EIP Volunteer Technology Training

PARTNERS

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To Begin

- ▶ This is the technology portion of the EIP volunteer training

- ▶ Before beginning this training, you should complete the EIP subject matter training

- ▶ As a reminder, the EIP Helpline has a voicemail and email option

- ▶ Emails and a recording of each voicemail will come into a shared inbox inside an online platform called Freshdesk

- ▶ Volunteers will use the CoreNexa app to respond to voicemails

- ▶ If you prefer to only respond to emails, slides 26-32 don't apply to you

  - ▶ Although, if you feel comfortable, we would appreciate if you would also be a voicemail volunteer to help with the call volume. Since it isn't a live hotline, it should be a less stressful experience and similar in some ways to responding to emails

Volunteer Data Privacy

▶ Given that the current circumstances require that people stay home, this volunteer role will be done remotely using your personal devices (laptop, iPad, tablet, and/or smartphone)

  ▶ *However, your personal information and data will be protected*

▶ Email replies you send using Freskdesk will come from help@GetMyPaymentIL.org and will only include your first name in the signature

▶ Calls made using the CoreNexa app on your phone will appear to clients as coming from the EIP hotline number (888-553-9777)

▶ **In order to protect your privacy and data, ONLY respond to client emails and voicemails through either Freshdesk or the CoreNexa app**

CoreNexa Overview

- CoreNexa is an app you load on your smartphone to make outbound calls to clients (download instructions are on [this slide](#))

- The app is similar to other apps you may use that allow you to make calls using the 'WiFi and/or Cell Network data features' of your phone

- Volunteers will use the CoreNexa App to place return calls to clients who left voicemails

- Volunteers will not use their personal cell phone number to make calls

- Clients will see the hotline number, not the volunteer's personal phone number, when they receive the call

Freshdesk Overview

- Freshdesk is a customer support software that helps manage large numbers of voicemails and emails efficiently

- When a client emails or calls the EIP support line, a ticket will be created in Freshdesk (see next slide for detail)

- Each volunteer will be referred to as an "agent" in the Freshdesk system and will have the ability to see and respond to tickets within the groups they are assigned to

Video Instructions

- In addition to the following written materials, we also posted some instructional videos about how to use Freshdesk if you prefer to watch video instruction
  - Introduction to Freshdesk
  - How to Work an Email Ticket
  - How to Work a Voicemail Ticket
  - How to Refer a Ticket to Someone Else

Freshdesk Agent Groups

There are five agent groups within Freshdesk. Volunteers are called "agents" in Freshdesk, and will be assigned by Ladder Up staff to one or more groups, based on the role(s) they want to fill

📞 Telephone Support- Those calling back clients who left voicemail messages

✉️ Email Support- Those replying to clients who emailed a question

👥 Spanish Support- Those following up with Spanish-speaking clients

💡 Tax Experts- Those fielding tax questions (within VITA limits)

⚠️ Escalations Group- LU staff handling more complicated matters

How to Access Freshdesk

Setting up Freshdesk for the first time

- Once Ladder Up has created a Freshdesk account for you, you will receive an email to activate your account and create a password (be sure to check your spam folder!)
- Your username will be the email address you provided when completing the original EIP Interest Survey sent out by Ladder Up

Log into Freshdesk

- Note that you will log in and then will need to log in again on the second screen (use the same credentials both times)
- Please bookmark this Freshdesk page (https://getmypaymentil.freshdesk.com/a/dashboard/default) and use this bookmark to log in each time you volunteer, as it will take you directly to the page you need

Test Out Freshdesk First

- You will initially be assigned to a demo "testing" group so that you can practice with Freshdesk before responding to client tickets

  - Once you activate your Freskdesk account, you should see sample email and voicemail tickets in the testing group

  - After completing this training, you will process tickets in Freskdesk as practice

  - Note that you will NOT have to return the call on the voicemail ticket because it is a fictious number, but follow the other steps such as taking notes on the client's question and updating the contact information

  - If you will be helping with emails and voicemails, please answer a sample ticket for each type

  - If you are helping with returning voicemails only, you only need to process a voicemail ticket

  - If you are helping with email only, you only need to respond to an email ticket

- After you complete the practice tickets, a member of the Ladder Up staff will review and then assign you to the correct groups so you can begin working on real tickets

Ticket System in Freshdesk

▶ When a client emails or leaves a voicemail, a ticket is created

  ▶ Example email ticket

Subject Line and Ticket Number

New

Example Email Ticket #33

☐ A

✉ Alex Vizard · Created a few seconds ago · First response due in a day

■ Low ⌄

👤 Email Supp... / -- ⌄

∿ Open ⌄

Name of client

Time received

Status of the ticket- see slide 16 for more information about status

The Group that the ticket is assigned to (Email Support) and the "- -" means it is **not** assigned to an agent

  ▶ Example voicemail ticket

Subject Line and Ticket Number

New

New Voicemail Received #34

☐ V

✉ Voicemail · Created 19 minutes ago · First response due in a day

■ Low ⌄

👤 Telephone ... / Alex Vizar... ⌄

∿ Open ⌄

For voicemails, won't have name until agent fills in this information

Time received

Status of ticket

The Group that the ticket is assigned to (Telephone Support) and agent assigned (Alex)

Instructions for Email Support Group

► After logging in you will be directed to the "Dashboard" page. View tickets by clicking the "tickets" icon on the left panel on the screen

► First check to see if you have any tickets assigned to you by selecting this view:

> ≡ My Open and Pending Tickets
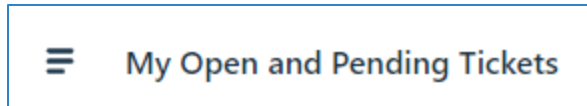
> ► This list will show you only the tickets assigned to you that are still open

> ► You will want to resolve these tickets first **before** taking any new tickets

► If you have no open tickets, select this view:

> ≡ Open Tickets in My Groups
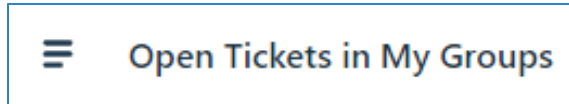
> ► Update your list by clicking on the 3 lines in the upper left-hand corner of the screen and selecting "Open Tickets in My Group"

> ► You will now see all open tickets in the Email Support group (and any other groups you may be a part of)

> ► You can click on any ticket that appears in the list - **start with the lowest ticket number (which indicates it's the oldest ticket)**

Once You Open A Ticket

► You will be able to read the client's message in the main portion of the screen

► If this is a question you know you can answer either immediately or by researching the matter, assign yourself as the agent on the ticket. On the right side of the screen, underneath "Properties", you will see an "Agent" dropdown menu.

   ► Select your name from that menu to assign yourself as the agent on this ticket and then click the blue "Update" button at the bottom of the column to save the change

► <u>**This lets other volunteers know that you are responding to the ticket so that they don't also begin working on it**</u>
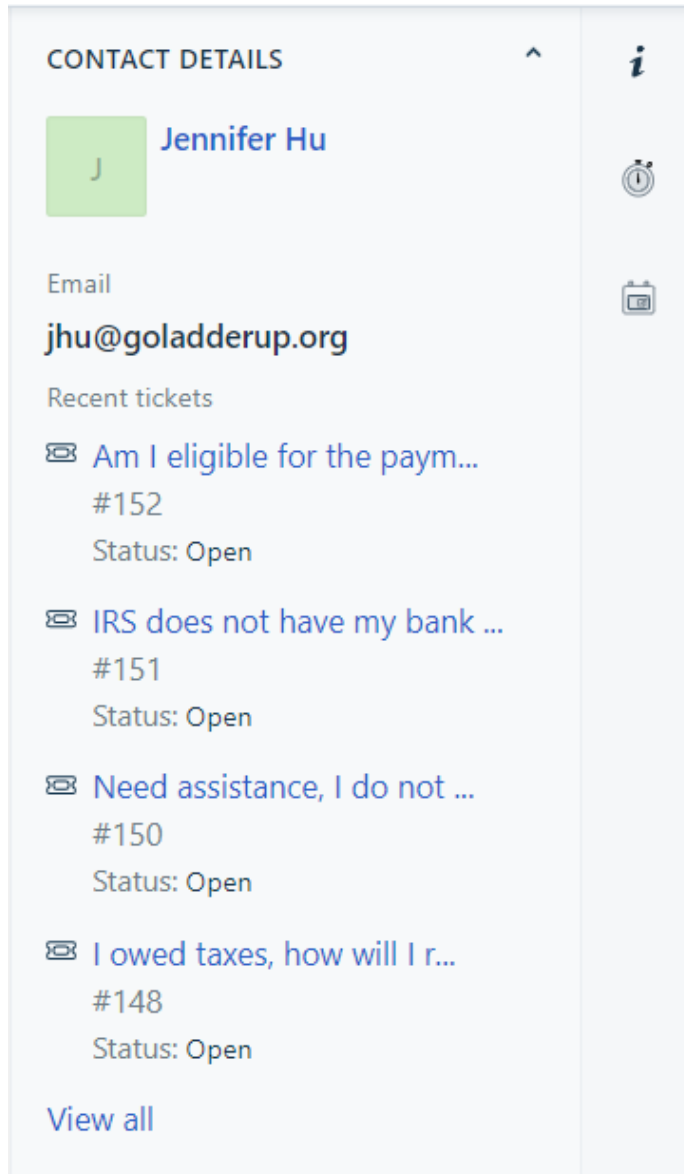
Never assign a ticket to a specific agent other than yourself! If the agent does not log in and see the assignment, then the ticket may not be responded to!

☆ | ↩ Reply | ▤ Add note | → Forward | ⊘ Close | � Merge | 🗑 Delete | ⋮

✉ **Example Email Ticket**

Alex Vizard reported via email

New

  A   **Alex Vizard** reported via email, 2 hours ago
        to: "help@getmypaymentil.org" <help@getmypaymentil.org>

Hi,

I haven't gotten my EIP yet. It looks like I meet the criteria. What should I do?

Best,
Alex

LADDER UP   **Alexandra Vizard**, Accounting Specialist
accounting@goladderup.org
(312) 466-0771

Open

● FIRST RESPONSE DUE
by Fri, 08 May 2020, 09:51 AM

● RESOLUTION DUE | Edit
by Tue, 12 May 2020, 09:51 AM

PROPERTIES

Tags

Group
[Email Support ⌄]

Agent
[-- ⌄]

[Update]

Choose your name

Don't forget to click update to save the agent assignment!

Same Client with Multiple Tickets

CONTACT DETAILS

Jennifer Hu

J

Email
jhu@goladderup.org

Recent tickets

✉ Am I eligible for the paym...
#152
Status: Open

✉ IRS does not have my bank ...
#151
Status: Open

✉ Need assistance, I do not ...
#150
Status: Open

✉ I owed taxes, how will I r...
#148
Status: Open

View all

- ▶ If a client only responds to the same email thread, each email will appear as being within the same ticket
    - ▶ However, some clients send separate emails to follow up and this creates separate tickets
- ▶ In this example, Jennifer has sent several separate emails to the helpline
    - ▶ You can see the list of emails on the right-hand side of every ticket from Jennifer under "contact details"
- ▶ When working with a client, it is helpful to know if they have contacted the helpline before and to refer to their other tickets before responding

Replying to the Client Email

▶ You can type a response to the client by clicking on the "Reply" button towards the top or bottom of the screen

▶ A template response is automatically generated with the client name, a greeting, and a closing

▶ There are a number of "canned responses" (i.e. prewritten responses) that you can insert into your email reply to save time if you encounter a frequently-asked question for which we've already drafted a canned response

  ▶ You can view a full list of canned responses on the EIP Volunteer Resources Website, which will be updated as more are created

▶ **If this is the first reply to the client, always insert the "Disclaimer-We are not the IRS" canned response first, then proceed with the rest of your message**

Client name is populated

If this is the first reply to the client, enter the **"Disclaimer-We are not the IRS"** canned response first

To: jhu@goladderup.org   Cc Bcc

Jennifer,

Thank you for contacting us.

First, let me share that this help desk is not run by the Internal Revenue Service (IRS). It is operated by volunteers and staff members of the Get My Payment IL Coalition.

Thank you,

****
Please note that this GetMyPaymentIL.org help desk is not run by the Internal Revenue Service (IRS). It is operated by volunteers and staff members from the Get My Payment IL Coalition which comprises several Illinois nonprofit organizations.

Enter your first name here

Inserting a Canned Response

▶ To insert a canned response, move the cursor in your reply to where you want the canned response to be added, then click on the "canned response" icon (appears below the reply section you are typing in - when you hover your cursor over the icon, you'll see the description "Canned response" appear)
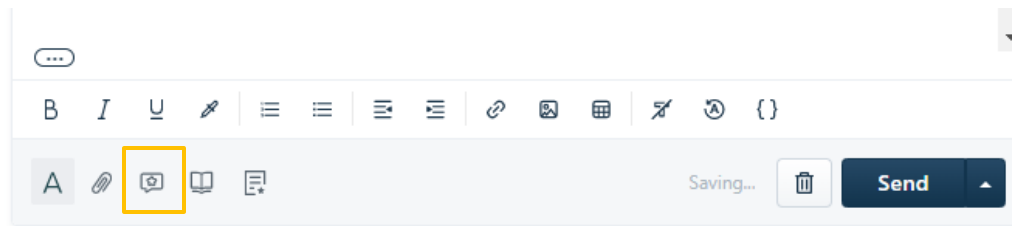

▶ You will then be able to look through the canned responses that exist in the "EIP" folder - pick the one that's relevant and click the " + Insert" button

▶ You can continue writing your reply if any additional information is needed

▶ When you are finished writing your reply, make sure you write in your first name at the end (under the pre-filled "Thank you,") so the client knows who is responding to their email

Please let us know if you have suggestions for additional canned responses by emailing EIPsupport@goladderup.org

Sending a Reply

- There is a shortcut you can use to both send a reply and update the status of the ticket with just one click

    - If you look at the blue "Send" button towards the bottom of the screen, you'll see a white upward arrow immediately to the right
    - When you click on the arrow, you will see some choices appear that allow you to do two things with one click.

        - You **always** pick "Send and set as Resolved"

- Even if you ask follow-up questions, it is best to mark as resolved because you do not know if the client will respond

- If the client does respond, the ticket status will automatically change to "open" again and go back into your queue of open tickets

- Even if you forget to use the shortcut, you can still manually update the ticket's status in the Properties area – select the appropriate status from the dropdown menu and click the blue "Update" button to save your change

Send and set as Pending

Send and set as Resolved

Send and set as Closed

Saved | 🗑 | Send | ▲
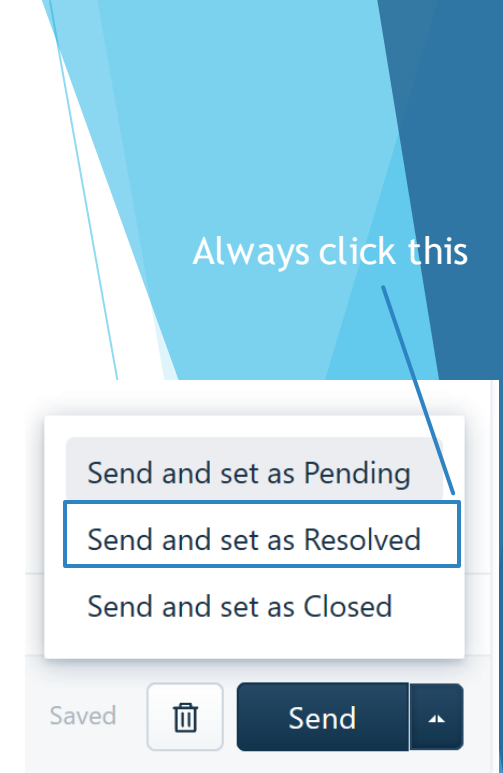
Leaving Notes on a Ticket

▶ You may find that sometimes it is helpful to leave a note on a ticket for other volunteers or Ladder Up staff to view. For example:

▶ You listen to a voicemail and need to document the client's phone number and questions

▶ You return a call with a client but are unable to answer their question. You want to leave a note for Ladder Up staff about your phone call so that we can follow up with the client

3. Assign the ticket to a different group, if needed, and update the status of the ticket as you normally would

1. Click on "add note" to add a note to a ticket

2. After you have typed your note, click on "add note" to save the note to the ticket

Always make sure the note is set to "private." Setting the note to "public" will send it to the client!

What Happens When Two Agents View a Ticket?

► As mentioned previously, it is important to assign yourself as the agent on a ticket you want to take so that another volunteer does not try to take the same ticket

► If two agents are in a ticket at the same time, Freshdesk will notify you with a flashing red circle

► In this example, Agent Christine and Agent Alex were typing a response at the same time

► To avoid sending double responses, be sure to immediately assign yourself as an agent to any ticket you will respond to

This area shows Agent Christine that Agent Alex is also currently typing

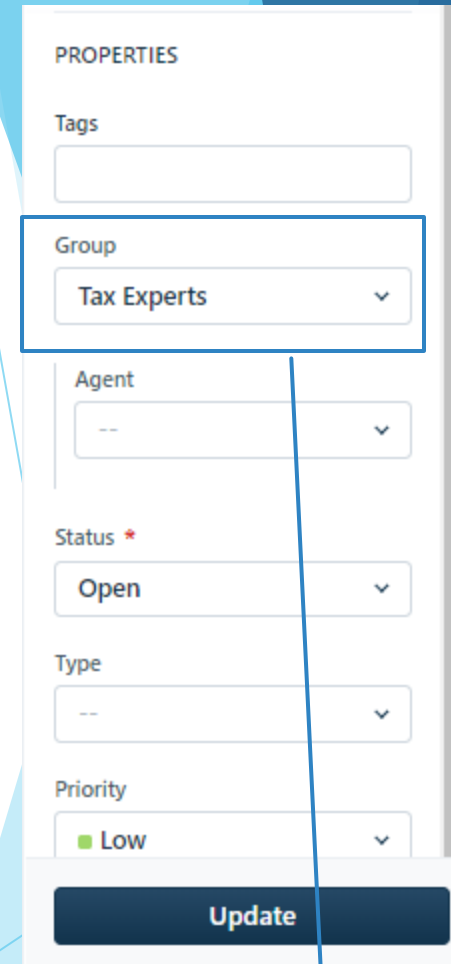This red circle indicates that 1 other agent is also in the ticket

What to Do When You Cannot Answer a Ticket?

Scenario 1: Client is asking a tax question and you are not a member of the Tax Experts group

Per our subject matter training, this question should be answered by a tax expert. To assign it, follow the directions below

On the right side of the screen, underneath "Properties", you will see a "Group" dropdown menu. Select "Tax Experts" and then click the blue "Update" button on the bottom of the column to save the change you just made. *Always* leave the "Agent" field completely blank

Now the ticket has been assigned to the Tax Experts group. On the left side of the screen, click on the Tickets icon to be taken back to your main Tickets view

PROPERTIES

Tags

Group

Tax Experts

Agent

--

Status *

Open

Type

--

Priority

■ Low

Update

Choose tax experts

Don't forget to click update to save the agent assignment!

What to Do When You Cannot Answer a Ticket?

Scenario 2: Client is asking a question that is best answered by the Ladder Up Financial Capability Team. Examples include:

The client wants their EIP direct deposited but can't open a bank account or they ask you specifically about a prepaid debit card

Any request for assistance related to financial coaching, budgeting, or college financial aid/FAFSA

Forward the email to debitcard@goladderup.org and mark the status as Resolved. On the left side of the screen, click on the Tickets icon to be taken back to your main Tickets view
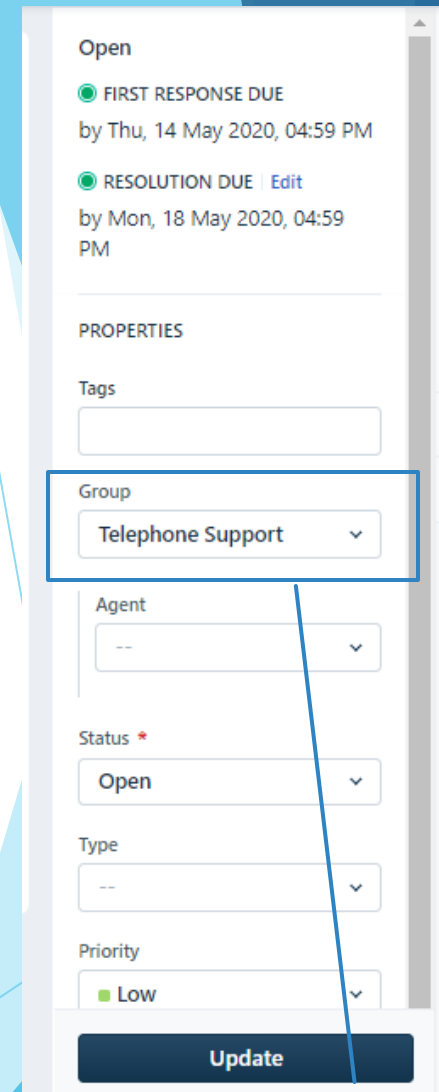
What to Do When You Cannot Answer a Ticket?

Scenario 3: Client requests a phone call in their email, and you are not comfortable making phone calls

You can assign the ticket to the Telephone Group and another agent will call them back

On the right side of the screen, underneath "Properties", you will see a "Group" dropdown menu. Select "Telephone Support" and then click the blue "Update" button on the bottom of the column to save the change you just made. *Always* leave the "Agent" field completely blank

Now the ticket has been assigned to the Telephone Support group. On the left side of the screen, click on the Tickets icon to be taken back to your main Tickets view

Open
● FIRST RESPONSE DUE
by Thu, 14 May 2020, 04:59 PM
● RESOLUTION DUE | Edit
by Mon, 18 May 2020, 04:59 PM

PROPERTIES

Tags

Group
Telephone Support ⌄

Agent
-- ⌄

Status *
Open ⌄

Type
-- ⌄

Priority
■ Low ⌄

Update

Choose Telephone Support

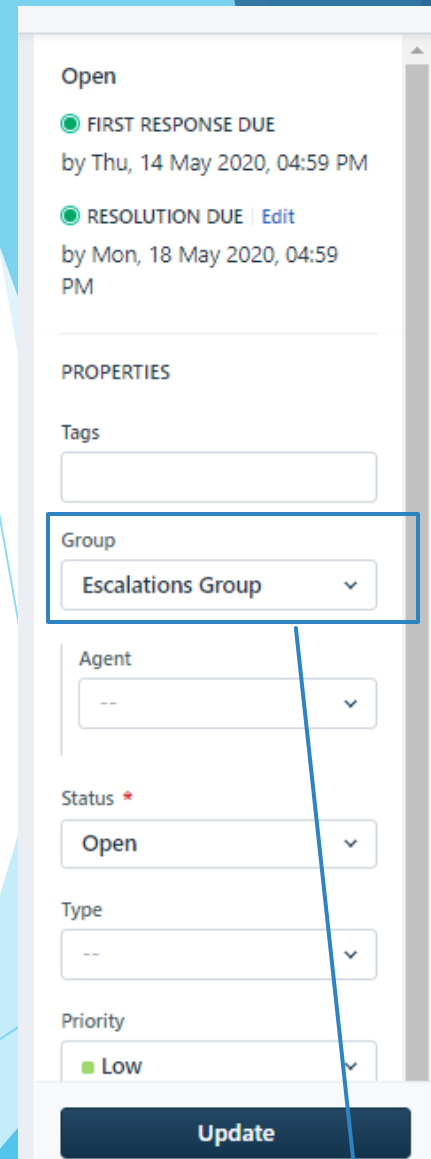Don't forget to click update to save the agent assignment!

What to Do When You Cannot Answer a Ticket?

Scenario 4: Client is asking about something else entirely, the matter is very urgent, or you are not sure how to handle the ticket

⬇

Members of the Ladder Up full-time staff oversee the Escalations Group within Freshdesk - you can assign the ticket to them for review

⬇

On the right side of the screen, underneath "Properties", you will see an "Agent" dropdown menu. Select "Escalations Group" and then click the blue "Update" button on the bottom of the column to save the change you just made. *Always* leave the "Agent" field completely blank

⬇

Now the ticket has been assigned to the Escalations group. On the left side of the screen, click on the Tickets icon to be taken back to your main Tickets view

Open
⬤ FIRST RESPONSE DUE
by Thu, 14 May 2020, 04:59 PM
⬤ RESOLUTION DUE   Edit
by Mon, 18 May 2020, 04:59 PM

PROPERTIES

Tags

Group
Escalations Group ⌄

Agent
-- ⌄

Status *
Open ⌄

Type
-- ⌄

Priority
▪ Low ⌄

Update

Choose Escalations Group

Don't forget to click update to save the agent assignment!

What to Do When You Cannot Answer a Ticket?

Scenario 5: Client submits an inquiry in Spanish, and you do not speak Spanish

Voicemails left on the Spanish-language hotline will be automatically assigned to the Spanish Support agent group, so you likely will not experience this with voicemails. Clients may still send emails in Spanish, and you will need to re-assign the ticket to the Spanish Support group.

On the right side of the screen, underneath "Properties", you will see an "Agent" dropdown menu. Select "Spanish Support" and then click the blue "Update" button on the bottom of the column to save the change you just made. *Always* leave the "Agent" field completely blank

Now the ticket has been assigned to the Spanish Support group and a Spanish-speaking volunteer can respond. On the left side of the screen, click on the Tickets icon to be taken back to your main Tickets view

Choose Spanish Support
Don't forget to click update to save the agent assignment!

What to Do When You Cannot Answer a Ticket?

Scenario 6: You return a client's voicemail and during the call the client asks additional questions that you do not know the answer to

Let the client know you will look into their question and someone will get back to them. Leave a note summarizing your conversation with the client and reassign the ticket to the "Escalations Group"

On the right side of the screen, underneath "Properties", you will see an "Agent" dropdown menu. Select "Escalations Group" and then click the blue "Update" button on the bottom of the column to save the change you just made. *Always* leave the "Agent" field completely blank

Now the ticket has been assigned to the Escalations group and a Ladder Up staff will respond. On the left side of the screen, click on the Tickets icon to be taken back to your main Tickets view

Open
● FIRST RESPONSE DUE
by Thu, 14 May 2020, 04:59 PM
● RESOLUTION DUE   Edit
by Mon, 18 May 2020, 04:59 PM

PROPERTIES

Tags

Group
Escalations Group

Agent
--

Status *
Open

Type
--

Priority
■ Low

Update

Choose Escalations Group

Don't forget to click update to save the agent assignment!

Follow-Up Procedures

Once you assign a ticket to yourself, if a client responds, the ticket will be reopened and remain assigned to you. This provides consistency for clients so that they are interacting with the same volunteer

We understand that you may not be volunteering with us every day and clients may respond to you tickets on days you are not planning to volunteer

If you are unable to respond to a client within 12 hours of a ticket being reopened, Freskdesk will automatically redirect the ticket to the escalations group

If you receive a reply from a client on a day you are off, feel free to log on to respond, but know that if you cannot, the ticket will be addressed by another team member

Instructions for Phone Support Group

- As mentioned previously, calls to the support line go to voicemail and a recording of the voicemail is sent to help@GetMyPaymentIL.org

- A ticket is created in Freshdesk when the voicemail is received

- You will be responding to these voicemail tickets by calling the client back

- On the left side of the screen, click the "Tickets" icon

- Update your view by clicking on the 3 lines in the upper left-hand corner of the screen and select "Open Tickets in My Group"

  ≡ Open Tickets in My Groups

  - You will now see all open tickets in the Phone Support group (and any other groups you may be a part of)

  - You can click on any ticket that appears in the list - **start with the lowest ticket number (which indicates it's the oldest ticket)**

How to search for a client

- Because voicemails are being forwarded, Freshdesk does not notify you if multiple voicemails are left by the same caller

- We recommend you always use the search feature to check whether a client has left additional voicemails before calling the client back

  - If the client has left previous voicemails, there may be important information in the voicemail or documented in the notes section

- To do this, copy the 10 digit phone number into the search bar (don't include any dashes or brackets!)

 - If the client has called before, their other tickets will appear in the search results

Enter this phone number into the search bar

Once You Open A Ticket

▶ The ticket will contain a sound file of the voicemail message the client left

▶ Listen to the message and take notes on the name of the caller, their phone number, and their question

  ▶ Click the "Add Note" button that appears on the top of the page to add these brief notes (your notes can be much briefer than what you see as a sample in the video tutorial on working a voicemail ticket)

▶ If you know you can answer the question, on the right side of the screen, underneath "Properties", in the "Agent" dropdown menu, select your name from that menu to assign yourself to this ticket and then click on the blue "Update" button on the bottom of the column to save the change you just made

  ▶ **It's important that other volunteers in the Telephone Support group know that you've claimed this ticket so they don't start work on it too**

Click to add notes about the voicemail

This is where you'll see the caller ID name associated with the phone number and the 10-digit phone number itself - oftentimes the number will be the caller's desired callback number but the caller's name may differ

Choose your name

Don't forget to hit update to save the agent assignment!
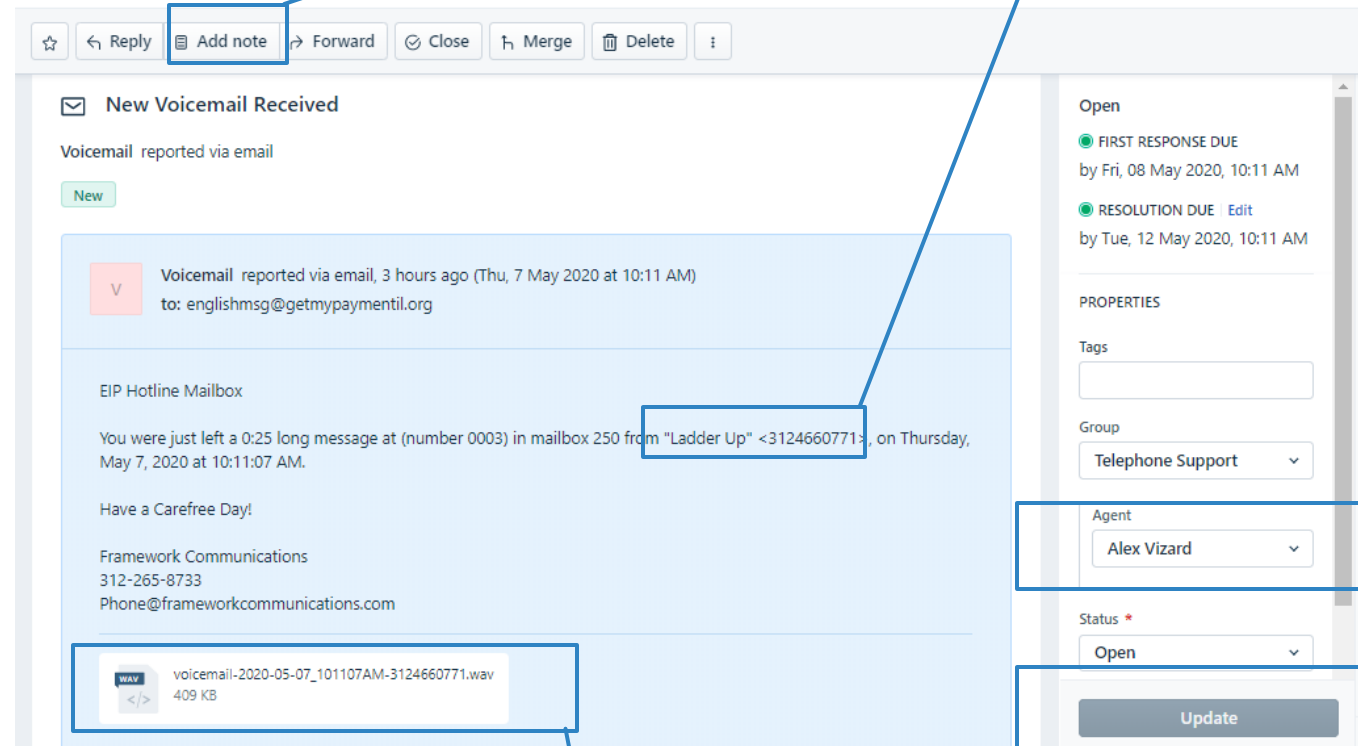
Voicemail recording file

Updating the Caller's Information

▶ **It is important to update the caller's name and phone number in the ticket**

- ▶ Right now, the ticket appears to come from "Voicemail"

- ▶ Hover your cursor over the blue box in the main portion of the email, you'll see a pencil icon appear to the right – click on the icon to edit the contact details

- ▶ An "Edit Ticket" area will appear – in the "Contact" field at the top, click "Add new contact"

- ▶ When the new contact form appears, fill in:

  - ▶ Name: Client's name followed by their phone number

  - ▶ Phone number: Include dashes

- ▶ When you're done, click the blue "Save" button at the bottom

---

🖉 Edit ticket

Contact *

Voicemail <voicemail@voipsynergy.com> ⌄

Add new contact

Subject *

New Voicemail Received

🖉 Edit ticket

Add new contact   Cancel
An email or a phone number is required

Name *

Type in the client's first and last name and phone number (ex: Frank Jones 847-123-4567)

Email *

Leave the email field blank

Company

Type in (or copy and paste from the voicemail email) the phone number and include dashes (847-123-4567)

Phone number *

Subject *

Updating the Caller's Information

▶ You will also see a "Contact Details" panel on the right of the screen with an option to edit the details

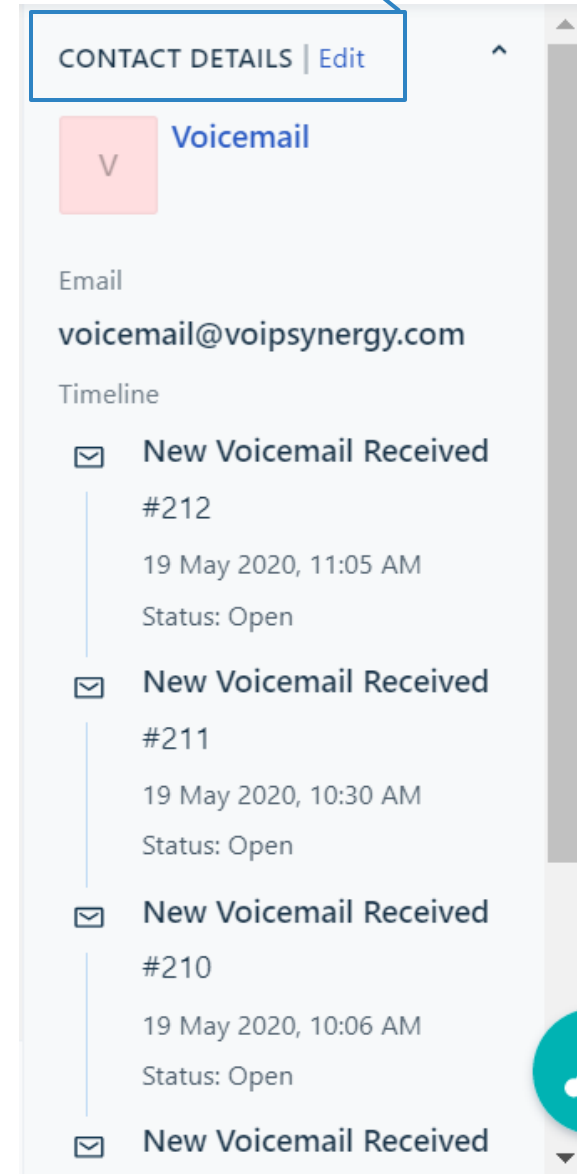   ▶ **Do not ever use this panel to update a caller's information!**

▶ This "Contact Details" panel is a way to edit an *already existing* contact, rather than create a new one

    ▶ This means that instead of creating a new contact for each new caller, the contact information for the voicemail forwarding service will be edited instead

    ▶ This will make it look like ALL voicemails are coming from the same caller, rather than from the voicemail forwarding service

▶ When updating a caller's information, please always follow the instructions on the previous slide

Never use this panel to update a caller's information!

CONTACT DETAILS | Edit

V

Voicemail

Email

voicemail@voipsynergy.com

Timeline

✉ New Voicemail Received
#212
19 May 2020, 11:05 AM
Status: Open

✉ New Voicemail Received
#211
19 May 2020, 10:30 AM
Status: Open

✉ New Voicemail Received
#210
19 May 2020, 10:06 AM
Status: Open

✉ New Voicemail Received

Calling the Client Back

▶ Using the CoreNexa app on your smartphone, call the client back on the number that either 1) appears in the email that came from Ladder Up's phone system or 2) is provided by the client in their voicemail message

  ▶ Instructions for installing and using the app are on the next slides

▶ Once you have finished your call, you'll need to update the ticket to reflect that either 1) the question has been resolved or 2) you weren't able to reach the person and/or you left a message with certain information

  ▶ If you speak with the client and answer their question, then change the status of the ticket to "Resolved", click the blue Update button, then return to the Tickets view

  ▶ If the client doesn't answer, the number isn't working, or you end up leaving a message, click "Add Note" near the top of the screen to document what happened. Change the status of the ticket to "Resolved"

Downloading the hotline app

2

4
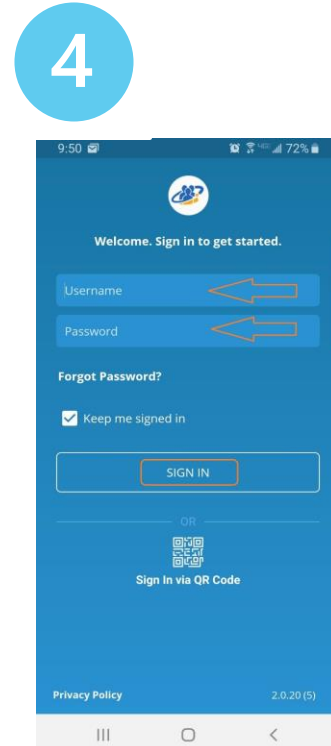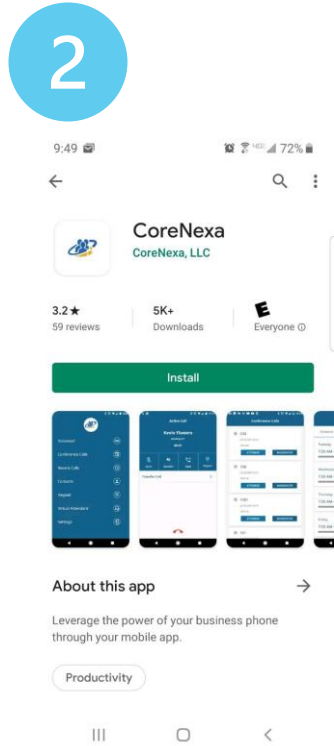
1 Go to the App Store on your phone

2 In the store, search for the app named "CoreNexa" and install

3 Once installed, go to the app and it should prompt you for a username and password
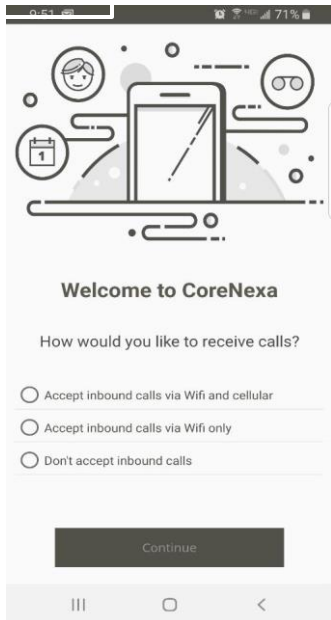
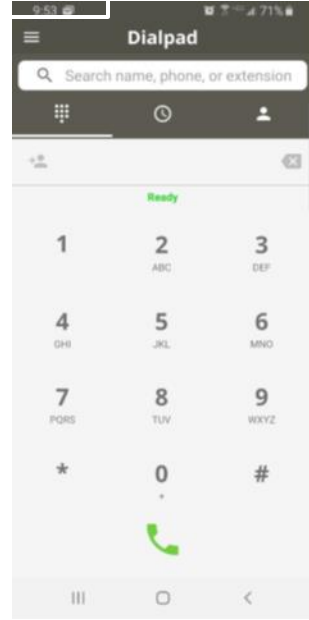**4** Enter the username and password provided by Ladder Up

Downloading the hotline app

5

7

Welcome to CoreNexa

How would you like to receive calls?

○ Accept inbound calls via Wifi and cellular
○ Accept inbound calls via Wifi only
○ Don't accept inbound calls

Continue

Dialpad

Search name, phone, or extension

Ready

1	2 ABC	3 DEF
4 GHI	5 JKL	6 MNO
7 PQRS	8 TUV	9 WXYZ
*	0	#

5 Once you login, the app will ask you several questions. It will ask how you want to accept incoming calls (Wi-Fi, data, or both), for access to your microphone, contacts, etc. You do not need to import your contacts

6 The app will then guide you through a brief tutorial

7 Once you complete the tutorial, you should be at home screen. Use this dial pad to make calls

A Note on Scams

▶ Unfortunately, with the recent events occurring, there has been an increase in scams and malicious emails

▶ Please be mindful and do not open any links or attachments that look suspicious

   ▶ If you see a ticket that looks extremely mistrustful or has suspicious links or attachments, assign the ticket to the Escalations Group and Ladder Up staff will address it

▶ Be aware that all voicemails will be received as attachments to an email. These are not spam and you will need to open the attachment to hear the message

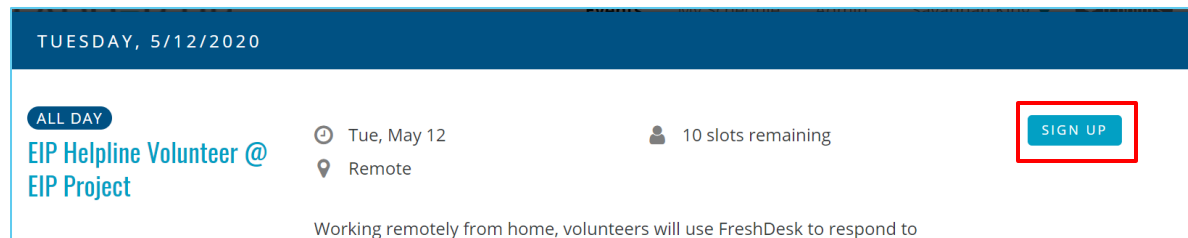▶ For more information on avoiding scams, visit the Federal Trade Commission Website

Registering for a Volunteer Shift on VolunteerHub

- VolunteerHub is the platform we use for scheduling all volunteer shifts
  - You can access it at www.goladderup.volunteerhub.com
- If you already have a VolunteerHub account with us, please use that same account to register for EIP Helpline volunteer shift
- If you don't have a VolunteerHub account with us, you'll need to create one
  - If you'd like instructions on creating an account, you can view those here

Registering for a Volunteer Shift on VolunteerHub

We ask that you register for a shift when you anticipate you will be volunteering on the helpline *for any amount of time*. Shifts are scheduled as "all-day" events to provide you with flexibility on when in the day you would like to volunteer.

▶ To register for a volunteer shift, click on a shift on the homepage calendar to view more information, and then click "sign up" to register

Didn't register ahead of time on VolunteerHub but had some time to volunteer on the helpline? Don't worry, you can still register for a shift of the day of!

# Why do we ask you to register for sessions on VolunteerHub?

Please feel free to volunteer according to your own personal schedule. If you prefer to volunteer for several hours at a time, great! If your schedule allows for you to volunteer for 15 minutes here and there, you are welcome to do that!

However, we ask that you register for shifts on VolunteerHub whenever you volunteer for any amount of time for two reasons:

- Having volunteers register in advance (when possible) assists us with ensuring adequate coverage of the helpline
  - For example: If we see that there are no volunteers planning on responding to inquiries for several days in a row, we know we will need to provide additional staff coverage
- The project is receiving specific funding and it may prove helpful to show the in-kind contributions of our EIP volunteers

Reporting your hours on VolunteerHub

- At the end of each day you volunteered *any* amount time on the helpline, self-report the hours you spent volunteering
  - In the top, right corner of VolunteerHub, click on your name and select "View Hours" from the drop-down menu
  - Click on "Report Hours"
  - Select the date you wish to report hours for in the drop-down menu, enter the total hours spent volunteering on the helpline that day, and click "Submit"
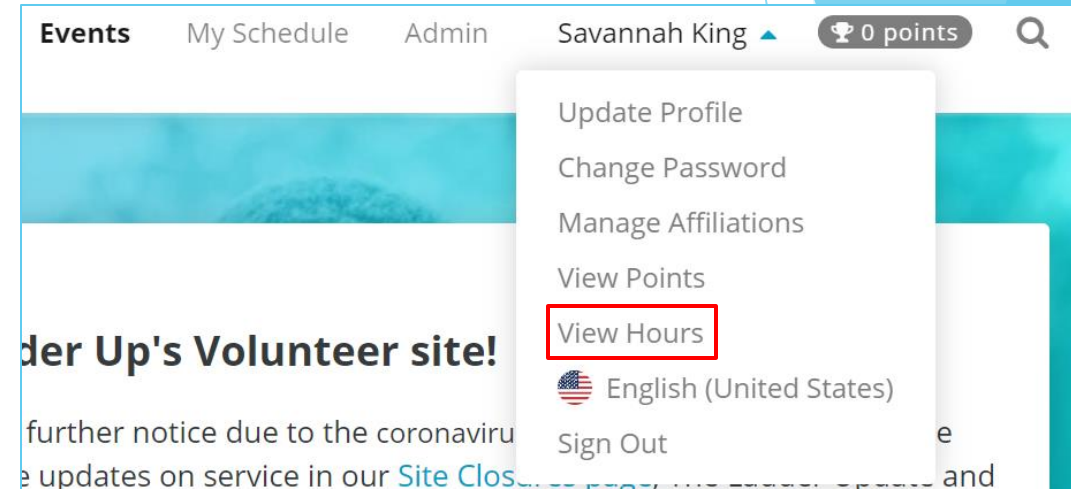
Certification Test

- Now that you have completed both modules, you are ready to certify!

- In order to provide quality service to our clients, we require that all volunteers pass a brief, 8-question certification test and demonstrate they can use Freshdesk

- The test will cover the materials presented in the EIP Subject Matter training

  - You can access the test here

  - To pass, you must answer 7 of 8 questions correctly

- Additionally, as described in slide 9, you must complete test tickets as practice

- Once you complete the test tickets, allow 1 business day to be added to your support group(s)
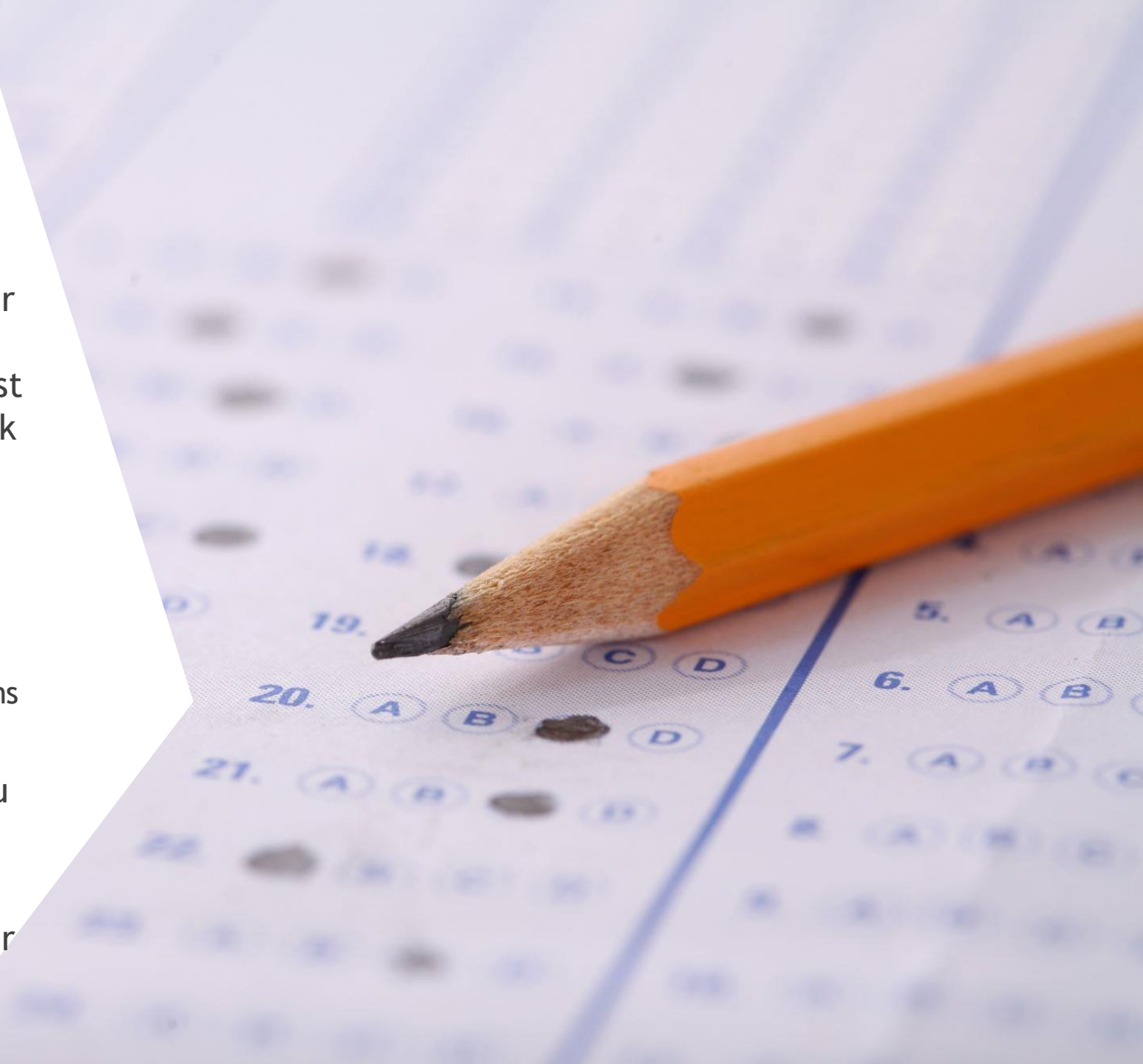
Volunteer Support

Ladder Up staff are here to support you!

- If you have an urgent technology request such as difficult accessing Freshdesk or using the CoreNexa app, reach out to Jennifer during regular business hours (M-F, 9 am-5 pm)

  - Jennifer: 312-466-0771 ext. 127

- For non-urgent requests email eipsupport@goladderup.org

  - Let us know if you have suggestions for additional canned email responses, FAQs, or other resources!

- Having difficulty resolving a client question? Assign the ticket to the Escalations Group and Ladder Up staff will take a look at it.