

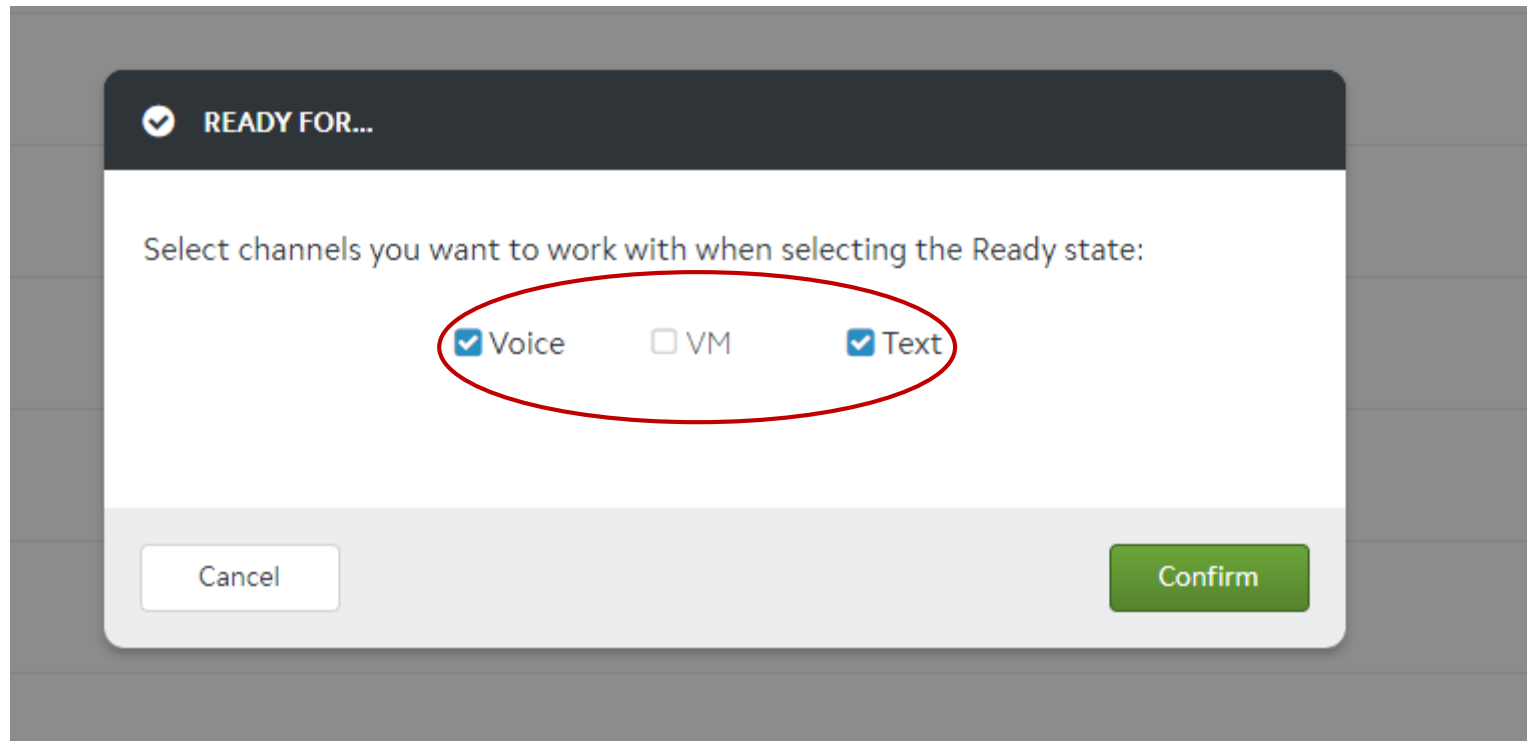
How to Do Chat on Five9

- Log into Five9 like you normally do for every shift.
- When you're ready to take calls/chats, click the red "Not Ready" box and select "Ready For..."

The screenshot displays the Five9 user interface. At the top, a dark blue header contains the 'Five9' logo on the right. Below the header, a red status bar indicates 'Not Ready' with a timer at '0:47'. A dropdown menu is open from this status bar, listing options: 'Ready (Voice,Text)', 'Ready For...', 'Break', and 'Meeting'. A red circle highlights the 'Not Ready' status bar and the dropdown menu. A green arrow points from the text 'click the red "Not Ready" box and select "Ready For..."' to the 'Ready For...' option. A black tooltip box with white text reads 'Select channels to be Ready for (Ctrl + Alt + Shift + R)'. Below the status bar, the user's name 'astrangelo' and organization 'Long Island Crisis Center' are visible, along with an email address and a phone icon. The main content area shows a 'MY SKILLS' section with a 'Change...' link, followed by a 'Chat' section listing skills: '227Talk_911Operator', '988', 'Children of Hope', and 'Huntington', each with the note '(you have not selected this skill)'. A vertical sidebar on the left contains icons for 'Voice Mail', 'Chat', 'Contacts', and 'Activity'.

Click to check Voice (will probably already be checked), and click to check Text. Then click Confirm.

You will only have to do this upon your first log in after the chat update.



READY FOR...

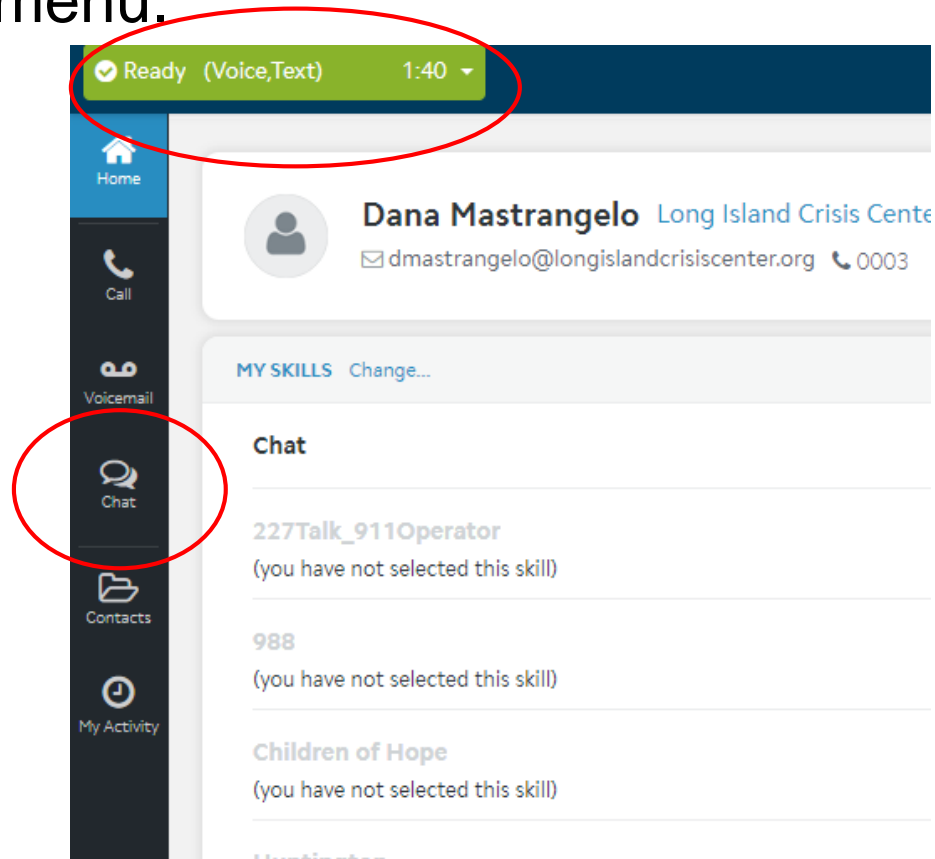
Select channels you want to work with when selecting the Ready state:

Voice VM Text

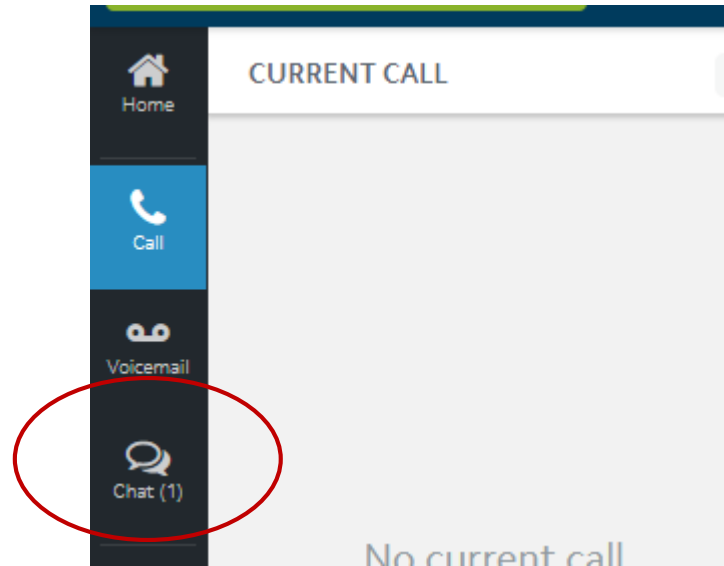
Cancel Confirm

After clicking Confirm, you will see you are ready to take Voice calls and Text chats.

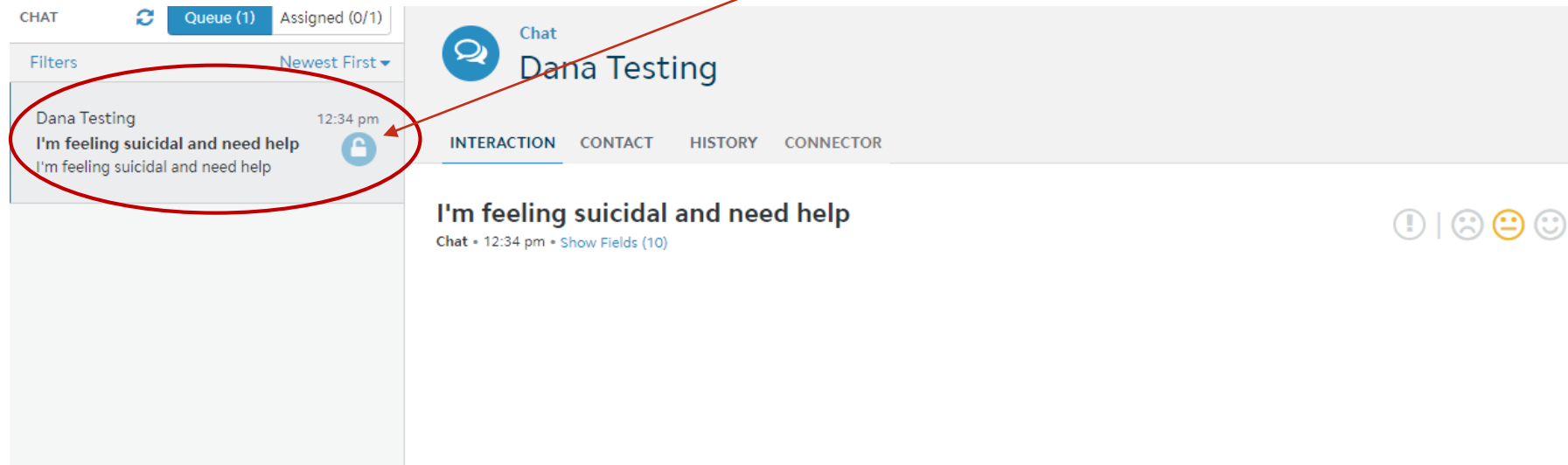
If you look down on the left, you will see a Chat icon was added to the menu.



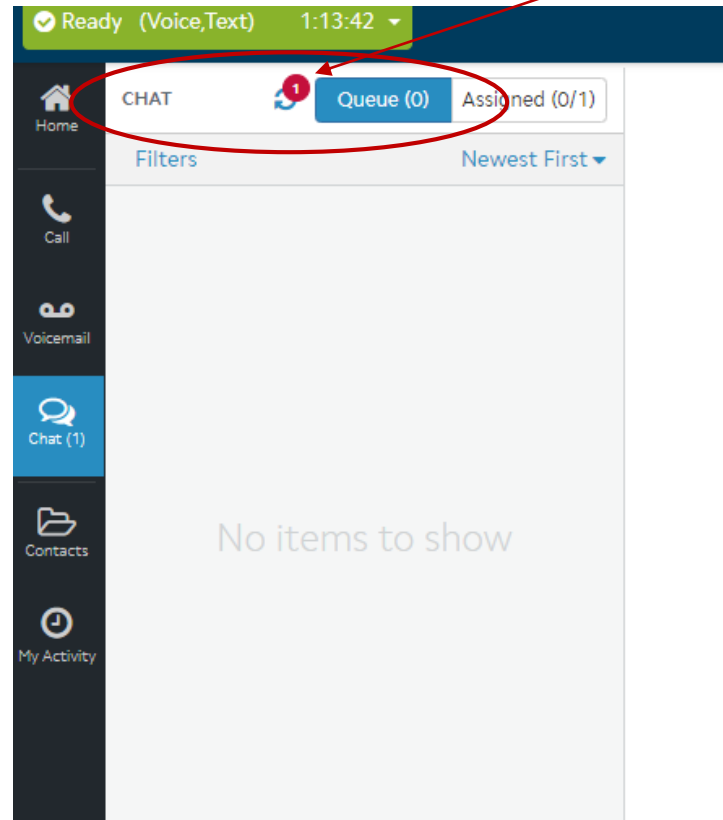
When a chat comes through, you will hear a ding alert (which is the same as when you use the address book to chat with your fellow counselors, so it's pretty easy to recognize). You will see the number 1 appear next to the chat icon. The system will only offer you one chat, or one call at a time, but never both at the same time. Please keep your volumes up so you can hear the alerts!



When you click on the chat icon, you will see the chat and the opening message the client sent to the left. You will also see a lock button. **The chat is sent to ALL available agents at the same time** in minimize chances of it being missed, so if you want to take the chat, you must click the lock button and then the chat is yours to take.



Occasionally (and I don't know why) the chat will come through but the notification will be up in the little circle arrow thing. Just click the red 1 and then you can lock the chat in.



Once you've locked in the chat, you will be able to type to the client. You will see if they are typing and they will when see you are typing, so you'll know if they're still engaged. If you've been here awhile you'll remember we used to keep track of known chatters by their IP address, but this system does not show the IP, so you don't have to worry about that anymore.

The screenshot shows a chat window for 'Dana Testing'. At the top, there are navigation tabs: INTERACTION, CONTACT, HISTORY, and CONNECTOR. The chat title is 'Dana Testing' with a chat icon. On the right, there are buttons for 'TRANSFER...' and 'SET DISPOSITION'. Below the title, there are links for 'Contact Lookup...' and 'Worksheet'. The main chat area shows a message from 'Dana Mastrangelo' at 12:36 pm: 'I'm feeling suicidal and need help'. Below this is a blue informational box: 'Long Island Crisis Center is a Long Island based agency that offers short-term crisis intervention counseling and referrals. Since we are only funded to serve the Long Island area, we are really only able to offer our counseling services to people from Long Island. In order to ensure that you are, indeed, from Long Island, please tell me the town you are contacting us from and the name of a major beach or mall on Long Island. If you are not from Long Island, please visit www.crisischat.org in order to connect to a counselor.' Below that is a message from 'Dana Testing' at 12:36 pm: 'I'm feeling suicidal and need help'. Then another message from 'Dana Mastrangelo' at 12:36 pm: 'It's great you contacted...'. At the bottom, there is a text input field with the placeholder 'Type here to send a message...' and buttons for 'End Chat', 'Conference', 'Assistance', and 'Send'. On the right sidebar, there is a 'Comments' section with a text input field. Below that is a 'Text Details' section with a table of metadata: Title: 'I'm feeling suicidal and need help', Cluster: 'None', Attributes (0): 'Edit', Disposition: 'None', Topic thread: 'None', Rules & Priority: 'None', Conversation: 'None'. Below that is a 'Contact' section with 'Edit' and 'Dana Testing' with phone number '1555550100' and email '018a18f2-bc09-a5ad-a52d-aa31c891...'. At the bottom of the sidebar is a 'History' section with 'Show All'.

Either the counselor or the client can end the chat once it's over. If you are ending the chat, you will just hit the End Chat Button at the bottom (pictured on the previous slide). After clicking the End Chat button, you **must** click the green Set Disposition button on the top right and select "No Disposition" in order to be able to accept future calls or chats. If the client ends the chat, it will tell you and you will do the same steps with Disposition. If you do not do this, you will not get calls or chats sent to you for the remainder of your shift.

The screenshot shows a chat window for 'Dana Testing'. At the top right, there is a 'SET DISPOSITION' dropdown menu, which is circled in red. The dropdown menu is open, showing options: 'No Disposition' and 'Spam'. Below the chat header, there are tabs for 'INTERACTION', 'CONTACT', 'HISTORY', and 'CONNECTOR'. The main chat area shows a message from 'Dana Mastrangelo' at 12:36 pm: 'I'm feeling suicidal and need help'. Below this, there is a response from 'Dana Testing' at 12:36 pm: 'I'm feeling suicidal and need help'. Further down, there are two more messages from 'Dana Mastrangelo' at 12:36 pm and 12:37 pm: 'It's great you contacted...' and 'Chat terminated by the agent'. On the right side, there is a 'Comments' section with a text input field and a 'Text Details' section with a table of metadata.

Text Details	
Title	I'm feeling suicidal and need help
Cluster	None
Attributes (0)	Edit
Disposition	None
Topic thread	None
Rules & Priority	None
Conversation ...	None

Lastly, your chat will appear in the “My Activity” tab a few minutes after it’s completed. If you click the chat in the “My Activity” tab where you’re used to seeing the calls you took for the day, you will be able to see a transcript of the chat, which will help you when trying to write it up in InfoBase.

If any questions or issues come up, please let Dana know @
dmastrangelo@longislandcrisiscenter.org

Online Counselor Manual

- ▶ **In order to be an effective Online Crisis Counselor, the volunteer must possess the following skills:**
- ▶ Must be extremely comfortable with using the basic commands of the computer (copy, paste, toggle)
- ▶ Ability to multi task, using InfoBase and Five9 at the same time.
- ▶ Strong written communication skills (spelling, able to form coherent thoughts in into thoughtful statements, non judgmental)
- ▶ Good typing skills (typing speed, for example)
- ▶ Ability to assess intensity and risk of the chat without hearing clients voice or affect
- ▶ Patience
- ▶ **Chat vs. Telephone Crisis Services**
- ▶ While most of the same crisis intervention skills are needed to have an effective chat session (MRPISS, MESFEOCA, Feelings), some translate better on the internet than others.
- ▶ For example, minimal encouragers such as mmmm, go on, etc. probably wouldn't be necessary because the client can see when the counselor is typing. In addition, prolonged silence is not productive on the internet, as the time it takes to read and respond to what the client has said is usually enough. In terms of restatement, it's usually more powerful when used in addition to another skill as opposed to a single statement.
- ▶ **Some skills that are extremely effective in online counseling are:** making contact on a feeling level, support, paraphrasing, summary, focus, interpretation and exploration.

Online Counselor Manual Cont.

- ▶ **Making contact on a feeling level and support:** Because of the lack of voice and affect, feelings must be used throughout the chat, however are the most effective towards the beginning. Counselors must identify, reflect and validate feelings in order to establish both trust and understanding between counselor and client. Once a client feels the counselor understands on a feeling level, it can lead to further disclosure on the part of the client. In addition, it can let the client know you are reading and responding to what they are saying, and are not using canned statements. Giving support is also useful in trying to establish trust and break down any walls the client may have up. It takes a lot of courage to reach out for help and there's no harm in letting the client know that. It's also important to acknowledge and support the positive things they have going on in their life based on what they have told you.
- ▶ **Paraphrasing, Interpretation, Summary and Focus:** Online disclosure tends to be higher and many issues are often revealed at once. Since online chats tend to be longer, it's important to focus on the IT (what's causing them the most pain) and the best way to accomplish this is by using paraphrasing, interpretation and summary to wade through everything they have said. By using these skills, it can make the client feel like they are being listened to and that you are not jumping to problem solve. For the Counselor, it gives them control of the chat and an idea of the direction they want to take it. Once the IT has been decided on, it's time to focus.
- ▶ **Exploration:** Once you have focused on the IT, it's time to use exploration to try to help them come up with a plan. By using open ended questions we can help them explore feelings on using their resources, our resources, and other coping mechanisms they may not have thought of.

Online Counselor Manual Cont.

- ▶ **Things to keep in mind:**
- ▶ It's important to use shorter chat segments, a few sentences at most. By using long paragraphs, clients may skim over important information.
- ▶ Use language that you feel the client will understand. For example, when speaking to a younger teen, keep in mind they may not understand larger words.
- ▶ Address suicide promptly with a lethality assessment.
- ▶ Be prepared for the client to end the chat without warning. This can feel jarring, however it is the clients right to end the chat whenever they feel like it. It doesn't mean you as the Counselor has failed, it just means the client may have been less engaged by this means of communication, or they needed to get off their device quickly.
- ▶ You may need to repeat important questions if the client doesn't respond to them. Sometimes clients get so into the groove of typing and telling their story that they can sometimes miss what they Counselor has typed.
- ▶ It's OK to ask how the client is feeling as the chat is progressing. Since we have no way of hearing their affect, Counselors can periodically check in on the client by asking.

Online Counselor Manual Cont.

- ▶ Things to Keep in Mind Cont.
- ▶ Be mindful of always asking open ended questions which lend to longer, more thought out answers. Close ended questions will usually lead to one word answers, and it's harder to come back from that online than it is on the phone.
- ▶ If a client repeatedly uses one word answers and seems disengaged, it's okay to remind them that you are asking these questions to get a sense of what is going on for the client in order to help them through their crisis. Some things you may ask are, "what's on your mind right now" or "when you contacted here today, what did you hope the outcome would be".
- ▶ Avoid advice giving! Clients often become disengaged when being told what to do. Conversely, if a client presses that they WANT you to tell them what to do, it's important to remind them that what we do is explore options and cannot tell them what do to.
- ▶ No problem is too small. Due to the nature of chat and the population it attracts, sometimes Counselors may feel teen problems are minor and dismiss them. It's important to remember crises come in different shapes and sizes. If you feel you are having trouble relating to the client, talk more about their feelings surrounding the situation. Feelings are easier to relate to than situations and feelings are what make someone feel like they are in crisis to begin with.
- ▶ Lastly, patience is key. Clients can feel when you are trying to rush them. Just because they choose the online medium to reach out on does not mean they are not in a real crisis and you need to get them off the chat quickly to keep yourself open to answer the phone call for someone who is in a "real" crisis. Some people are more comfortable communicating online than on the phone and in no way takes away from the crisis they are experiencing. Take your time with them. It took a lot of courage for them to reach out.