



# LiveChat Agent User Guide

<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 document 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.

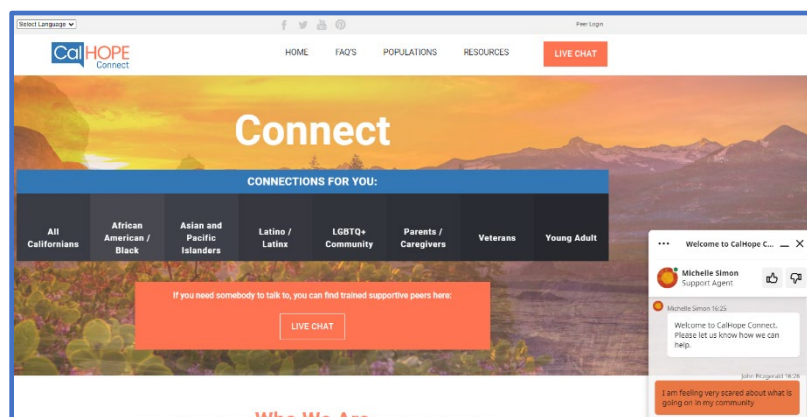
The [Crisis Counseling Assistance and Training Program \(CCP\)](#) has key roles with definitions used in the United States when responding to disasters. CalHOPE's CCP is the first to provide virtual support. While the roles used for CCP remain consistent with the CCP model, this guide uses different 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 learnings and collaboration have been invaluable to supporting Californians.**

## CalHOPE Connect Website

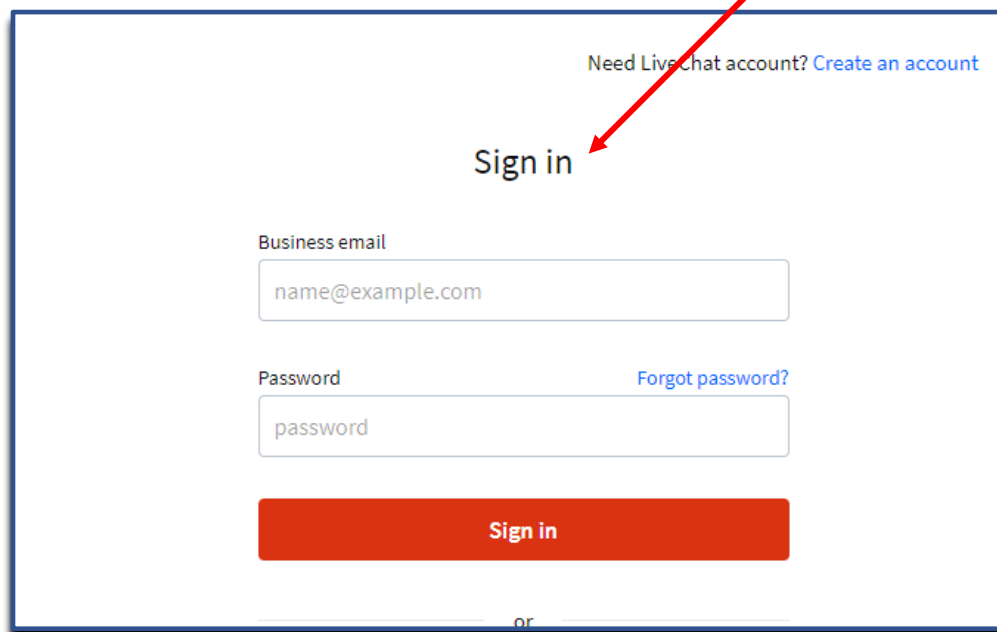
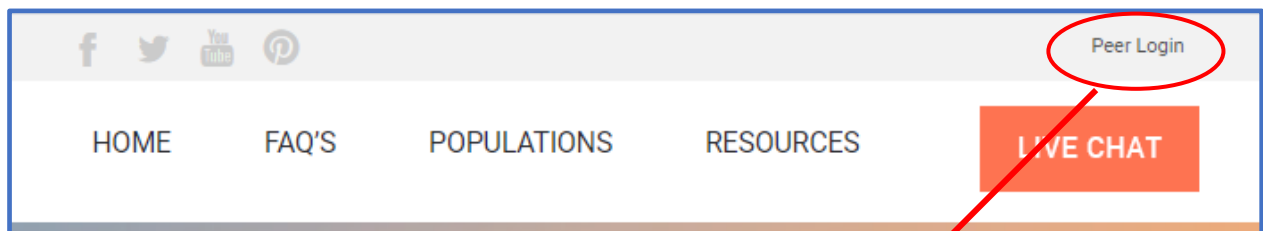
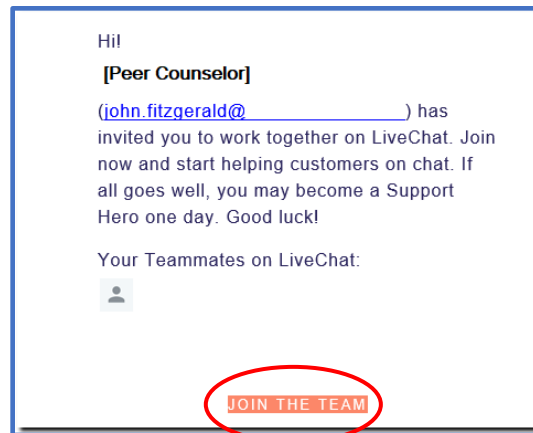
Supporters/Agents can use CalHOPE Connect through the internet, or by downloading the application to smartphone, or another device. This document focuses on the experience of the Supporter/Agent and provides instructions on how to use CalHOPE Connect.



## Section 1: CalHOPE Connect Account Set-Up

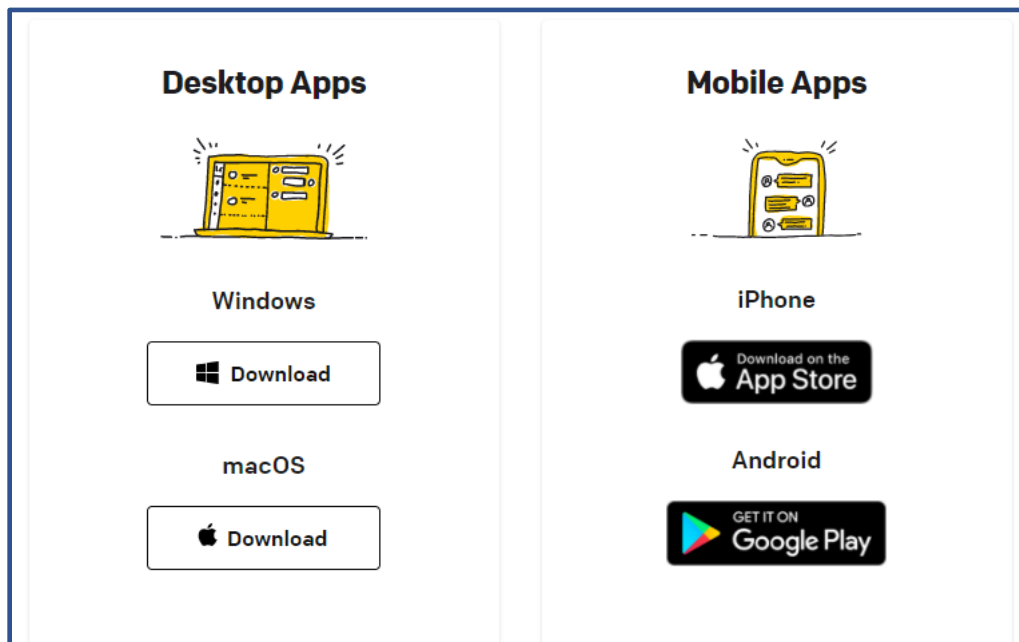
Your organization's Coordinator will register you as a Supporter/Agent with CalHOPE Connect. You will receive an e-mail with a link inviting you to activate your account.

The invitation email will feature a JOIN THE TEAM button. Clicking this button will take you to CalHOPE Connect's web-based platform. A link to the web-based application has been included in the upper-right hand corner of all the CalHOPE Connect pages. You can log-into your account by clicking the "Peer Login" button and entering your e-mail address and creating a password.



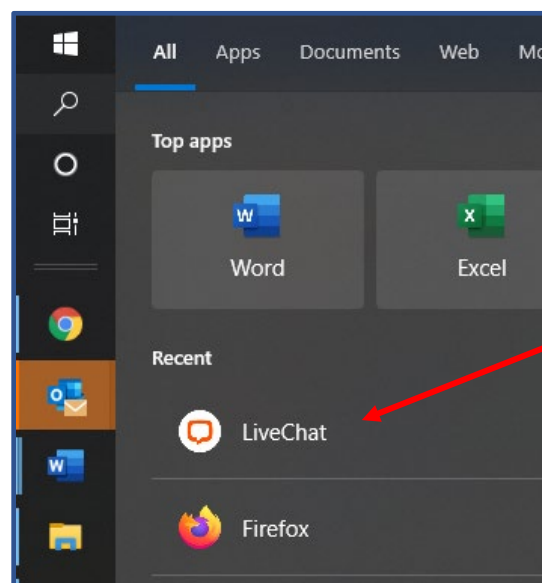
## Downloading and Logging in via the Application

If you will consistently be using CalHOPE Connect then you will want to download the LiveChat application to your assigned CCP laptop, phone or another device. To download the LiveChat application, go to the LiveChat website at: <https://www.livechat.com/app/>. From this website, you can download the application for a number of different platforms.



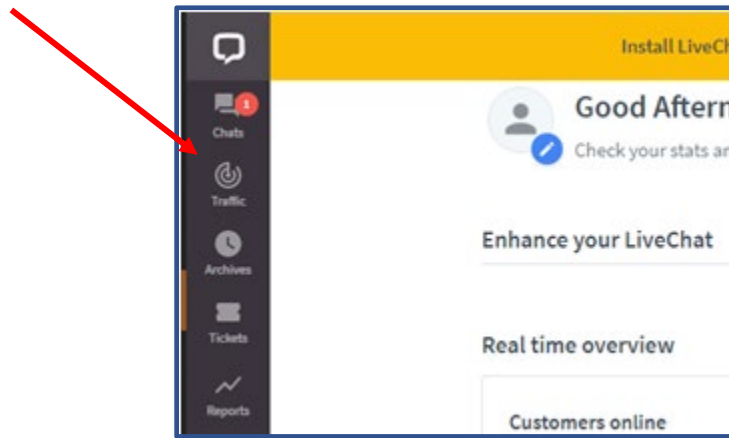
Regardless of whether you log in through the website, or use the application installed on your workstation:

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



## Section 2: Navigating The LiveChat Platform

Within the LiveChat there are five main functions that will be used by Supporters/Agents which can be accessed by clicking on the icons located along the left-hand margin of the application.

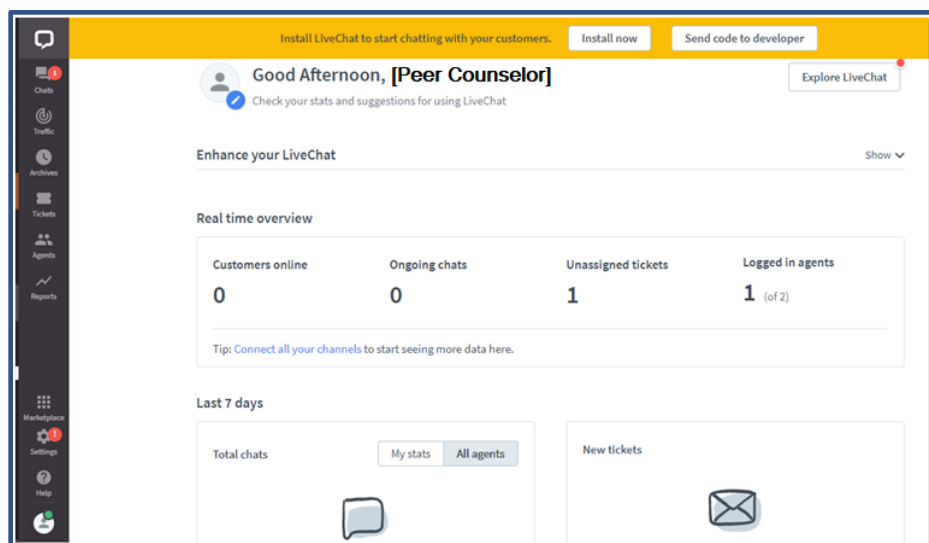


### Dashboard

The dashboard is the starting point for your LiveChat experience. From the dashboard, Supporter/Agent can see an overview of the statewide CalHOPE Connect/LiveChat application including:


- Number of Visitors/Customers on-line. This is number of people currently on the CalHOPE Connect website reaching out for support.
- The number of chats across all Supporters/Agents engaged with CalHOPE Connect.
- The number of Supporters/Agents currently logged in and ready to provide support.
- Statistics related to your activities over the last 7 days.

As the CalHOPE Connect program evolves, the information presented to Supporter/Agent via their Dashboard may be updated with more information.



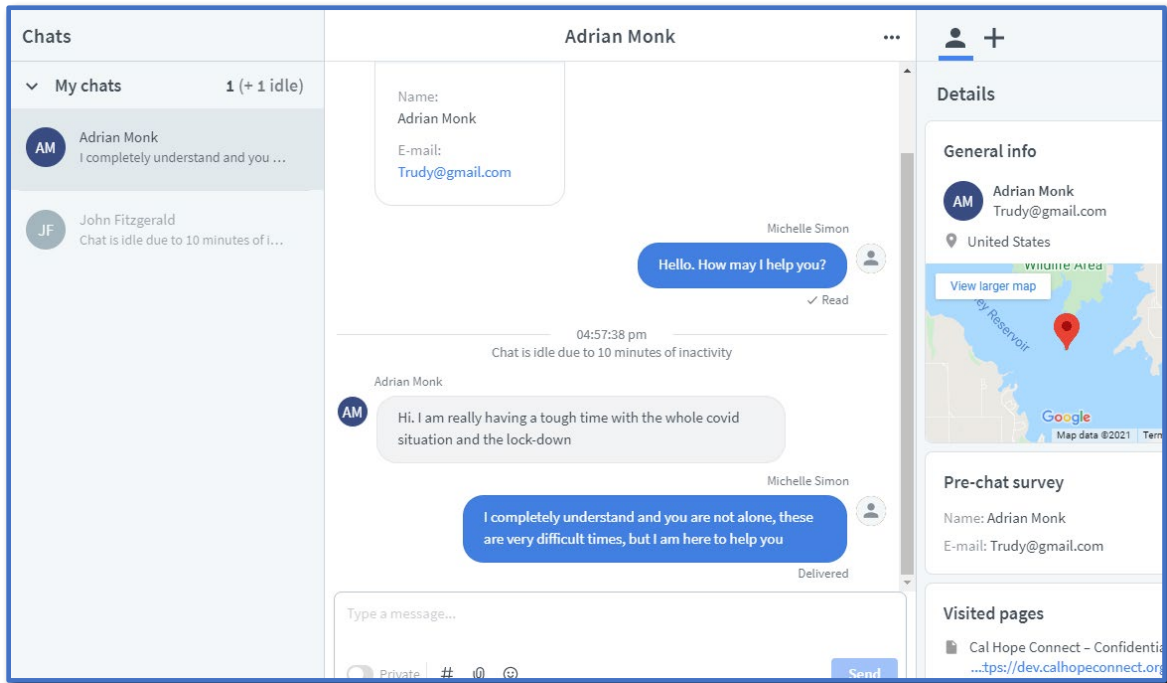
Should a CCP Supporter/Agent wish to return to their Dashboard, they can do so by clicking the icon in the left-hand margin.

## Chats

Represented by the  icon, the Chats portion of LiveChat is where most of a Supporters'/Agents' activities will be performed. The "Chat" section of LiveChat is divided into three sections:

- 1) Chat List
- 2) Chat Feed (Currently "Adrian Monk")
- 3) Visitor/Customer Details.

When a Visitor/Customer seeks assistance and starts a chat session, they will be assigned to a Supporter/Agent.



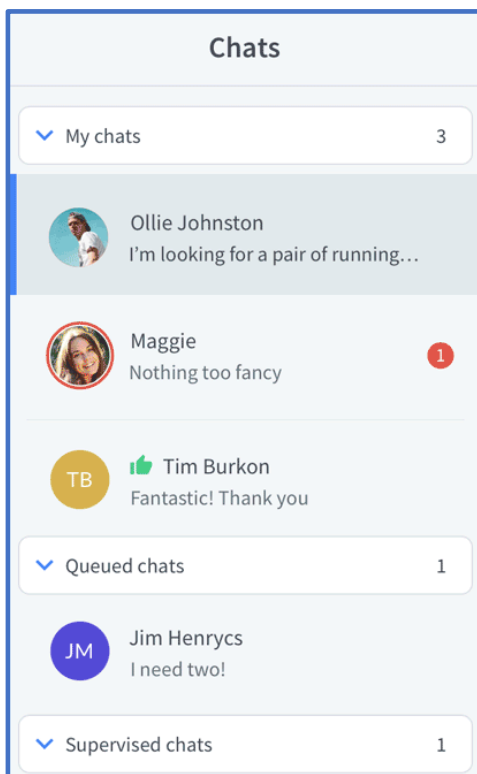
## Chat List

The left-hand section of the screen shows all active chats. The Chat List is divided into three sections:

- 1) My Chats: where all of your current conversations are listed.
- 2) Queued Chats: where Visitors/Customers who are waiting to start a chat are listed.
- 3) Supervised Chats: where chats that require support from your organization's Coordinator(s).

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

- 1) Active - either you or the Visitor/Customer has typed something recently.
  - a. These chats stay at the top of your list as they require your attention the most.
  - b. If you do not respond in 40 seconds a red rim will appear around the circle to remind you that you should respond immediately.
- 2) Inactive - the Visitor/Customer has not responded for a certain time.
  - a. You can set the time length after a chat turns inactive in Settings.
  - b. The red rim does not necessarily mean that a Visitor/Customer has left. They might just need more time to respond.
  - c. All inactive chats are greyed out and are placed at the bottom of the list.



**Queued Chats** - Visitor/Customer who are waiting for an available agent. If you can chat with more than one Visitor/Customer, pick a Visitor/Customer/ from the list to start a conversation.

**Supervised Chats** - All Supporters/Agents can “Supervise” chats that are currently on-going between a Visitor/Customer and another Supporter/Agent. The guide provides more detail about this function in Section 5 (page 19).



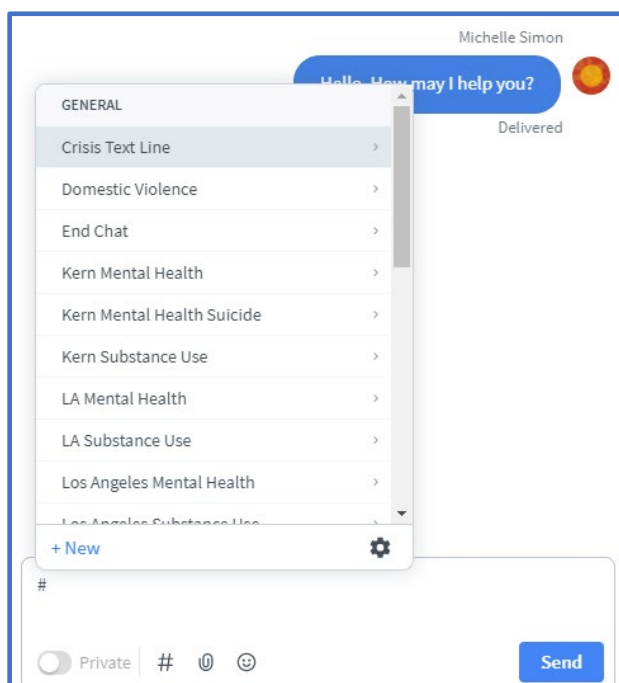
## Chat Feed

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/Customer and the Supporter/Agent). If a Visitor/Customer 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/Customer 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 Supporter/Agent will type in their responses. Visitors/Customers 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/Customer you will see it in the chat history.

Within the Chat Feed there are two helpful and valuable functions:

- 1) Canned Responses
- 2) Transferring a Chat



**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. 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.

Several shortcuts specific to CalHOPE Connect 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 Disorder Department, and/or Suicide Hotline.

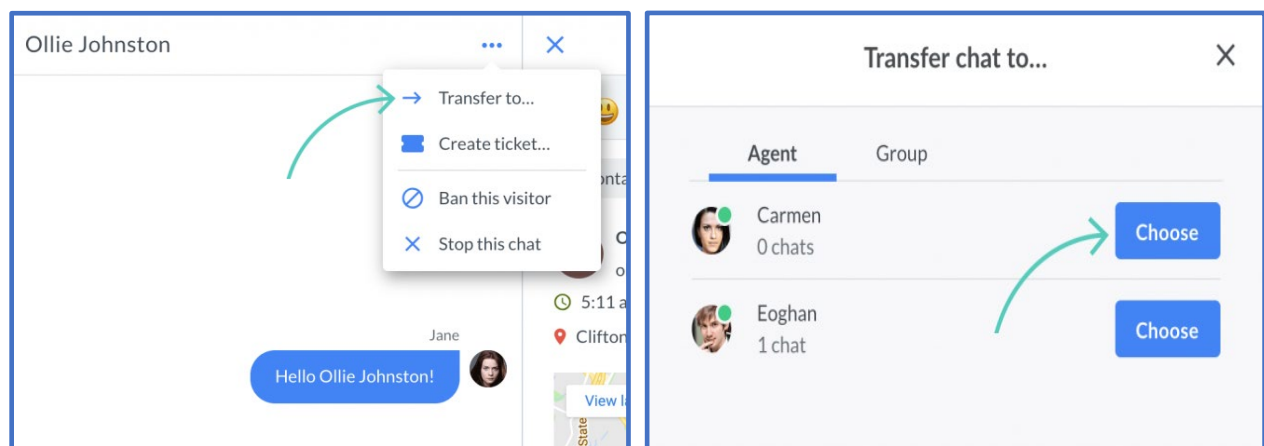
Shortcuts include but are not limited to:

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

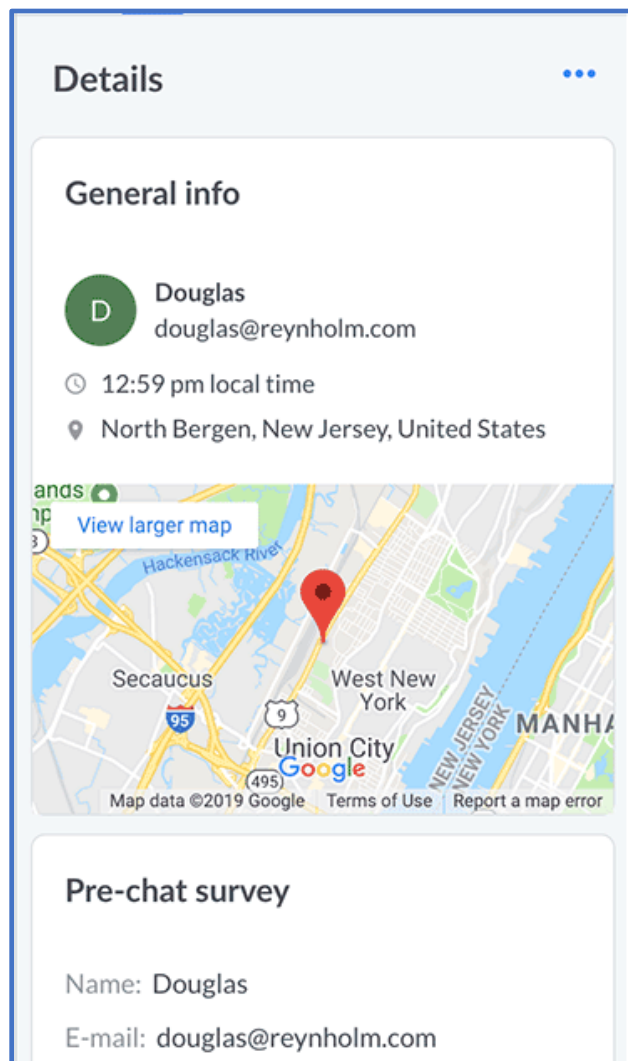
**Transferring a Chat** - In the upper-right corner of the Chat Feed are three dots (a.k.a. Ellipses). Here you will be presented with a few additional functions associated with the active chat, including the ability to transfer a chat.

If derogatory language, sharing of sexually explicit language, or other language is a trigger for you, consider transferring the Visitor/Customer to another Supporter/Agent. Your job is to provide a listening spirit and support while also keeping yourself safe and present to help others. Transferring a chat is not a reflection of your ability. It reflects your self-awareness and desire to ensure Visitors/Customers are assisted by the someone who may not have the same set of triggers. 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/Customer and the other Supporter/Agent know what you are planning to do and why. If you are on the receiving end of a chat transfer, let the Visitor/Customer know that he/she/they do not need to explain the situation again (Supporters/Agents can see the chat history).



## Visitor/Customer Details


The last section of the Chat screen is the Visitor/Customer Details found in the right-hand pane of the screen. If the Visitor/Customer has used the LiveChat function in the past<sup>1</sup>, the amount of information in the Details section may include:

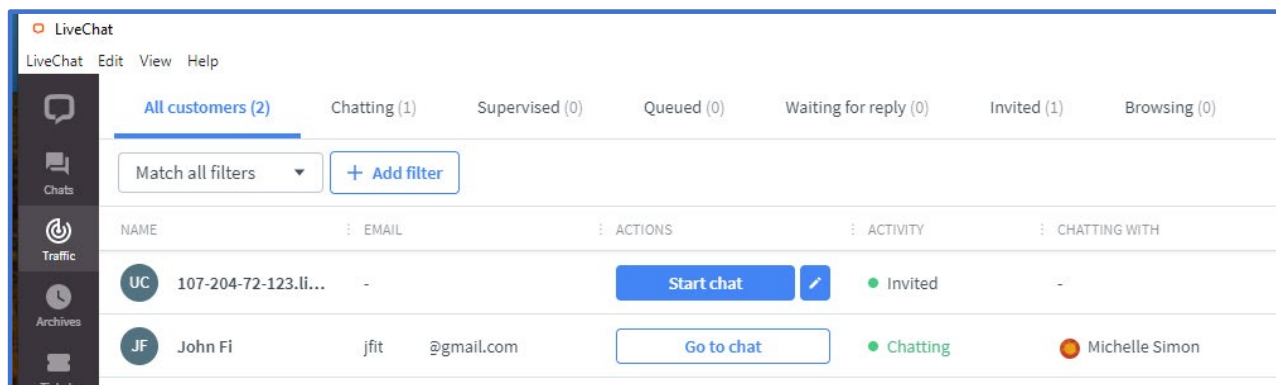
- General Info—shows name, e-mail address, location (an address and a map), time zone.
- Pre-chat survey—shows information provided in the pre-chat survey.
- Post-chat survey—displays information from the post-chat survey (this is visible only when the customer has ended the chat and submitted a post-chat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

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

<sup>1</sup> LiveChat is a platform used for websites and applications that have a chat functions. Only past CalHOPE Connect LiveChat details will be visible. LiveChat sessions used by a Visitor/Customer on another platform will not appear.


## Traffic

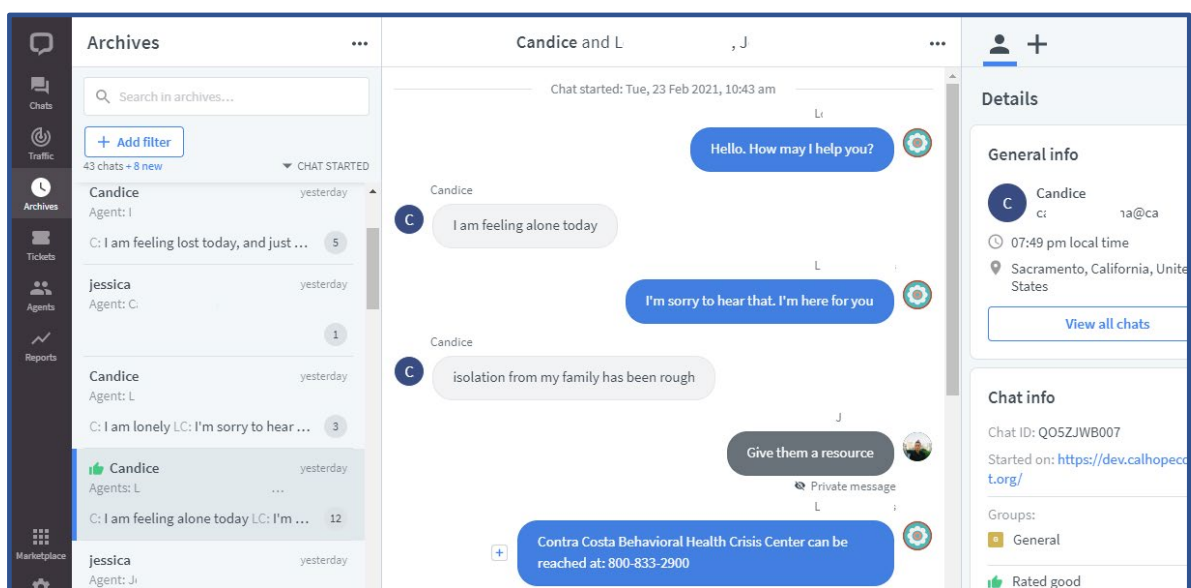
Represented by the  icon, the Traffic section of LiveChat displays a list of the Visitors/Customers currently engaged in active chats as well as people who are browsing the CalHOPE Connect website. The information about the Visitor/Customer being displayed will be determined by what has been provided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



If someone is on the CalHOPE Connect website and they have not initiated a chat, then only their IP address internet service provider (ISP) is displayed. More detailed information (as mentioned in the above section) about a Visitor/Customer is only displayed when they join a chat.


## Archives

Represented by the  icon, the "Archives" section of LiveChat stores all past conversations between you and your Visitors/Customers. Access to past conversations can be helpful in many ways. For return Visitor/Customer/Visitor (Customer)s. Being able to review the content of previous conversations between a Supporter/Customer and a Visitor/Customer that has returned to an active chat can help you establish rapport and provide better support. In general, access to archived conversations can help you understand what your Visitor/Customer may need.

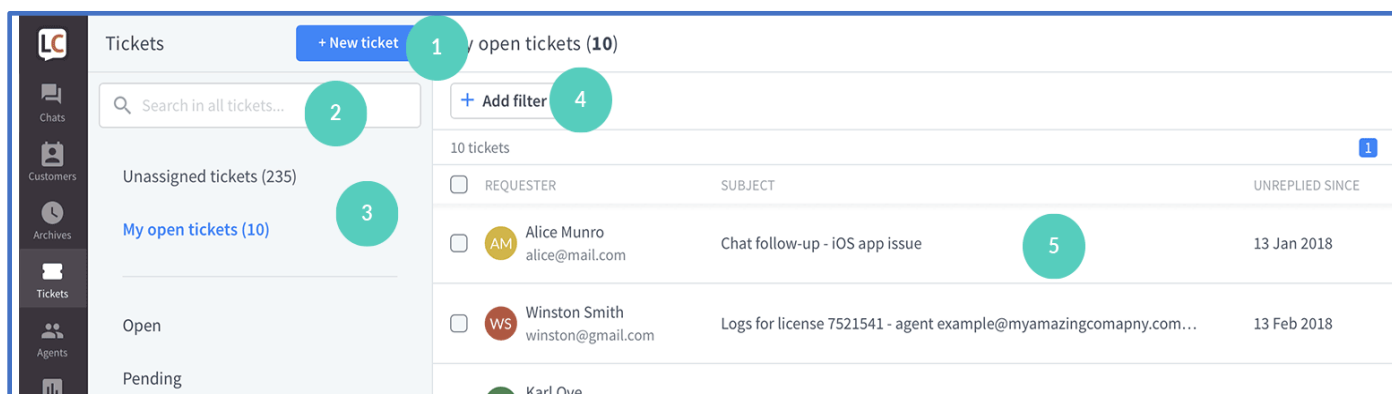


## Tickets

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.

On the Supporter/Agent's side of the engagement, such "Tickets" can be reviewed and followed-up by clicking on the  icon.

The numbers on this screenshot of the ticket section coordinate with the numbers beneath it:



- 1) **New Ticket** – The majority of tickets will be created by a Visitor/Customer 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/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 you follow-up on a Ticket, you can assign different categories to the Ticket. These categories can be used to search/filter for a specific Ticket. You can search/filter using these categories:
- a. Unassigned Tickets
  - b. My Open Tickets
  - c. Open
  - d. Pending
  - e. Solved
  - f. Spam
  - g. 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 that was assigned to you. Simply hovering over a Ticket with the arrow/cursor will provide a preview of the Ticket. Clicking on the Ticket Record will open the full Ticket history. Below are functions you can perform in the Ticket List. The green dots with a number correspond with the numbered function list.

The numbers on this screenshot of the ticket section coordinate with the numbers beneath it:


The screenshot shows a ticket management interface. On the left is a sidebar with navigation icons for Chats, Customers, Tickets (highlighted), Agents, and Reports. The main area is titled 'Problem with greetings' with a pencil icon (1). Below the title is a chat transcript (2) showing a conversation between Winston Smith and Alicja. The transcript includes a chat transcript summary, a message from Alicja about a greeting issue, a response from Winston Smith, and a follow-up from Alicja. Below the transcript, there are actions taken by Alicja: adding a contact to CC, assigning the ticket to the 'Tech Support' group, and assigning it to Alicja. At the bottom of the main area is a text input field (3) with a 'Send' button. On the right is a 'Details' sidebar (4) containing: 'Ticket info' (5) with ID YTR5Q, creation date, last message, status, and source; 'Assignee' (6) showing Alicja with a 'Change' link; 'Groups' (7) showing 'General' and 'Tech Support' with an 'Edit' link; 'Requester' (8) showing Winston Smith with a 'Change' link; 'People in the loop' showing George Orwell; and 'Recent tickets' showing a pending ticket 'Can't add a new greeting'.

- 1) **Ticket Subject** - Edit the subject by clicking on the pencil icon.
- 2) **Ticket Feed** – View the entire ticket history.
- 3) **Text Area** – Reply to the Ticket, create a private message, add files, and change Ticket status.
- 4) **Ticket Info** – See basic information about the Ticket.
- 5) **Assignee** – See which Supporter/Agent and Coordinator the Ticket is assigned. The Assignee can be updated by clicking the change icon.
- 6) **Groups** – See which Groups the Ticket assigned. Members of the Groups are your Organization’s Supporters/Agent. A Ticket is directly assigned to one Supporter/Agent for next steps. Groups allow for your Organization’s Supporters/Agents are made aware of the Ticket’s existence.
- 7) **Requester** – See the name of person that initiated the Ticket. You can view the Visitor/Customer’s name and email. You can also add additional Supporters/Agents and/or Coordinators to keep them aware.
- 8) **Recent Tickets** - All tickets that are assigned to the same email

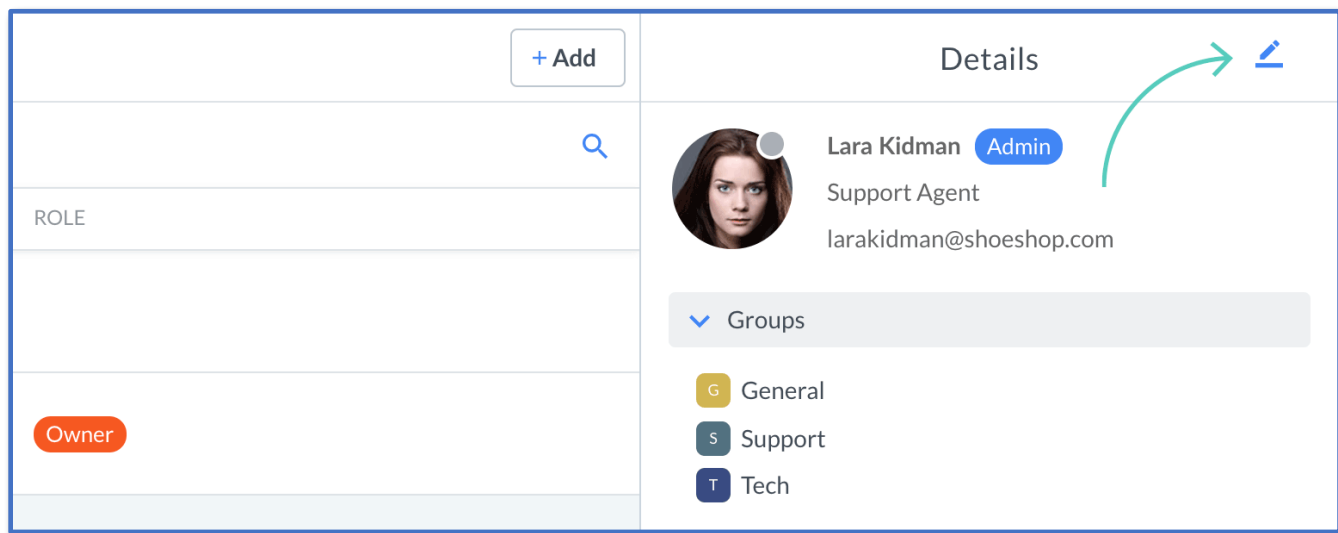
## Section 3: Configuring Your LiveChat Account

There are several settings that will need to be updated when you first access your LiveChat Account. Some of these settings are set once (upon your initial set-up) while others might be updated during each scheduled shift based upon your preference on that day.

### Supporter/Agent Details

LiveChat will refer to you as a Support Agent. The functions that allow you the ability to edit your settings can be accessed from the Supporter/Agent section by clicking on the  icon.

Select your account from the list of Supporters/Agents. The right-hand section of the screen is where information about the Agent selected will be presented. At the top of this section in the Details, header, if you have selected your own Support Agent account, you will be presented with a blue pencil representing your ability to edit your profile.



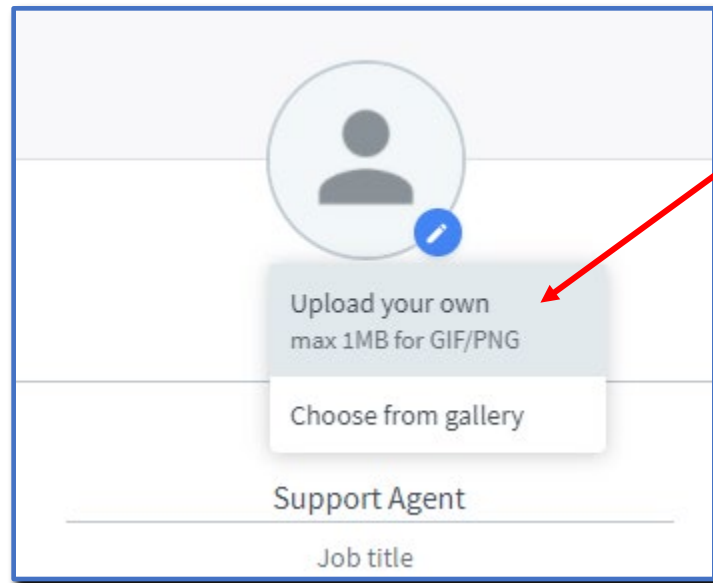
All Supporters/Agents (Support Agents) and Coordinators will need to make the following changes to your account. These changes will support CalHOPE Connect's operations.



## Set Your Profile Picture

Please use a picture of yourself. The photo will be visible to the Visitor/Customer and will support building rapport and establishing a welcoming, comforting atmosphere. We are reducing the stigma of help seeking by saying "this is who I am". **Remember your picture needs to reflect an appropriate level of professionalism.**

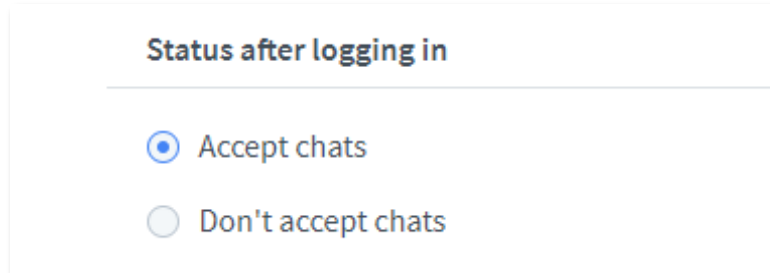
To update your profile picture, click on the blue pencil icon in the lower-right portion of the picture silhouette icon.



Upload an existing photo of you or select a photo of you from a gallery.

## Setting Status Upon Log-In

You may want to hit the ground running and immediately be available for providing support. There may be times when you need to first review tickets or perform other activities prior to engaging with a Visitor/Customer. Configuring the “Status after logging in” allows you to control your support status.

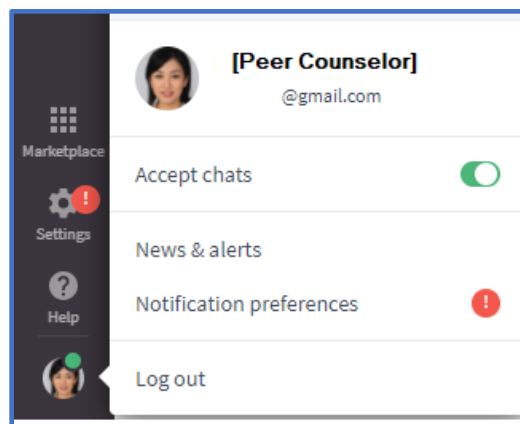


The screenshot shows a settings panel titled "Status after logging in". It contains two radio button options: "Accept chats" (which is selected) and "Don't accept chats".

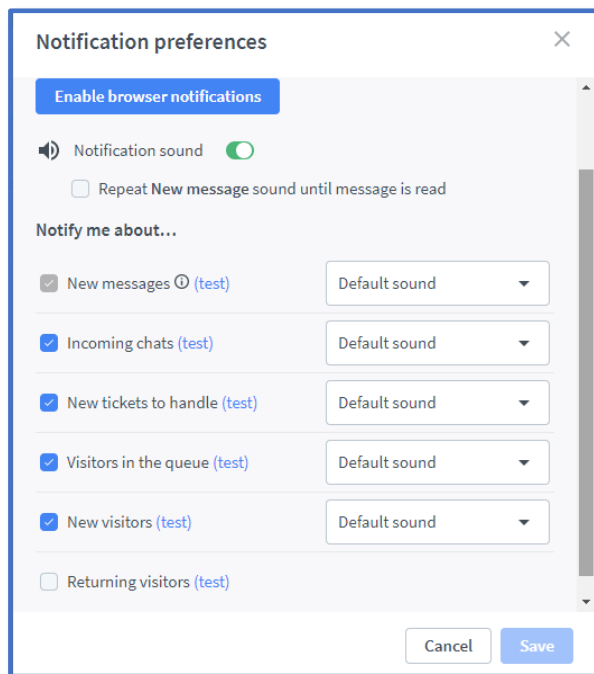
## Supporter/Agent Session Preferences

Other settings/preferences that a Supporter/Agent may want to update throughout their scheduled shift can be easily accessed by clicking on the Support Agent Profile picture/icon in the lower left-hand corner of the LiveChat application.

Most notable of these preferences is the ability to toggle back and forth between accepting new chats or not (while on break or completing paperwork) as well as the ability to log out of CalHOPE Connect. You need to log out of CalHOPE Connect at the end of each shift.



Within each session a Supporter/Agent can change their notification preferences. These preferences control which sounds, or specific sounds, are used for different notifications. You may find using sound notifications is helpful when you are engaged in multiple chats with multiple Visitors. Customers. The notification would sound whenever a Visitor/Customer sends you a message. This will allow you to go back and forth between chats. You may also find that frequent sounds distracting and chose to not have a sound notification.

A screenshot of a 'Notification preferences' dialog box. At the top, there is a blue button labeled 'Enable browser notifications'. Below this, a 'Notification sound' toggle is turned on, indicated by a green circle. Underneath, there is an unchecked checkbox for 'Repeat New message sound until message is read'. The section 'Notify me about...' contains a list of notification types, each with a checkbox and a dropdown menu for sound selection. The items are: 'New messages (test)' (checked), 'Incoming chats (test)' (checked), 'New tickets to handle (test)' (checked), 'Visitors in the queue (test)' (checked), 'New visitors (test)' (checked), and 'Returning visitors (test)' (unchecked). All dropdown menus are set to 'Default sound'. At the bottom right, there are 'Cancel' and 'Save' buttons.

## Section 4: Initiating a Chat

All Supporters/Agents currently logged into LiveChat will receive a notification when a new Visitor/Customer enters into Chat. Supporters/Agents will be able to view these Visitors/Customers through the “Traffic” section. Chats will not be initiated until the Visitor/Customer clicks on “Live Chat” from the CalHOPE Connect website.

Visitors/Customers will be asked to complete a pre-chat survey to provide their name, e-mail address, and their preferred language prior to being connected to a Supporter/Agent. Following the completion of the survey, there are two paths for the Visitor/Customer:

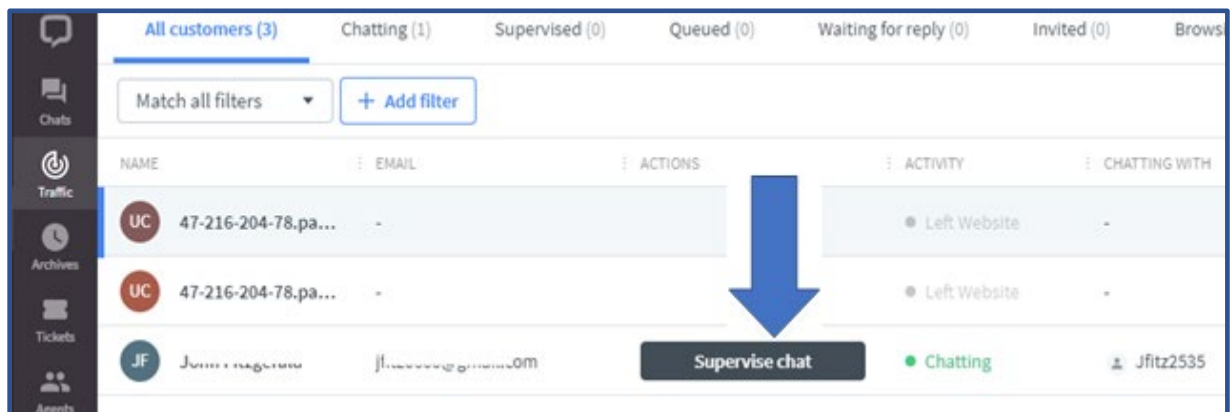
1. If the Visitor/Customer has previously engaged in chat with a Supporter/Agent, their request will be assigned to the Supporter/Agent with whom they previously chatted.
2. If the Visitor/Customer is new to CalHOPE Connect, their request will be placed in a queue until a Supporter/Agent initiates the chat.

Visitor/Customer chat requests will be visible in the queue and can be selected by the Supporter/Agent either through the “Chat” or “Traffic” section of the LiveChat application.

## Section 5: Coordinating a Chat

All Supporters/Agents can “supervise” chats that are currently on-going between a Visitor/Customer and another Supporter/Agent. This function is intended to provide extra support to the Supporter/Agent and Visitor/Customer. Your organization will have identified Coordinators. Those using the supervise function are able to see both sides of the communication (Visitor/Customer texts and Supporter/Agent texts) but the Visitor/Customer will not be able to see “private” messages between Supporter/Agent and Coordinator.

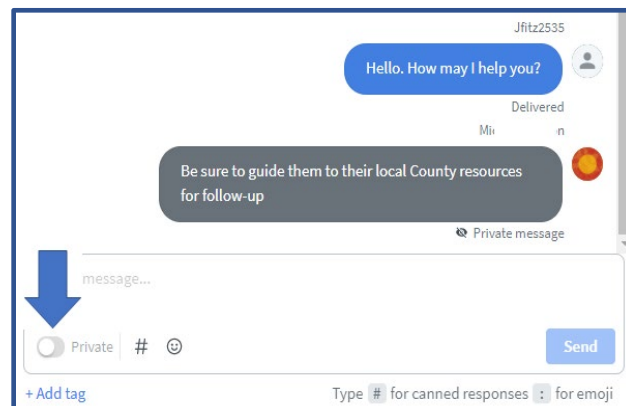
To initiate the supervise chat function, the Supporter/Agent will select the on-going chat from the list in the “Traffic” section of LiveChat.



Once selected the Coordinator is presented the chat and the chat is added to the Coordinator’s list of Active Chats. The Coordinator will be able to see the interaction history (log of back-and-forth messages) between the Visitor/Customer and initial Supporter/Agent assigned to the chat. If the Coordinator believes it necessary, they can send a “private message” to the original Supporter/Agent.

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

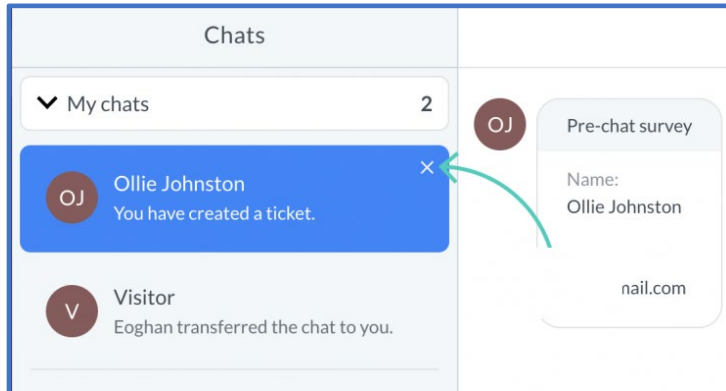
For the Supporter/Agent engaged with the Visitor, they will need to identify which messages are to be considered private by toggling the “Private” button.



## Section 6: Ending a Chat

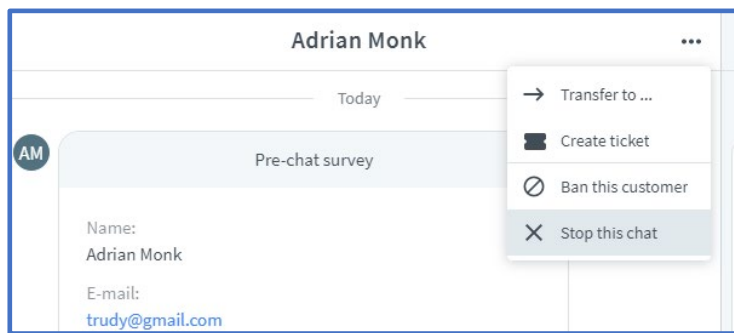
Close each chat **in a timely matter** after you have supported the Visitor/Customer. The act of closing the chat will trigger a post-chat survey in the Visitor/Customer's chat window. Encourage each Visitor/Customer to complete this survey.

There are two ways to close a chat:



### 1) Chat List

Hover over the name of the Visitor/Customer in the chat list. An x should appear in the top right corner. Click on the x and the chat will end.



### 2) Chat feed

Click on the ' in the top right corner.

## Don't Forget to Complete the CCP Data Forms

After the visit is completed, don't forget to complete the CCP data forms in the Online Data Collection and Evaluation System (ODCES). If the chat lasted longer than 15 minutes, you need to fill out the Individual/Family Crisis Counseling Encounter Log. If it lasted less than 15 minutes, you will include it on your Weekly Tally Sheet.