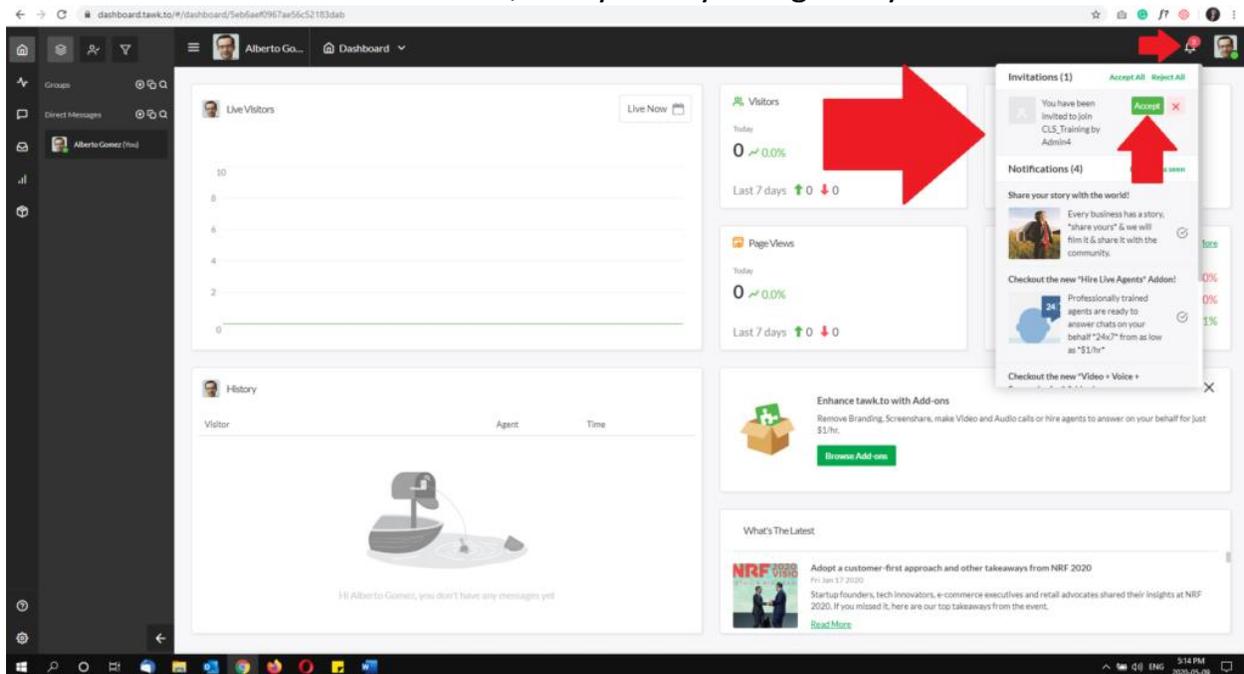


Lesson 3 – Live-Chats and Protocols

Before your training appointment, review and duplicate this lesson on your own on the training chatroom.

Meeting your Team Coordinator on your shift

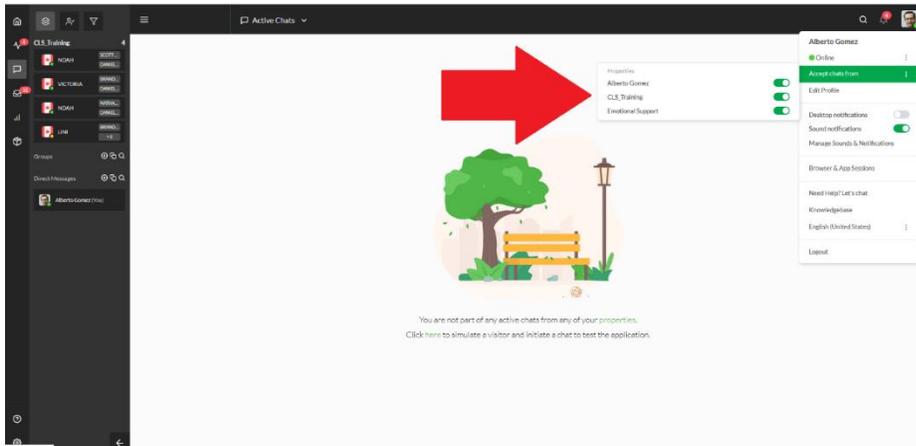
- On the date and time of your Shift, Tech support will enable your credentials.
- Go to tawk.to and log-in <https://dashboard.tawk.to/login>
- Once you have logged-in on time for your shift.
- Go to Alerts on the top right-hand corner of your window.
- Accept any pending invitation you might have to join either, the Training Chatroom or the Live Chatroom
 - If you have a pending invitation, you will notice the Invitation Alert and the Green button to Accept the invitation.
 - If you do not have any pending Invitations, you will not see the Invitation or the green Accept button.
- You should do this exercise, every time you log into your account.



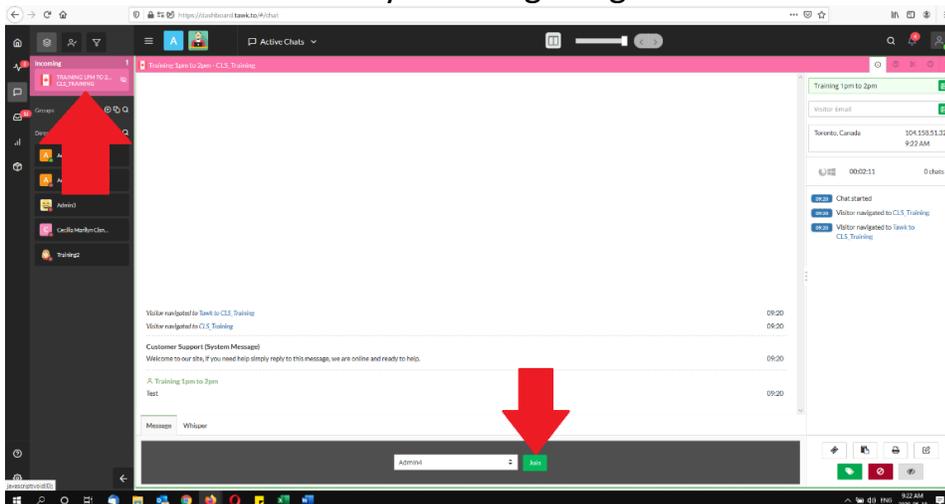
Selecting a Chatroom

- Once you have accepted all pending invitations on **Alerts**.
- Go to **Accept Calls From**, on the dropdown menu under your profile and select from where do you want to accept calls from
 - **Your Name**. This will accept direct messages from others volunteers

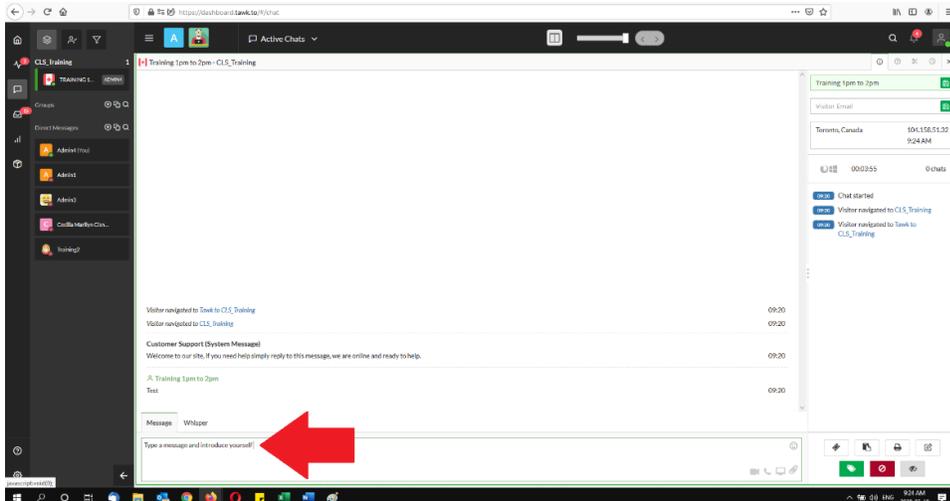
- **CLS Training.** This will accept calls from the **Training Chatroom.** **Disable this chatroom so you do not get distracted.**
- **Emotional Support.** This will accept calls from the **Live Chatroom.** **Make sure this is enabled.** If you do not see the Emotional Support on your list. Please contact volunteers@certifiedlisteners.org



- Once you have enabled the Emotional Support Chatroom. you will see a call coming in with the date and time of the shift you are in
- Meet your **Coordinator, Supervisor** and the rest of your **team** on this live Call titled "Shift"
- Join the chat-call by selecting the green "Join" button



- Once you have joined the chat-call
- Enter a message to introduce yourself



Team Coordinator Announcements

- At this moment your Shift Coordinator would make any necessary announcements and updates.

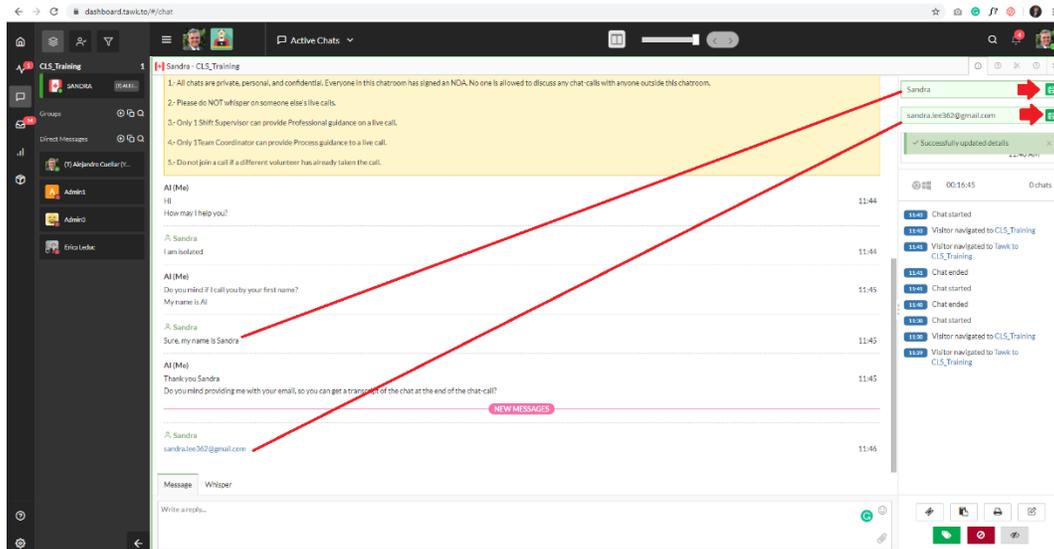
Live-Chat

- Every new chat shows a System Message to remind everyone about our commitment to each other, the callers and the organization.
- 1.- All chats are private, personal and confidential. Everyone in this chatroom has signed an NDA. No one is allowed to discuss any chat-calls with anyone outside this chatroom.
- 2.- Please do NOT whisper on someone else's live calls.
- 3.- Only 1 Shift Supervisor can provide Professional guidance on a live call.
- 4.- Only 1 Team Coordinator can provide Process guidance to a live call.
- 5.- Do not join a call if a different volunteer has already taken the call.

When you answer a live chat-call.

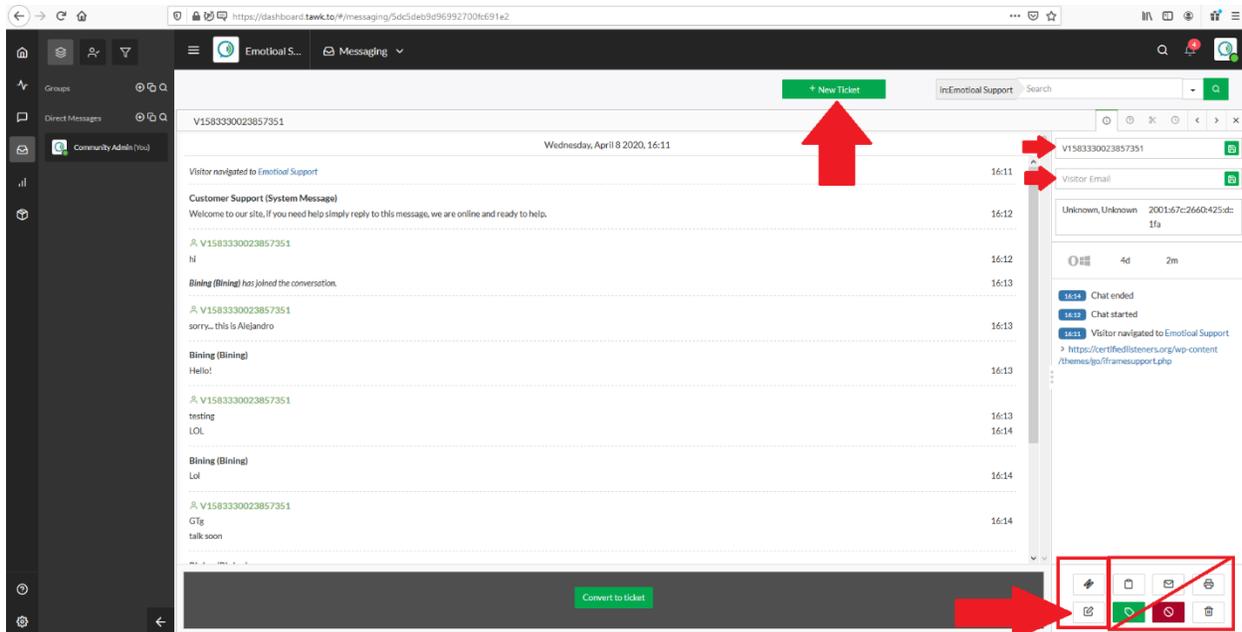
- After you greet the caller.
- Please type “/” backslash on the chat box
 - Select 1-name
- /Do you mind if I can call you by your name?
 - If yes, add visitor’s name and save (**image below**)
 - If not, continue with the conversation
- type “/” backslash on the chat box
 - Select 1-email

- /Do you mind providing me with your email, so you can get a transcript of the chat at the end of the chat-call?
 - If yes, add visitor's email and save **(image below)**
- If not, continue with the conversation



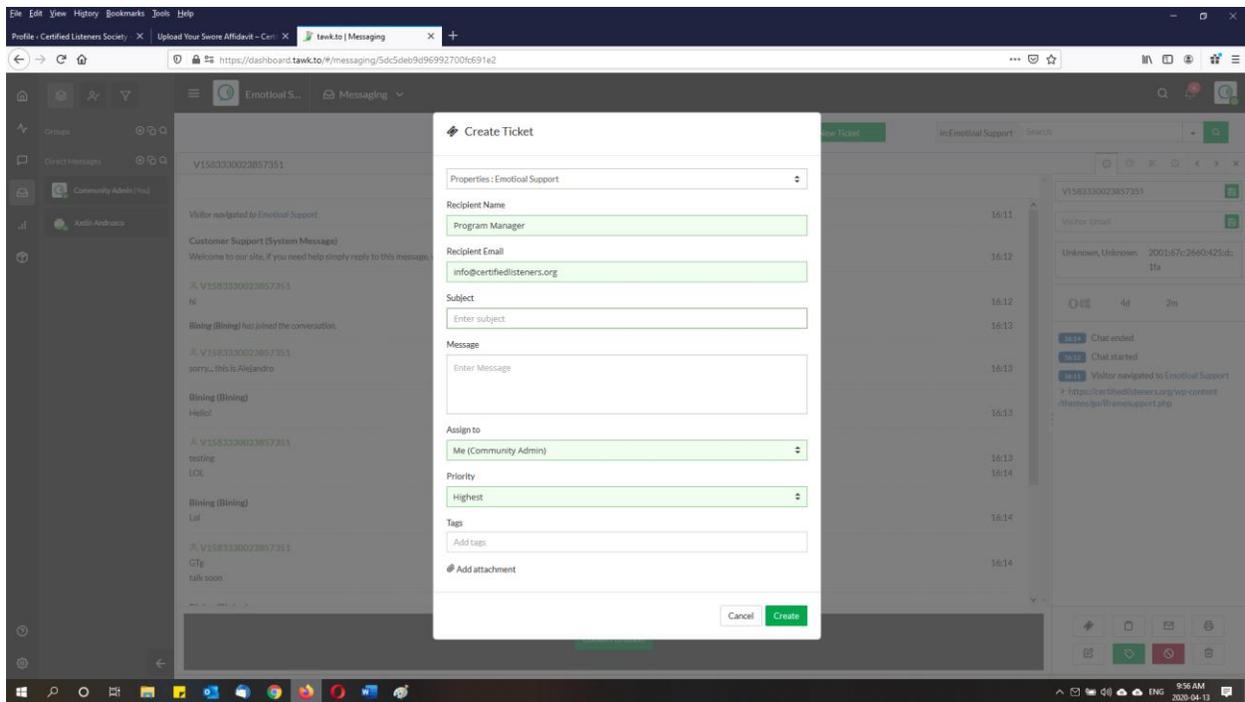
- If you need it pertinent, Add a Note about anything that you think is relevant.
- Due to privacy policies you cannot use any of the following features:
 - **Delete, Email, Copy, Tag or Band anyone.**
- Only Shift Supervisors are allowed to use these features.
- Please remember, never jump into a chat when another Volunteer has already taken the chat call. This would be disrespectful to the visitor and would invade their privacy.
 - If you need to communicate with the volunteer, taking the call. use whisper

- When you are concerned about your safety or the safety of the client. You need to Create a Ticket, close the chat and let your **shift supervisors** know.
- To create a ticket, you can either select the button on the top or on the menu on the bottom



Creating a Ticket

- Properties: Leave it as is
- Recipient Name: **Program Manager**
- Recipient Email: ticket@certifiedlisteners.org
- Subject: **Ticket**
- Message: **Explain the reasons why you are creating a ticket**
- Assign to: Leave it as is
- Priority: Leave it as is
- Tags: **Optional**
- **Hit Create**
- **Do not worry to memorize this.** Any time you need help you come and ask me and I will have this instruction for you
- **Once you create the ticket.**
 - Close the chat with the client (if it's not closed already)
 - Go to Direct Messages and find your Shift Supervisor (in case he is not already whispering to you)



How to find your shift supervisor?

- Before each shift, your shift supervisor will introduce him/her-self on the shift Live-chat box.
- Her/his name will be displayed with the letter **(S)** before the name.
- You can also ask your Team Coordinator for help to find the Supervisor. Your coordinator is the one who runs the shift Live-Chat box and her/his name is always displayed with a **(C)**

Before your training appointment.

- Login to the training chatroom
- Please go to <https://tawk.to/CLS.Training>
- Open a chat-call and duplicate every scenario mentioned on this lesson.