

LIVE CHAT AGENT STANDARD OPERATING PROCEDURE

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LIVE CHAT AGENT STANDARD OPERATING PROCEDURE

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Purpose

To create a standard and uniform process for Live Chat agents and anyone operating in Live Chat moving forward.

Upon the implementation of a dedicated Live Chat department, it was determined that a process of standardization had not been implemented. It is the goal of the Live Chat department to produce consistent service to our customers.

Live Chat is meant to be a virtual resource equal to that provided by our OneStop's and WorkSource centers. To encourage customer engagement an umbrella of uniformity in: how the service is delivered, the information provided, and the experience by the customer needs to be fulfilled. The procedure manual is meant to service as the guiding principle in this endeavor.

Scope

This procedure manual is meant for any person that has access to, or intends to access, the Velaro software for the purpose of providing remote virtual service to WorkSource WA customers. Live Chat is meant to be a comprehensive resource to our customers, with access to the information that would be provided to them in a center. Anyone who wishes to or has access to Velaro Live Chat portals with intent to provide remote service should be familiar with this document.

Prerequisites

Velaro Live Chat is a third-party system utilized by Employment Security staff to provide remote chat services direct to our customers. In order to use this procedure manual, the user should have already completed overview training with a certified Valero trainer or Live Chat Program Support personnel lead. The training should include the process to accept and respond to a chat, reporting, and the process of being available or unavailable as a chat agent.

Further and more comprehensive training will be provided by one of the Live Chat Program Support personnel leads to outline the common response systems, Live Chat etiquette, and FAQ's. The user should have prior knowledge of the programs and facility resources utilized and promoted through Onestop centers, WorkSource locations, and The Unemployment Claims Center.

Responsibilities

The Program Support Personnel that share a primary role in the development, maintenance, and integrity of this procedure manual are:

1. **Mary Zavala**- Customer Experience Leader, mzavala@esd.wa.gov, 509-679-0998
2. **Carol Cauthron**- Live Chat Program Coordinator/Live Chat Administrator/Trumba Administrator
ccauthron@esd.wa.gov, 509-406-4422
3. **Tiffany Granillo**-Live Chat Program Coordinator/Live Chat Administrator/Trumba Administrator
tgranillo@esd.wa.gov, 360-485-7720

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The above parties have a vested interest in the implementation and processes detailed in this document and share the responsibility of generating the procedure detailed throughout.

Mary Zavala oversees and directs the Live Chat Program Coordinators on daily tasks, projects, and department goals for the future. She is the final approving authority on this document.

It is the personal responsibility of every person acting as an agent of Live Chat to adhere to proper professional etiquette when conducting chats.

Agents are accountable for ensuring that each customer is given true and accurate information regarding WorkSource programs, services, and duties; or, if not confident in the knowledge, to conduct a warm hand-off to the appropriate designated professional.

Agents can be held liable for misinformation shared to unemployment claimants regarding their claims; and as such it is the agent's duty to ensure only accurate information is provided or refer to the claims center in instances of uncertainty.

Agents are required and expected to conduct themselves with integrity and professionalism with the knowledge that they are representing Employment Security in a virtual capacity.

Chat Orientation

Live Chat is meant to be a virtual resource for customers; where they can have instant virtual access to the information and assistance equal to an in-person experience at WorkSource and Onestop centers.

What is Live Chat? Live Chat is the synchronous live chat platform used by Employment Security that facilitates real-time communication with visitors via the WorkSourceWA.com website online environment.

There are two primary roles in the Velaro online portal:

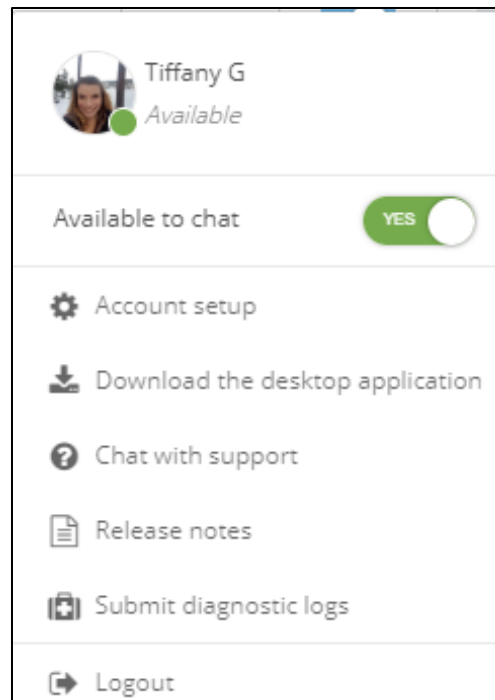
Role	Description
Agent	Designated Employment Security staff tasked with performing front line customer satisfaction
Visitor	Customer utilization the WorkSourceWA.com portal

Logging In and Getting Started

To access the Velaro site for the first time, navigate your browser to <https://app.velaro.com/> and enter your username and password. If you do not have a username and password, contact a Live Chat Administrator for access. The Velaro system is optimized for Chrome and is the suggested browser of operation to prevent bugs or system glitches.

The first time you log in, your availability will be set to "Available" meaning that you can accept any incoming chat requests and should be prepared to do so. You can change your availability in the top right with your name and silhouette (or headshot if you've provided one to an administrator). You will see a green dot when you are available and a red one when you are not.

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If you are not ready to receive chats, change your availability to “Unavailable” by clicking on your name and selecting “Switch to Unavailable.” The icon will change to red. You should always confirm your availability when logged in to ensure that chats are being directed correctly.

When you are available you can:

- Receive chats
- Access real time visitor monitoring

It is recommended that you use the “Available” status most of the time.

When you are un-available you:

- Can't receive chats automatically
- Can manually accept any chats that are queued or join existing ones
- Any previous chats can be continued
- Can access real time visitor monitoring

Use the “Unavailable” status if you are taking a break or need to get up from your desk for a few minutes. Log out completely if you are leaving for the day.

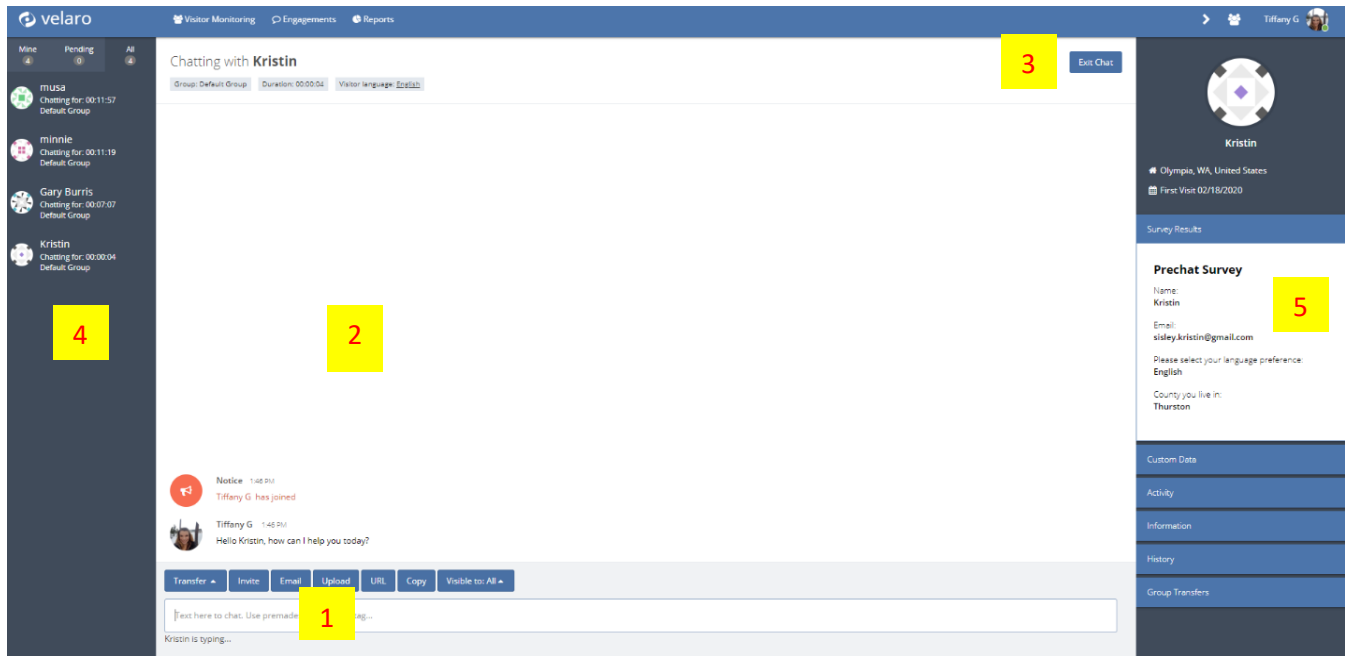
***Maintaining the correct availability is extremely important, if all agents logged into Live Chat are Unavailable, an offline message will be displayed. This can lead to a poor customer experience if they are expecting for find services online during normal operating hours.**

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If you find that you are not receiving chats, check your availability first.

Chatting with a Visitor

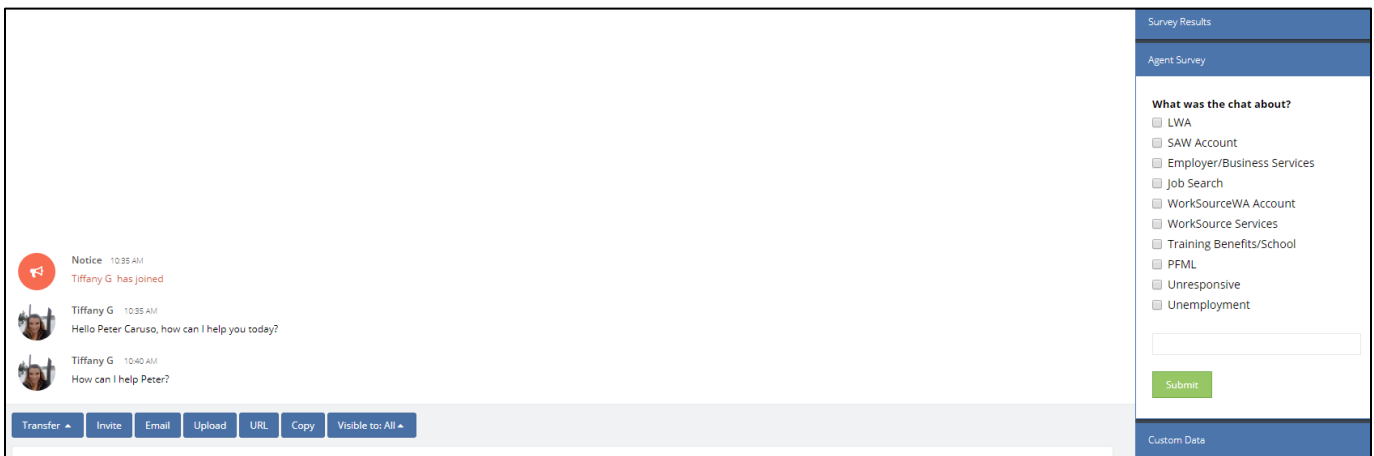
As a Live Chat agent, the majority of your time will be spent in the “Engagements” screen of the control panel:



1. Message Input Box- Area of the engagement screen where messages to the visitor are typed. When typing, a notification will appear on the visitor’s window and will alert them to expect a response. In turn, when visitors are typing agents will see a notification below the input box.
2. Chat Content- All communication is displayed in the center screen in the order that the content is received. Each chat line contains who sent the response, at what time, and whether a like was supplied.
3. Exit/Close Chat- Once a chat is complete, if the visitor doesn’t close, you can close out the chat by selecting the “Exit/Close Chat” button. This allows Velaro to archive the transcript for later review. If you have hit your limit of concurrent chats, closing will then allow a new chat to replace the closed one.
4. Visitor List- Visitors who initiate a chat will appear on the left, and you can filter the results to show only your own chats, visitors who are waiting in queue, or see all at once. New chats and queues will automatically appear here. You should see and hear accompanying alerts when a new chat/queue does come through.
5. Visitor Info- Once you are in a chat, you’ll see the visitor’s information will appear in detail on the right. This will allow you to view their survey answers, visitor monitoring info, and visitor history. This information can be helpful when escalating technical issues to the relevant help desk.

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After a chat is completed, you will be asked to select a topic of the chat before you close. This is called the Agent Survey:

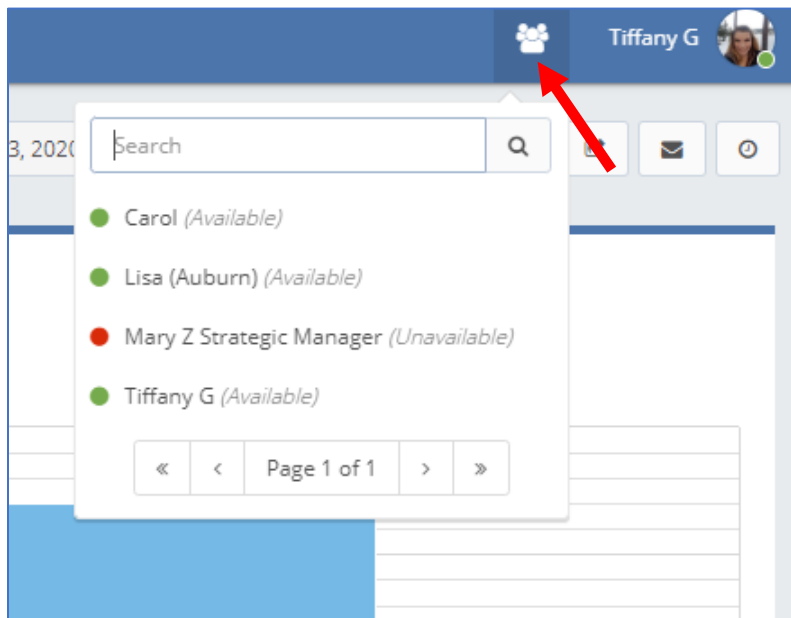


From the list, select the topic that represents the chat focus. If none of the options apply, you may type the subject in the blank box provided and click "Submit."

The agent chat must be completed before a chat can be closed. It can be completed at any time during your chat with the visitor.

Agent-to-Agent Chat

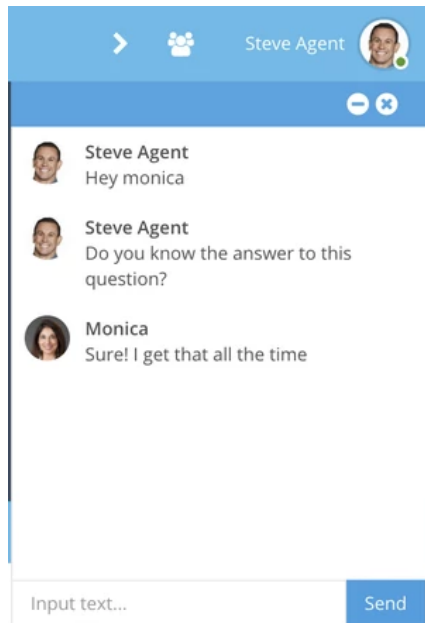
One of your greatest resources to answering challenging visitor questions is your fellow agents. Agent-to-agent chat (a2a chat) is accessed by clicking on the people icon, next to the profile avatar on the main menu.



A control will appear that allows agents with access to agent2agent chat to be searched. Each agent that is logged into Velaro is listed, along with their availability status.

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When an agent is selected messages can be exchanged within the chat, and then the chat history is displayed:

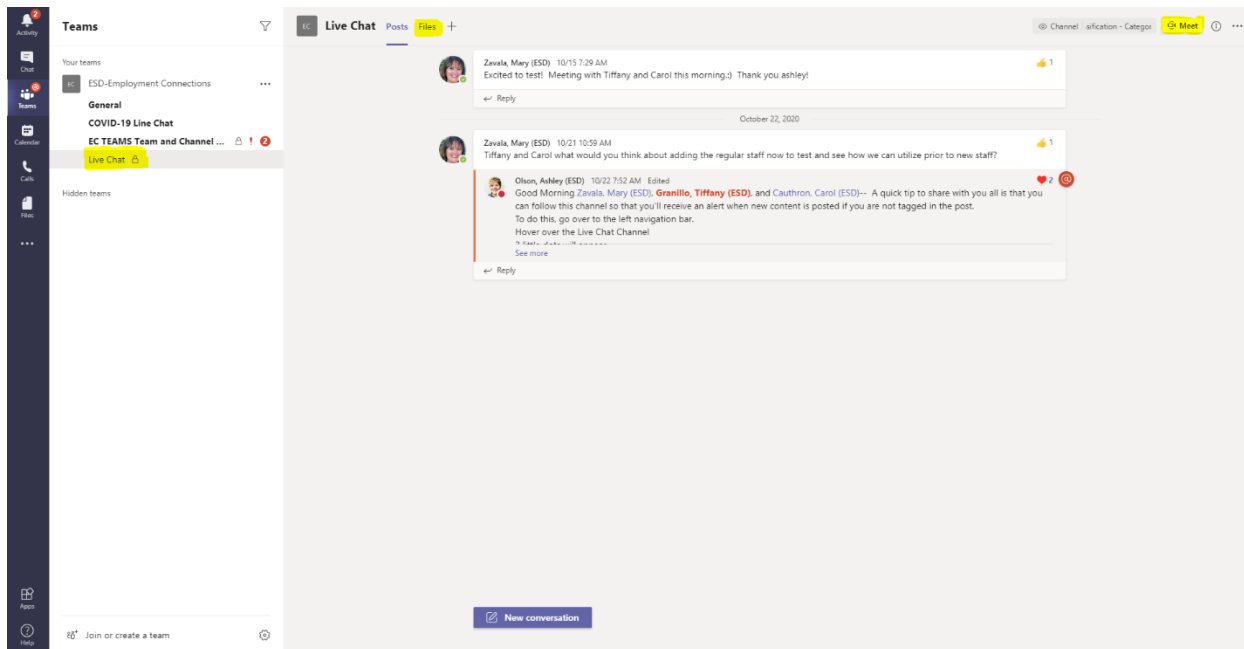


Clicking “-” will minimize the chat and change to a “+”. Click “+” to maximize the agent2agent window again.

Clicking “x” will close the chat window. The chat history will be saved.

TEAMS Chat

In addition to Agent2agent chat, the Live Chat Division has a TEAMS channel that allows chat agents to reach out to the team with questions, concerns, or to access Live Chat resources.



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Once granted access to TEAMS, you will need to be added to the “Live Chat” channel. You can access this by selecting the “TEAMS” in the left-hand side of the screen, third icon from the top. This will display the channel you have been granted permissions for. Select “Live Chat” from the list to view the Live Chat channel.

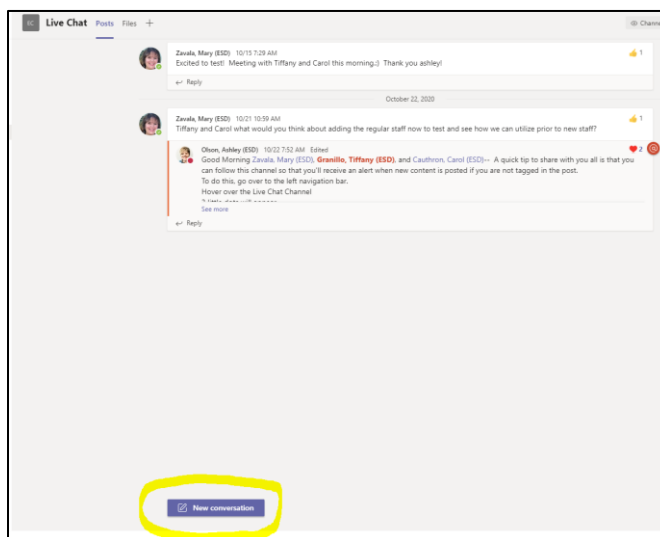
Utilizing TEAMS will allow the Live Chat agents to work together to address issues, questions, or visitor requests.

Functions of TEAMS Chat

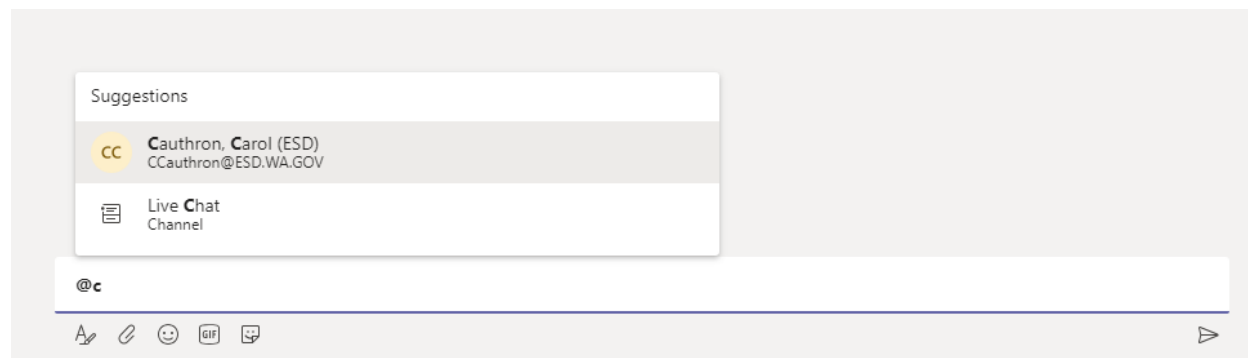
Selecting the channel will display the chat feed of the channel. Here you can type questions, share knowledge, tag specific people in your post, or access resource files that can assist you with chat.

Starting and managing a Post

To start a new chat, simply click on “New conversation” located in the bottom center of the TEAMS chat page.



To tag a specific person in your post, click on the “New conversation” button. Type “@” to bring up the channel search pop up:

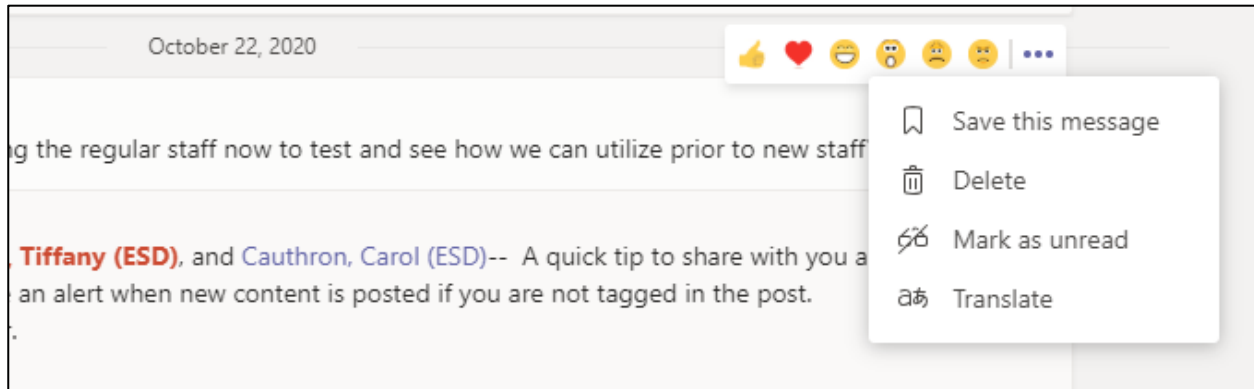


Begin typing the individuals name and select them from the list provided. After selected, you can continue with typing your message. To send the message, either hit “Enter” or click on the paper airplane icon to the bottom right of the message box.

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You can also attach files or screenshots in your message by clicking on the paperclip or dragging and dropping objects into the chat box. This is an efficient and easy way to share items with your team.

Once you create a post, you can manage it by hovering over the right-hand side of the message to bring up 3 small dots:



Saving the message will allow you to access it later for future reference or view any updates or additional comments.

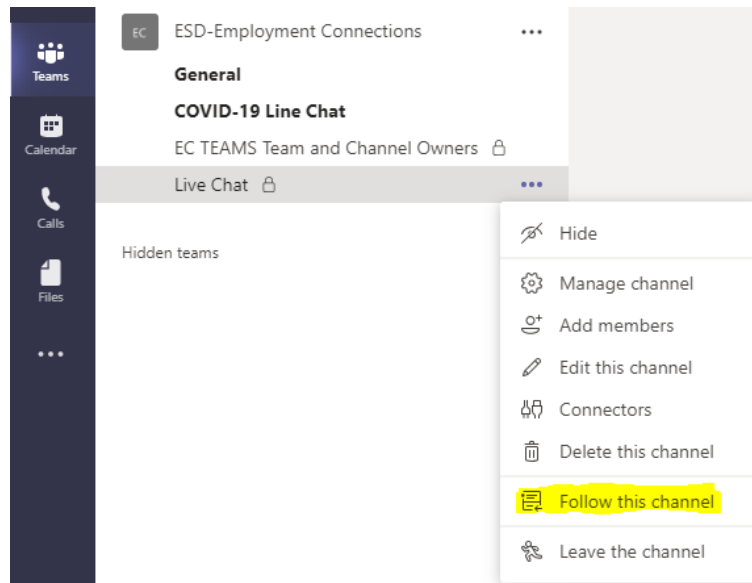
Deleting the message will remove the post from the chat channel feed.

Marking the post as unread will “bump” the message to the most recent part of the feed for maximum viewability.

Translate will translate the message from English (not commonly used).

Turning on Notifications for TEAMS

To ensure that you receive notifications from the channel follow the following steps:



1. Go over to the left navigation bar.
2. Hover over the Live Chat Channel

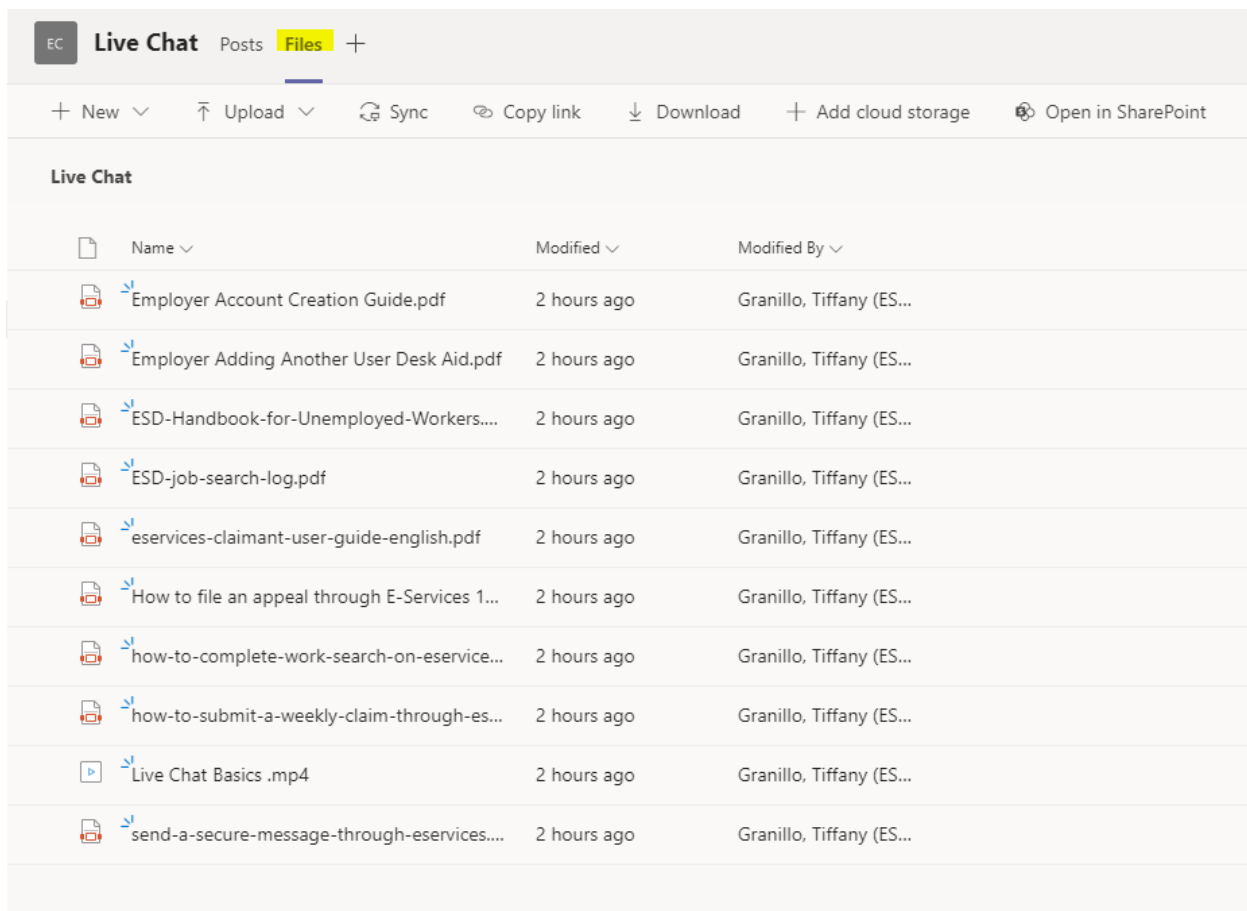
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3. 3 little dots will appear
4. Click the dots
5. This drop-down menu will appear
6. Click "Follow this channel"

If you are tagged in TEAMS posts, you will receive a desktop notification of the tag and clicking on the desktop alert will direct you to the post.

Accessing Live Chat TEAMS File Resources

As part of the channel, we have loaded commonly used documents and resources to assist you with Live Chat. It can be accessed by clicking on the top middle of the TEAMS portal beside "Posts":



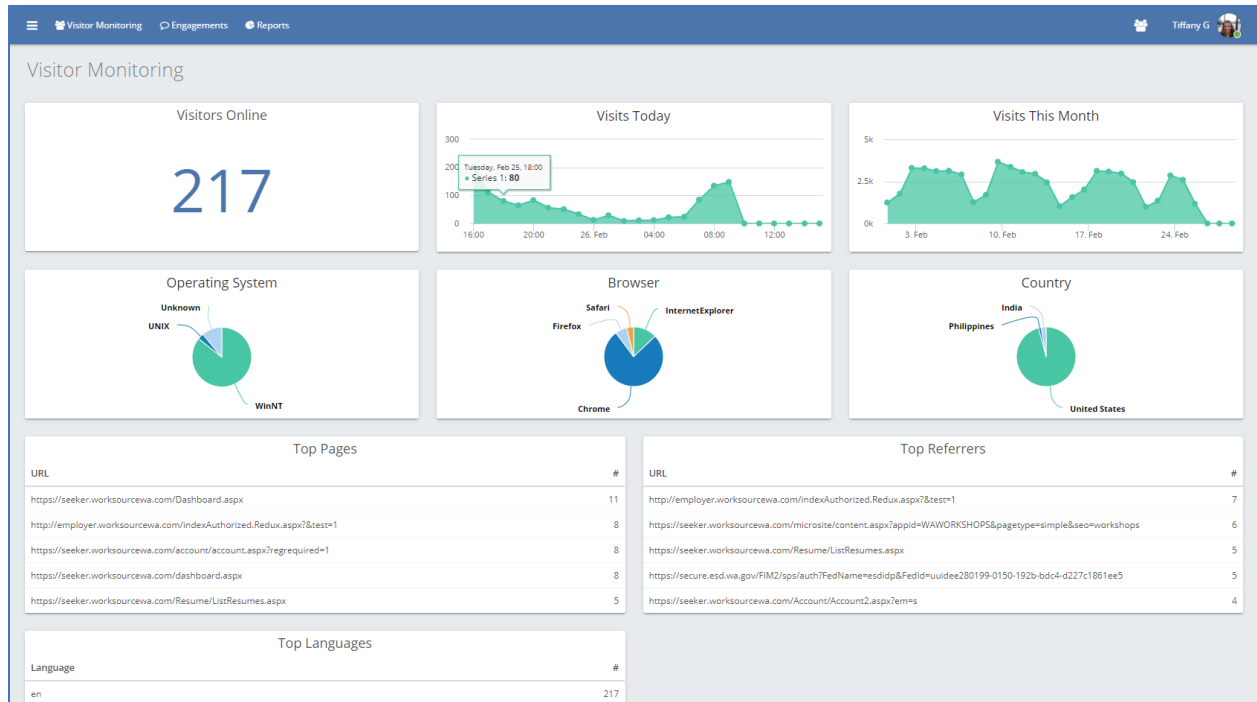
Name	Modified	Modified By
Employer Account Creation Guide.pdf	2 hours ago	Granillo, Tiffany (ES...
Employer Adding Another User Desk Aid.pdf	2 hours ago	Granillo, Tiffany (ES...
ESD-Handbook-for-Unemployed-Workers....	2 hours ago	Granillo, Tiffany (ES...
ESD-job-search-log.pdf	2 hours ago	Granillo, Tiffany (ES...
eservices-claimant-user-guide-english.pdf	2 hours ago	Granillo, Tiffany (ES...
How to file an appeal through E-Services 1...	2 hours ago	Granillo, Tiffany (ES...
how-to-complete-work-search-on-eservice...	2 hours ago	Granillo, Tiffany (ES...
how-to-submit-a-weekly-claim-through-es...	2 hours ago	Granillo, Tiffany (ES...
Live Chat Basics .mp4	2 hours ago	Granillo, Tiffany (ES...
send-a-secure-message-through-eservices....	2 hours ago	Granillo, Tiffany (ES...

If you plan on utilizing the documents provided, it is asked that you either access without changing, you do not save any changes made, or you download to your own desktop to edit. We will edit and arrange the resources as new information becomes available, so please keep an eye out for updates to this feed.

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Visitor Monitoring

The Visitor Monitoring Dashboard is comprised of several widgets that present the visitor data in graphic formats. This Dashboard updates automatically and requires no maintenance.



Dependent on your permissions, the view of your Visitor Monitoring dashboard may vary. In general, the widgets available for view will consist of:

1. Visitor Count- Displays the count of current visitors on pages where Chat is enabled.
2. Visits Today- Displays the history of visitors over the course of the available chat timeframe within the last working day. Automatically updated hourly.
3. Visitors This Month- Displays the history of visitors over the course of the month. Automatically updates daily.
4. Operating System- Displays the operating systems that visitors are using while logged in.
5. Browser- Displays the browser visitors are using.
6. Country- Displays the countries where visitors are located.
7. Top Pages- A list of the top pages that the visitors are currently on.
8. Top Referrers- A list of the top pages that visitors are accessing chats on. Great indicator of where users are experiencing the highest need of Live Chat assistance.
9. Top Languages- Language most used during chats.

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Procedure

Once a chat has been initiated, an agent needs to do their best to fulfill the needs of the visitor. Provided the wide variety of services that WorkSource has, visitor requests could stem from any number of needs, questions, or concerns.

Chat Engagement

Chats are independently initiated by the visitors:

The screenshot shows a mobile live chat interface. At the top, there is a dark blue header with the text "Live Chat" and a white close button. Below the header, a light gray box contains the following text: "Please answer these questions so we can help you in a timely manner." This is followed by "Live Chat hours are 8:00 AM to 5:00 PM PST Monday through Friday." and "For UNEMPLOYMENT BENEFITS, Live Chat staff are unable to assist you with your claim. You must visit the Employment Security Department's website or call 800-318-6022." Below this text are four form fields: a text input for "Name", a dropdown menu for "Have you or your spouse ever served in the military?", another dropdown menu for "County you live in:", and a dropdown menu for "Please select your language preference:" with "English" selected. At the bottom of the chat window, there is a dark blue bar with two circular icons: a white Facebook 'f' and a white Twitter bird.

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Users will be asked to fill out the pre-engagement survey consisting of their Name, Email, Military Service, Language Preference, and County that they live in. Only their Name, Military Service, and County are marked required fields for completion.

At the click of “Start Chat”, an engagement is initiated.

The system is structured where chats are automatically routed to an agent marked available. Chats are auto-routed and assigned on a “round-robin” pattern and will cycle chat assignment through available agents as chats occur.

When a chat is received, engagement has begun.

The job as the agent is to determine the issue at hand and resolve the best you can.

Procedure for Common WorkSourceWA.com Issues

Error Code 5160 and 5165

In the past, any error codes that came across from a visitor was immediately directed to our WorkSource WA Help Desk. To help mitigate visitor frustration, agents are now expected to attempt to resolve these issues at a chat level.

So how do you proceed?

Error Code 5160

This code occurs when a user is attempting to make a new account, but already has a registered account in the WorkSourceWA.com system. The system recognizes the individuals personal identifying information, such as their social security number and date of birth and flags the new account as a duplicate. This results in the error code of 5160.

To assist in resolution, we conduct the following steps:

1. Let them know you are going to attempt to assist. Ask if the visitor is comfortable providing their last name (if not already provided) and date of birth. If more than one result appears, as a last resort, ask for the last four digits of their social security number.
2. Pull their information up in ETO. Verify that it is them by comparing the date of birth and (if available) last four of their social.
3. Compare the email address with the one they provided in their chat. They will likely be different. This is a confirmation that an account has already been previously registered.
4. Let them know of your findings. Example:
“It looks like you already have a registered account with an alternate email address of example@xyz.com. Do you still have access to that email address?”
5. If **yes**, recommend that they retrieve their prior account by accessing with the prior email address. If they do not remember the username or password associated with the older account,

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you can direct them on the retrieval of that information by offering something similar to the following:

“My recommendation is to use the old email to access your account and then update with your new email once you are in. You can click on the "Do I have an account" link to retrieve your username, and then the "Forgot Password" to reset your password if you don't happen to remember them.”

6. If **no**, you have a few options here. You can offer them something similar to the following statement:

“Since you no longer have access to that particular email, this issue will have to be escalated to our help desk. If you have the time you can reach them at 1-888-316-5627. I apologize for the inconvenience.”

OR

You can contact the help desk on their behalf. The help desk can reconcile the 2 accounts and the user will have access to their old account while being able to use the username and password they just created.

It is at the discretion of the agent to determine the proper response.

Error Code 5165

This code occurs as a result of the system. When Employment Security was upgraded to a new case management system (ETO) some of the data translated over incorrectly. The user may have had an account over 2 years ago and is now asked to create a new one. In creating the new one, the system has their information as something alternate to what the user is inputting. Most often, this error is found in the user's date of birth. Sometimes the system shows this date as 01/01/1900; or another date that is different from the one the user is registering.

To assist in resolution, we conduct the following steps:

1. Let them know you are going to attempt to assist. Ask if the visitor is comfortable providing their last name (if not already provided) and date of birth. If more than one result appears, as a last resort, ask for the last four digits of their social security number.
2. Pull their information up in ETO. Verify that it is them by comparing the last four of their social.
3. There will be a date of birth different from the one they provided. That is the source of the error 5165. Note the incorrect date of birth for the next step.
4. At this point we will check back in with the user. Let them know of your findings and that to correct this issue, they will need to create the account with the wrong date of birth to move forward. After they log in, they can update their profile with the correct information. You can use dialog such as this:

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“Thank you for that information. When we went to a new system some of the data translated over incorrectly. Our system is showing your date of birth as 1/1/1900. You will need to put the wrong information in and once your account is created you can go in and correct your profile to the correct information.”

5. Allow them a moment to attempt the fix you suggested. Confirm with the visitor that they have completed your recommended steps.
6. If user is still experiencing issues, refer to the help desk at 1-888-316-5627 for further resolution

Zip Code Error

The WorkSourceWA.com portal is bound by specific rules of process. The forms to set up or modify accounts are designed to be filled out top to bottom and have pre-populated auto-fill rules. Essentially, when a user types information in a form box, the system will supply a list of suggested inputs. Not using the suggested prompts can result in errors, especially in reference to the zip code.

Commonly, a user will chat because they are attempting to set up their account, but the system will not accept the zip. Users become used to entering their zip code first, and having the city and state updated for them. The WorkSourceWA.com portal is not set up for this function.

To assist in resolution, we conduct the following steps:

1. They need to go back and ensure the “Country” selected is “US”
2. Slowly type in the desired “City/Town”. When the system suggests the correct one, they need to select it from the list automatically populated in the drop-down menu
3. Ensure that the state shows “WA”
4. They can add their zip code at this time will and the system will allow them to move forward

Apply Now Not Functioning

The most common cause for this issue is the visitor has a pop-up blocker enabled. This will deactivate the “Apply Now” button if the posting is supposed to direct them to an outside application site. The pop-up blocker will block the link the user is supposed to be directed to without notifying the user.

To assist with this issue:

1. Ask if they have pop-up blocker software enabled on your pc/device
2. Verify if the user knows how to disable the pop-up blocker on their browser
3. If the user does not know, ask the browser they are using, and Google the directions on how to disable the blocker
4. Ask them to refresh the page and attempt again once the blocker has been disabled

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Common Employer Errors

Employer assistance can be one of the more challenging tasks for an agent on WorkSourceWA.com. Following are commonly encountered employer contacts and how to respond.

Creating a New Employer Account

When dealing with an employer it is important to first determine if they have an employer account already through WorkSourceWA.com. They can use the free account to:

- Post job listings
- Access to WorkSource AND Monster candidate resumes
- Store job descriptions for future use
- Screen candidates using custom made questionnaires
- Add as many users within their company as needed

Many employers that visit do not have accounts and need direction on how to create one.

To assist in resolution, we conduct the following steps:

1. Advise them to click on “Employer” anywhere on the WorkSourceWA.com page to begin the process
2. Offer to send them the “Employer Account Creation Guide” info-doc as a visual map to aid in account creation
3. Provide them with contact information, both phone and email, to their local WorkSource Business Services team for further guidance and in-depth candidate search assistance

Employer Account Error-Red Triangle

There is a known issue affecting the updating or creation of a job posting in an employer account. The system will not accept a decimal within the wage range boxes. There are a few routes to resolution for this error.

To assist in resolution, we conduct the following steps:

1. Advise employer to remove the wage data from the box and post that information in job details section of the posting

OR

2. Advise employer to use a range that does not include a decimal. For example, if the wage is \$16.50, use \$16 to \$17.

Account Administrator Inactive

If the Administrator on an employer account is no longer with the company and does not grant access to alternate users prior to separating, the account is no longer accessible. Chat agents are not able to address this issue via chat. The employer will have to contact the help desk at 1-888-316-5627 and select option 2 for employer.

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NAICS Code

Employers are required to supply certain verifiable information when creating an account or job posting to ensure integrity of the business. When entering the NAICS (North American Industry Classification System) code in any area of the website for required fields the user MUST select the NAICS code from the drop-down box that the system populates for the system to accept the code.

If the employer does not know their business NAICS, the code can be found here:

- <https://www.naics.com/search/>
- <https://www.census.gov/naics/> this link is what shows on the employer screen

UBI number look-up

The employer account on WorkSourceWA.com is easy to create but to ensure the integrity of the creating business, a Unified Business Identifier (UBI), Federal Employment Identification Number (FEIN) or Employment Security Reference Number are required to create the account. If the employer does not know their business UBI number, it can be found here: dor.wa.gov.

Error Message logged by Monster

There is a common error that occurs for employers when they attempt to sign in or access their employer account on WorkSourceWA.com. The error message will state that an error was logged by Monster and to try again later. This error prevents the employer from logging in to their account and refreshing does not appear to clear the issue.

To assist in resolution, we conduct the following steps:

1. Make sure the employer is on the WorkSourceWA.com site. Re-directs occur often and they may no longer be on the page
2. Ensure the employer is accessing using the Chrome browser. WorkSourceWA.com is optimized for Chrome and errors occur more often on alternate browsers
3. Ask the employer to clear cache, cookies, and browser history on their computer. Advise them that they do need to be completely logged out of the page and that all tabs are closed before attempting this step. If they do so with open tabs, the error will remain imbedded in the page and will not clear properly
4. If the error persists after all above steps are taken, refer to help desk at 1-888-316-5627