



## Guide for Using Our Flex Calling Platform

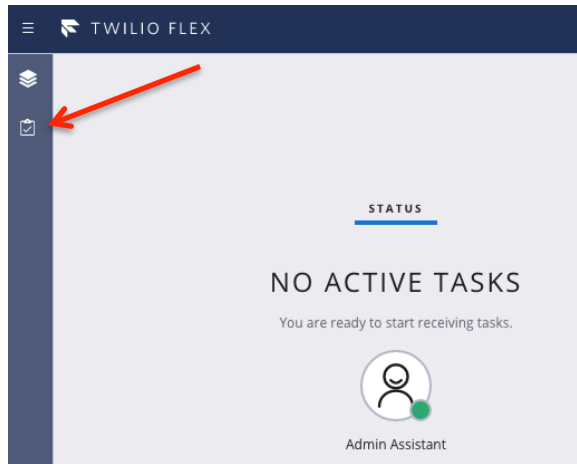
### Accessing Flex

1. Login to [Flex](#). Flex works best on the **Chrome Browser**. Flex logs in through Office365 so you will see a Microsoft login screen. **Refer to the email from Cyber-Seniors for your username and initial password.**
2. Once you login, you'll see a Dashboard like this. Click on your name in the top right corner or in the Status section (the left side of the screen) and click Available.

The screenshot shows the Twilio Flex dashboard interface. At the top, there is a dark blue header with the Twilio Flex logo on the left and a user profile on the right. The user profile shows a name "Admin Assistant" and a status "Offline | 1h 5min". A red arrow points from the user profile in the header to the status dropdown menu in the "STATUS" section. The "STATUS" section on the left has a heading "NO ACTIVE TASKS" and a sub-heading "Change activity state to start receiving tasks." Below this is a user profile icon for "Admin Assistant" and a dropdown menu currently set to "Offline". A red arrow points to this dropdown menu. The "CRM CONFIG" section on the right has a heading "NO CRM CONFIGURED" and a sub-heading "Our docs can help you get started." Below this is a "HOW TO CONFIGURE" button.

## Making an Outbound One-on-one Support Call

1. Open the [One-on-one Support Call Log](#).
2. Fill in what you can into the Call Log from your assignment on uSked.
3. Click on the clipboard with a check mark on the left panel, called the Task List.



4. Find the task that lists **your name** as the Volunteer name, the name of your senior, and the time of your assignment.
5. Click on the phone handset in the right-hand column.

Show  entries Search:

Senior name	Volunteer name	Reason	Language	Organization	Time Zone	Other	Date	Time	
Anthony	Varinder	Zoom/Apple ID Help- Create apple ID and have him join a practice Zoom meeting.	English				2021-02-23	09:00	📞
Harriet	Dusan	Zoom/Apple ID Help- Create apple ID and have her join a practice Zoom meeting.	English				2021-02-23	09:30	📞
Cecilia	Rhea	Zoom Help	English				2021-02-23	11:00	📞
Lois	Emma	General Tech Help	English				2021-02-23	11:15	📞

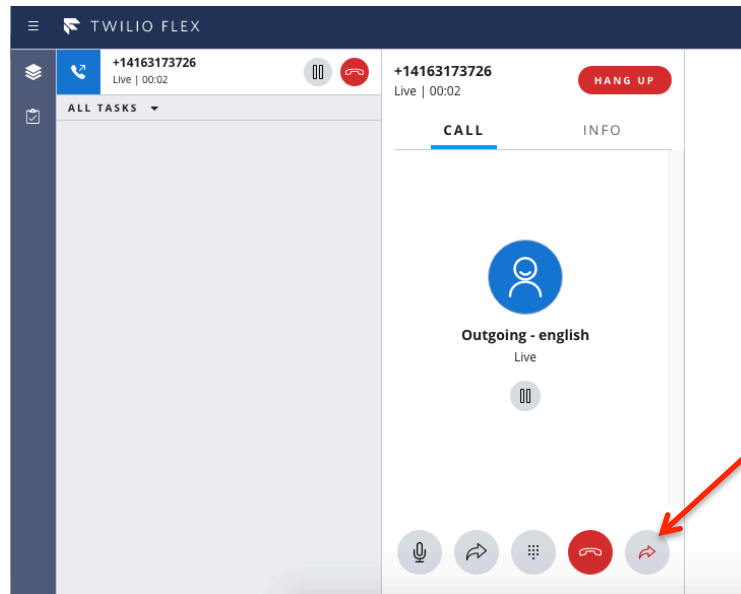
6. Your Dashboard will then have a red dot on it. Click on the Dashboard, and click on the check mark to start the call.
  - If the Senior doesn't answer, and an answering machine comes on, leave a message. Say "Hello, this is \_\_\_\_\_ from Cyber-Seniors. I'm calling for \_\_\_\_\_. I'll call back in a few minutes,

[www.cyberseniors.org](http://www.cyberseniors.org)

but in case I can't reach you, you can call us back at 844-217-2057. Press one for English and one for Seniors." You only need to leave a message once.

- Click **Hang Up**, click **Complete**, wait 2 minutes, go back to the task list and call again.
- If the senior doesn't answer, wait 15 minutes and call a third time.

7. If you are able to get ahold of your senior: At the end of the call, ask the senior if they would be willing to complete a short phone survey. If so, **before hanging up**, click the **red forward button** to transfer the senior to the survey.



8. Hang up. Make sure you click **Complete**. If you don't click Complete, every time you try to make a call, it will send you back to that number.

## Taking Inbound Calls

As the Inbound Call Volunteer, you will be volunteering with our call centre and will be taking any calls we get to our toll-free 844-217-3057 number. You will be using our calling platform, [Flex](#). Please login to Flex before your shift to make sure that you know how to do so and to make sure it is working for you. You will need to set your status as **Available** (See step 2 in the Outbound call instructions)

Your main job is to answer all incoming calls and help to the best of your ability. You are not expected to solve every technical issue. However, if you have time, you are welcome to help a senior who calls in with any quick tech questions. Keep in mind that you may be the only Inbound volunteer scheduled for your shift so the longer you spend with a senior, the more likely it is you will miss a call from other seniors.

Please refer to the instructions on the [Volunteer Tools page](#) in the **Inbound Calls** section for any new information or procedures. Please also refer to the confirmation email you received when you were matched with the Inbound Call assignment in uSked.

We work with seniors from various organizations. You can expect to receive calls from:

**a. General population**

- i. Answer the call by saying “Hello this is \_\_\_\_\_ from Cyber-Seniors. How can I help you?”
- ii. Help them with their tech issues if it only takes a couple of minutes
- iii. Book them a longer session on [Calendly](#), our online booking calendar if needed

**b. Niagara Regional Housing** (Area codes 289 or 905) about programs or devices

- i. For a free device: [Register a Senior Here](#)
- ii. If a senior has a question about a device received, go [Here](#)
- iii. If a senior has a question about programs being offered for the Niagara Region, that information is on our [Niagara page](#).

**c. Foster Grandparents/Seniors in Service/Senior Neighbors**

- i. We provide both one-on-one sessions and group sessions for these groups
- ii. To book a one-on-one session, go to this [Calendly](#)
- iii. To find answers about group sessions, email [scheduling@cyberseniors.org](mailto:scheduling@cyberseniors.org) . If you don't hear back, email [macaulee@cyberseniors.org](mailto:macaulee@cyberseniors.org)

If you have time, you can go to the Task List to see if there are any tasks with a Volunteer Name of “**Inbound**”. These are outgoing calls to seniors who have left a voicemail (VM) or seniors who need to rebook their sessions. At the end of your shift, email [scheduling@cyberseniors.org](mailto:scheduling@cyberseniors.org) and let us know who you were able to call so we remove those completed tasks from the task list.

For this shift, you generally do not need to complete the One-on-one Support Call Log or forward a senior to the 2-question survey. However, if you do help a senior with a tech issue, complete step 1 and step 7 in the section “Making an Outbound One-on-one Support Call”

**IMPORTANT LINKS:**

- [Book a one-on-one tech call](#) (the same link as on our home page, cyberseniors.org)
- [Volunteer Tools page](#)
- [Niagara page](#)
- [Register a senior from Niagara Regional Housing for a free device](#)