Changed in Navigation Panel



2.4 Can I Update My Profile?

If your responsibilities or other profile information change, update your profile as soon as you can. An up-to-date profile will ensure that you receive chat requests targeted to your current assignments.

To update your profile:

Click **Update User Registration** to open an editable page for updating your profile, Figure 2-13.

Figure 2-13: Update User Registration

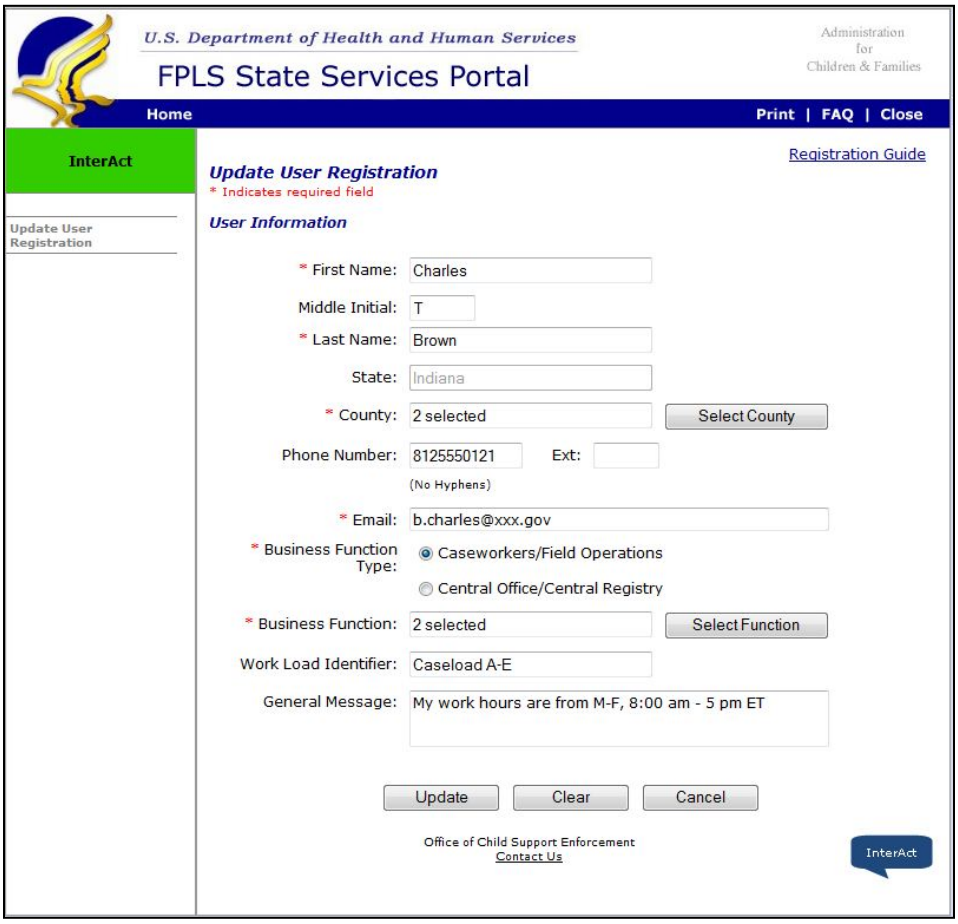
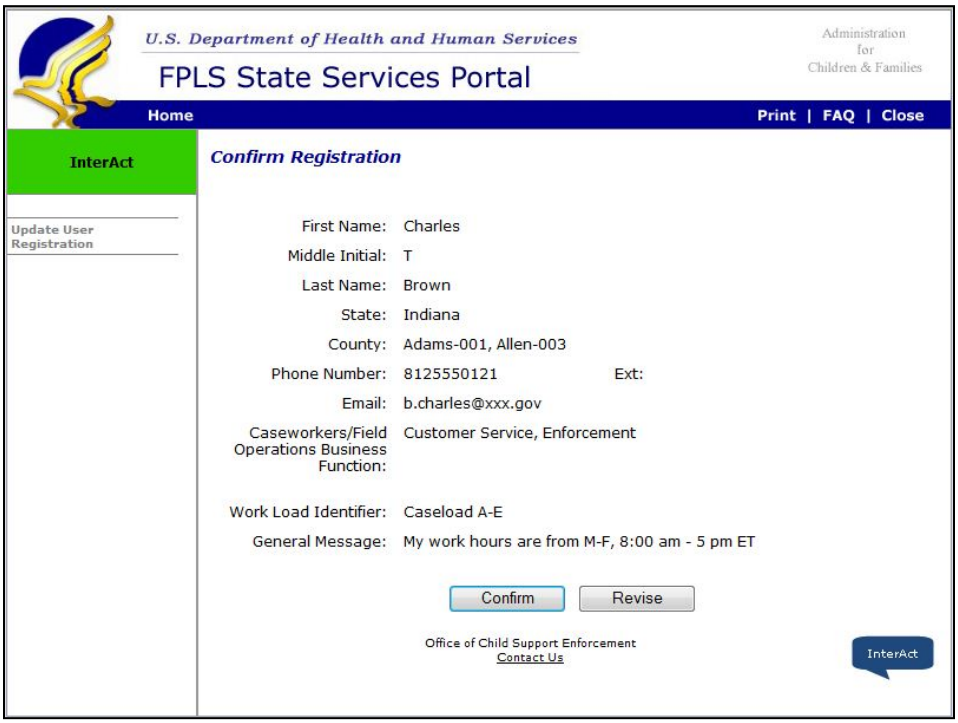


CHART 2-8: UPDATE USER REGISTRATION PAGE DESCRIPTION	
Element	Description
Update	Submits the updated registration information and opens the Confirm Registration page
Clear	Clears new information you entered
Cancel	Cancels your entries and returns you to the InterAct Welcome page
Contact Us	Opens the list of contacts for the Portal applications
InterAct Icon	Opens the InterAct Home page, Figure 3-2

To submit updated registration information:

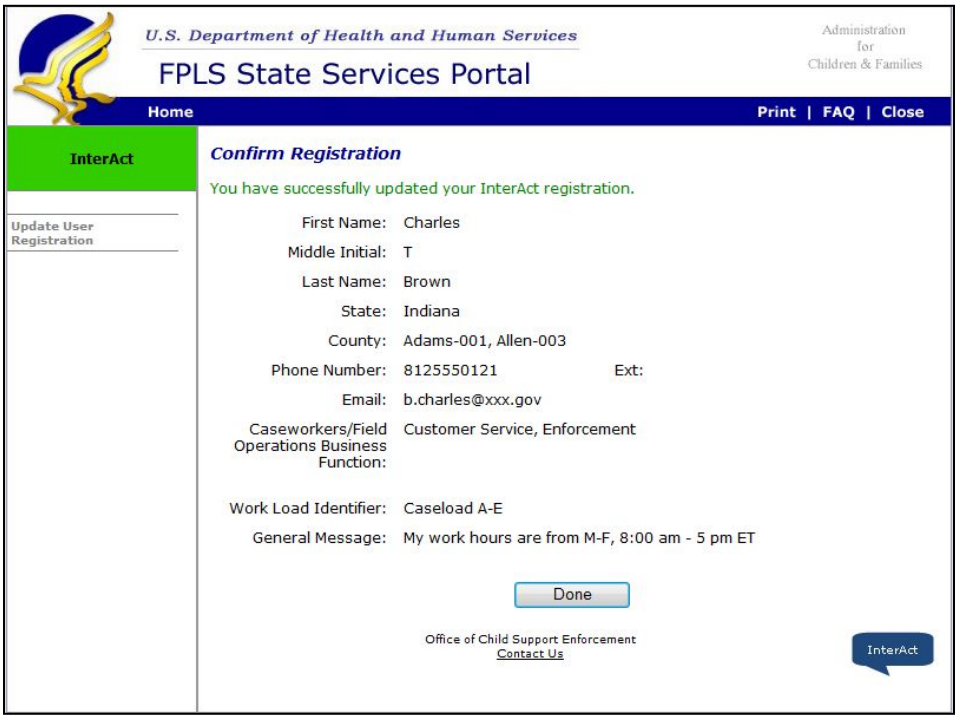
1. Make the necessary changes to your profile.
2. Click **Update**. (The Confirm Registration page appears, Figure 2-14.)

Figure 2-14: Confirm Registration – Updated User Registration



3. Click **Confirm**. (A confirmation message appears in green, Figure 2-15, "You have successfully updated your InterAct registration.")

Figure 2-15: Confirm Registration – Update Confirmation Message



4. Click **Done**. (The InterAct Welcome page appears, Figure 2-3.)

3. HOW DO I GET STARTED?

To start, you should set your preferences and learn the types of statuses InterAct displays for users. You also should know about timing out after periods of inactivity.

The InterAct icon, Figure 3-1, appears on the pages of all applications on the Portal (except for Contact Us and FAQ pages). You can open it to have a conversation at any time from any application. Click the icon to open the InterAct Home page.

Figure 3-1: InterAct Icon

The InterAct Home page, Figure 3-2, allows you to set your preferences and change your online status, as well as search for and add users to your contact list.

Figure 3-2: InterAct Home Page

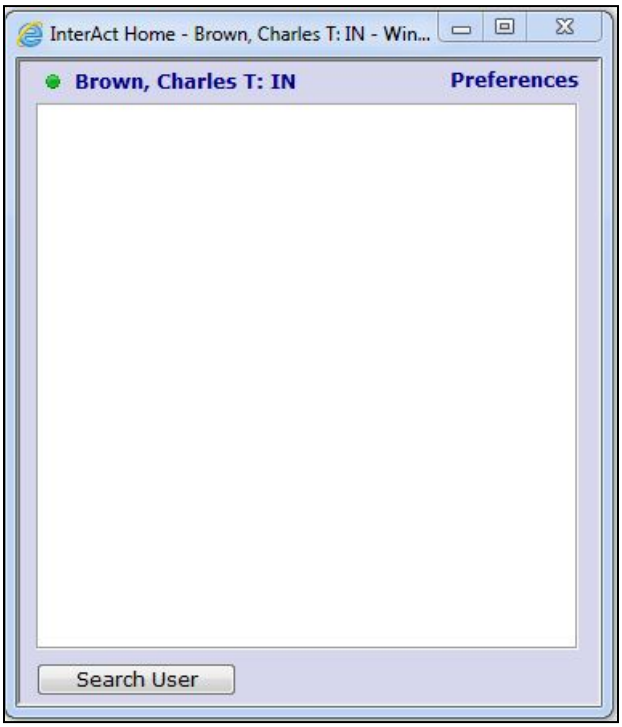


CHART 3-1: InterAct HOME PAGE DESCRIPTION	
Element	Description
Status Icon	• Displays different icons depicting whether the user is online, busy, away, away for an extended period, or offline (Figure 3-4) • Click this icon to change your status. • If you want to know the status of other users, add them to your contact list
User's Name	Displays your last name, first name, middle initial, and state abbreviation from the profile you created when you registered
Preferences	Set preferences for various aspects of InterAct
Contact List Area	• When you launch the tool for the first time, no users will show in this area • Contacts will display after you've added them • (For more information, refer to section 5, "How Do I Work with Contacts?)
Search User	Opens a page to search for and add other InterAct users to your contact list You can also start a chat with a user without adding the person to your contact list

3.1 Set Preferences

Using the InterAct – Options page, Figure 3-3, you can set preferences for certain InterAct options.

Figure 3-3: InterAct Preferences Page

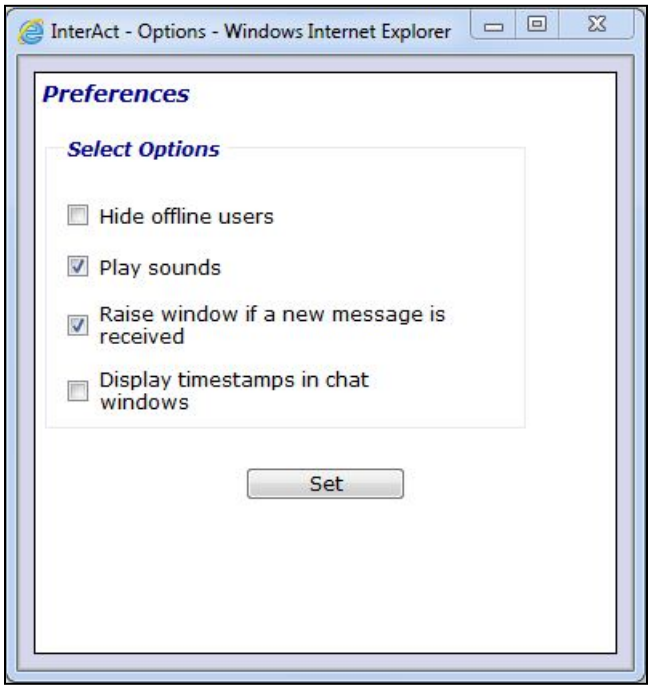


CHART 3-2: InterAct PREFERENCES PAGE DESCRIPTION	
Element	Description
Hide Offline Users	Hide users in your contact list when they are offline
Play Sounds (Default)	Play sounds for incoming messages and InterAct alerts
Raise window if a new message is received (Default)	View the message page automatically if you minimized your InterAct home page
Display timestamps in chat windows	View a timestamp in your message page
Set	Saves the options you selected

To enable or disable options:

Click the check boxes beside the options to select or deselect them, and then click **Set**. (The InterAct Home page appears.)

3.2 Set Online Status

You can set your online status to show your availability. You can only select one option from the five available, as shown in Figure 3-4.

Figure 3-4: Change Online Status

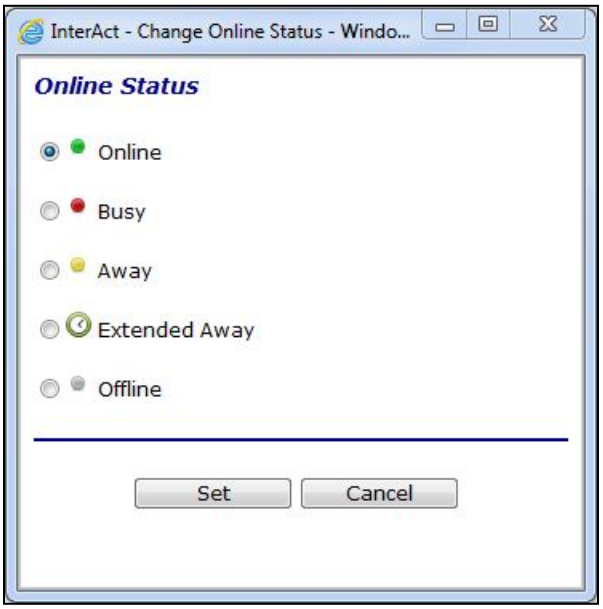


CHART 3-3: CHANGE ONLINE STATUS PAGE DESCRIPTION	
Element	Description
Online	• Indicates you are available online • Displays automatically when you launch the InterAct Home page
Busy	• Indicates you are busy • Use this status to minimize interruptions
Away	Indicates you are away for a short time
Extended Away	• Indicates that you are away for an extended period, for example, for a conference or vacation (See section 3.2.2, "Set Extended Away," for details.) • If you have not logged into InterAct for 10 business days, the system automatically marks your status as Extended Away • When you log into InterAct again, the system automatically updates your status to Online
Offline	• Select Offline if you wish to sign off of InterAct or you may close the InterAct window, which sets your status to "Offline" • See section 3.3, "Timing Out," for when the system automatically sets your status to "Offline"
Set	Saves the selected option and closes the page
Cancel	Closes the page without saving changes

To change online status:

1. Click the status button beside your name on the InterAct Home page. (The InterAct – Change Online Status page opens.)
2. Click the desired status button, and then click **Set**. (The system records your status and the InterAct Home page appears, displaying your new status.)

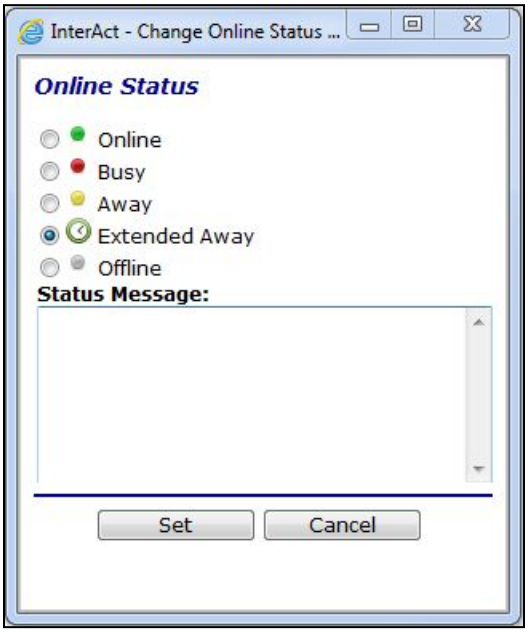
3.2.1 E-MAIL NOTICE OF MESSAGES RECEIVED

If you are offline and receive messages or a group chat invitation during that time, InterAct sends one e-mail per day in the morning to let you know you have messages waiting.

3.2.2 SET EXTENDED AWAY

When you select Extended Away, a Status Message text box appears, Figure 3-5. You can type a message here for users to view while you are away, for example, dates you will be out of the office. Users who have you on their contact list will see your status message in their InterAct Home page.

Figure 3-5: Set Extended Away



To change your online status:

1. Click **Extended Away**.
2. Type your message, and then click **Set** to close the Change Online Status page. (The InterAct Home page appears, Figure 3-2.)

When you next log in, InterAct will automatically change your status to Online.

3.3 Timing Out

As with all applications on the Portal, InterAct times out after 15 minutes of inactivity for security reasons. The system generates a time-out warning after 10 minutes.

Because InterAct can be open while you are working in another application, the period of inactivity applies to both applications. That is, a timeout will not occur when you are doing the following:

- Clicking buttons or links or entering data in another application and not using InterAct
- Chatting or searching for a user in InterAct and not using the other application

A timeout will occur only when there is no activity for 15 minutes on the pages of InterAct *and* other applications you have open on the Portal.

4. HOW DO I FIND OTHER USERS?

You can exchange messages with people within your state or in other participating states.

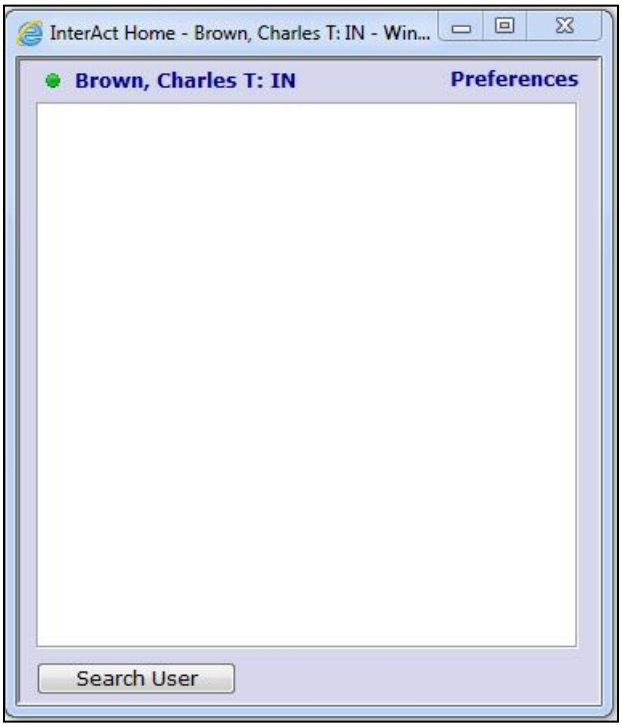
4.1 Search for Users

You can search for users whose states participate in InterAct.

To begin your search:

1. Click the **InterAct** icon at the bottom of the InterAct Welcome page. (The InterAct Home page opens, Figure 4-1.)

Figure 4-1: **InterAct Home Page**



2. Click **Search User**. (The Search User page appears, Figure 4-2.)

4.2 About Search Criteria

Keep in mind the following about entering your search criteria:

- The fewer criteria you specify (the less fields you fill), the greater the number of your search results. (You can search again with additional criteria to narrow your results.)
- The more criteria you specify (the more fields you fill), the smaller the number of your search results.

4.2.1 USING SEARCH SHORTCUTS

InterAct has search shortcuts called "wildcards" built into certain fields. Wildcard searches allow you to enter a few letters to search for those letters among users in the state you select. Wildcards are useful when you are not sure about a name.

For example, you may remember you spoke to someone in Colorado Enforcement whose name was Steven or Stephen. In this case, being unsure of the spelling of the first name and not remembering the last name, you would select the state and then enter the following criteria:

- 'Ste' or 'ste' in the First Name field (wildcard fields are not case-sensitive)
- Select 'Enforcement' from the Caseworkers/Field Operations Business Function

4.3 Performing a Search

You can open the Search User page, Figure 4-2, by clicking **Search User** on the InterAct Home page, Figure 4-1.

Figure 4-2: **Search User**

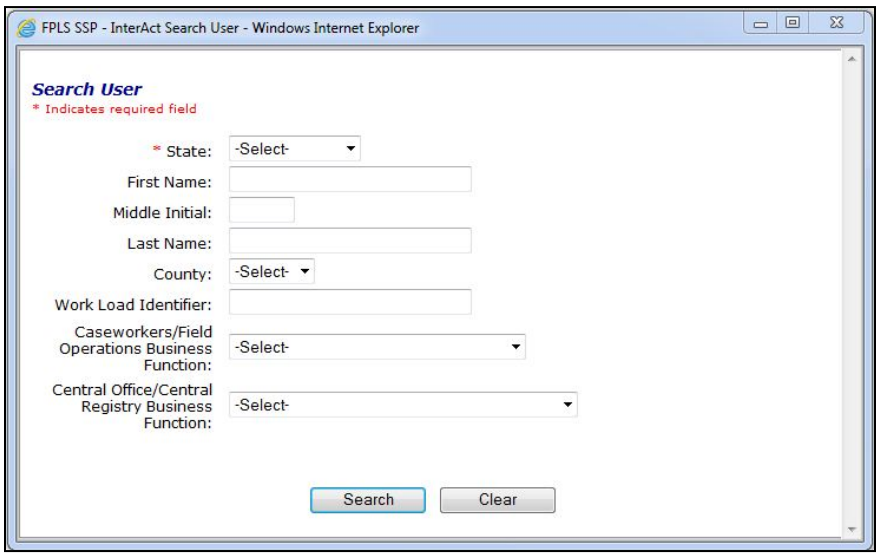


CHART 4-1: SEARCH USER PAGE DESCRIPTION	
Element	Description
* State	State of the user you are searching for
First Name	First name of the user you are searching for (Wild card search entry available)
Middle Initial	Middle initial of the user you are searching for (Wild card search entry available)

CHART 4-1: SEARCH USER PAGE DESCRIPTION	
Element	Description
Last Name	Last name of the user you are searching for (Wild card search entry available)
County	County or counties for the state you have selected (Wild card search entry available)
Work Load Identifier	Work load identifier of the user you are searching for (Wild card search entry available)
Caseworkers/Field Operations Business Function	• Business function or functions for this business function type • When you make a selection from this list, the Central Office/Central Registry option is unavailable **Note**: If you select Enforcement (or any other function that also has a Supervisor option), InterAct will return enforcement workers as well as enforcement supervisors
Central Office/Central Registry Business Function	• Business function or functions for this business function type • When you make a selection from this list, the Caseworkers/Field Operations option is unavailable
Search	Initiates your search and displays the results in the Search Results section at the bottom of the page
Clear	Deletes your entries and resets the default values

To find a user:

Click **Search**. (The Search User – Search Results section appears, Figure 4-3, at the bottom of the page.)

In this example, the worker used wildcards to locate the right person in Colorado, and InterAct found Steve O. Johnson in Enforcement.

Figure 4-3: Search Results

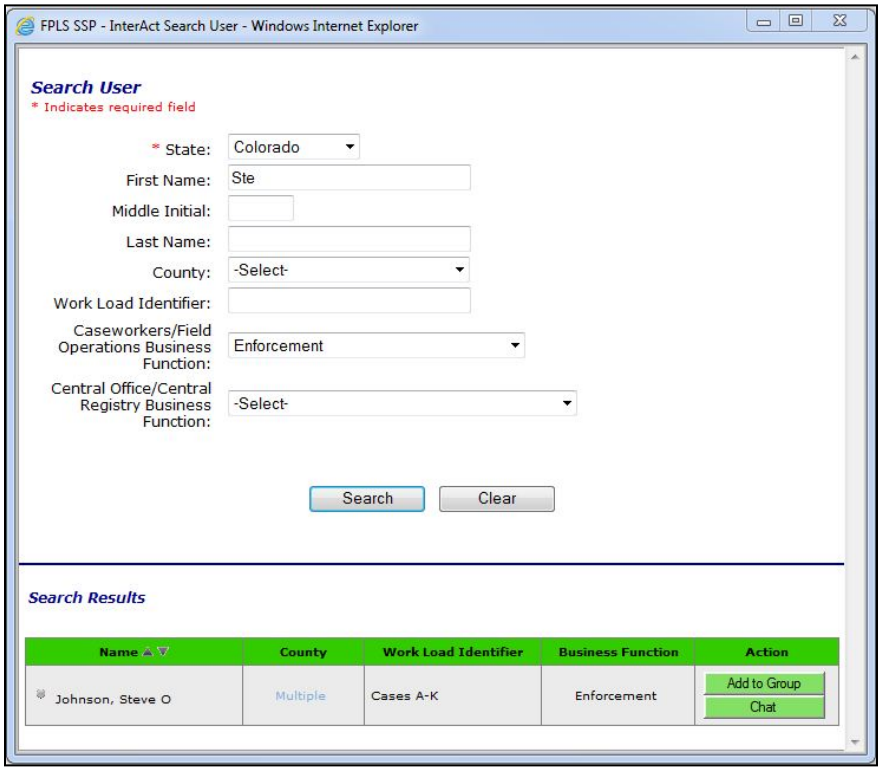
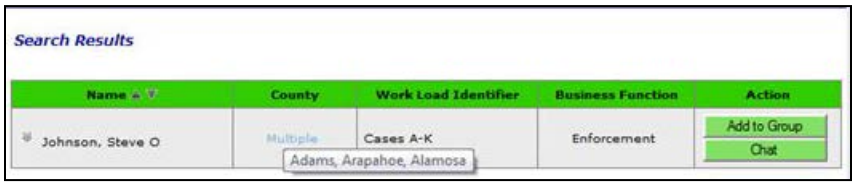


CHART 4-2: SEARCH USER – SEARCH RESULTS PAGE DESCRIPTION	
Element	Description
Name	• Last name, first name, and middle initial of the user from that state • Also displays the user's current status • Use the arrows to reverse the order when there are several results
County	• Displays one county if the user selected only one • Displays 'Multiple' if the user selected more than one • Point to 'Multiple' to see all county names
Work Load Identifier	• Displays work load identifier if the user filled it in during registration • Otherwise, the display is blank
Business Function	• Displays the business function name if the user selected only one • Displays 'Multiple' if the user selected more than one • Point to 'Multiple' to see all business function names

CHART 4-2: SEARCH USER – SEARCH RESULTS PAGE DESCRIPTION	
Element	Description
Action	Click: • **Add to Group** to add that user to your contact list • **Chat** to start exchanging messages without adding the user to your contact list
Next and Previous (Not shown)	Appear when there is more than one page of responses, so you can navigate through the pages

Figure 4-4 shows an example of the display of multiple counties.

Figure 4-4: **View All Values for 'Multiple'**



To add users you found in search results to your contact list:

1. Click **Add to Group** in the line with the person's name. (The Add to Group page appears, Figure 5-1.)
2. Repeat this step for each person you want to add to your contact list.

To start exchanging messages without adding the user to your contact list:

Click **Chat**. (The Chat page appears, Figure 7-1.)

5. HOW DO I WORK WITH CONTACTS?

This section describes how to add and remove contacts, assign them to groups, and start chats with people on your contact list.

5.1 Add Users to Your Contact List

If you think you will have more than one chat with a person, you can add that person to a group on your contact list. This requires searching for the user and clicking **Add to Group** on the Search Results page.

Note: You must assign all contacts to a group, and all groups must have at least one member.

5.1.1 ADD TO GROUP

When you click **Add to Group** in the Search Results on the Search User page, the Add to Group page appears, Figure 5-1. On this page, you can create a new group or select from a list of groups you established.

Figure 5-1: **Add to Group**

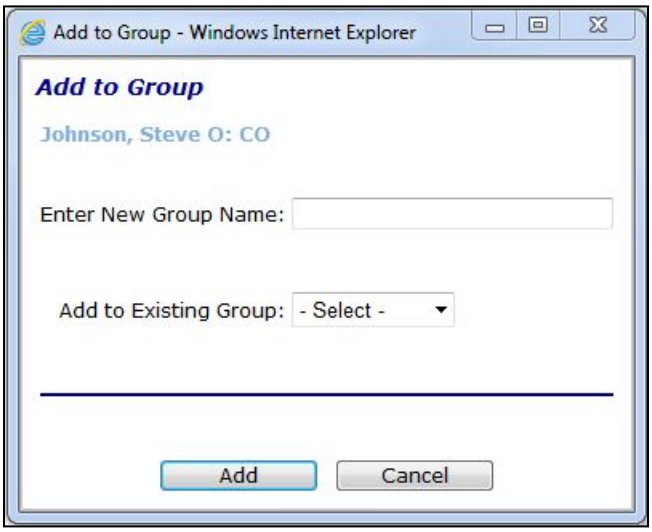


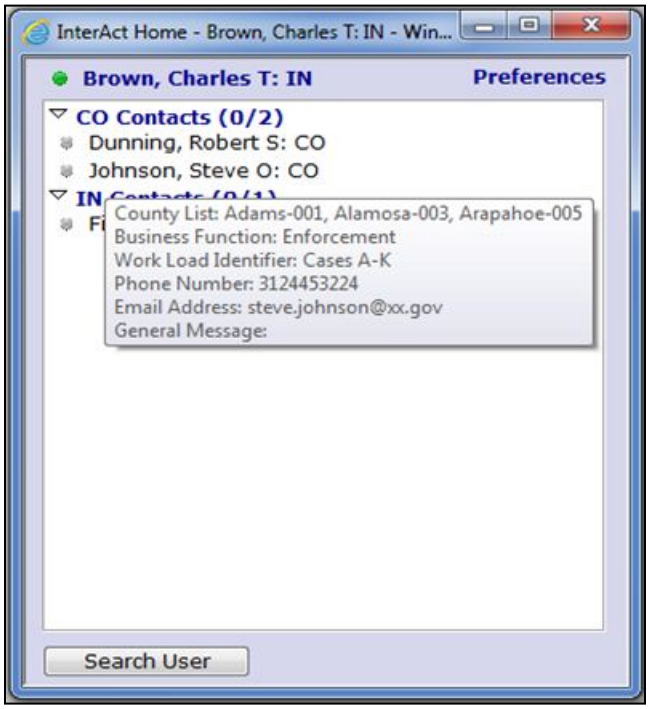
CHART 5-1: ADD TO GROUP PAGE DESCRIPTION	
Element	Description
User's Name	Displays the last name, first name, middle initial, and state abbreviation of the person you are adding
Enter New Group Name	Type a name to create a new group, if desired

CHART 5-1: ADD TO GROUP PAGE DESCRIPTION	
Element	Description
Add to Existing Group	• Select a name from existing groups you created If this list is blank, it means you have not added any contacts, since all contacts must be assigned to a group
Add	• If you entered a new group name, creates a new group and adds the contact to that group If you selected an existing group, adds the contact to a group already in your contact list
Cancel	Cancels your Add to Group request

5.1.2 VIEW A CONTACT'S PROFILE

Once you've added a contact, you can view the profile the person created at registration, Figure 5-2.

Figure 5-2: Contact's Profile



To view a contact's profile:

Point to the contact's name. (A tool tip appears displaying the contact's profile.)

5.2 Using Your Contact List

Using the contact list, Figure 5-3, you can:

- Start a chat with a contact
- Move a contact from a current group to a new or different group
- Remove a contact from your contact list

Figure 5-3: Shortcut Menu for Working with Contacts

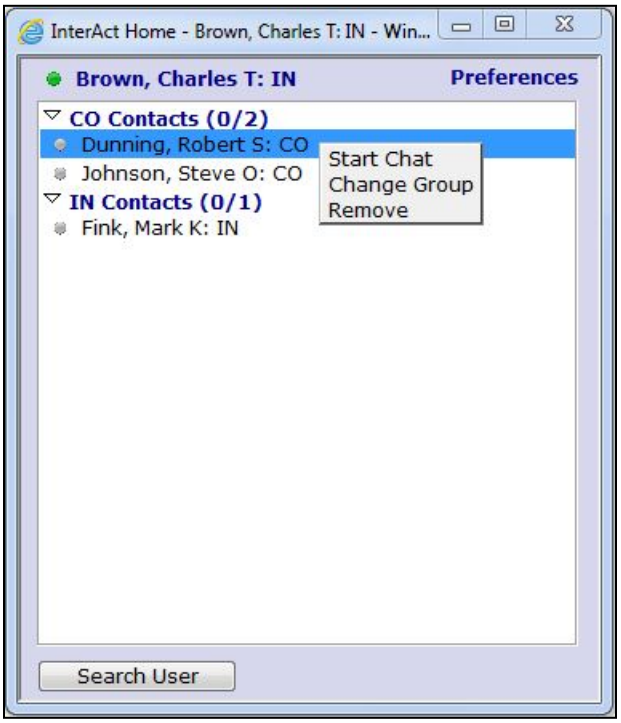


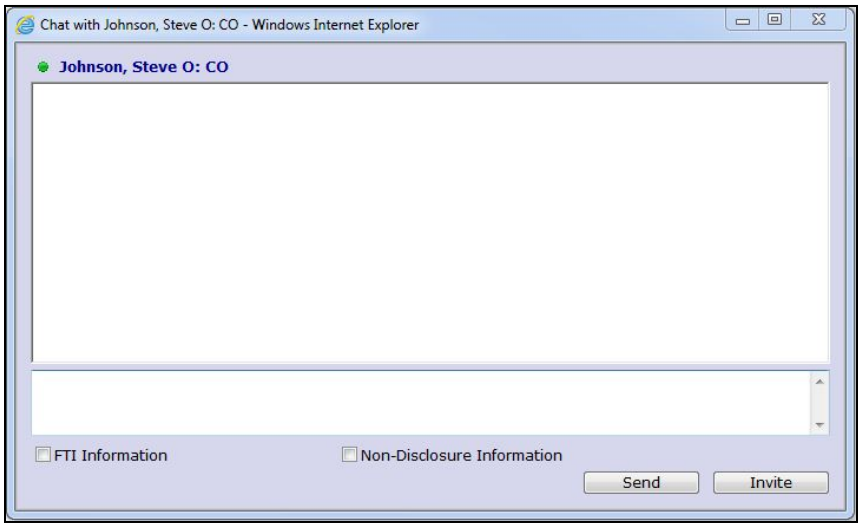
CHART 5-2: SHORTCUTS FOR WORKING WITH CONTACTS	
Element	Description
Start Chat	Opens the Chat page to start exchanging messages, Figure 5-4
Change Group	Opens the Change Group page, Figure 5-5, to move the contact to a new or different group
Remove	Deletes the contact from your contact list

5.2.1 START A CHAT

To start exchanging messages:

1. Right-click the contact's name. (The shortcut menu appears, Figure 5-3.)
2. Click **Start Chat**. (The Chat page appears, Figure 5-4.)

Figure 5-4: Chat Page



5.2.2 CHANGE A GROUP

Use the Change Group page to add an existing contact to a new or different group, Figure 5-5.

Figure 5-5: Change Group

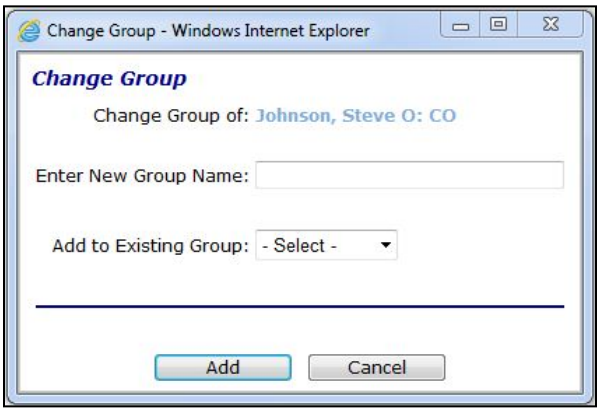


CHART 5-3: CHANGE GROUP PAGE DESCRIPTION	
Element	Description
Enter New Group Name	Type a name to create a new group, if desired
Add to Existing Group	• Select a name from existing groups you created • If this list is blank, it means you have not added any contacts, since all contacts must be assigned to a group
Add	• If you entered a new group name, creates a new group and adds the contact to the group • If you selected an existing group, adds the contact to a group already in your contact list
Cancel	Cancels your Change Group request

To change a contact's group:

1. Right-click the contact's name. (The shortcut menu appears, Figure 5-3.)
2. Click **Change Group**. (The Change Group page appears.)
3. Type a new group name or select a group from the Add to Existing Group list.
4. Click **Add**. (The InterAct Home page appears, displaying the contact in a new group.)

5.2.3 REMOVE A CONTACT

To remove a contact from your contact list:

1. Right-click the contact's name. (The shortcut menu appears, Figure 5-3.)
2. Click **Remove**. The system deletes the contact. (The InterAct Home page appears.)

Important: If the contact is the only user in the group, the system also deletes the group.

6. HOW DO I WORK WITH GROUPS?

You can use groups to organize your list by categorizing contacts in ways that are personally useful. Some examples include the following:

- New or frequent contacts
- State name
- Business function

6.1 Rename and Delete Groups

You can manage the groups in your contact list by renaming a current group or deleting the group and its contacts, Figure 6-1.

Important: Deleting a group deletes all contacts assigned to the group. If you don't want to delete the contacts, move them to another group before deleting the group.

Figure 6-1: **Shortcut Menu for Working with Groups**

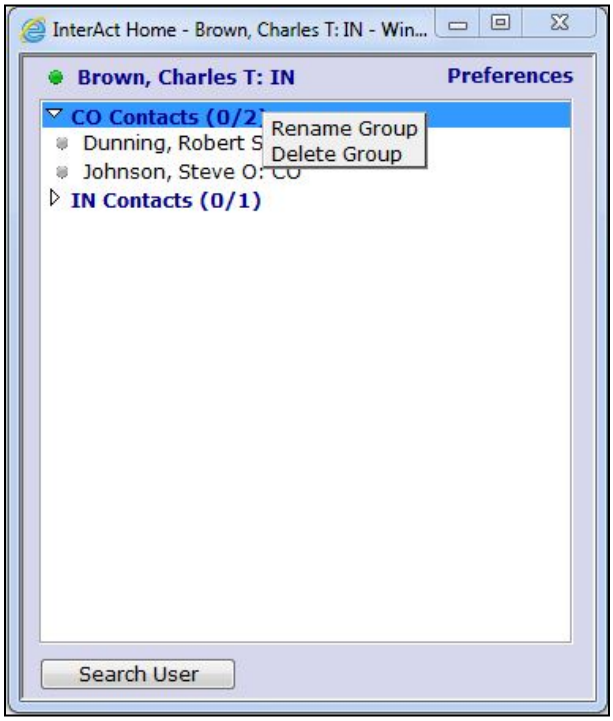


CHART 6-1: SHORTCUTS FOR WORKING WITH GROUPS	
Element	Description
Group Name	• Down arrow – Group expanded (CO Contacts) • Right arrow – Group collapsed (IN Contacts) • (N/N) – Number of contacts online of the total contacts for the group – For example: (1/5) indicates one contact is online out of five contacts in the group – Of the Colorado contacts shown in Figure 6-1 (0/2), neither contact is online and there are two people in the group
Rename Group	Change the name of the group
Delete Group	Delete the group and its contacts

To change the name of the group:

1. Right-click the group name. (The shortcut menu appears.)
2. Click **Rename Group**. (The Rename Group page appears, Figure 6-2.)

Figure 6-2: **Rename Group**

3. Type the new group name, and then click **Save**. (The InterAct Home page appears, displaying the new name of the group.)

To delete a group:

1. Right-click the group name you want to delete. (The shortcut menu appears.)
2. Click **Delete Group**. (A confirmation message appears, Figure 6-3.)

Figure 6-3: **Confirm Group Delete Message**

Note: As the message states, deleting a group deletes all contacts in the group. If you want to retain the contacts, move them to another group before deleting.

3. Click **OK**. (The InterAct Home page appears.)

7. HOW DO I START A CHAT?

As mentioned in section 4, "How Do I Find Other Users?" you can chat with someone in any participating state without adding the person to your contact list. You can also initiate messages from your contact list. (See section 5, "How Do I Work with Contacts?")

7.1 Start Chat

You can start a chat either from the Search User – Search Results page or from your contact list.

When you click **Start Chat** in either location, the system displays a message page with a section at the bottom for typing your messages, Figure 7-1. To upload your message, click **Send** or press **Enter** on the keyboard.

Important: Do not paste large amounts of text or whole documents into the Chat window. Use another means of sending the information, such as Electronic Document Exchange or e-mail (if there is no PII or FTI in the material).

Figure 7-1: **Chat Page**

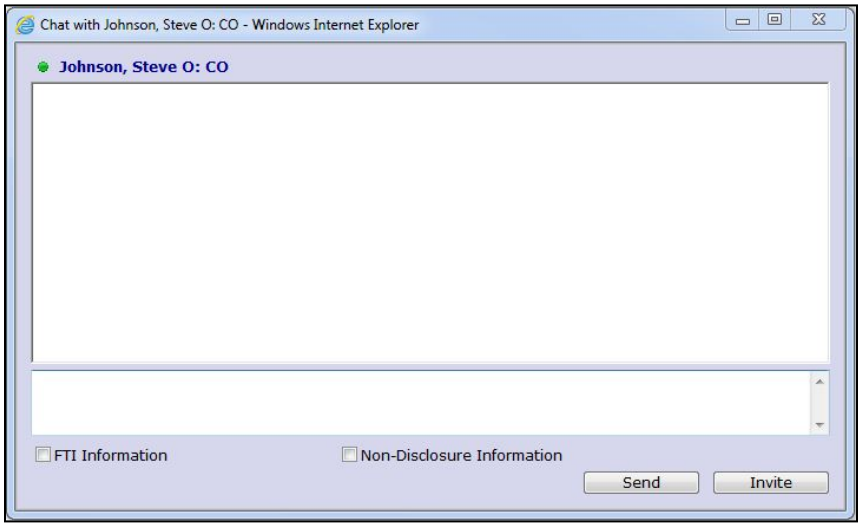


CHART 7-1: CHAT PAGE DESCRIPTION	
Element	Description
User's Name	Displays your name and state abbreviation as the initiator of the chat
Message Page – Conversation Section	Displays the conversation between you and the other person

CHART 7-1: CHAT PAGE DESCRIPTION	
Element	Description
Message Page – Message Section	Type your messages
FTI Information	Check to indicate the message you are sending has federal tax offset information
Non-Disclosure Information	Check to indicate the message you are sending has information that the recipient should not disclose to third parties **Note**: Follow your state's policies for non-disclosure
Send	Uploads the message to the conversation section of the message page
Invite	Click to invite other people to join the chat (See section 7.2, "Invite Multiple Users to Chat")

To open the Chat page:

1. Click **Chat** in the Search User – Search Results page, Figure 4-3.

OR

2. Right-click a contact name in the contact list, and then click **Start Cha**t, Figure 5-3.

Figure 7-2 shows an example of a chat between two users. It also illustrates use of the federal tax information (FTI) alert.

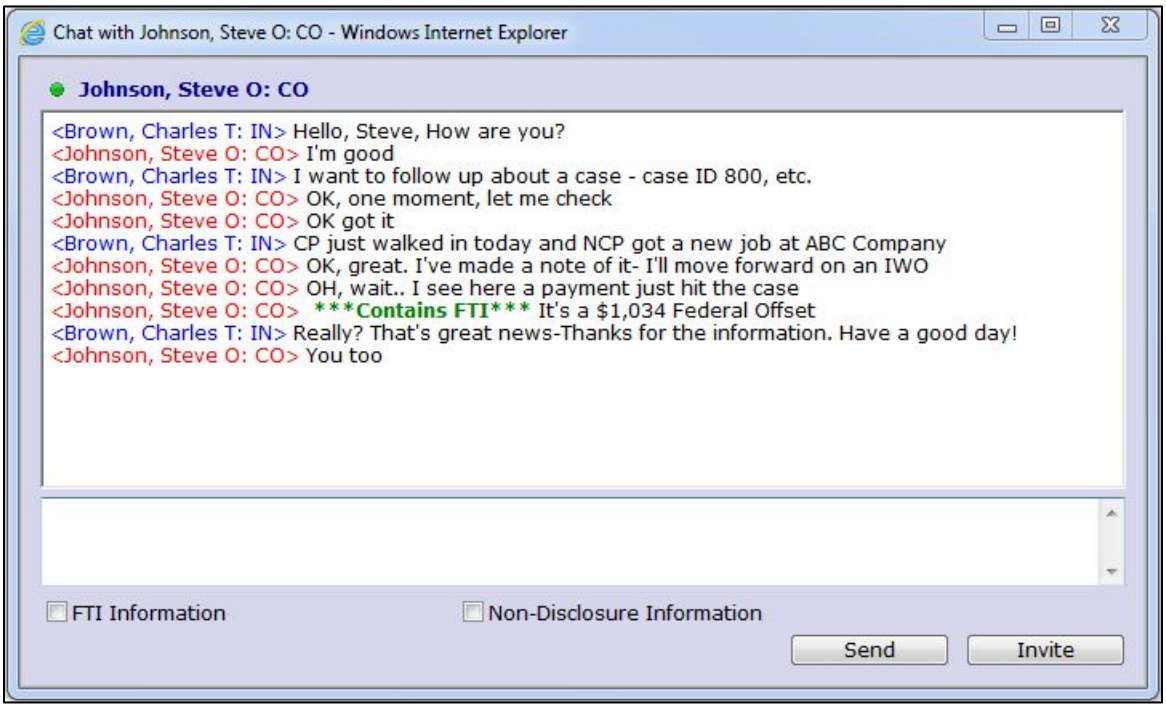
Notes about FTI and Non-Disclosure: You may check either or both check boxes at any point when typing your message. When you send the message, InterAct always places the relevant alert at the beginning of the message.

Important: You must uncheck FTI (or Non-Disclosure) before you send subsequent messages that don't contain sensitive information. Otherwise, all your messages will appear with the FTI or Non-Disclosure notice.

In the example below:

- Steve Johnson clicked the FTI Information check box after realizing the statement contained FTI, and *before* he sent the message about the federal offset.
- He unchecked FTI *after* sending the message, so the system would not mark subsequent messages as FTI.
- Notice how Steve's last comment, "You too," isn't marked as FTI.

Figure 7-2: **Chat Example with FTI Checked**



7.2 Invite Multiple Users to Chat

You can invite multiple users to participate in a chat. You must have the Chat page already open with one user to invite others to join the conversation.

Chat Duration: InterAct allows you to chat with multiple users for up to one hour.

Using the Select User – Invite User page, you can either select an existing contact or search for a user not in your contact list. To invite several people to chat, use this page to invite each one individually.

To open the Select User – Invite User page:

Click **Invite** at the bottom of the chat page, Figure 7-2. (The Select User – Invite User page opens, Figure 7-3.)

Figure 7-3: Select User – Invite User

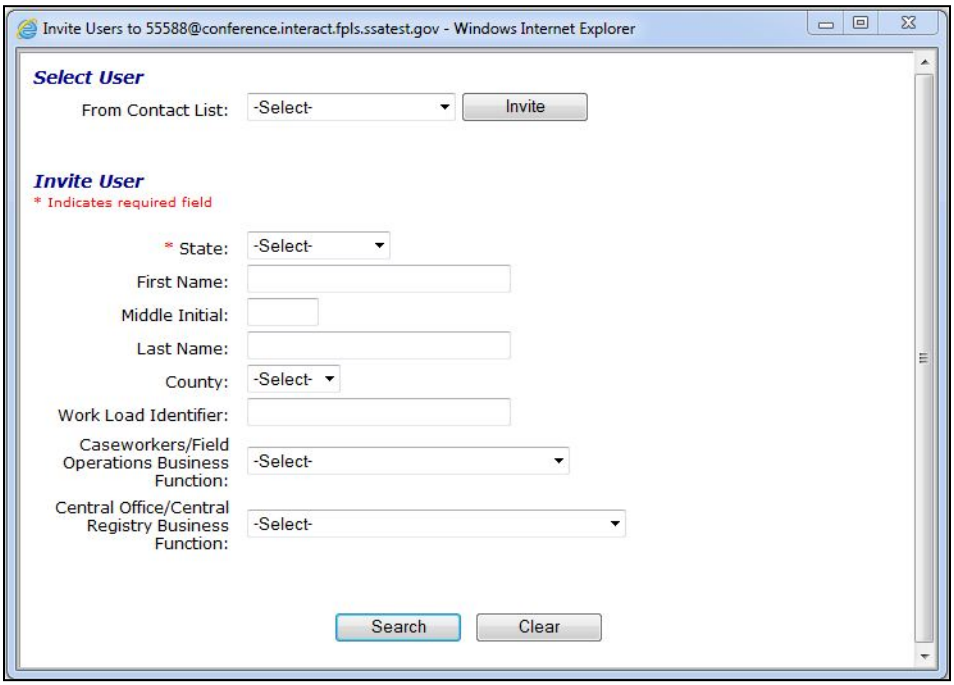


CHART 7-2: SELECT USER – INVITE USER PAGE DESCRIPTION	
Element	Description
Select User	This section allows you to invite a person on your contact list
From Contact List	Select a person from your contact list
Invite	Sends the invitation to the contact you selected
Invite User	This section allows you to search for a user who is not in your contact list
* State	State of the user you are searching for
First Name	First name of the user (Wild card search entry available)
Middle Initial	Middle initial of the user (Wild card search entry available)
Last Name	Last name of the user (Wild card search entry available)

CHART 7-2: SELECT USER – INVITE USER PAGE DESCRIPTION	
Element	Description
County	Counties in the state (Wild card search entry available)
Work Load Identifier	Work load identifier of the user you are searching for (Wild card search entry available)
Caseworkers/Field Operations Business Function	Business function for this business function type
Central Office/Central Registry Business Function:	Business function for this business function type
Search	Initiates your search and displays the results in the search results section on the same page
Clear	Clears your entries and resets the default values

To invite a person on your contact list:

Select a name from your contact list, and then click **Invite**. (The system sends an invitation to the contact to join the conversation, Figure 7-5.)

To search for a user:

1. Fill in your search criteria. (See section 4.2, "About Search Criteria," for additional information on searching.)
2. Click **Search**. (The Select User – Invite User – Search Results section appears at the bottom of the page, Figure 7-4.)
3. Click **Invite** in the Search Results section. (The system sends an invitation to the user to join the conversation, Figure 7-5.)

Figure 7-4: Select User – Invite User – Search Results

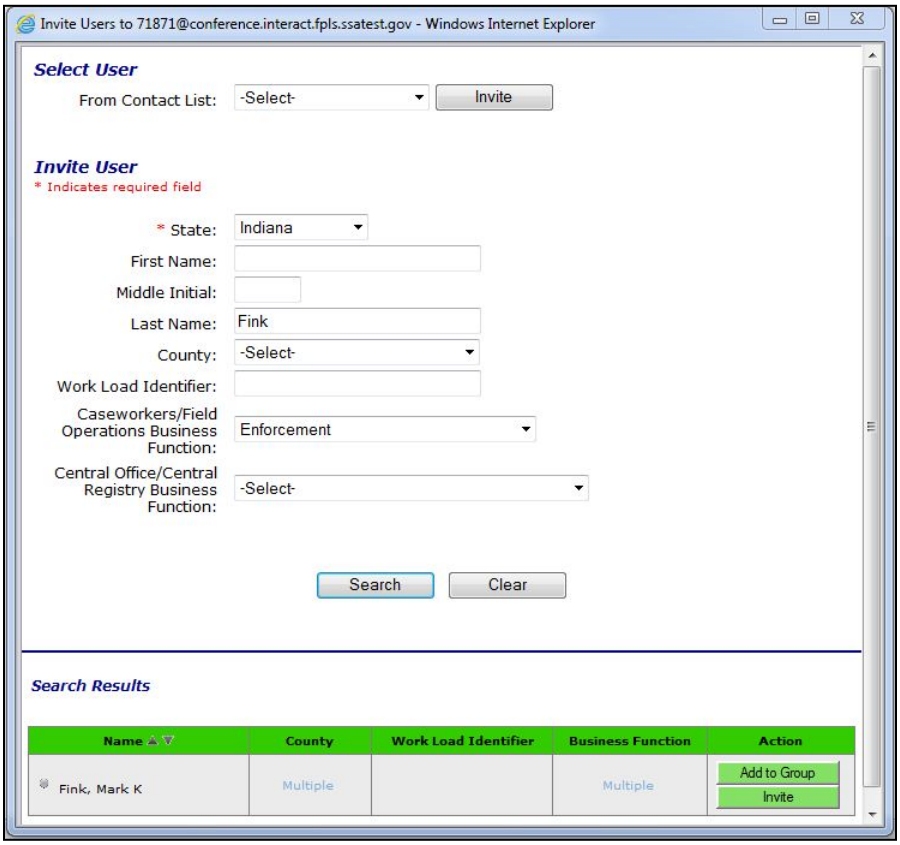


CHART 7-3: SEARCH USER – INVITE USER – SEARCH RESULTS PAGE DESCRIPTION	
Element	Description
Name	• Last name, middle initial, and first name of the user from the selected state • Also displays the user's current status • Use the arrows to reverse the order when there is more than one user displayed
County	Displays one county if the user selected only one • Displays 'Multiple' if users selected more than one • Point to 'Multiple' to see all county names
Work Load Identifier	• Displays work load identifier if the user filled it in during registration • Otherwise, the display is blank

CHART 7-3: SEARCH USER – INVITE USER – SEARCH RESULTS PAGE DESCRIPTION	
Element	Description
Business Function	Displays one business function if the user selected only one • Displays 'Multiple' if users selected more than one • Point to 'Multiple' to see all business function names
Action	Click: • **Add to Group** to add that user to your contact list • **Invite** to ask the user to join the conversation without adding the user to your contact list
Next and Previous (Not shown)	Appear when there is more than one page of responses, so you can navigate through the pages

To add users you found in search results to your contact list:

Click **Add to Group**. (The Add to Group page appears, Figure 5-1.)

To send an invitation without adding the user to your contact list:

Click **Invite**. (The system sends a group chat invitation to the person you invited, Figure 7-5.)

7.3 Group Chat Invitation

The person you invited will receive an invitation to join the group chat, Figure 7-5. If the person clicks **Join**, his or her name will appear on a list in the chat window. If the user clicks **Decline**, his or her name will not appear.

Figure 7-5: Group Chat Invitation

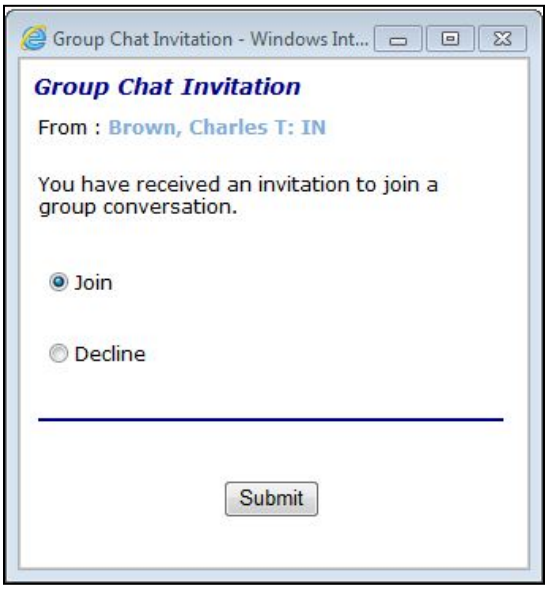


CHART 7-4: GROUP CHAT INVITATION PAGE DESCRIPTION	
Element	Description
From	• Name and state of the requester to join a chat • Point to the name to see the requester's profile, Figure 5-2, "Contact's Profile"
Join	Opens the Group Chat page once you click **Submit**
Decline	Closes the group chat invitation without joining the chat once you click **Submit**
Submit	• Enters your response into the system • Adds your name to the chat participant list if you clicked **Join**

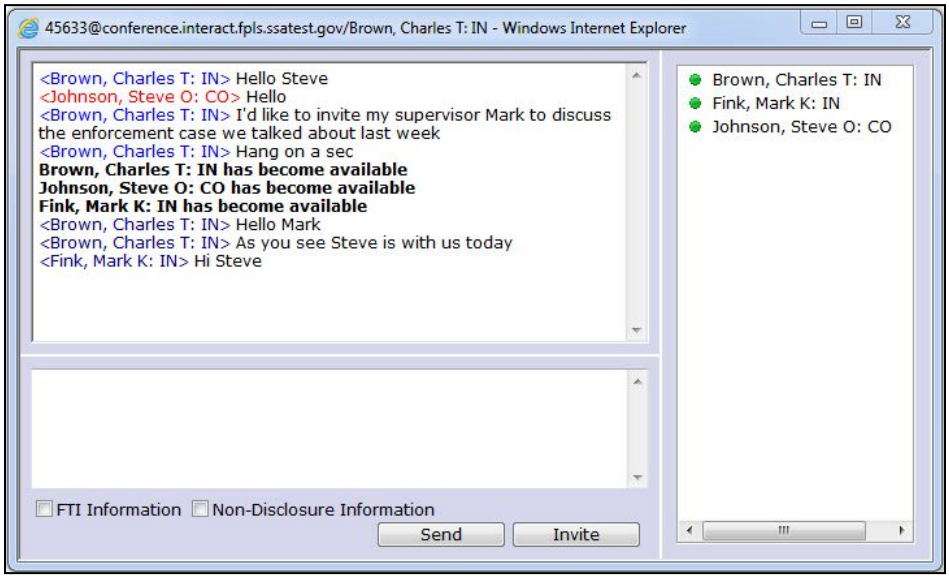
To join the group chat:

Click **Join**. (The Group Chat page appears, Figure 7-6.)

7.4 Group Chat Example

If users accept the invitation to join the group chat, InterAct adds a section showing the list of participants and their online status. It also adds a notice to the message pane that the user has become available. Figure 7-6 shows these elements.

Figure 7-6: **Group Chat Example**



To add more users to a chat:

1. Click **Invite**. (The Select User – Invite User page appears, Figure 7-3.)
2. Click **Select User** to select from your contact list or fill in criteria to search for a user in the Invite User section.

8. WHEN DOES INTERACT DEACTIVATE ACCOUNTS?

To minimize the number of inactive users, InterAct deactivates users who have not logged into InterAct for 90 days. Ten calendar days before deactivation occurs, the system sends an e-mail alert about the upcoming deactivation and its consequences.

As you see from the message in Figure 8-1, when deactivating an account, InterAct deletes your contact list, but retains the user profile you entered when registering. Logging into InterAct prevents deactivation.

Figure 8-1: Deactivation Alert E-mail

Subject: **InterAct Account Deactivation Alert**

In 10 days, InterAct will deactivate your account. At that time, your account will have been inactive for 90 days.

When it deactivates your account, InterAct will delete your contact list, but will retain your profile information.

If you have questions or concerns, contact the Service Desk at 800-258-2736 or ocse.gr-portal@lmco.com.

This is your only reminder.

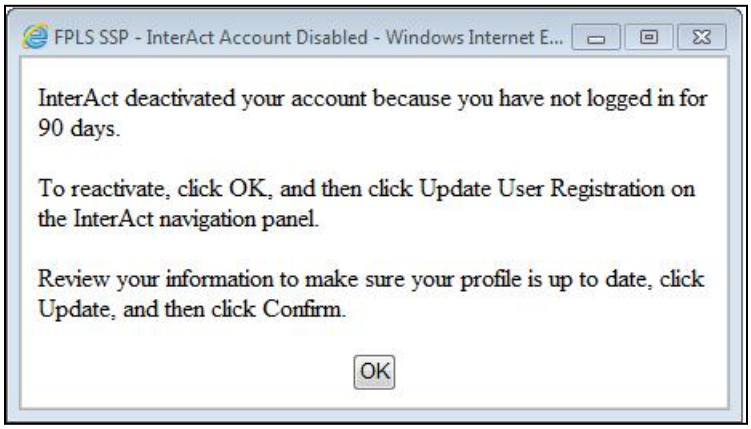
To keep your account active, click the InterAct icon to open the InterAct Home page.

Once deactivated, you can re-activate your account. Refer to the "Guide for Navigating InterAct" for information.

8.1 Reactivating Your Account

After InterAct deactivates your account, you will receive the following message when you try to launch the application, Figure 8-2.

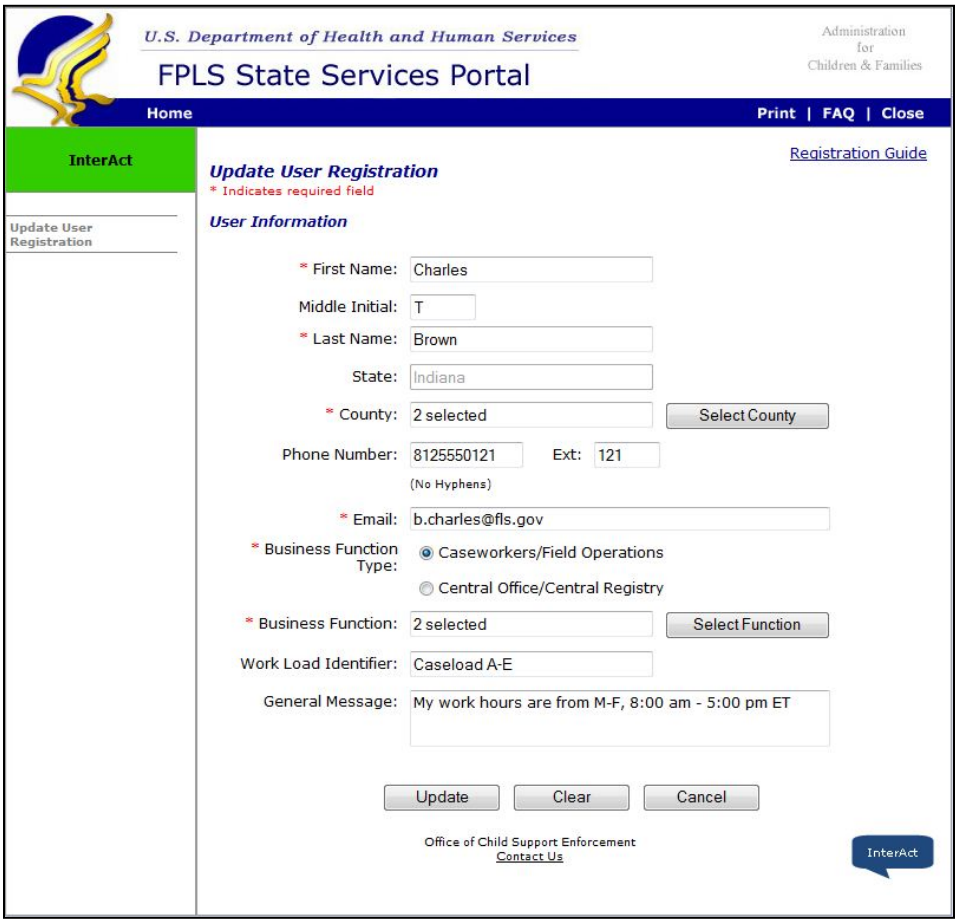
Figure 8-2: **InterAct Account Disabled Message**



To re-activate your account:

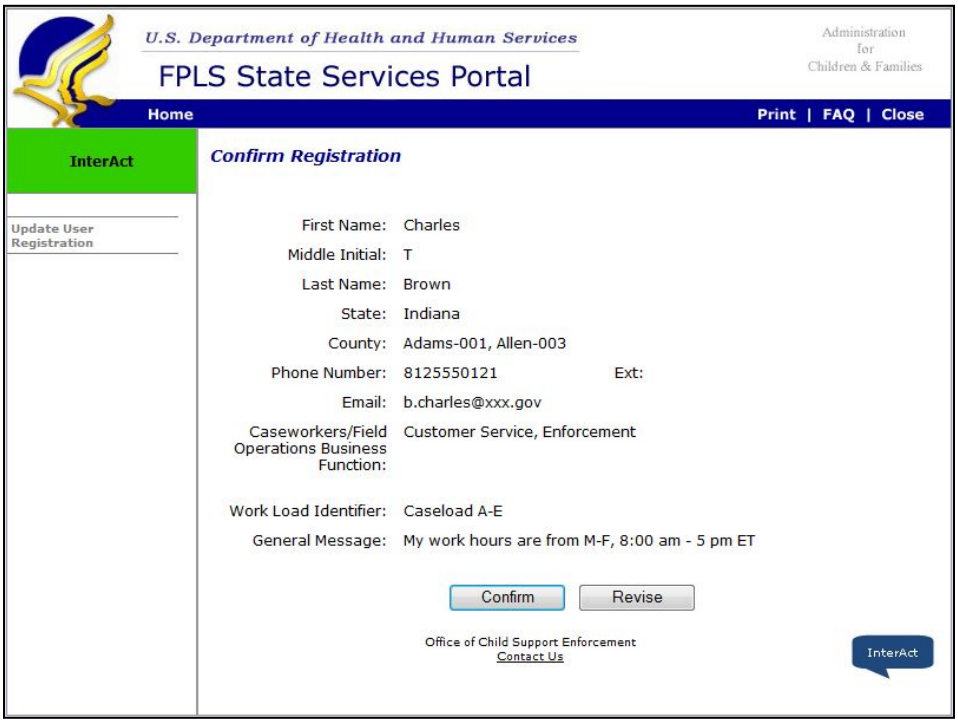
1. Click **OK** on the InterAct Account Disabled message.
2. Click **Update User Registration** in the navigation panel on the InterAct Welcome page. (The Update User Registration page appears, Figure 8-3.)

Figure 8-3: Update User Registration – User Reactivation



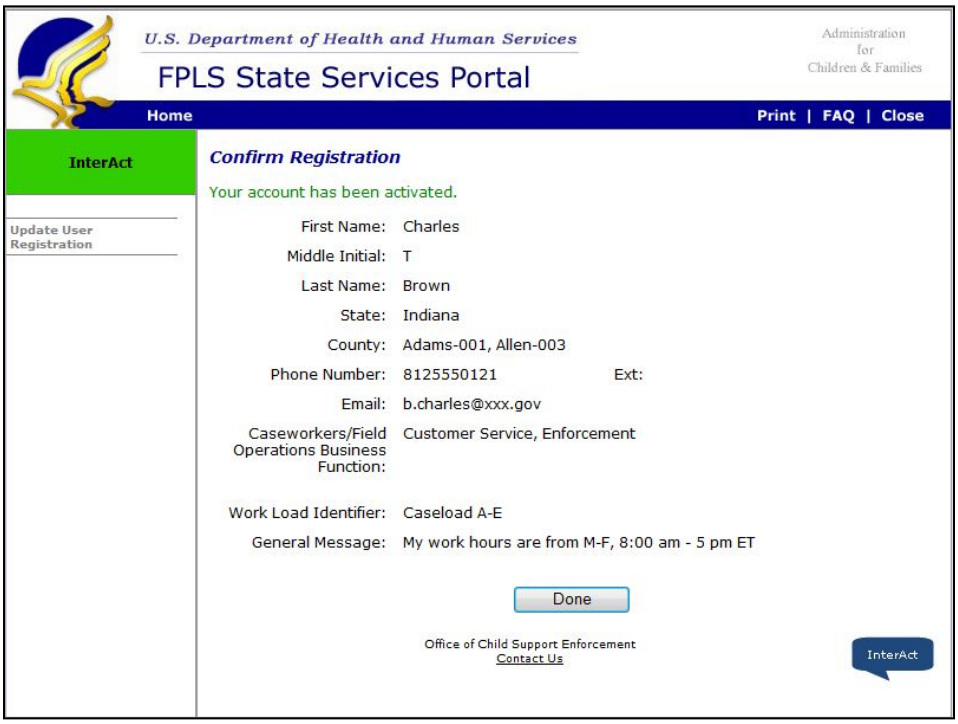
3. Make any changes needed to update your information.
4. Click **Update.** (The Confirm Registration page appears, Figure 8-4.)

Figure 8-4: Confirm Registration – User Reactivation



5. Click **Confirm**. (You receive a confirmation message, Figure 8-5.)

Figure 8-5: Confirm Registration – Account Activated



6. Click **Done** to navigate to the InterAct Welcome page.
7. Click the **InterAct** icon to open the InterAct Home page, Figure 3-2.