

# IT Guide

This section covers in detail how to use the different online forms, websites, and apps mentioned in the Guide to the Helpline Shift. Depending on how you learn best, you can find screenshots, written descriptions, and links to videos taking you through the same information.

In this section-

The volunteer website – Starting your shift

Zoho CRM – Returning calls

Call Monitoring form – All calls

Postage Request form

Email Templates

Emails – Replying

Emails – Post-call

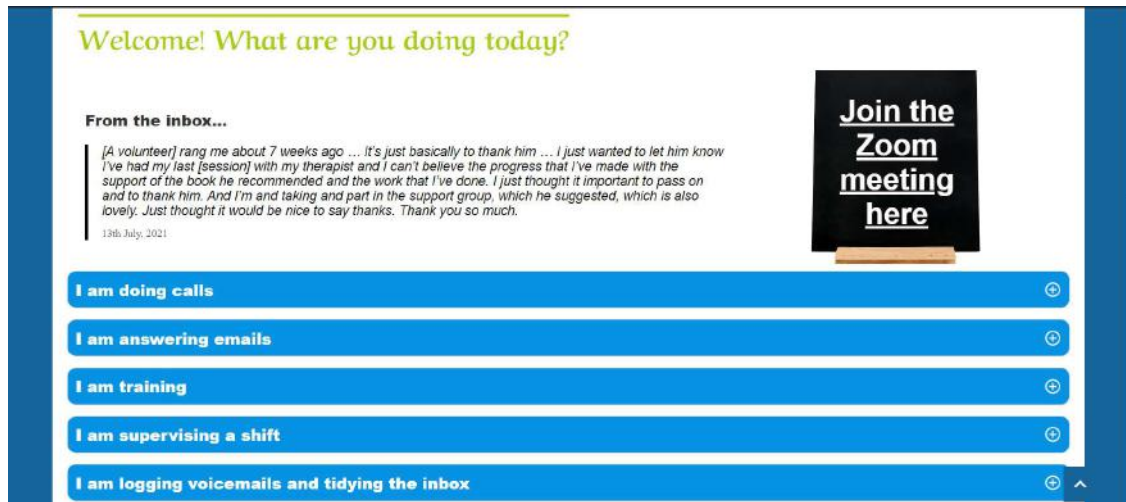
3CX app – All calls

OneDrive – Volunteer folders



## The volunteer website – Starting your shift

1. Visit <https://ocdactionvols.org.uk> and sign in:  
Username: helpline  
Password: your will be given this individually



>Welcome! What are you doing today?

**From the inbox...**

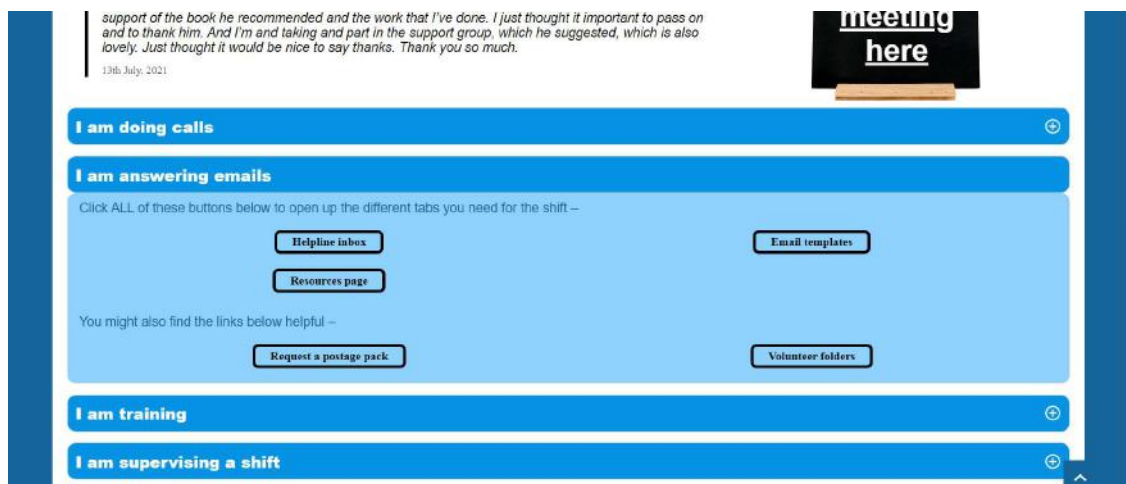
*[A volunteer] rang me about 7 weeks ago ... It's just basically to thank him ... I just wanted to let him know I've had my last [session] with my therapist and I can't believe the progress that I've made with the support of the book he recommended and the work that I've done. I just thought it important to pass on and to thank him. And I'm and taking and part in the support group, which he suggested, which is also lovely. Just thought it would be nice to say thanks. Thank you so much.*

13th July, 2021

**Join the Zoom meeting here**

- I am doing calls
- I am answering emails
- I am training
- I am supervising a shift
- I am logging voicemails and tidying the inbox

2. Select what you are doing for this shift by clicking on the relevant blue bar and it will expand to give you links to everything you will be needing.



*support of the book he recommended and the work that I've done. I just thought it important to pass on and to thank him. And I'm and taking and part in the support group, which he suggested, which is also lovely. Just thought it would be nice to say thanks. Thank you so much.*

13th July, 2021

**meeting here**

**I am doing calls**

**I am answering emails**

Click ALL of these buttons below to open up the different tabs you need for the shift –

- Helpline inbox
- Email templates
- Resources page

You might also find the links below helpful –

- Request a postage pack
- Volunteer folders

**I am training**

**I am supervising a shift**

If you don't know what you will be doing in your shift, you will be told during the Zoom meeting at the start of every shift. This link will be in the instructions for each individual shift, but you can also find it on the front page of the website.



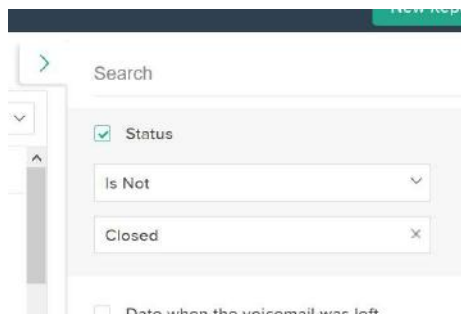
## Zoho CRM – Returning calls

Zoho is an online platform through which we keep the information about people who have asked us to give them a call. Each person waiting for a call has an individual form. You open the form of someone you will be calling and fill it out based on whether you spoke to the person.

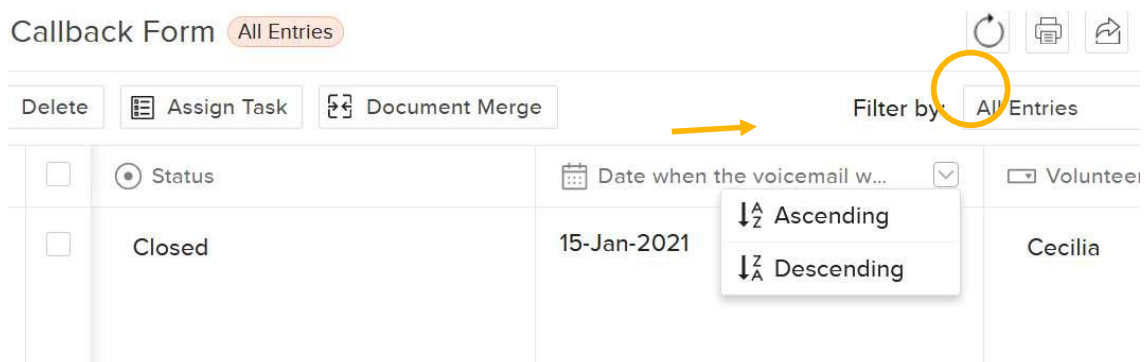
1. Click on the spyglass in the top right to start a search



2. Set the status. Unless you are told otherwise, set it to- Is Not : Closed



3. Set the forms in chronological order by setting the second column (Date when voicemail was left) to 'Ascending'. If you can't find a person who is on your list, double check that you've done this step.




- Find the form for the person you want to call You will either be given a list or be told to start from the top. To open and edit the form, click the little pencil to the left.

**Forms**

Forms Reports Users Tasks Approvals

← Callback Form All Entries

Delete Assign Task Document Merge

	Volunteer's name	Status	Date when the voicemail was left	Nature of
	Cecilia	Open	24-Feb-2019	Looking for inf on "Anxiety OC about any "gre contacts". Sour she might be a professional.

- Check:

The notes

and

Whether it's ok to leave a voicemail

Then make the call

**Volunteer's name \*** Cecilia Person who has filled the callback form

**Nature of Call** Wants to know more about support groups

**Caller's Name** Cecilia

**Caller's phone number \*** 07588118050 If an error appears, review the other callback form for the phone number on "all forms" report. If you want to create at the end of it, e.g. "07458965238 (12Feb2018)"

**Best time to call**

**Ok to leave message?**


Yes (either caller said it's OK to leave a mobile)

No (either caller said it's NOT OK to leave landline)



6. Fill out the next available 'Call Attempt' section and leave a voicemail as appropriate (see guidelines)

### Attempt 1

**First Call back attempt date**   Today's date  
dd-MMM-yyyy

**Volunteer's name**  Your name  
Now, please click on "UPDATE" at the bottom of the screen BEFORE making th when more than one person is making calls at the same time) so we don't en same person twice on the same shift.

**Made contact**  Yes  No Did someone pick up the phone

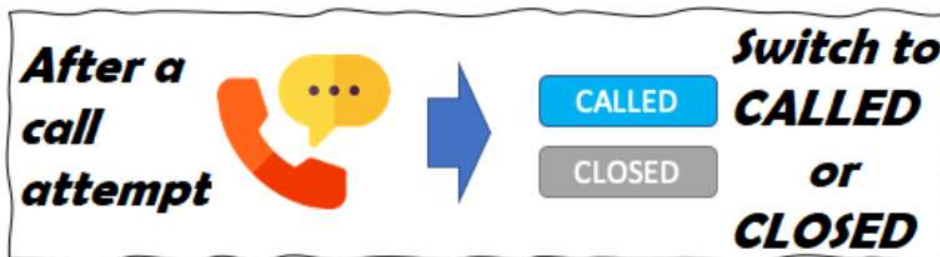
**Left message**  Yes  No  No answering machine Did you leave a voicemail

**Additional comments**  This section is for things to give context to what you did, like 'It was a bad time'. Please do not put requests or important updates in this box as it might not get seen.

7. Set the top of the form to 'Closed' or 'Called':

Called if you haven't reached them on the first or second attempt

Closed if you spoke to them or have left the final voicemail telling them we will stop calling



[Click to access training guide](#)

Status \*  No Call  Called  Closed



# Call Monitoring Form – All calls

Date - Time 1 *	<input type="text" value="31"/> [dd-MMM-yyyy HH:mm:ss]
Call Taker *	- Select-
Call is *	<input type="radio"/> Direct <input type="radio"/> Call Back
Call Length in minutes *	<input type="text"/>
Service Usage *	<input type="radio"/> First time caller <input type="radio"/> Has called before <input type="radio"/> Regular
Caller is *	- Select-
Subject Gender *	<input type="radio"/> Male <input type="radio"/> Female
Subject age *	<input type="radio"/> Adult <input type="radio"/> Child <input type="radio"/> Adolescent
Subject is *	- Select-
Condition	<input type="checkbox"/> OCD <input type="checkbox"/> BDD <input type="checkbox"/> Hoarding Disorder <input type="checkbox"/> Skin Picking <input type="checkbox"/> Trichotillomania
Any other condition / Comorbidity	<input type="text"/>
Checkbox *	<input type="checkbox"/> Body focused obsessions/sensorimotor <input type="checkbox"/> Checking <input type="checkbox"/> Contamination <input type="checkbox"/> Describes self as Pure-O <input type="checkbox"/> Order/symmetry <input type="checkbox"/> Relationship <input type="checkbox"/> Rumination <input type="checkbox"/> Sexually intrusive thoughts <input type="checkbox"/> Scrupulosity/Religion <input type="checkbox"/> Thoughts about sexuality/gender <input type="checkbox"/> Thoughts of harming others <input type="checkbox"/> Other
Caller Needs *	<input type="checkbox"/> Advocacy <input type="checkbox"/> Emotional Support <input type="checkbox"/> Information <input type="checkbox"/> Signposting <input type="checkbox"/> Other
<input type="button" value="Submit"/> <input type="button" value="Reset"/>	

If your name is not in the drop-down list let Cecilia or Christian know, and select one of their names as a placeholder until they've added it

"Subject" is the person with OCD, not necessarily the person you are speaking to

You can select more than one of these

You can select more than one of these. If it's an OCD related disorder, select "Other"

You can select more than one of these

Once completed, press "Submit"



# Postage Request form

## Postage request

Send a form to the administrator requesting a postage pack

Date

dd-MMM-yyyy

Today's date

Volunteer

Select your name from the list

Name and address of service user

Caller's name and address – it can help to look it up on Google to make sure you've written it down correctly

Condition factsheets

- OCD
- BDD
- BFRB (skin picking, hair pulling, etc.)
- Hoarding

Which conditions the person wants to find out about

Treatment information

- Therapy only
- Medication only
- Both

Which treatments they would like information on

NHS information

- Standard pack for adults
- Standard pack for young people
- Specialist pack for adults
- Specialist pack for young people
- Pack for CADAT through Patient Choice (England only)

If caller wants to seek local treatment (most cases)

If caller wants to seek specialist treatment

If caller wants to seek treatment at CADAT through Patient Choice. When ticked, this other option will appear, tick it if they are also interested in local treatment

Service user would also like information about local treatment

Service user needs a list of local IAPT services (England only)

This option will only come up if you select 'Standard pack for adults'.

Service user wants information on Patient Choice (England only)

Please still tick this if you've selected the CADAT Patient Choice pack above

Please tick this if the caller is interested in information about Patient Choice (even if you've already ticked the CADAT option)



Information for carers

- Support for family and carers
- Supporting someone with OCD
- Reassurance seeking
- Loved one refusing treatment
- 'OCD at school' factsheets
- Book list for families and young people

Rights and legal protections

- OCD and the Equality Act
- Self-advocacy toolkit
- Rights at work
- Information for employers
- Housing rights
- Sectioning rights
- Watersure scheme (bill reduction)
- NHS complaints

Other factshseets

- Keeping well during Covid-19
- Talking to a loved one about your condition
- Treatments not recommended and why
- Assessment and diagnosis
- Book list - OCD and self-help
- Book list - OCD-related conditions
- Book list - CBT
- Book list - Miscellaneous

Flyers and booklets

- GP Card
- OCD at university
- Youth services leaflet
- OCD-related conditions
- Getting treatment
- Legal rights and protections

Other things to print (please add link/s)

Message for service user (if any)

This should be self-explanatory, it's a list of all of our resources and factsheets and flyers. Tick all the ones you want to send to the caller.

If you want to include something that isn't on our website (for example, an article about OCD and Autism from the IOCDF), include the link/s here. Please remember to only use information from vetted charities or check with a staff member before sending.

This is for a short, hand-written note ONLY. If you are sending a letter alongside the pack, please send the letter to [Thea@ocdaction.org.uk](mailto:Thea@ocdaction.org.uk), who will be receiving this form and putting the pack together.

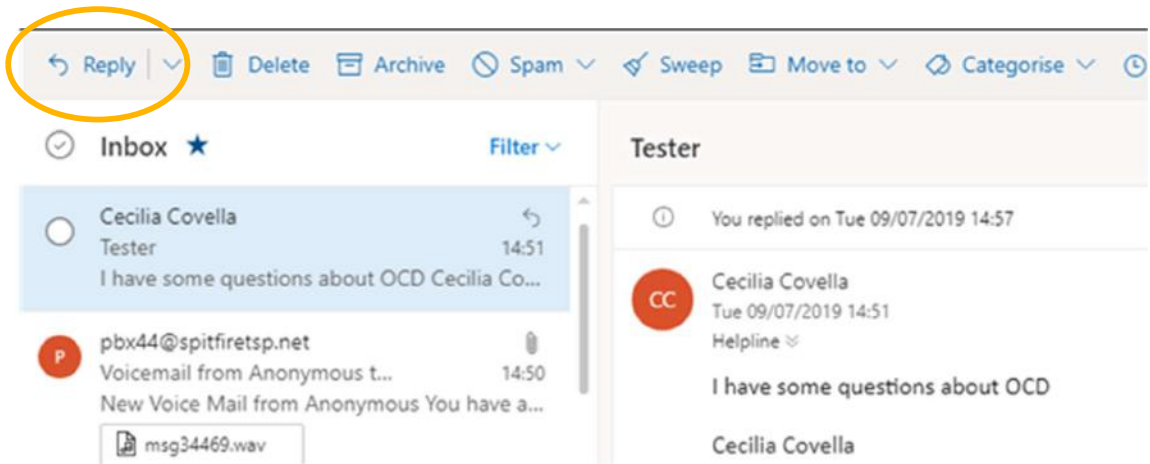






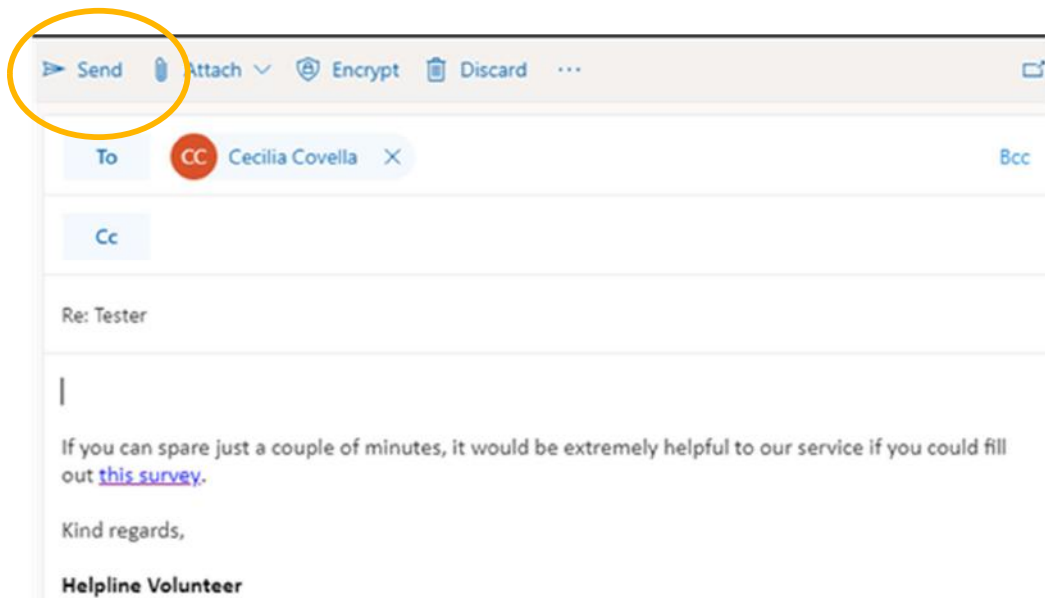
## Emails – Replying

Select the email you will be replying to and click Reply



The screenshot shows an email client interface. At the top, a toolbar contains several action buttons: Reply (circled in orange), Delete, Archive, Spam, Sweep, Move to, and Categorise. Below the toolbar, the 'Inbox' is visible with two email entries. The first entry, from Cecilia Covella, is selected. To the right, a preview pane shows the email's content, including a 'You replied' notification and the original message text: 'I have some questions about OCD'. A 'CC' icon is also present in the preview pane.

Write your reply, add your name in the signature if you want, and click send!

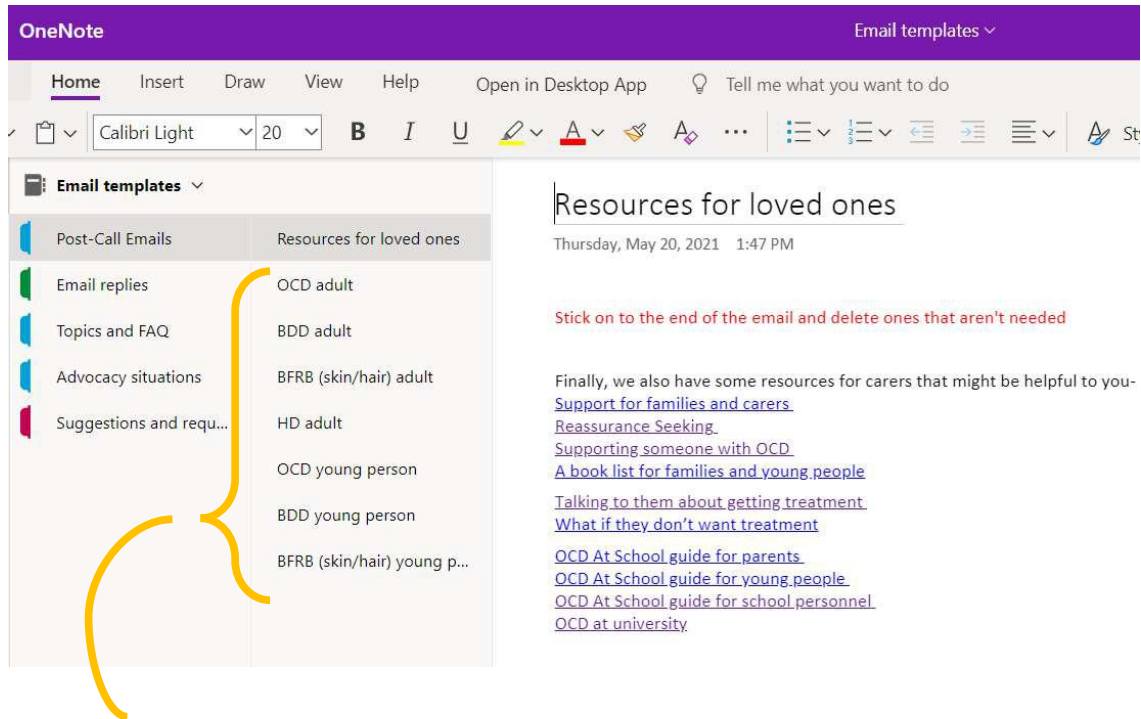


The screenshot shows an email composition window. At the top, a toolbar contains buttons for Send (circled in orange), Attach, Encrypt, and Discard. Below the toolbar, the 'To' field contains 'Cecilia Covella' with a 'CC' icon. The 'Cc' field is empty. The subject line is 'Re: Tester'. The body of the email contains a vertical line, followed by the text: 'If you can spare just a couple of minutes, it would be extremely helpful to our service if you could fill out [this survey](#).' Below this is the signature: 'Kind regards, Helpline Volunteer'.



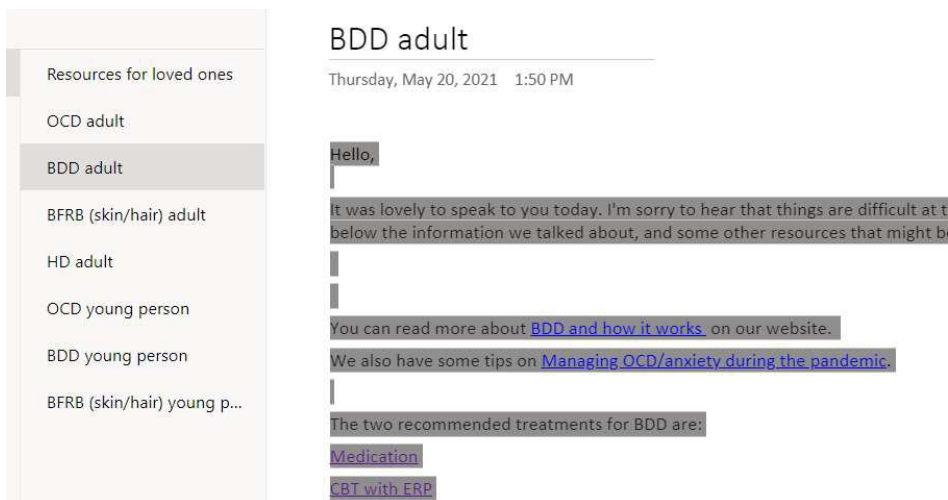
## Emails – Post-call

1. Select the 'Post-Call Emails' tab at the top of the Email Templates document. The top page is an add-on for if the person you spoke to is a loved one rather than personally affected.



The screenshot shows the OneNote interface with the 'Email templates' document open. The 'Post-Call Emails' tab is selected, and the 'Resources for loved ones' page is displayed. A yellow bracket highlights the list of templates in the left sidebar, including 'OCD adult', 'BDD adult', 'BFRB (skin/hair) adult', 'HD adult', 'OCD young person', 'BDD young person', and 'BFRB (skin/hair) young p...'. The main content area shows the 'Resources for loved ones' page with a date and time stamp, a red instruction: 'Stick on to the end of the email and delete ones that aren't needed', and a list of resources for carers.

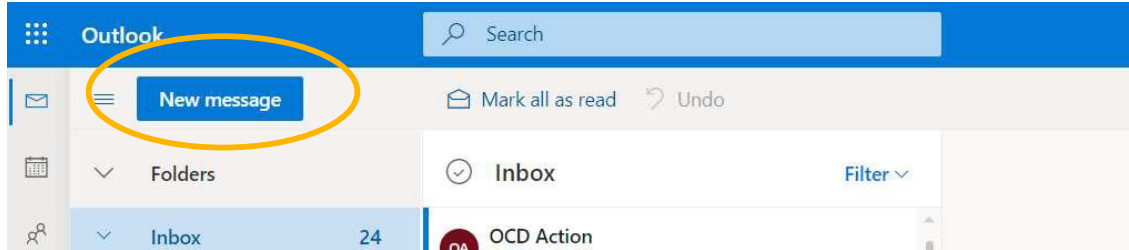
2. Select the appropriate template from the list of pages underneath that
3. Copy the email template



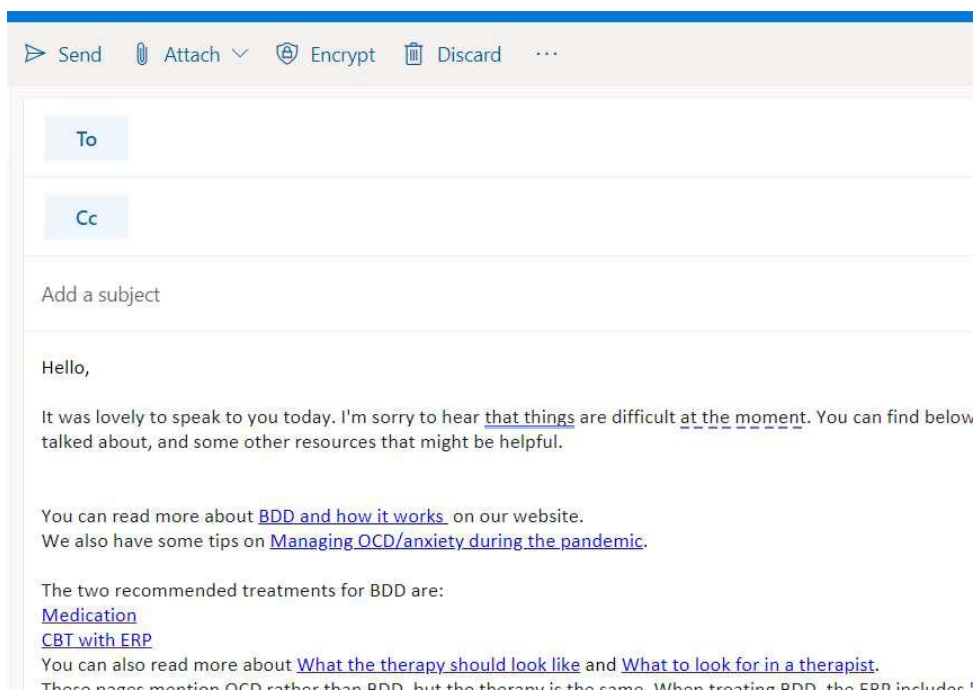
The screenshot shows the 'BDD adult' email template selected in the left sidebar. The main content area displays the email body text, which includes a greeting, a message of sympathy, and a list of resources for carers. The text is highlighted in grey, indicating it has been copied.



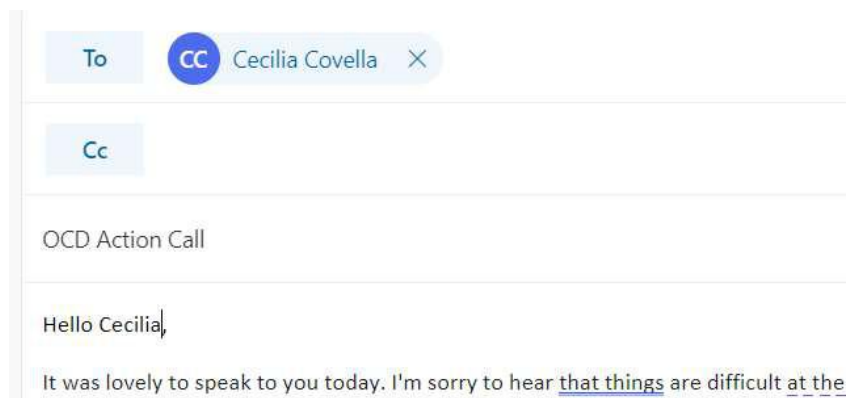
4. Start a new email in the inbox.



5. Paste the template into the body of the email.



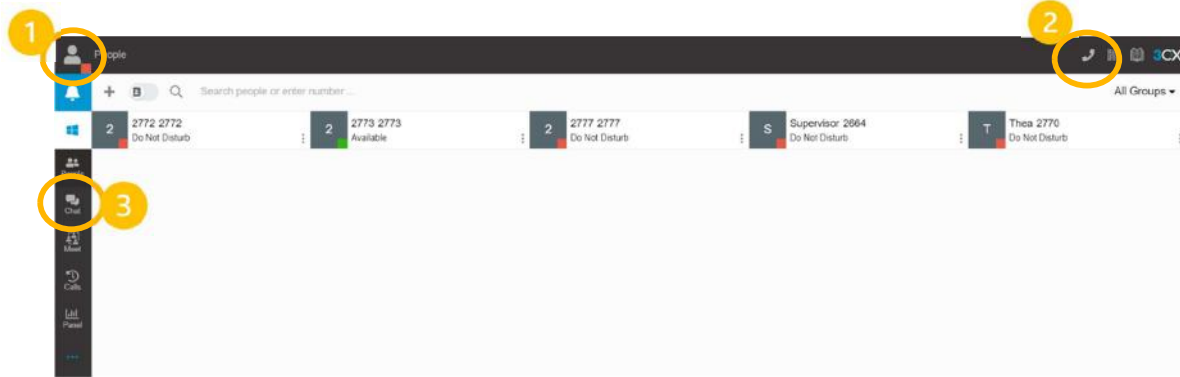
6. Add a title, any other information that might be useful, the caller's name and email, and your name if you want to. Then send.



## 7. 3CX app – All calls

You will be given an extension number at the start of every shift. When you log in to the webclient, this will bring you into the helpline through the internet.

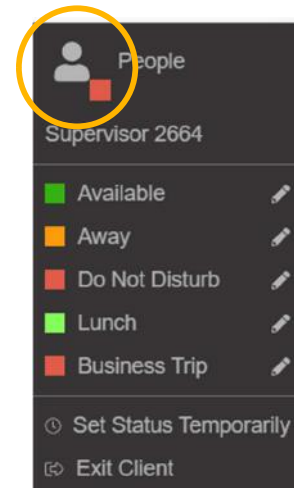
This is what the main page will look like:



### 1. Availability and profile

You can click on this to check what extension you are logged into and to sign out.

Set this to 'Do Not disturb' most of the time. Set to 'Available' if you are taking live calls or have asked for a call from the shift supervisor.



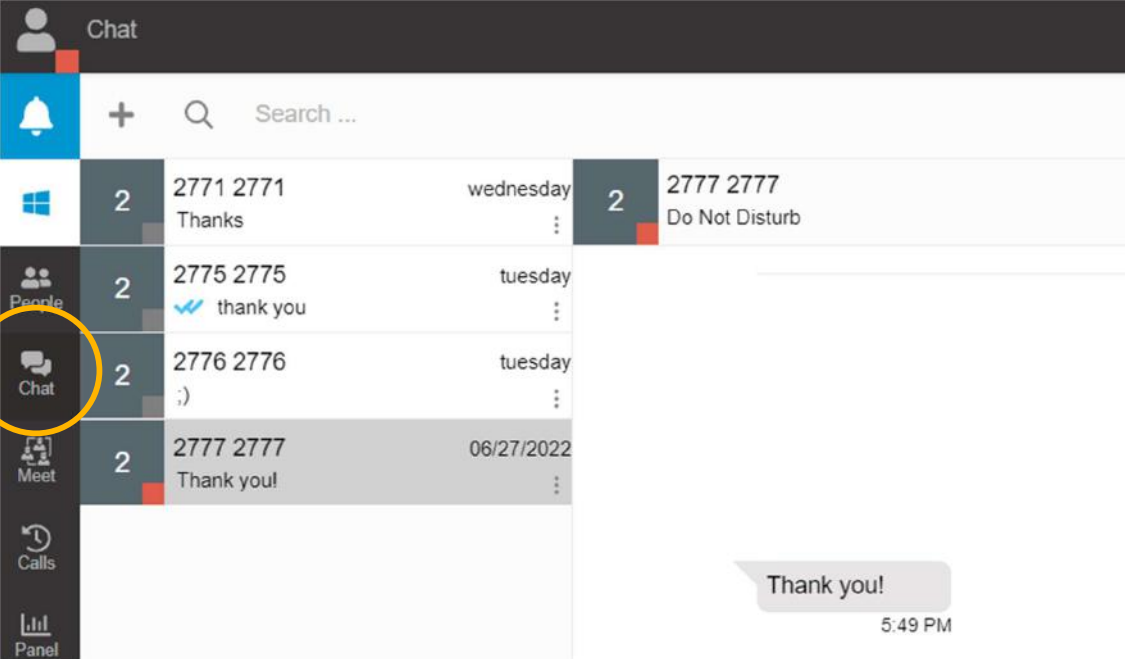
### 2. Dialler

Use this dial pad to make call. You can copy and paste a number straight from Zoho into the dialler



### 3. Chat

Use the chat function to speak to the shift supervisor or the person you are shadowing.

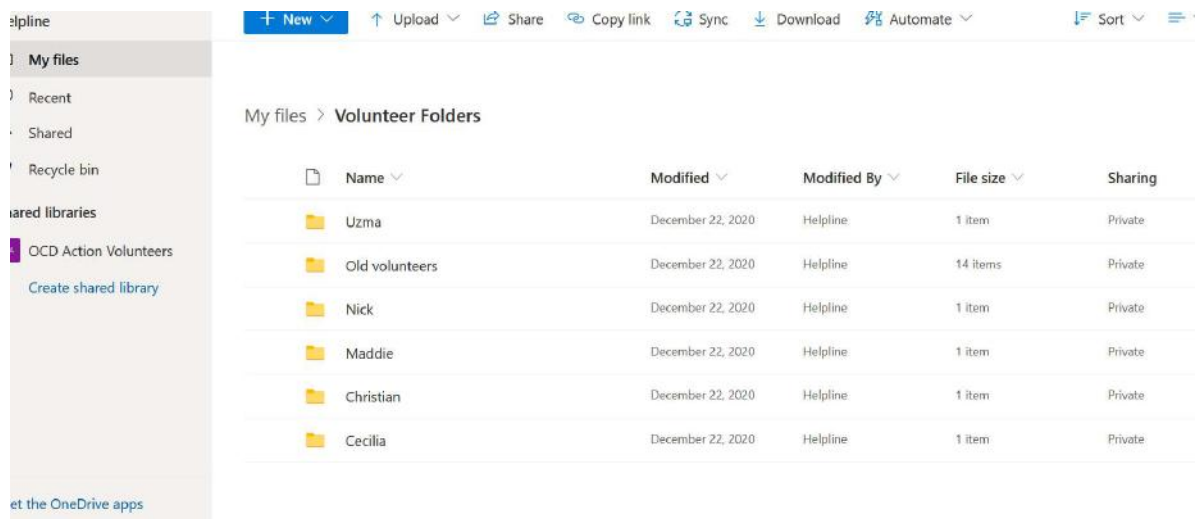


The screenshot displays a chat application interface. At the top, there is a header bar with a person icon and the word "Chat". Below this is a search bar with a plus sign, a magnifying glass icon, and the text "Search ...". The main area shows a list of chat items, each with a status icon, a count of 2, a name, a date, and a message snippet. The "Chat" icon in the left sidebar is circled in yellow. To the right of the list, a chat bubble contains the text "Thank you!" with a timestamp of "5:49 PM".

Icon	Count	Name	Date	Message
Windows	2	2771 2771	wednesday	Thanks
Windows	2	2777 2777		Do Not Disturb
People	2	2775 2775	tuesday	thank you
Chat	2	2776 2776	tuesday	;)
Meet	2	2777 2777	06/27/2022	Thank you!



## OneDrive – Volunteer folders



The screenshot shows the OneDrive web interface. On the left is a navigation pane with 'My files' selected. The main area displays a table of folders under 'Volunteer Folders'. The table has columns for Name, Modified, Modified By, File size, and Sharing. All folders were modified on December 22, 2020, by 'Helpline', and are set to 'Private' sharing.

Name	Modified	Modified By	File size	Sharing
Uzma	December 22, 2020	Helpline	1 item	Private
Old volunteers	December 22, 2020	Helpline	14 items	Private
Nick	December 22, 2020	Helpline	1 item	Private
Maddie	December 22, 2020	Helpline	1 item	Private
Christian	December 22, 2020	Helpline	1 item	Private
Cecilia	December 22, 2020	Helpline	1 item	Private

Your volunteer folder will contain your Next Steps information. You are also welcome to keep anything else that is useful in there, like a document with your personal email templates.

