Guide to the Helpline Shift

This section takes you through the different tasks you might be asked to do during a shift. You might train in each of these at different times or all within your initial 3 month training period. Step by step breakdowns of how to use the technology for the tasks will be covered in the IT Guide section.

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Answering emails

Many people contact us by email rather than over the phone. This is for a number of reasons, including being abroad, being too scared to talk on the phone, or not being able to get through to the helpline.

Step 1 – Log in to the Helpline inbox

Step 2 – Reply to email

Do not reply to flagged emails, as these are either being worked on by someone else or are in the inbox for another reason.

Flag an email once you start working on a reply for it.

Remember that emails, like calls, are not simply fact-finding, and are usually from people who are distressed and in need of support. Cater your email to what the person has told you; offer them the same levels of compassion, understanding, and in-depth information that you would a caller.

If the service user has asked any specific questions or described a particular issue, start by writing your response to those. Only once you have covered everything the person is specifically asking about should you move on to information that we offer to everyone. This can help with the 'listening' part of the email (yep, you have to listen there, too!), as it keeps you focused on the individual elements that matter most to the person.

When giving information, you should not simply link them to the relevant informational pages and factsheets. The goal is for the person to get the information they need without having to click the link, so spend some time explaining things like what OCD is or how CBT works. The usual format for Helpline emails is a paragraph on a subject followed by a link to our factsheet about the subject. For examples, you can look through emails that have been sent in the past and the email templates.

Once you have built up experience with emails and find yourself writing similar paragraphs on a regular basis, you can create a notes document with some of your most used paragraphs that you can cut and paste into emails when appropriate. If you are doing this, make sure to carefully read through your email before sending it to make sure that it fits. We don't want the service user to feel not listened to or dismissed because the paragraph has a phrase in it that does not apply to their situation.

Sign either your name or a name of your choosing (let us know what) at the end of the email, then send.

Step 3 – Archive email

Mark the email as 'unread' if it isn't already, then unflag.

Drag the email into the 'Dealt with' folder.

Returning calls

For many hours a week, the Helpline is closed because of no volunteers or members of staff being on shift. The majority of your shift will be calling back the people who have left a voicemail.

Step 1 – Open the Callback forms on Zoho and filter them using the search function.

The standard setting is:
Status: Is not: Closed
For some shifts, though, you will be told to set it differently by a member of staff.

Step 2 – Set the forms in chronological order by clicking on "Date when the voicemail was left"

Step 3 – Open the form for the person you will be calling back

You will usually be given a list of who you are due to call by a member of staff. If not, you will be asked to just make your way through the forms from the top down.

Step 4 – Make the call

If the person answers and it is a good time for them to talk, close the form at the top and skip Step 5.

Step 5 – Leaving a message

Check the Callback form to see whether it is ok to leave this person a message. If it is and they don't answer the phone, leave a message:

First call attempt – Let them know who we are and that we will try again
Second call attempt – Let them know who we are and that we will try again
Third call attempt – Let them know who we are and that we will stop trying to call them, if they would still like to speak to someone please call us back, and leave our numbers

If it is a landline and a different person answers the phone, only let them know who we are and who you are calling for if it is ok to leave a message.

At the end of the call

Once a call is finished, update the Callback form (see IT guide), fill in a Call Monitoring form (see appendix) and send through any post-call information (see guideline).

Answering live calls

If all of the call backs have been attempted, you can set yourself to available on the 3CX app and start taking calls as they come in.

Answering the phone
When the phone rings, pick it up. The person calling will continue to hear ringing for the first couple of seconds, so take a little pause between picking up and saying your greeting. Don’t worry if you forget about this sometimes, it takes some getting used to!
What you say in your greeting is up to you – you can just say “Hello, OCD Action”, or you can add your name, or a “how can I help you”. Make sure you mention the name of the charity.

Anxious callers
Callers don’t always expect their call to be picked up. Returning callers, especially, will have had to leave a message and get a call back in the past. Because of this, sometimes the caller will hang up when you answer, and this is ok. You don’t need to log this anywhere.
Other times the caller won’t have prepared for the call, and will say they don’t really know where to begin. In these cases, you could offer to tell them about the helpline service, which will give them a bit of time to settle and clear up what we can and can’t offer.

At the end of the call
Once a call is finished, fill in a Call Monitoring form (see IT guide) and send through any post-call information (see guideline).

Sending post-call information

After making or taking a call on the Helpline, it’s ideal to send some information and factsheets through to the caller, as it can be hard to keep track of all of the information we give them. You might want to offer this early on in the call, so they know that they don’t have to memorise anything or take notes.

The best way to send information through is via email, as we can include links to factsheets and other websites, as well as to our service user survey. We have a few email templates set up to make this quick and easy!

If the caller doesn’t use email, we can also send them information by post. You can request a postage pack on someone’s behalf through the form (see IT guide)

<u>Emailing information</u>

Step 1 – Log in to the Helpline email

Step 2 – Get the email template

Go into the Email templates document (see IT guide), and choose the template you want to use based on the condition and age of the subject of the call. Copy the body of the appropriate email.

Step 3 – Write the email

Open a new email and paste the template into the body of the email. Insert the caller’s email address, add any other information that might be helpful, and send!

The caller’s and volunteer’s names are not in the template, so if you would like to include these you will need to add them when editing, but you don’t have to.

Next Steps

The Next Steps service offers support to people who are having treatment for their OCD. The purpose of the call is not to guide the person through CBT or homework, but rather to help them recognise and engage with good quality CBT with ERP.

The Next Stepper will receive 4 or 5 calls through the course of their Next Steps, and each call has a specific purpose and 'script' to cover.

Step 1 – Log in to the Volunteer website

Step 2 – Find Next Stepper details

Go to your volunteer folder, and you will find a word file called 'Next Steps [##]' based on your Next Stepper's client number. This file will contain the script for you to go through over the 4 or 5 calls, with sections for your notes, and their details. Remember to keep your notes anonymous.

Step 3 - Call the Next Stepper

There will be an agreed time or window of time for you to call your Next Stepper, which will have been agreed between you, the Next Stepper, and a member of staff.

The Next Stepper will have up to twenty minutes for the call, but calls can be shorter if they don't have a lot to say about how treatment is going. The calls should stay focused on the treatment, which is what the script can help with, but still need to be supportive. Fill out the script as you go along or at the end of the call.

There will be some more general listening involved as you want to form a trusting relationship, but if the Next Stepper needs somewhere to talk about things in more depth you can refer them to a different service. You can remind them that it's important to keep these calls focused on how you can help, and you would rather they get other support from somewhere better set up for it. Support groups offer a regular space to talk, and the helpline can provide information on other matters such as work or a separate referral.