



<https://www.calhope.org/>



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Introduction

Thank you for being part of [CalHOPE](#): California's response to the COVID-19 pandemic and other disasters. You are part of a network of organizations and individuals that are being trained to provide virtual support to Californians experiencing stress, anxiety and/or trauma because of the current pandemic. This guide will guide you through the different pieces of CalHOPE Connect. Californians all over the state will be able to ask to speak to a counselor through this live chat application, and it will connect you with a Californian who is need of support. You will notice that there are pages of this guide with blank space. This is intentional, so that you can print out the guide and take notes.

The two components of the CalHOPE Connect website covered within this document are:

1. LiveChat – This is the chat application that allows Californians to connect to Supporters/Supporters/Agents.
2. WordPress – This tool provides a shared Calendar that can be updated and presented to visitors of the CalHOPE Connect website.

This guide is specifically for CCP Coordinators/CCP Coordinator/Supervisors of the contracted agency as they have higher editing and managing abilities in LiveChat and WordPress. If you are not a CCP Coordinator/CCP Coordinator/Supervisor, there is a separate guide to walk you through the LiveChat application.

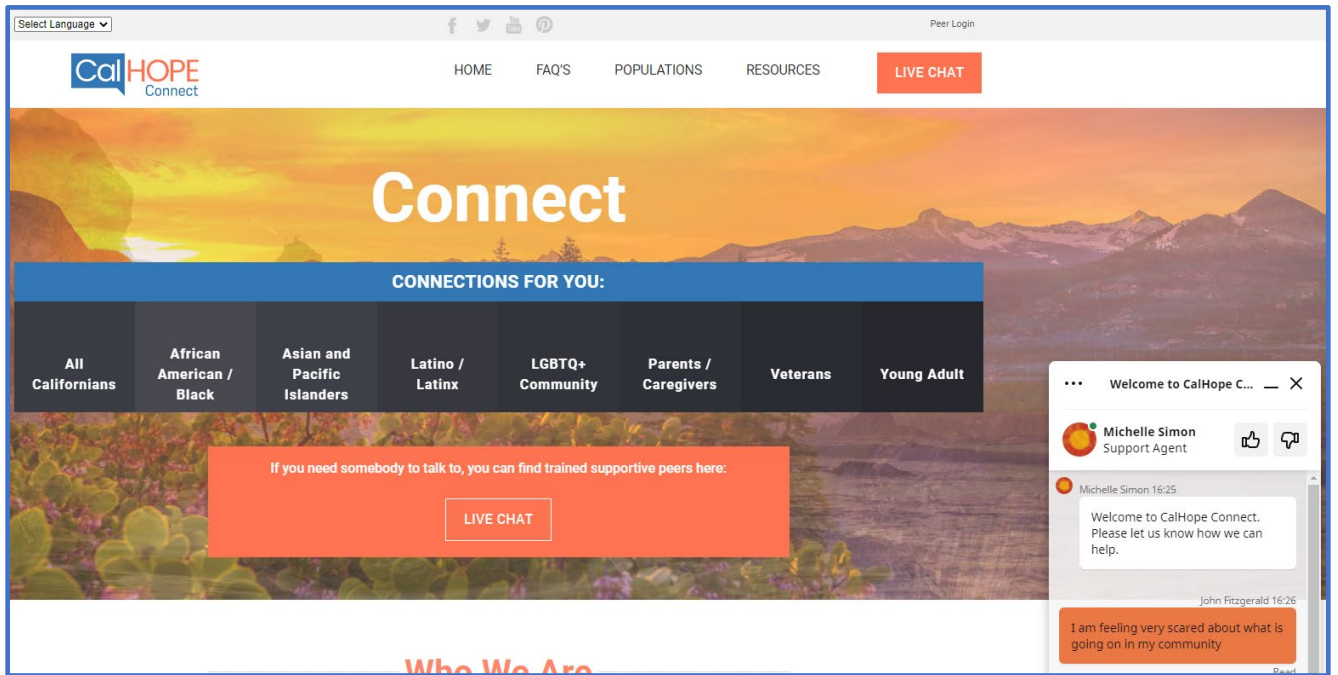
The [Crisis Counseling Assistance and Training Program \(CCP\)](#) has key roles with definitions used in the United States when responding to disasters. CalHOPE's CCP is the first to provide virtual support. While the roles used for CCP remain consistent with the CCP model, this guide uses different terms for roles due to the chat platform. Below you will see how the CCP Terms are used throughout this guide.

- Crisis Counseling Program (CCP) Counselor
 - Supporter/Agent
 - Peer
 - Community Health Worker
 - Family Member
- Crisis Counseling Program (CCP) Program Coordinator
 - Coordinator
- Californians seeking support
 - Visitor/Customer

We want to acknowledge and thank Riverside County for their contributions to Peer Chat support services. CalHOPE Connect leverages the MHSA funded Innovation project developed by Riverside County *Take My Hand*. Their leanings and collaboration have been invaluable to supporting Californians.

LiveChat Introduction For Californians who visit the CalHOPE Connect website and click the orange “Live Chat” button (in the top right-hand corner of the screenshot below), a chat box will pop up and they will be using the LiveChat tool. Their only interaction with the LiveChat application is the engagement they have with Supporters/Agents in this chat box.

Example: CalHOPE Connect Website:



For Supporters/Agents, their entire user experience will be driven through the LiveChat application which can be accessed either through the internet, or by downloading the application to your assigned CCP laptop, phone or another device.

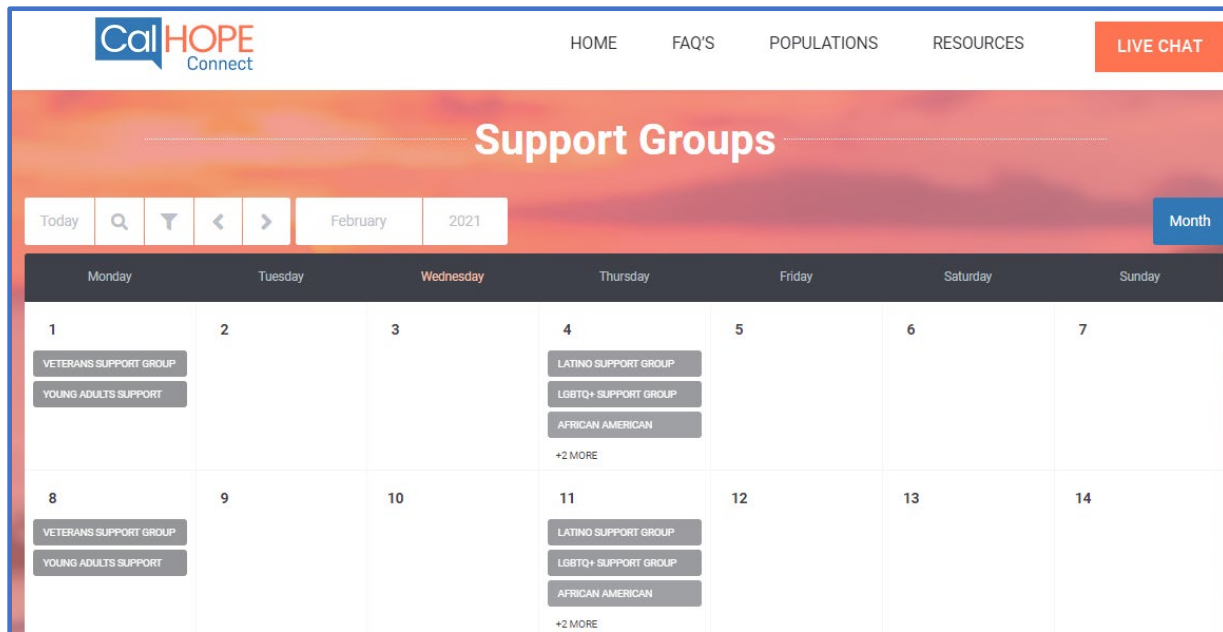
The sections of this document associated with LiveChat will focus on the experience of the Supporter/Agent as well as the Admin/CCP Coordinator/Supervisor role.

Additional information about the LiveChat Application can be found on the vendor’s website at: <https://www.livechat.com/help/>

CalHOPE Connect Event Calendars Introduction

As a resource for California citizens seeking information about support during the COVID-19 Pandemic, the CalHOPE Connect website includes a series of interactive calendars. CCP Subcontractors will add support groups offered by their organization so that individuals accessing CalHOPE Connect can join support groups from around the state.

The CalHOPE Connect website is divided into different pages for the different populations identified within the FEMA/SAMHSA grant that governs this project. Within each of these pages (e.g. Populations) a different calendar is provided allowing for events to target specific population groups. Events that might apply to multiple groups can be applied across multiple calendars.



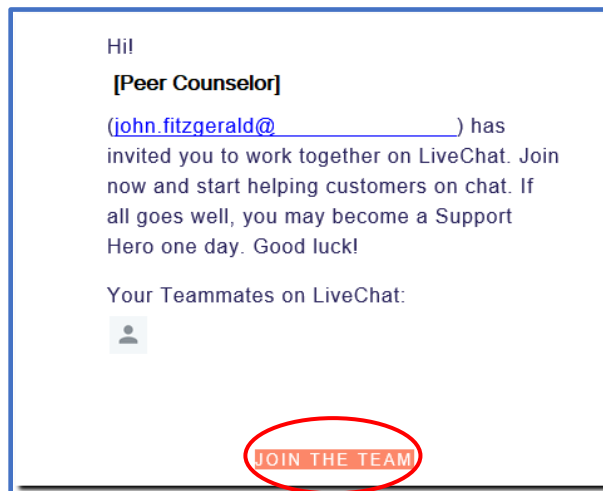
Within this document, instructions regarding how to add and manage events in these interactive calendars is provided. Since these calendars will be used by multiple CCP Subcontractors, access to update/manage calendar events will only be available to CCP Coordinator/Supervisors.

Lesson 1 - Logging Into The LiveChat Application

The vast majority of your organization's staff activities will be performed using the LiveChat tool. Once an organization has contracted with CalMHSA, it will create your account. CCP Coordinator/Supervisors will be created as "Admin" users in the LiveChat application and thus will have abilities and privileges beyond what a basic "Agent" will have.

All that will be required to create this account is your e-mail address within the organization. Once CalMHSA has set you up in the LiveChat application, you will receive an e-mail via your designated e-mail address with a link to activate your account:

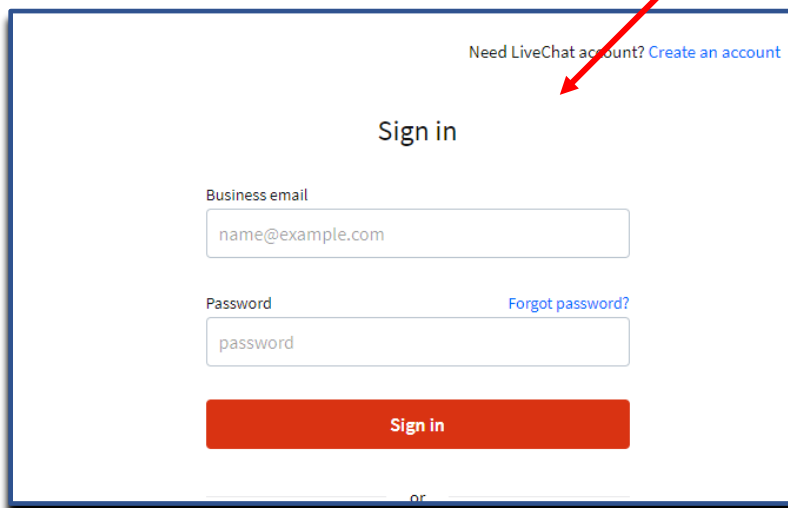
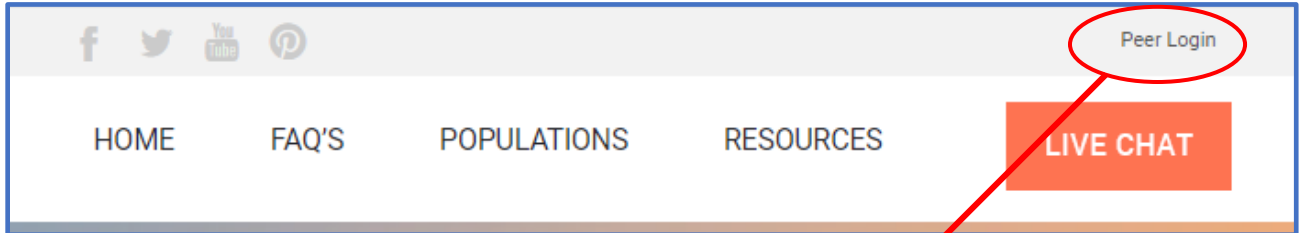
Example: Invitation e-mail for LiveChat



Once you have joined the team, you have two options as to how to connect to LiveChat on an on-going basis.

Logging in via CalHOPE Connect

From the CalHOPE Connect website, a link to the web-based LiveChat application has been included in the upper-right hand corner of all pages. As such users can log-into their account by clicking the “Peer Login” button and enter their e-mail address and personal password.

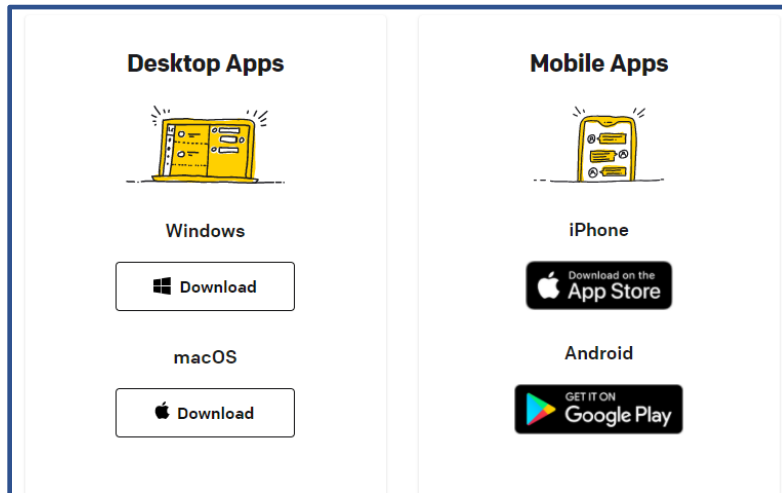


A screenshot of the LiveChat "Sign in" form. At the top right, there is a link: "Need LiveChat account? [Create an account](#)". The main heading is "Sign in". Below this, there are two input fields: "Business email" with the placeholder text "name@example.com" and "Password" with the placeholder text "password". To the right of the password field is a link: "[Forgot password?](#)". Below the input fields is a red "Sign in" button. At the bottom, there is a faint "or" separator.

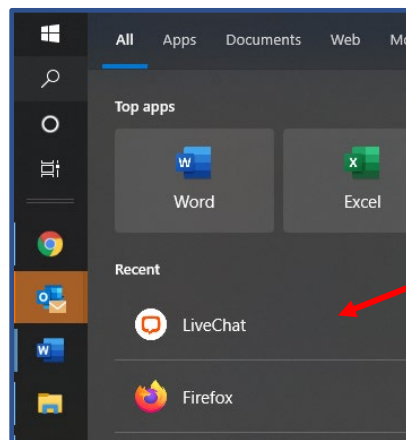
Downloading and Logging in via the Application

If it is anticipated that you will consistently be using CalHOPE Connect, then you can download and install the LiveChat application to your assigned CCP laptop, phone or another device. The LiveChat application downloads can be accessed at any time by going to the LiveChat website at: <https://www.livechat.com/app/>

From this website, users can download the application for a number of different platforms:



Once installed, you will be able to launch the LiveChat application directly from your assigned CCP laptop, phone or another device without having to first go to the CalHOPE Connect website.

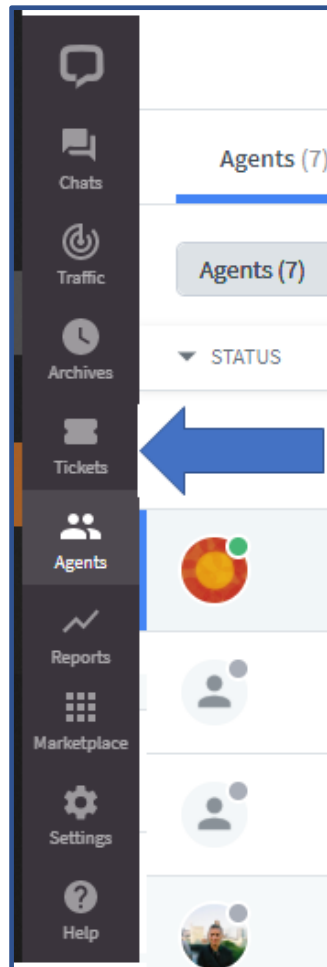


Regardless of whether you log in through the website, or use the application installed on your laptop/phone/device :

- Logging in will require your address and personal password
- The features, functionality, workflow of the LiveChat application are the same
- The laptop/phone/device being used will need to be connected to the internet.

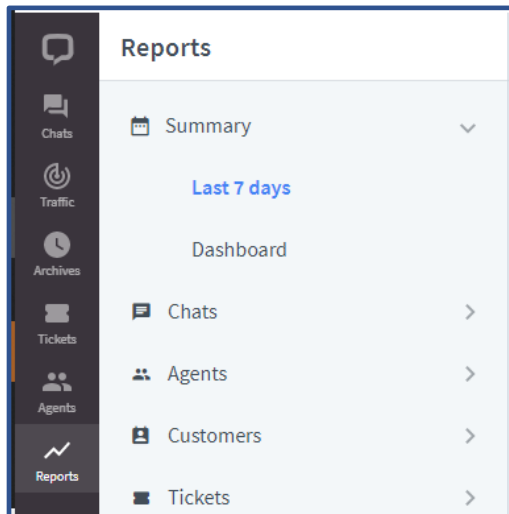
Lesson 2 – Navigating Through LiveChat

Within the LiveChat application the different sections of the application can be selected via the Icons which are stacked along the left-hand margin of the screen/application.



The specific function of the different sections of LiveChat are covered in the “CalHOPE Connect LiveChat Users Guide” but here is a quicksummary:

- **Chats** – Is the section where Supporters/Agents will be engaged in one or multiple chat sessions with Visitors.
- **Traffic** – Is the section where users of the LiveChat application can see information about visitors who are currently browsing the CalHOPE Connect website. These visitors may be currently engaged in a chat with an Agent, or may be simply browsing the website for information.
- **Archives** – This section allows LiveChat users to see previous chat sessions between Visitors and Supporters/Agents.
- **Tickets** – When a Visitor attempts to chat with an Agent but none are available, they will be able to create a Ticket which is essentially a message for follow-up. The “Tickets” section of LiveChat is where these messages can be reviewed and managed.
- **Supporters/Agents** – This section is where Admins can add, edit, or delete user accounts on the LiveChat application. Although users identified as “Supporters/Agents” also have access to this section of the application, they do not have the same level of ability as managers and can only edit their own user account.
- **Reports** – presents a series of reports about the chats, tickets, and other activities performed through the LiveChat application.
- **Settings** – This is where much of the configuration of the application is controlled. All LiveChat users will have access to this section but their abilities will vary based upon when there they are an Agent or an Admin user.



As you navigate throughout the system by selecting one of the icons, you may be brought to a screen that is further sub-divided. These new selections will appear in a margin just to the right of the section icons.

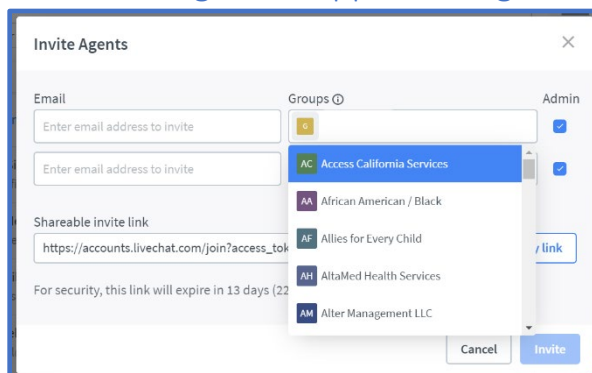
For example, the “Reports” section is further sub-divided by different categories of reports.

Lesson 3 – LiveChat Creating and Managing Supporters/Agents

Within the LiveChat application users of the tool are referred to as “Supporters/Agents”. For the CalHOPE Connect program, these will be any of the staff from the contractor agencies, CalMHSA, and/or its partners who are engaging with those in need of support. Each contracting organization will be responsible for adding and managing their staff as “Supporters/Agents” within the LiveChat application.

The LiveChat application will be shared by several contracting organizations. As such, configurations of LiveChat will be shared across all organizations and Supporters/Agents using the tool. As CalHOPE Connect operations evolve, there may be coordination with CalMHSA and or other contract organizations to implement rules for managing Agent accounts.

Inviting New Supporters/Agents



Creating “Supporters/Agents” is very easy and the process is referred to as “Inviting an Agent”.

1. Go to the Supporters/Agents section in the app.
2. Click on Invite Supporters/Agents.
3. Enter your teammates’ emails.
4. Assign the Agent to one (or more) Groups
5. Choose a role for them.



Groups: LiveChat allows for the grouping of Agent user accounts based upon similar characteristics (More on this later in the document). For the CalHOPE Connect implementation of LiveChat each Contractor Agency and the specific populations covered within the FEMA grant have been created as Groups. As the CCP Coordinator/Supervisors from each agency create LiveChat Agent accounts for their staff, please assign each Agent to the Group associated with your Contract Agency **and** any one of the populations the Agent and your Agency are qualified to support.



Agent "Roles": In the system there are two "levels" of users: Admin and Agent. Users identified as "Admin" have a higher level of access within the system. Only two individuals from each Contractor Agency will be identified as "Admin". All other users should be set-up as "Agent".

Once you click the "Invite" button, the new Supporters/Agents will get invitations to their inboxes with instructions on what to do next.

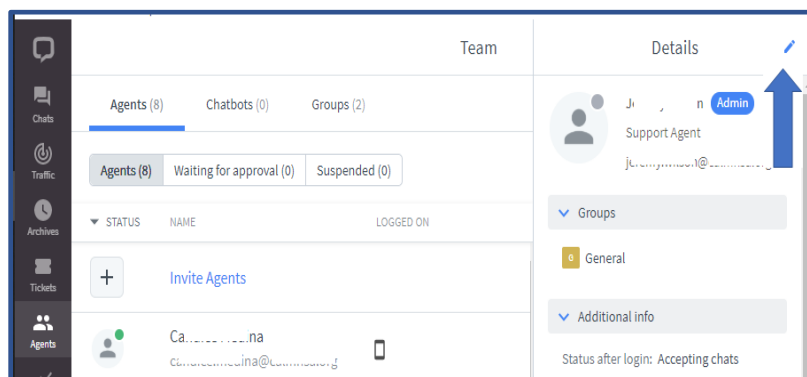
Editing Agent Accounts

Once an Agent has been created, their accounts can be updated. The Supporters/Agents will have the ability to update their own account, but they will not be able to update other Supporters/Agents' accounts. Additionally, the criteria an Agent can update will be limited.

LiveChat users who are identified as "Admins" can update all Agent/User profiles and are able to change more characteristics.

To edit an Agent's profile:

1. Go to the Supporters/Agents section.
2. Choose the profile from the list.
3. Click on the pencil icon in the top right corner and then make your changes.
4. Save changes when you are finished.



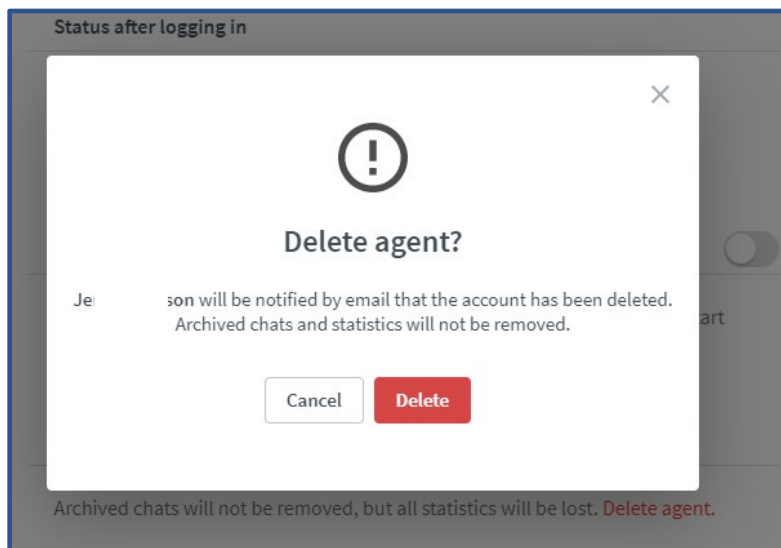
Some of the edits that an Admin might make to an Agent's account might include:

- **Update a Password** - If the Agent forgot their password.
- **Add/Edit Groups** – If the Agent has expanded responsibilities or potentially changed Agencies the “Groups” to which they are assigned should be updated.
- **Change Permissions Level** – If an Agent has been promoted to a manager, their LiveChat account might be upgraded from “Agent” to “Admin” privileges.
- **Chat Limits** – Increase or Decrease the number of active chats that can be assigned to an Agent.

Deleting an Agent Account

Deleting an Agent/User LiveChat Account is performed via the same steps as editing the account but this is an important function and so it is being detailed further.

When a staff member leaves an organization, you will want to make sure access to their LiveChat account is deactivated. This action is referred to as “Deleting an Agent”. When this action is performed, archived chats will not be removed, but all statistics/report data will be lost for that Agent. Before deleting an Agent, print out or save to a file, that Agent's statistics and report data .



To Delete an Agent's Account:

1. Go to the Supporters/Agents section.
2. Choose the profile from the list.
3. Click on the pencil icon in the top right corner.
4. Scroll to the very bottom of the form.
5. Click on the “Delete Agent” link
6. Confirm the deletion by clicking the “Delete” button.
7. Save changes when you are finished.

Lesson 4 – Creating and Managing Groups

“Groups” in LiveChat are used to consolidate Agent/User accounts. Groups are particularly useful when you have multiple Contractor Organizations using LiveChat.



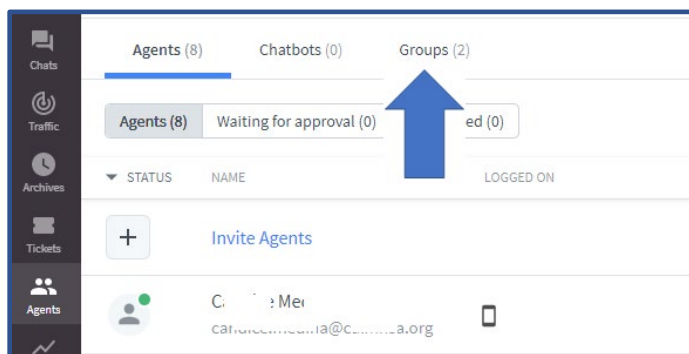
Please note: For the implementation of LiveChat to support the CalHOPE Connect program, all needed Groups have been created in the system. As such, it is anticipated that CCP Coordinator/Supervisors from the various Contract Agencies will not need to manage (Add/Edit/Delete) these existing Groups. None-the-less, the information on how to manage Groups is provided should the need one day arise.

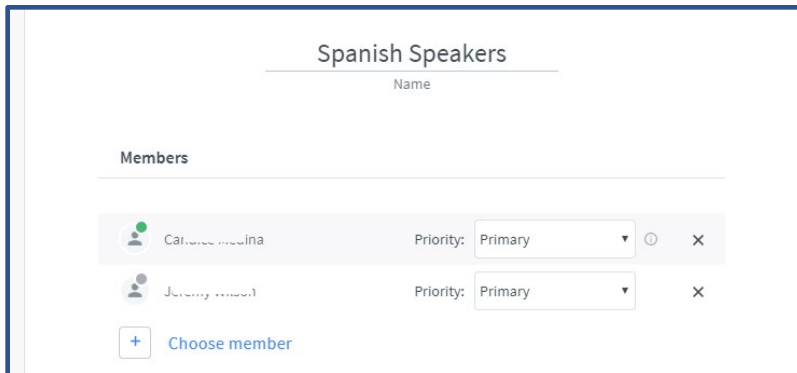
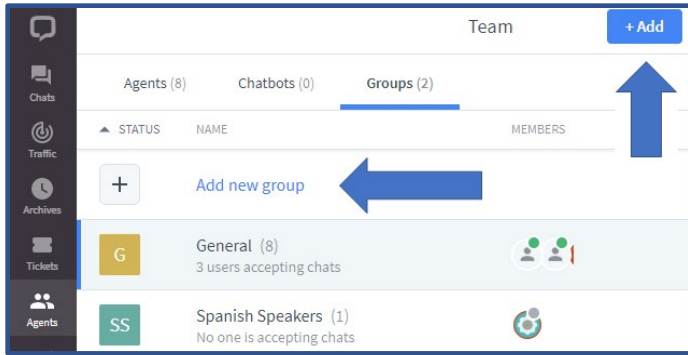
Groups can be used in several different ways:

- Routing Chat Requests - For example, in the CalHOPE Connect use of LiveChat, Visitors can select a population-specific webpage and from there, initiate a chat with an Agent. If there is only one Contract Provider who have staff with the cultural competency to work with this Population we can create a “Group” for those Supporters/Agents within that Contractor Agency and direct all traffic from that webpage to Supporters/Agents associated with this group.
- Group Canned Responses – LiveChat allows you to create pre-defined text responses to be used by Supporters/Agents. These are referred to as “Canned Responses”. Once Canned Responses are defined, they are able to be categorized by assigning them to Groups. For example, you may want to pre-define some of your responses in both English and Spanish. You could then associate the Spanish Canned Responses with the Group created for your Spanish Speaking Supporters/Agents.

Creating Groups

The action of creating Groups is performed through the “Supporters/Agents” section of the LiveChat application. Across the top of this screen, you select the “Groups” list and then you have two links which will allow you to “+Add New Group”.





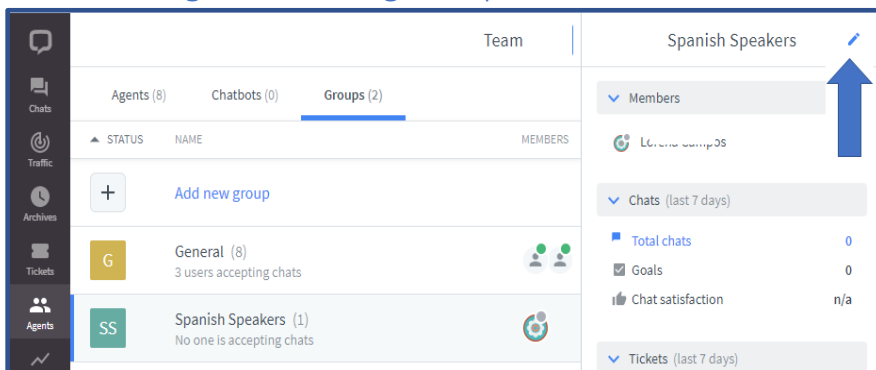
When creating a new Group, the steps are:

1. Click “Add New Group”
2. Define a Name for the Group
3. Select Supporters/Agents to be “Members” of this Group
4. Define each Member’s Priority within the Group
5. Click “Save Changes” Button

Setting Agent “Priority” will determine who should get chats first in a group. There are two settings:

- **Primary**—Supporters/Agents with primary priority always get chats first.
- **Secondary**—Supporters/Agents with secondary priority only get chats if all Supporters/Agents with primary priority can’t take any more chats.

Editing and Deleting Groups




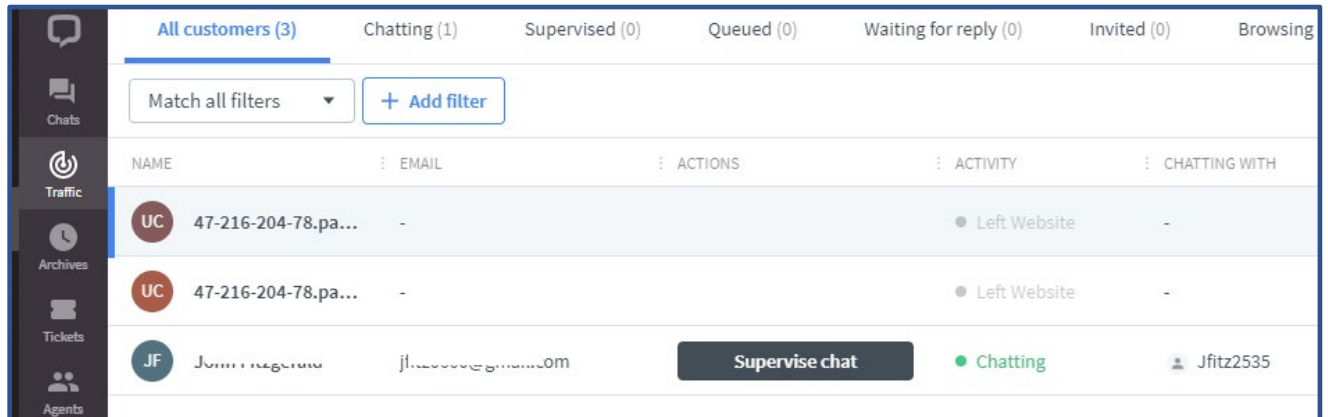
To edit a Groups:

1. Go to the Supporters/Agents section.
2. Select “Groups” in the Top of Screen
3. Choose the Group to be edited
4. Click the pencil icon (top-right corner)
5. Make your edit or...
6. Click on the “Delete Group” link
7. Click the “Delete” Button

Lesson 5 – Managing Traffic



Represented by the  icon, the “Traffic” section of LiveChat displays a list of the Visitors currently engaged in active chats as well as people who are browsing the CalHOPE Connect website. The information about the Visitor being displayed will be determined by what has been provided up to this point.



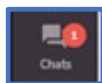
The screenshot shows the LiveChat interface with the 'Traffic' section selected. The top navigation bar includes 'All customers (3)', 'Chatting (1)', 'Supervised (0)', 'Queued (0)', 'Waiting for reply (0)', 'Invited (0)', and 'Browsing'. Below this is a filter section with 'Match all filters' and '+ Add filter'. The main table has columns for NAME, EMAIL, ACTIONS, ACTIVITY, and CHATTING WITH. The table contains three rows: two for visitors with IP addresses and one for an active chat with agent JFitz2535.

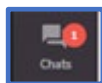
	NAME	EMAIL	ACTIONS	ACTIVITY	CHATTING WITH
UC	47-216-204-78.pa...	-		● Left Website	-
UC	47-216-204-78.pa...	-		● Left Website	-
JF	John Fitzgerald	jl.fitz@calhope.com	<button>Supervise chat</button>	● Chatting	Jfitz2535

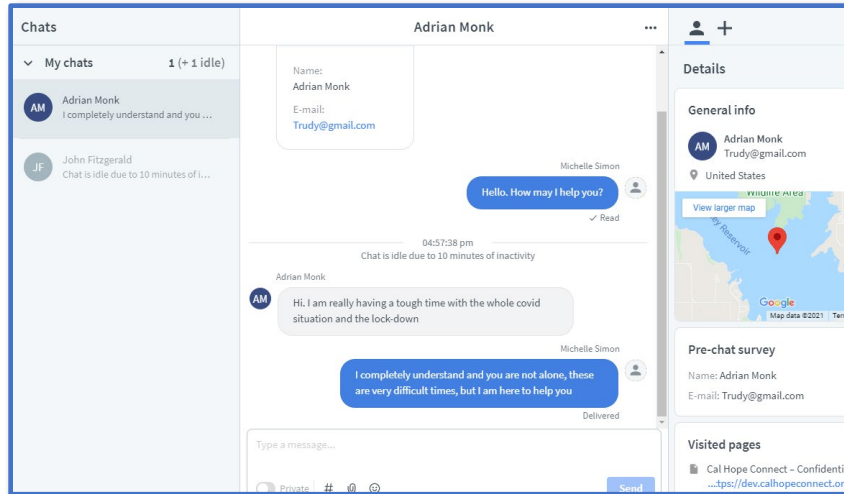
For example, if a person is on the CalHOPE Connect website but they have not initiated a chat, and therefore not provided any information about themselves, only the IP address/internet service provider (ISP) of the Visitor is displayed. For others who are engaged in chats with an Agent, or who have previously engaged in a chat via CalHOPE Connect’s LiveChat, it will display more detailed information such as their name and e-mail.

From the “Traffic” section, Supporters/Agents will be able to select visitors from the queue and engage in a chat. Additionally, from here all Supporters/Agents have the opportunity to “Supervise” on-going chats between a Visitor and another Agent.

Lesson 6 – Managing Chats



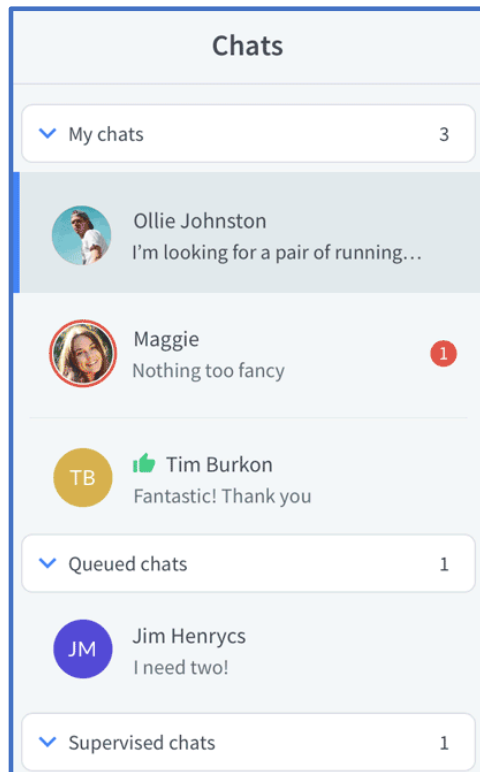
Represented by the  icon, the “Chats” portion of the LiveChat application is where most of an Agent’s activities will be performed. When individuals seeking assistance initiate a Chat session, they will be assigned to Supporters/Agents based upon different variables or sit in a queue waiting for an Agent to engage. In the “Chat” portion of the LiveChat application is where these interactions will occur:



As represented in the screenshot above, the “Chat” section of LiveChat is divided into three sections: Chat List, Chat Feed (Currently “Adrian Monk”), and Visitor Details.

Chat List

The left-hand section of the screen, “Chats” shows all active/recent chats. The chat list is divided into three sections: my chats (all of your ongoing conversations), queued chats (Visitors who are waiting to start a chat) and supervised chats (conversations you are currently supervising).



My Chats – Provides a list of your ongoing chats. You can switch between them by clicking on the names of Visitors. Within “My Chats” there are two types of chat statuses:

- **Active** - either you or the Visitor has written something recently, these chats stay at the top of your list as they require your attention the most. If you don’t respond in 40 seconds a red rim will appear around the circle to remind you that you should respond immediately.
- **Inactive** - the Visitor hasn’t responded for a certain time (you can set the time after a chat turns inactive in Settings); it doesn’t necessarily mean that a Visitor has left, they might just need more time to respond; all inactive chats are greyed out and are placed at the bottom of the list.

Queued Chats - Visitors who are waiting for an available agent. If you have capacity, just pick a visitor from the list to start a conversation.

Supervised Chats – All Supporters/Agents can “Supervise” chats that are currently on-going between a Visitor and

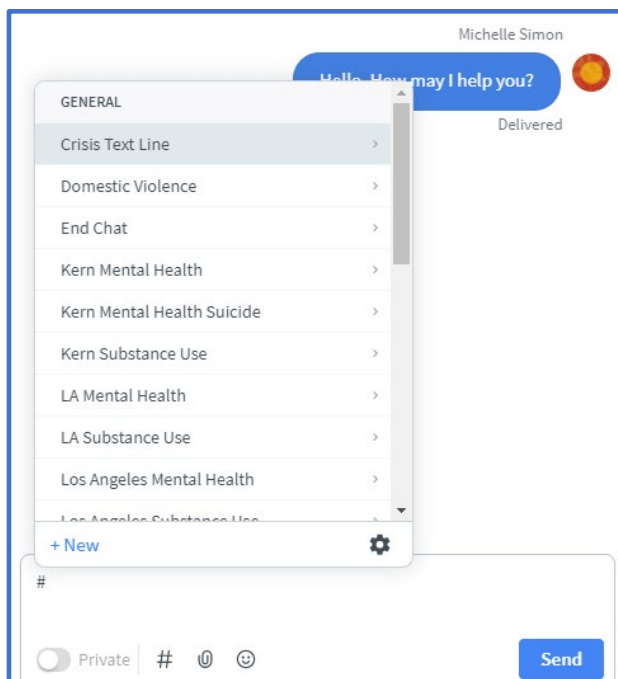
another Agent.

Chat Feed

The middle section of the screen is the actual chat selected from “My Chats.” The top section shows the history of the active chat (the entire back-and-forth between the Visitor and the Agent). If a Visitor is returning to the CalHOPE Connect website and they have not cleared their cookies since their last conversation, LiveChat is able to associate the Visitor with the archives of past chats and the back-and-forth from those previous chats will also be available in the chat history window.

The bottom section of the Chat Feed is the text area where Supporters/Agents will type in their responses. Visitors are given a heads-up that you are typing something, so they know they need to wait for your reply. Once you press enter, your message will be sent to the visitor. And you will see it in the chat history.

Within the Chat Feed there are a number of valuable functions:



Canned Responses - Canned responses are set messages that can be inserted with shortcuts. To use canned responses in chats or tickets, simply type in # followed by the shortcut for the response you wish to use.

When using shortcuts, it is important to remember that the system will look for the text entered after the #. Inclusion of any extra spaces, incorrect spelling, etc. can keep you from finding the correct/desired shortcut. As such, when searching for a shortcut remember:

- No space between the # and the shortcut name.
- The less characters you type, the wider your search criteria and the more shortcuts will pop up for you to choose from.

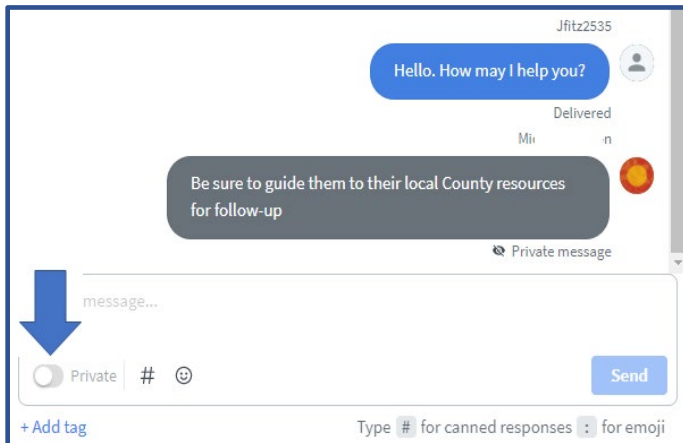
For the CalHOPE Connect implementation, several shortcuts have been developed for you to use. For each California county, one or more shortcuts have been developed to provide the contact information for resources such as the Mental Health Department, the Substance Use Department, and/or Suicide Hotline.

Additional resources have been added to LiveChat as shortcuts. Some of these include:

- #Warm Line – Provides the telephone number for CalHOPE Warm Line delivering COVID Counseling and Support
- #Crisis Text Line – Provides the text number for the 24 Hour Crisis Text Line
- #Domestic Violence - Provides telephone information for the national 24-Domestic Violence

Prevention Hotline

- #Suicide – Provides the telephone and text numbers for the national 24-Hour Suicide Prevention Hotline
- #TrevorText - providing crisis intervention and suicide prevention services to lesbian, gay, bisexual, transgender, queer & questioning youth.
- #Privacy Policy – Provides a link to the CalHOPE Connect Privacy Policy.

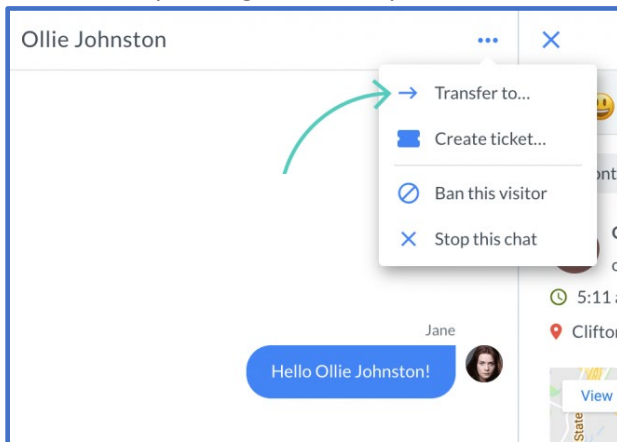


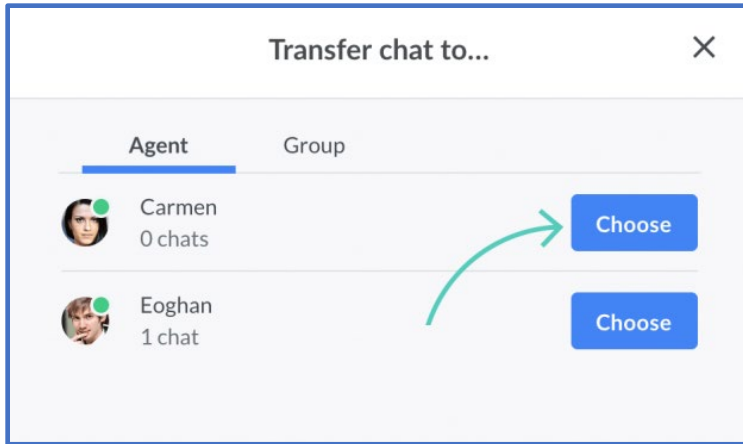
Supervised Chats – All Supporters/Agents can “Supervise” chats that are currently ongoing between a Visitor and another Agent. Those who are supervising are able to see both sides of the communication (Visitor’s and Agent’s input) but the Visitor will not be able to see “private” messages between Agent and CCP Coordinator/Supervisor.

Private messages are easily identifiable by the dark-gray bubble in which they appear.

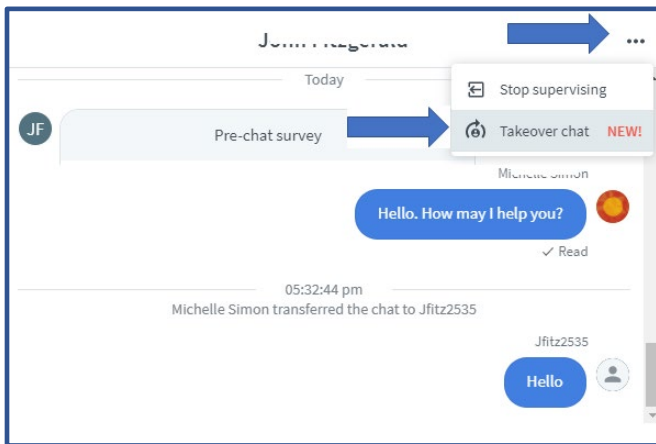
For the Agent engaged with the Visitor, they will need to identify which messages are to be considered private by toggling the “Private” button.

Transferring a Chat - In the upper-right corner of the “Chat Feed” are three dots (a.k.a. Ellipses). Here you will be presented with a few additional functions associated with the active chat. Most notably of these is the ability to transfer a Chat. Effective Peer Counseling requires that a level of rapport and trust be built with the Visitor. The CCP Counselor Guidance may be helpful in determining when to transfer a chat. Follow your organization’s protocol for transferring a chat.





Whenever you are making a chat transfer, let the Visitor and the other Agent know what you are planning to do (and why). If you are on the receiving end of a chat transfer, let the Visitor know that he, she, they do not need to explain the situation again (Supporters/Supporters/Agents can see the chat history).



Taking Over A Chat

There are varying reasons why an Agent supervising a chat may wish to take it over.

This ability is only available to LiveChat Supporters/Agents/Users that are identified as “Admin” thus allowing them additional privileges in the system.

To take over a chat:


- Click the three dots (a.k.a. Ellipses) in Upper-Right
- Click “Takeover Chat”

Visitor Details

The last section of the “Chat” screen is the Visitor Details found in the right-hand pane of the screen. If the Visitor has used the LiveChat function in the past, the amount of information in the Details section may include:


Details

General info

 **Douglas**
douglas@reynholm.com

🕒 12:59 pm local time

📍 North Bergen, New Jersey, United States



Pre-chat survey

Name: Douglas


E-mail: douglas@reynholm.com

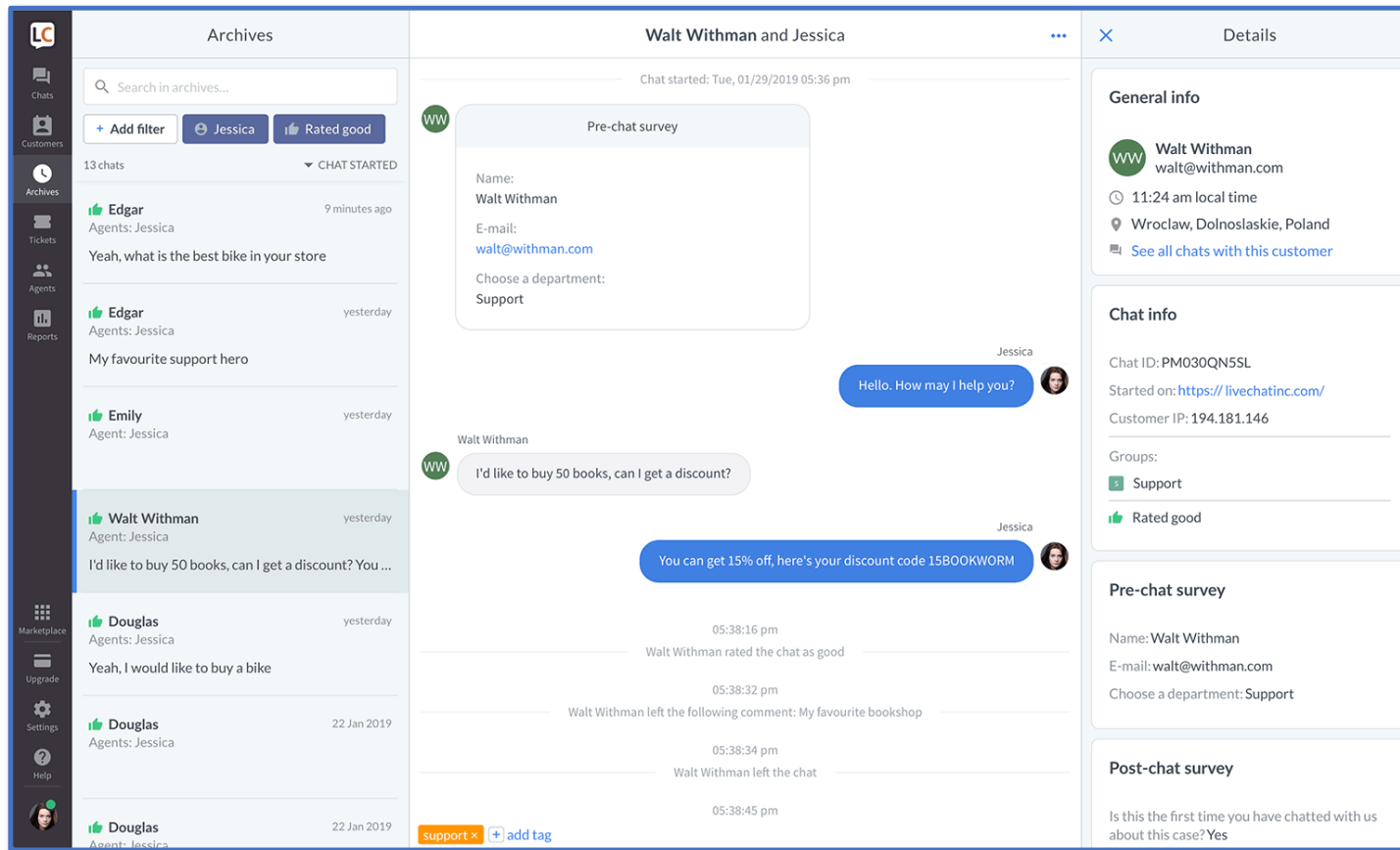
- **General Info**—shows name, e-mail address, location (an address and a map), time zone.
- **Pre-chat survey**—shows information provided in the pre-chat survey.
- **Post-chat survey**—displays information from the post-chat survey (this widget is visible only when the Visitor has ended the chat and submitted a post-chat survey).
- **Tickets**—shows links to all tickets assigned to a particular Visitor.
- **Visited pages**—provides names (and links) of pages visited during this session.
- **Additional info**—contains the number of times the Visitor visited your website, number of chats, and the date of the Visitor’s last visit.
- **Technology**—shows the Visitor’s IP address, OS/Device, and browser information.

All of this information can be used to build rapport and trust with the Visitor.

Lesson 7 – Reviewing Archives




Represented by the  icon, the “Archives” section of LiveChat stores all past conversations between Supporters/Agents and Visitors. Access to past conversations can be helpful in many ways. For return Visitors, being able to review the content of previous conversations can help establish rapport and provide better peer support. In general, access to archived conversations can help you understand what your Visitor/Customer may need.

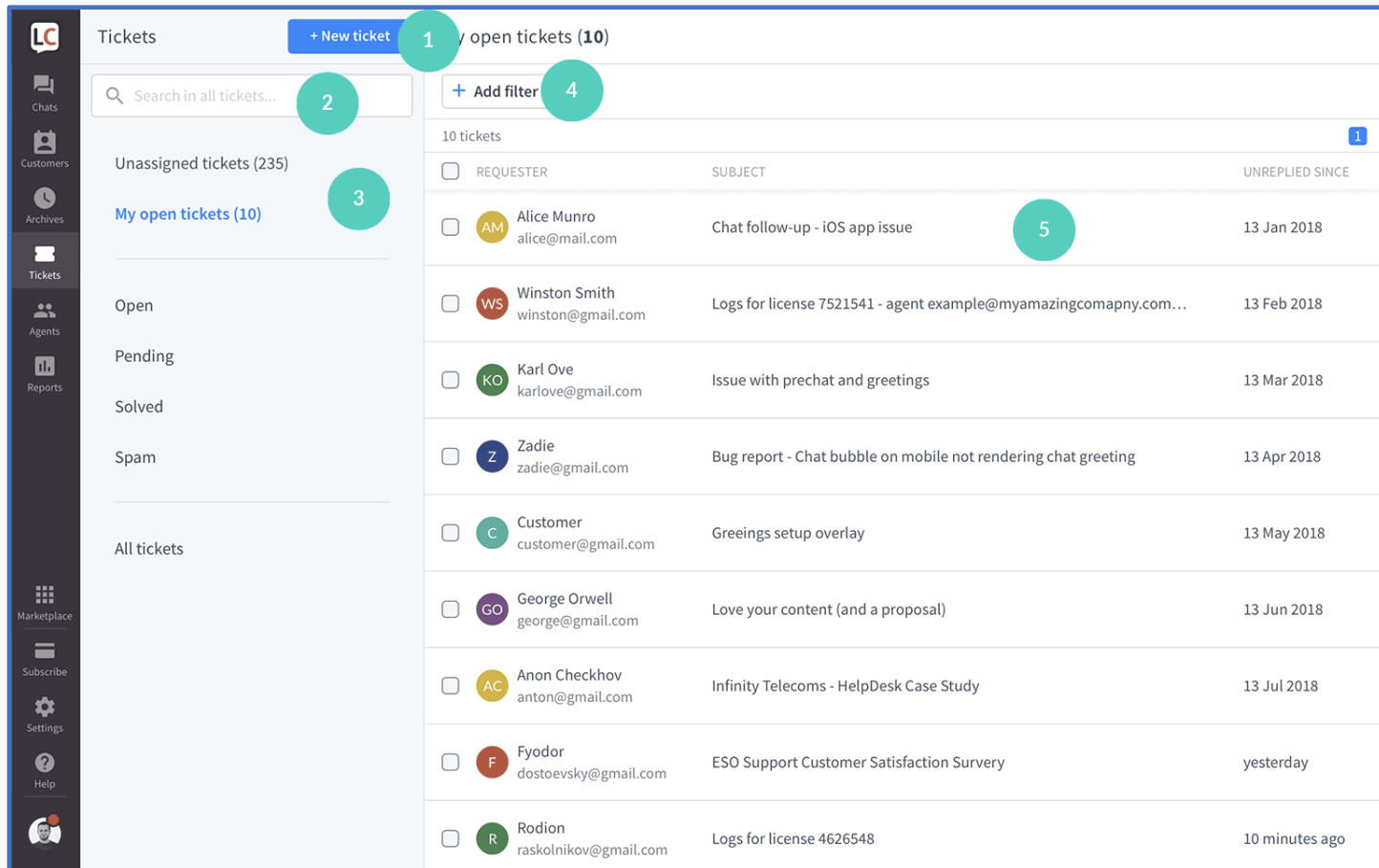
A screenshot of the LiveChat interface showing the 'Archives' section on the left and a detailed chat view on the right. The 'Archives' section lists 13 chats, with the selected chat by 'Walt Withman' highlighted. The chat view shows a pre-chat survey, a message from Jessica asking 'Hello. How may I help you?', and a message from Walt Withman asking for a discount. Jessica responds with a 15% discount code '15BOOKWORM'. The chat ends with 'Walt Withman left the chat'. The right sidebar contains 'General info' (Name: Walt Withman, Email: walt@withman.com, Location: Wroclaw, Poland), 'Chat info' (Chat ID: PM030QN5SL, Started on: https://livechatinc.com/), 'Pre-chat survey' (Name: Walt Withman, E-mail: walt@withman.com, Department: Support), and 'Post-chat survey' (Is this the first time you have chatted with us about this case? Yes).

Lesson 8 - Tickets

CalHOPE Connect is a new platform. There may be times when no Supporter/Agent is available to the Visitor/Customer. In such an instance, a Visitor/Customer interested in receiving support will be able to create a Ticket from the CalHOPE Connect website. A Supporter/Agent will be assigned to the Ticket once it has been created and the Supporter/Agent will receive an e-mail notification.

An Agent can review and follow up to these “Tickets” by clicking on the  icon.





1) New Ticket – The majority of tickets will be created by a Visitor/Customers who has accessed the CalHOPE Connect when there were no Supporter/Agent available. Tickets can also be created for/when:

A. Supporting ongoing communication.

A Supporter/Agent is experiencing a challenging interaction with a Visitor/Customer. The Visitor/Customer requests that a Coordinator follow-up. The Supporter/Agent will then create the ticket. The Visitor/Customer’s name and e-mail address will be included in the Ticket that is assigned to the Coordinator. Each Organization should provide Supporters/Supporters/Agents and Coordinators with their follow-up protocol.

B. Connecting a returning Visitor/Customer to a requested Supporter/Agent.

A Visitor/Customer enjoyed their last session and has returned. When they enter Chat, they are connected to the first available Supporter/Agent. The Visitor/Customer recognizes the Supporter/Agent they are chatting with is not the same Supporter/Agent from the last session. The Visitor/Customer requests to be re-connected to the Supporter/Agent from the last session. A Ticket can be created and the original Supporter/Agent could follow-up with the Visitor/Customer during their next scheduled shift.

2) Search Bar -This field is used to search all existing/historical records to find a ticket based upon specific words.

3) Tabs – As users of LiveChat activity follow-up on tickets, they are able to assign different categories to the tickets. Later these categories can be used to search/filter the tickets based upon these categories:

- Unassigned Tickets
- My Open tickets
- Open
- Pending
- Solved
- Spam
- All Tickets

4) Add Filter – Allows for further filtering of a list of tickets based upon criteria such as Meta Tags and/or Dates.

5) Ticket List – this is the section of the form where you select the Ticket you are following up on. Simply hovering over a ticket will provide a preview while clicking on the ticket record will open it up in full.

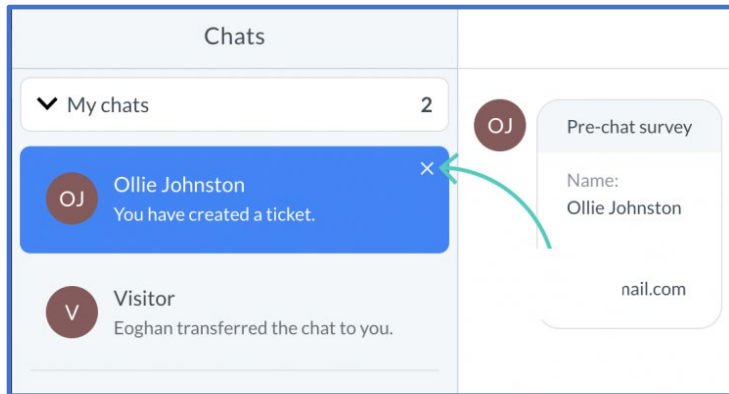
- 1) **Ticket Subject**—edit it by clicking on the pencil icon.
- 2) **Ticket Feed**—the entire ticket history.
- 3) **Text Area**—here you can reply to the ticket, create a private message, add files and change ticket status.
- 4) **Ticket Info**—basic information about the ticket.

- 5) **Assignee**—This is the Agent or CCP Coordinator/Supervisor to whom the ticket is assigned. The Assignee can be updated here.
- 6) **Groups**—When a ticket is created, in addition to the assignee, the ticket is associated with one or more “Groups”. These are groups of LiveChat users and thus, when tickets are created, there is one person assigned for direct/next action, but whole groups of LiveChat users are made aware of the ticket’s existence.
- 7) **Requester**—this is the person that initiated the ticket. Here you can view the Visitor’s name and email; you can also add additional people to keep them in the loop.
- 8) **Recent Tickets**—all tickets that are assigned to the same email.

Lesson 9 – Ending a Chat

Close each chat in a timely matter after you have supported the Visitor/Customer. The act of closing the chat will trigger a post-chat survey in the Visitor/Customer’s chat window. Encourage each Visitor/Customer to complete this survey.

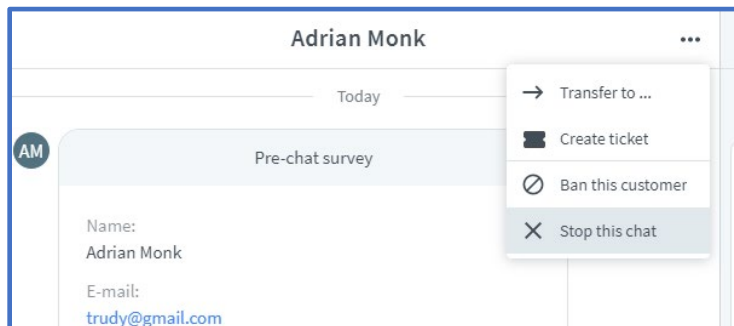
There are two ways to close a chat: from the chat list and from the chat feed.



How to end a chat (chat list)

Hover over the name of the Visitor in the chat list. An x should appear in the top right corner.

How to end a chat (chat feed)

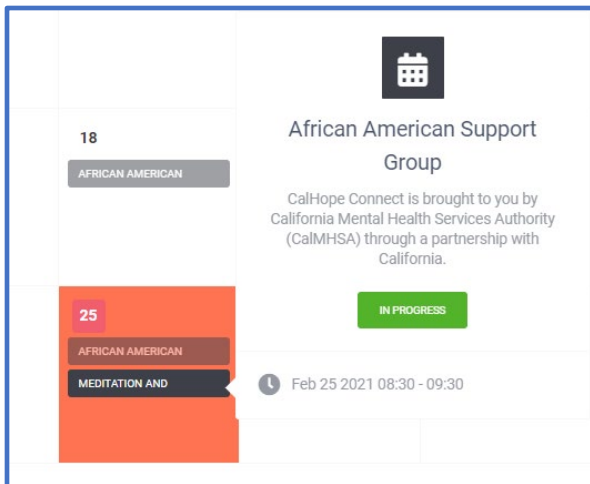
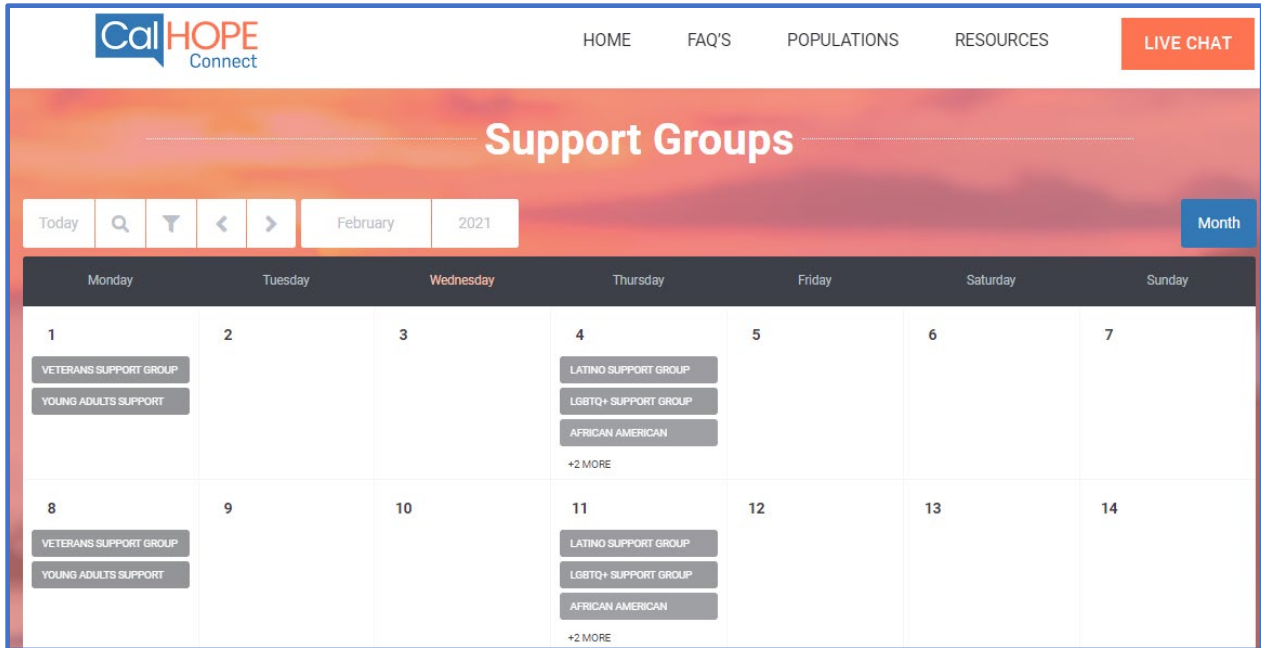


Click on the three dots icon “...” in the top right corner and then click “Stop this chat”.

Lesson 10 – Managing Calendars on CalHOPE Connect

So far all lessons in this document have been related to the LiveChat application. Now, we will cover the second tool that staff in the CCP Coordinator/Supervisor role will use: WordPress. WordPress is a tool used to create and maintain the CalHOPE Connect website. CCP Coordinator/Supervisors given access to WordPress will be able to manage the interactive Calendars on the CalHOPE Connect website.

The CalHOPE Connect website is divided into different pages for the different Populations identified within the FEMA grant that governs this project. Within each of these pages (e.g. Populations) a different calendar is provided allowing for events to target specific population groups. Events that might apply to multiple groups can be applied across multiple calendars.

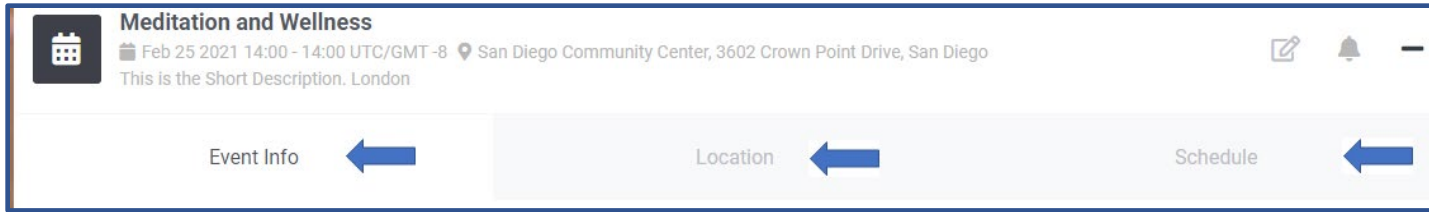


When Visitors to the CalHOPE Connect website are selecting events from the Calendar, the detail presented will vary based upon their actions. If the Visitor hovers their mouse over an event in the calendar, some information about the event will be presented in a “Fly-Over”.

If the Visitor wants additional details on a Calendar Event, they must follow a two-step process. First, they must click on the Date/Day of the Event. This will expand that Date/Day and display a list of all Events scheduled on that Calendar for that Date/Day.

Second the Visitor will need to click on the Event in which they are interested. This will then expand that Event and provide the details of the Event. The amount of information provided to the Visitor is dictated by the information entered when the Event was created by the Contract Agency.

The information about the Event may be contained within several Tabs that will appear across the top of the Event Detail page:



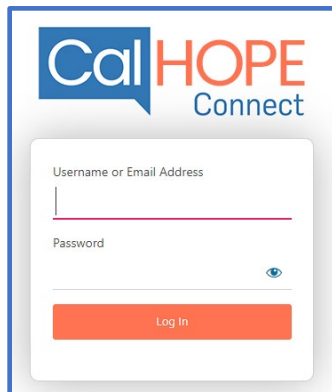
Logging Into Calendars

CalMHSA will provide WordPress user credentials to the identified CCP Coordinator/Supervisors as each Contract Agency is on-boarded to the CalHOPE Connect project.

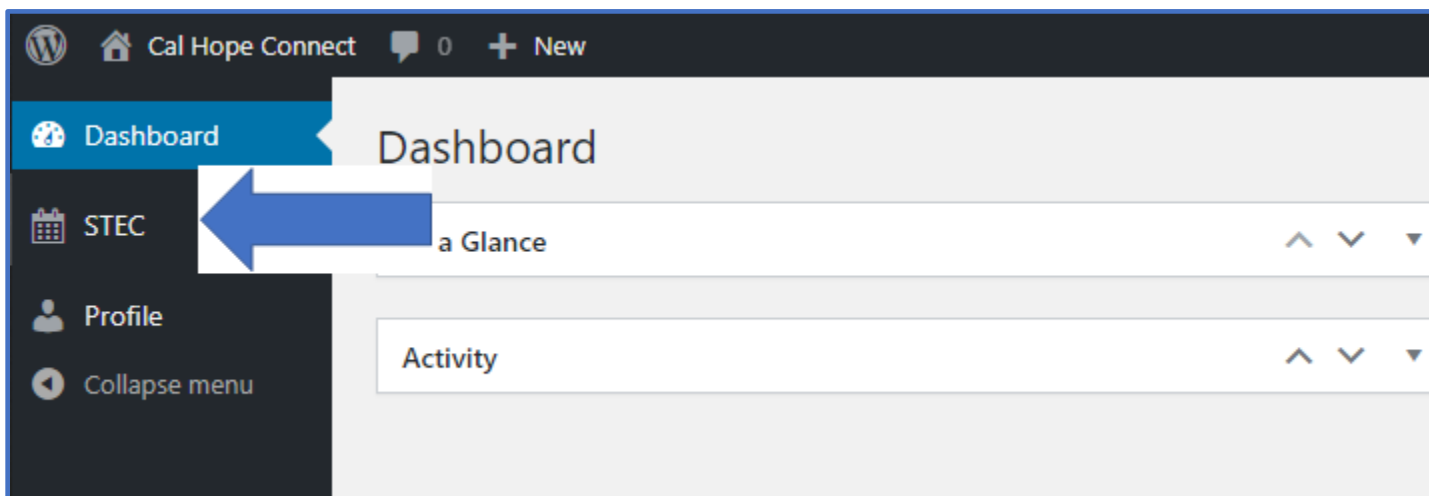
The log-in page to edit the Interactive Calendars is located via this URL:

<https://www.calhopeconnect.org/wp-admin/>

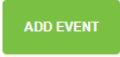
You will be presented this log-in page. Please note that this log-in is different than the log-in to the LiveChat application.



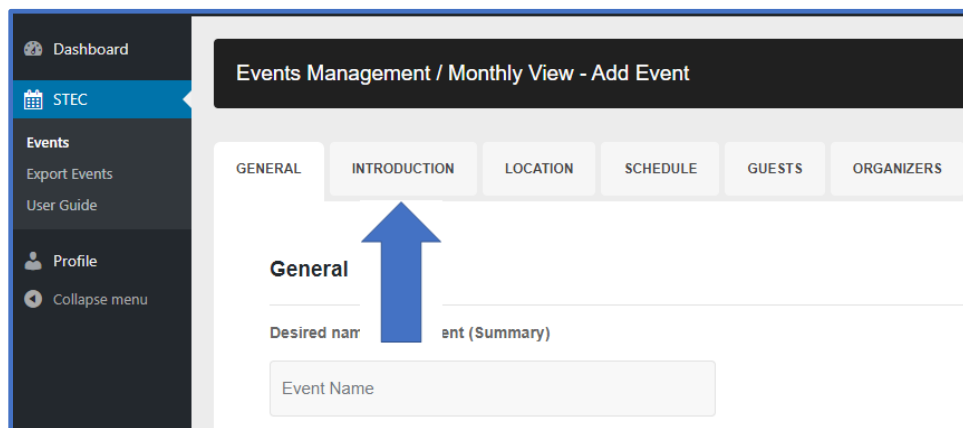
Once you have logged-in, you will be presented the WordPress Dashboard. Your user account will allow you to edit/manage the calendar on the CalHOPE Website. To access this, click the "STEC" Calendar Icon in the upper-left corner of the screen:



Adding Calendar Events

Once within the “STEC” Calendar page, at the top of the screen will be the  button. Clicking on this will bring you to the “Events Management / Monthly View – Add Event” Page. This page is further subdivided into eight (8) tabs presented across the tops of the page (e.g. General, Introduction, Location, Schedule, etc.). To add an event to the interactive Calendars it is **not** necessary to complete all fields in all these tabs.

This document will only cover the primary tabs and fields that should be completed when adding an Event to the Calendar.



General Tab

The “General” tab of the “Add-Event” page is the foundation of any Calendar event. In fact, an event can be created by just filling in the required field on the “General” tab.

Below is a list of the required fields and instructions as to how to complete them. If a field is not identified in this list it can and should be left blank or the default value presented by the system should be used/kept.

Desired Name of the Event– This is the information that is presented on the Calendar. This is all the information a Visitor will see unless they expand the events for a particular day. Given this, it is advised that descriptions be concise. Keep in mind that each Population will have their own Calendar so you do not need to include information about the Population in this field.

Category – **This is a very important field.** The “Categories” correspond to the Populations and thus the different calendars that appear on each Population’s page on CalHOPE Connect. You can select one “Category” or select multiple categories by holding down the <Ctrl> key and clicking each desired category with your mouse. By selecting multiple categories, you will be adding this Event to each Category/Population’s Calendar.

Starts-On – This series of fields is where you define the Date and Time that the Event will start. Note that the Time fields are not clearly identified and are just represented by two fields with “00” defaulted. **Furthermore, when identifying the time, this tool uses Military Time.** These fields are pull-down fields allowing you to select from a pre-determined list of values.

Set Repeater – This is a Button with in the “General” tab. When clicked a new window is presented which will allow you to define an event as re-occurring. (For those familiar with MS Outlook, this is similar to the “Recurrence” definition when adding an appointment or meeting to your Outlook Calendar.)

- Repeats – Identify the recurrence pattern (Daily, Weekly, Monthly)
- Repeat Gap – Defines gaps in the pattern to support occurrences such as every-other day events
- Repeat Ends On – The date of the last

occurrence for this Event

- Date Exceptions – Exclude identified dates that otherwise would be included in the pattern. (For example: Thanksgiving or other Holidays)

Search Key Words – The interactive Calendars on the CalHOPE Connect website allow visitors to search for events based upon key words. If you want to have your events discoverable by words/terms other than those in the Event “Desired Name of the Event” field, enter those words/terms here. These words can be separated by comas or simply by spaces.

Once these fields are completed, you can move on to further define the Event through the other Tabs or Add the Event with the information entered and it will be posted to the Calendar(s) on the CalHOPE



Connect Website. You “Add the Event” by clicking the button on the bottom of the “General” tab.

[Introduction Tab](#)

The “Introduction” Tab allows you to add long and short narrative descriptions that will be visible by website visitors based upon their actions in the interactive Calendar. Narrative descriptions (long or short) are not required to create an Event on the Calendar and the text entered in either/any narrative description fields are not included in the keyword search within the interactive Calendar.

The two fields in which you can enter these descriptions are:

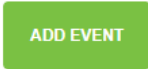
Introduction – This allows for a long narrative description of the Event. Visitors viewing the calendar will only see this information after they have selected the Event from the Calendar and clicked on it to view all details for the Event.

Short Description – This field allows you to provide a short description of the Event. Visitors viewing the Calendar will be able to see this information in the “Fly-Over” that is presented to them when they hover their mouse over the Event.

Also on the “Introduction” Tab, is the ability to identify an “External Link” for the Event.

External Link - This tool allows you to associate a web-address/link with the event. The Event will need to be selected/clicked by the visitor to view/access the “External Link”. When utilized the “External Link” creates a button on the Calendar Event that when clicked, will bring the user to that webpage. **The “External Link” should be used when creating Events that are supported through On-Line meeting applications such as Zoom, Go-To-Meeting, etc..**

These fields are not required to Add an Event, but it is suggested that these be completed to provide details to Visitors and drive attendance towards your Events.


You can save your changes to the Event by clicking the  button on the bottom of the “Introduction” tab.

[Location Tab](#)

The Location Tab is used when the Event is an In-Person Event and you want to define the address and other location details. When a visitor selects/clicks an Event, they will be presented with a “Location” tab on the Event. In this location tab they will be provided: the Address, a Map of the Address, an opportunity to have directions calculated for them from their desired starting point.

To add location details when creating an Event, on the “Location” tab of the “Events Management Monthly View” screen complete the following fields:

- **Select Event Location** – As you and the other Contract Agencies use the Interactive Calendar Tool, the Locations previously defined will be stored for future use. This first field “Select Event Location” allows you to select from a list of pre-defined locations or “Insert new location”
- **Title** – Give a Name to the Location (e.g. St. Luke’s Methodist Church, Community Center, etc.).
- **Type** – Always keep this as “Physical”
- **Address** – Enter the Street Address
- **City** – Enter the City
- **Country** – Not Required
- **Get Coordinates** – Click on this button and the system will calculate the specific coordinates for the location. Using this will assure a more accurate Map is displayed to the Visitors.
- **Location Details** – Provide a Narrative Description or Special Directions to help people find this event (e.g. Meeting is in the Church Basement. Please use the entrance on the West Side of the Building.)

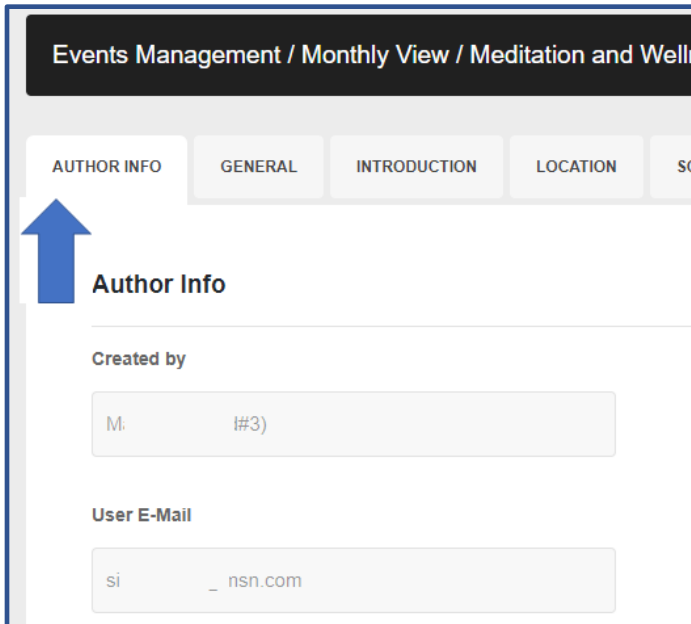
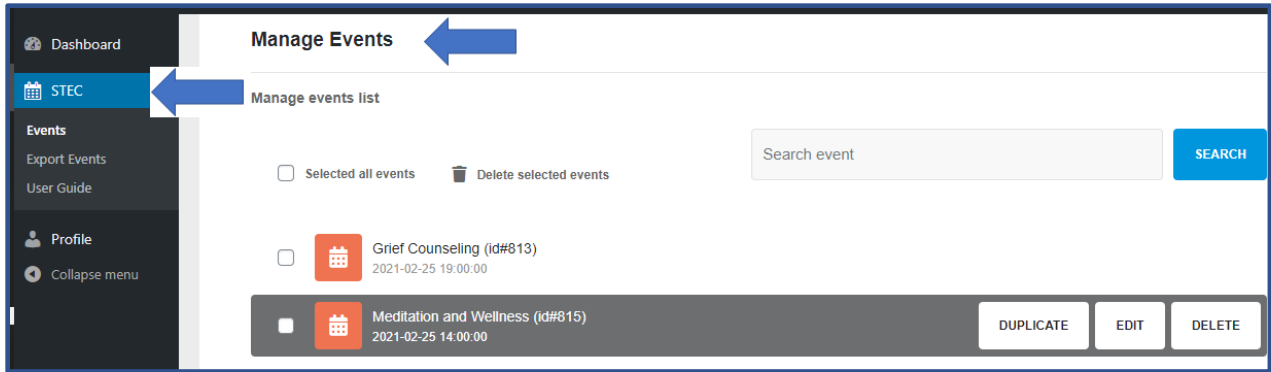
You can save your changes to the Event by clicking the  button on the bottom of the “Location” tab.

[Other Event Definition Tabs](#)

The remaining Tabs available on the “Events Management Monthly View” screen are not required and it is suggested that they not be used.

[Editing Calendar Events](#)

Once Events are added to the Calendar, they can always be updated. Every detail regarding the event that was defined when the Event was initially created can be updated/edited. All Events once added are available in a list under the “Manage Events” section of the STEC Screen.



When an Event is selected from the list, buttons will appear on the right side of the screen. To update/edit select the “Edit” button. Once done the “Events Management / Monthly View – Add Event” Page will be presented. All the Tabs previously discussed will be available for update/edit.

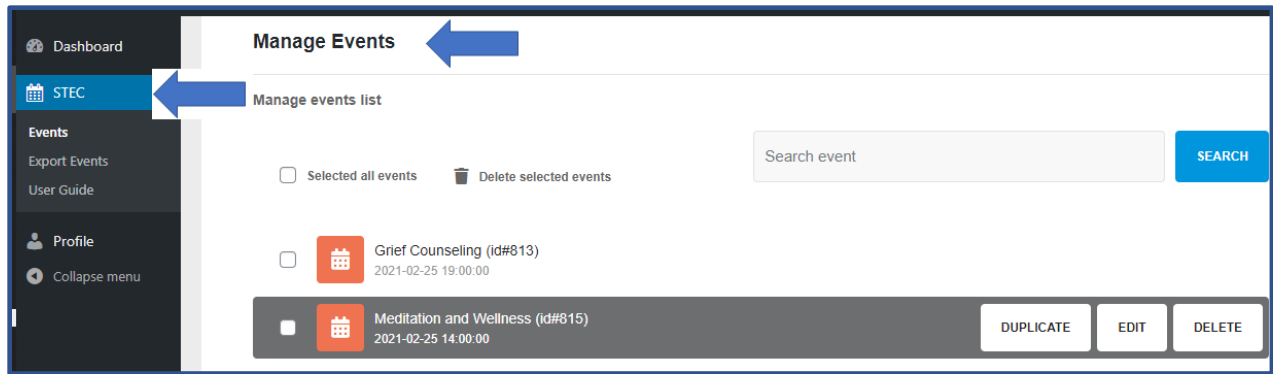
In addition to the Tabs previously discussed, a new Tab called “Author Info” will be presented. This Tab is added after an Event is initially created. In this Tab, you can see information about the person who created the event as well as leave Notes for that person and/or about the Event that you do not want to be public facing.

It is important to remember that the CalHOPE Connect website and the interactive calendars are resources that are shared by multiple Contractor Agencies. Please take care not to edit Events that do not belong to your agency.

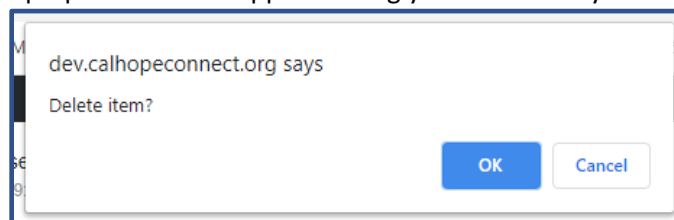
Deleting Events

Once Events are added to the Calendar, they can always be Deleted. Before deleting an event, think about whether the appropriate action would be to edit the details rather than delete the Event entirely.

All Events once added are available in a list under the “Manage Events” section of the STEC Screen.



When an Event is selected from the list, buttons will appear on the right side of the screen. Click the “Delete” button and a pop-up window will appear asking you to confirm your intent to Delete the Event:



It is important to remember that the CalHOPE Connect website and the interactive calendars are resources that are shared by multiple Contractor Agencies. Please take care not to Delete Events that do not belong to your agency.