

# LiveHelp Operator Manual

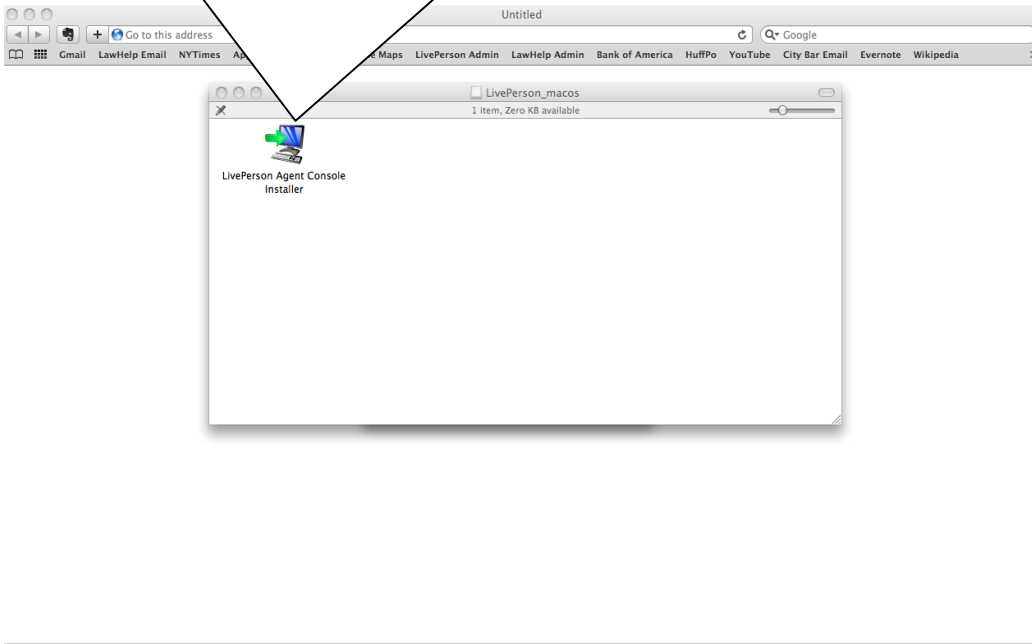


- For Mac Operators -

## livePerson – download and start

Download & install LivePerson software from

<https://solutions.liveperson.com/downloads/lp/LivePersonInstaller.zip>



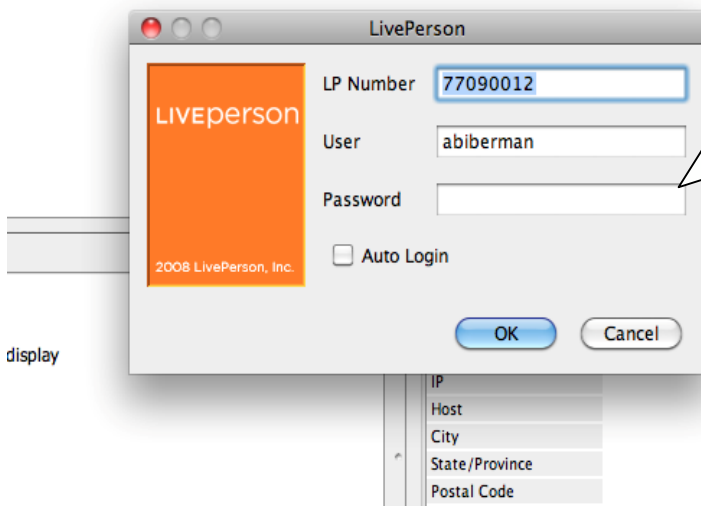
Next, open LivePerson. You can open LivePerson by:

- Clicking on 'Applications,' clicking on the 'LivePerson' folder, clicking on the orange LivePerson symbol, or;
- Clicking on the LivePerson icon on our desktop



Login to LivePerson by clicking on the 'Site' menu and then selecting 'Login' (or by clicking on the LivePerson icon, see above). You will need a User Name & Password to log in. If you do not have one, contact the LiveHelp Project Coordinator immediately to set one up. Enter the LP Number, your User Name and Password into the Login Dialog box. **The LP Number is 77090012.**

**Tip: Do not check 'Auto Login' because it will log you into LivePerson each time you restart your computer. This will cause problems for the system.**



# livePerson Operator Console

When you first logon to LiveHelp the Operator Console will look like this. **Make sure your computer speakers are ON when you log on**

It will display the LivePerson Menu Bar...

The Main Toolbar

The Visitor Bar

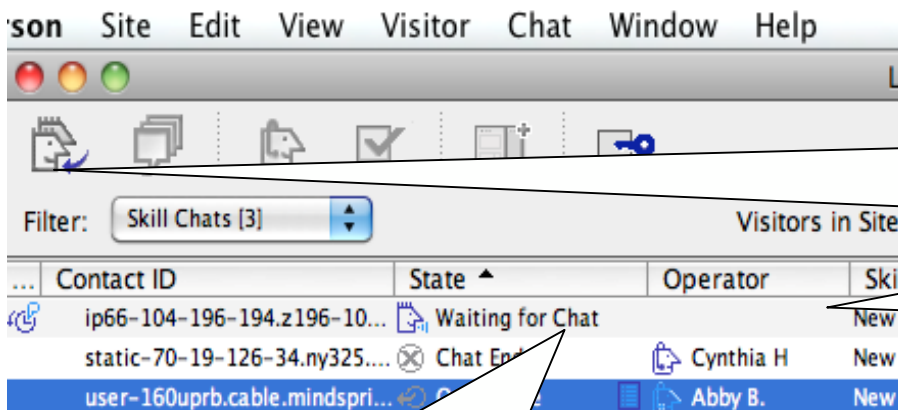
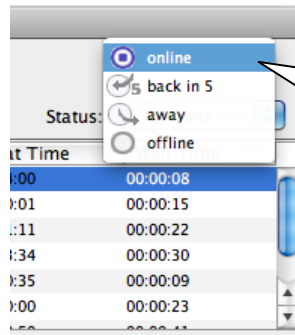
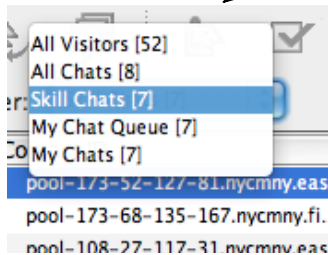
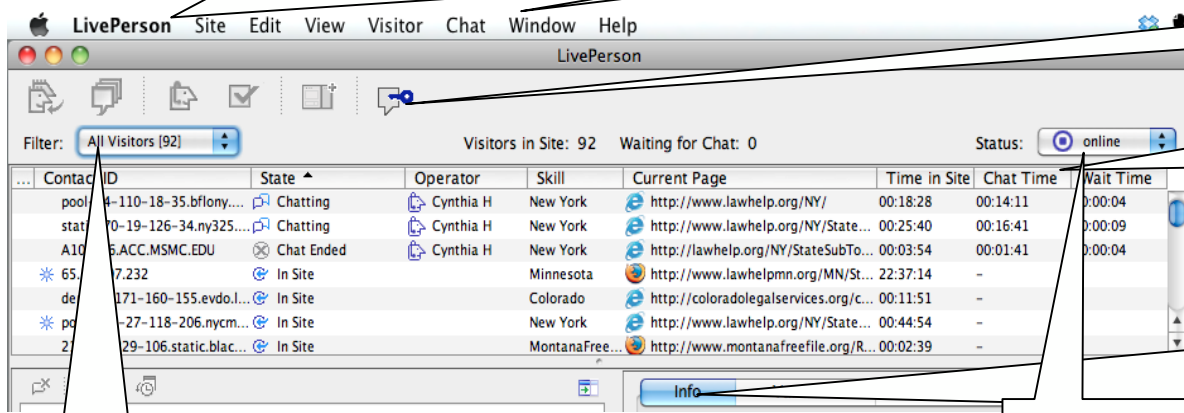
The chat area will remain blank until a chat session is initiated

Status will be set to 'online'...

Filter will be set to 'All Visitors...'

...select 'Skill Chats' from dropdown menu

...and if it's not, select 'online' from dropdown menu



When a website visitor clicks to chat, you will hear a phone ring and the icon with 2 faces will flash, indicating that a user has initiated a chat. Click on that icon to begin a LiveHelp chat session. **Remember to have your computer speakers on during LiveHelp Shifts**

You can also right click on the chat coming in & select 'accept'

When you 'Take' a chat session, the user's 'state' column will change from 'Waiting for Chat...'

## livePerson Operator Console (cont'd)

... to 'Chatting'

Contact ID	State	Operator	Skill	Current Page	Time in Site	Chat Time	Wait Time
pool-74-110-18-35.bflyn.e...	Chatting	Cynthia H	New York	http://www.lawhelp.org/NY/	00:18:04	00:13:47	00:00:04
static-70-19-126-34.ny325....	Chatting	Cynthia H	New York	http://www.lawhelp.org/NY/State...	00:25:16	00:16:17	00:00:09
A100T06.ACC.MSMC.EDU	Chat Ended	Cynthia H	New York	http://lawhelp.org/NY/StateSubTo...	00:03:30	00:01:41	00:00:04

Live Chat by LIVEPERSON

Print Email Close Chat

Please wait for a site specialist to respond.  
You are now chatting with 'Abby B.'

**Abby B.:** Hello, welcome to LawHelp NY. I can help you find free legal services and information about your legal rights. I cannot act as your attorney, give you advice about your specific situation or tell you what you should do. Please don't tell me anything confidential. The other side in your case may contact LiveHelp to ask for information. In that case, we will also give him or her information.

Is this okay? Please type **yes** if you would like to continue.

**you:** Yes.

**Abby B.:** Thanks. What information can I help you find today?

Send Chat

This is what the chat window looks like on the visitor's end.

# Assisting Users

The screenshot shows the LivePerson chat interface. At the top, there's a status bar with 'Visitors in Site' and 'Waiting for Chat: 0'. Below this is a table listing active chat sessions. The main area is divided into a chat window on the left and an information panel on the right. The chat window shows a conversation between Abby B. and a visitor. The information panel displays various survey variables and their values. Callouts point to different parts of the interface: the Communication Panel, the Chat Toolbar, the Chat Operator Area, the Chat Format Toolbar, the Chat Typing Area, and the Information Panel.

**When you begin chatting, the Communication Panel will appear**

**It will show the chat Toolbar**

**The Chat Operator Area...**

**The Chat Format Toolbar, and...**

**The Chat Typing Area. You will enter text here and send it to the visitor by clicking the 'Send' button or hitting the "return" key on your keyboard**

**The Information Panel will also appear. Click on 'Variables' for information about the visitor**

Contact	State	Operator	Skill	Current Page	Time in Site	Chat Time	Wait Time
pool-35-167.nycmny.fi...	Out of Site	Abby B.	New York	http://www.lawhelp.org/NY/StateChan...	00:03:59	00:00:01	00:00:15
pool-117-31.nycmny.eas...	Out of Site	Abby B.	New York	http://www.lawhelp.org/NY/StateChan...	00:23:30	00:21:11	00:00:22
pool-151-145.nycmny.f...	Out of Site	Abby B.	New York	http://www.lawhelp.org/NY/StateSubTo...	00:46:50	00:33:34	00:00:30
m3f5-1modns.net	Out of Site	Abby B.	New York	http://lawhelp.org/NY/StateChannelRe...	00:48:12	01:00:35	00:00:09
188-5-173.edge-1.net	Out of Site	Abby B.	New York	http://www.lawhelp.org/NY/	00:18:06	00:00:00	00:00:23
gate1-norfolk.nmci.navy.mil	Out of Site	Abby B.	New York	http://lawhelp.org/NY/StateSubTopics.c...	00:25:08	00:20:50	00:00:41

**Chat Window:**

Abby B.: Hello, welcome to LawHelp NY. I can help you find free legal services and information about your legal rights. I cannot act as your attorney, give you advice about your specific situation or tell you what you should do. Please don't tell me anything confidential. The other side in your case may contact LiveHelp to ask for information. In that case, we will also give him or her information.

Is this okay? Please type **yes** if you would like to continue.

Visitor: yes

Abby B.: Thanks. What information can I help you find today?

Visitor: Hi I have a question about this a situation: My younger sister and my parents files a lawsuit against the landlord almost 10 years ago. My mom was told that they cant access the money until my sister is 18 yrs old or if they need it for any emergencies. Right now my mom is losing her apartment and she was told that

Visitor: she can access the money since she's still the legal guardian and stuff. She went to the bank and they told her she needs a judge order saying they can access the money. Now my question is does it have to be the same court or can it be any family court. She has all the documents from the original court issue saying she can access the money as the parent.

Abby B.: What was the original court?

Visitor: Im not sure I think it was in brooklyn.

Abby B.: Ok. Does your mother have a lawyer for the current housing court case?

Abby B.: Is there a current case? Meaning, when you said your mother is losing her apartment, did you mean that she is currently in eviction proceedings?


Visitor: she is.

Visitor: shes getting evicted next week. now the lawsuit is not a pending case. It was closed a

**Information Panel:**

Variable	Value
Operator Survey Variables	
Pre Chat Survey Variables	
Which language do you prefer? ¿Cuál idioma prefieres?	English
What areas of law do you need information about? You can check more than one.	I don't know/other
Are you currently living in New York?	Yes
If yes, what county or borough do you live in?	Bronx
Exit Survey Variables	
Monitoring Tag Variables	
visitorActive	
Chat Tag Variables	
skill	New York
Other Variables	
Source	www.lawhelp.org
Medium	Realtime

## Assisting Users (cont'd)


Info	Variables	Navigation	Alerts	Operator Survey	History
State	New York				
Skill	New York				
IP	66.104.196.194				
Host	ip66-104-196-194.z196-104				
City	Brooklyn				
State/Province	New York				
Postal Code					
Country	United States				
Time Zone	America/New_York				
Organization	CAPITALASSOCIATES-GROUP, LLC.				
ISP	XO COMMUNICATIONS				
Connection Type	Dialup				
Current Page	 http://www.lawhelp.org/ny/				
Referrer					
Title					

The information panel to the right of the chat area allows you to look at the following information:

- Information about the visitor's computer (IP Address, general location)
- The 'Variables' tab (see more below) provides information about the visitor
- The 'Navigation' tab allows you to view the pages of LawHelp.org/NY the visitor has navigated
- Alerts (see more below)
- 'Operator Survey' tab allows you to access the survey you must complete after every chat.
- 'History' shows chat history from the same IP address


Info	Variables	Navigation	Alerts	Operator Survey	History
Variable		Value			
▼ Operator Survey Variables					
▼ Pre Chat Survey Variables					
Which language do you prefer? ¿Cuál idioma prefieres?		English			
What areas of law did you need information about? You can check more than one.		Other debt problems			
If yes, what county or borough do you live in?		Kings (Brooklyn)			
▼ Exit Survey Variables					
▼ Monitoring Tag Variables					
visitorActive		1			
▼ Chat Tag Variables					
skill		New York			
▼ Other Variables					
Medium		Direct			

In the 'Variables' you can view the user's responses to the pre-chat survey questions. **TIP: When you first accept a chat, check their survey responses to find out where they live. Be sure that they have selected English, unless you speak Spanish.**

Info Variables Navigation Alerts Operator Survey History	
<div>  List         <div> <div>Previous</div> <div>Next</div> </div> </div>	
Description	Time Fired
<a href="#">Potential DV issues</a>	10:42 AM

Be sure to check for ALERTS. The only way to see if there is an alert is by clicking here. **You must check for ALERTS for all visitors asking for family law information.**

When it says “Potential DV issues” this means that the visitor has viewed LawHelp.org/NY pages with information about domestic violence. In a polite and sensitive way, ask if there has been a history of domestic violence, so you can better direct the visitor. For more on this, see “General Considerations for Chats,” towards the back of this manual.

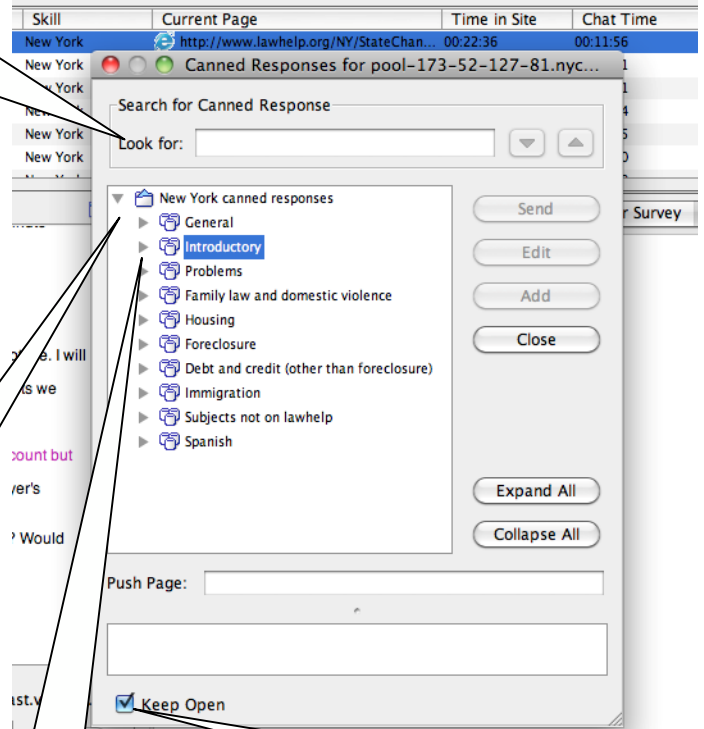
Info Variables Navigation Alerts Operator Survey History	
<div>  List         <div> <div>Previous</div> <div>Next</div> </div> </div>	
Alert Info	
<b>Description:</b>	Potential DV issues
<b>Time Fired:</b>	10:42 AM
Visitor may have viewed information about domestic violence. Consider sending DV disclaimer or asking if visitor needs additional assistance in that area.	

If you forget at any time what the alert means, click on ‘Potential DV issues’ (see above) for this description.



When first responding to a LiveHelp visitor, click on the 'Canned Responses' icon

This Canned Responses window will open



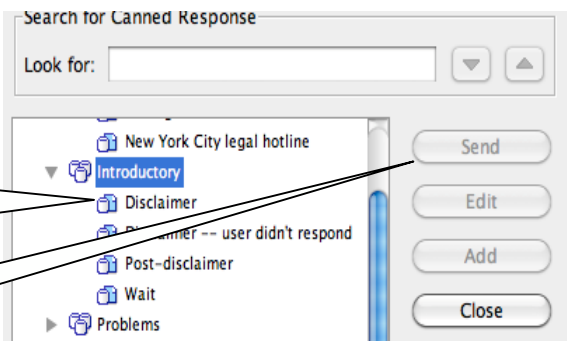
(1) Click on the arrow next to New York Canned Responses to expand.

**TIP: Keep this window open throughout the chats for quick access**

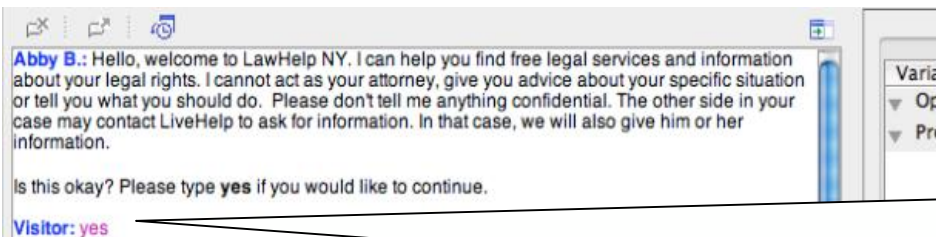
(2) Then click on Introductory...

(3) Then click on Disclaimer...

(4) Then click Send



The disclaimer will appear in the chat window. You must wait for the Visitor to respond YES before proceeding. If Visitor does not respond yes, go back to the canned responses & select 'Disclaimer -- user didn't respond'.





# Canned Responses

Canned responses are pre-written responses to common questions we receive on LiveHelp. They are very useful for the beginning of a chat, to provide a Visitor with basic information about their legal problem. They should be used sparingly and please take advantage of modifying them as needed.

The screenshot shows a web application window titled "Canned Responses for ip66-104-196-194.z...". It features a search bar at the top with the text "Search for Canned Response" and "Look for:". Below this is a tree view of categories: "New York canned responses" (expanded), "General", "Introductory" (expanded), "Disclaimer" (selected), "Disclaimer -- user didn't respond", "Post-disclaimer", "Wait", "Problems", "Family law and domestic violence", "Housing", "Foreclosure", "Debt and credit (other than foreclosure)", "Immigration", "Subjects not on lawhelp", and "Spanish". To the right of the tree are buttons: "Send", "Edit", "Add", "Close", "Expand All", and "Collapse All". At the bottom, there is a "Push Page:" field, a text area containing a sample response: "Hello, welcome to LawHelp NY. I can help you find free legal services and information about your legal rights. I cannot act as your attorney, give you advice about your specific situation or tell you...", and a "Keep Open" checkbox. The footer shows "Organization CAPITALASSOCIATES-GROUP, LLC.".

If you single-click on a canned response the text of the response will appear in the chat typing area of the Canned Responses Window...

...see here

You can also expand or collapse all of the branches of Canned Responses by clicking 'Expand All' or 'Collapse All'.

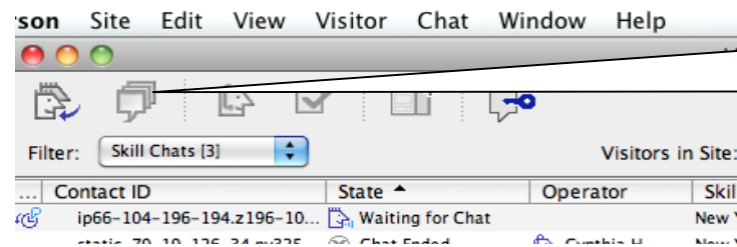
You can modify any canned response in the chat typing area of the Canned Responses Window.

After you have viewed or modified a canned response you can send it to the website visitor by clicking 'Send'. Note, response will only be modified for that single chat.

Under **Problems**, you will find canned responses to address problems that arise during user interactions. Most of the other categories of canned responses contain default answers to common questions. Under **Spanish**, you will find a canned response to use if no Spanish-speaking operator is available.

## Assisting Users

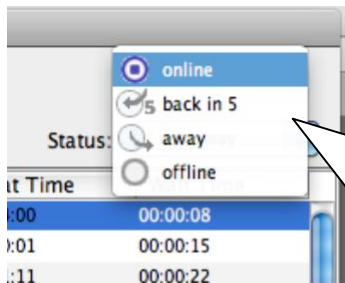
When helping more than one visitor navigate the website at a time, click the 'Next Response' icon in the Main Toolbar to respond to the visitor who is next in the queue.



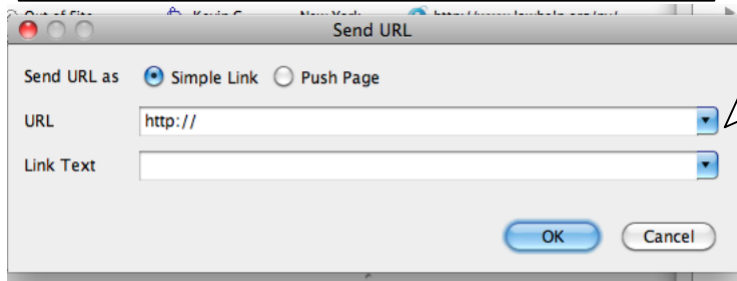
You can change your Chat status by clicking on the Status drop-down list on the upper right hand corner.

**You can change your status from 'Online' or 'Away' if you are going to be away from your computer for a longer period of time.**

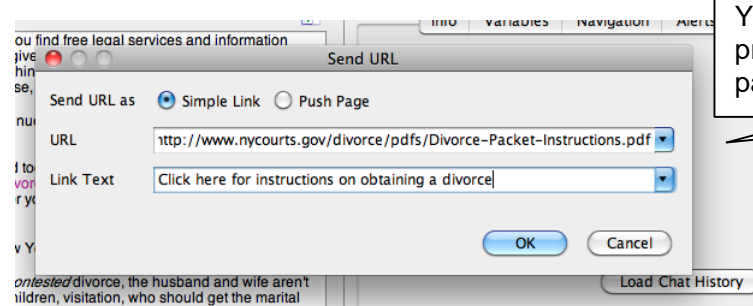
Make sure to use this function whenever you are away from your computer, and also be sure to change your status back to 'Online' when you return.



If you need to send a link to a web page to a visitor, you can do so by clicking the 'Send link to visitor' icon in the Chat format toolbar (this is below the chat window).



A 'Send URL' window will open. Enter the web address you want linked to in the 'URL' box. You can paste a link into the URL box, but **delete the http://** either here or in the link if you do copy/paste. Then type the text you want to be shown in the 'Text' box (such as "Click here for information on...").



You can either send it as a link (usually preferable) or select 'Push Page' to force the page to open on the visitor's computer.

# Sample Chat

[09:45:48] info: Please wait for a site operator to respond.

[09:45:54] info: Welcome! You are now chatting with 'tsmith'

[09:45:58] tsmith: Hello. Hello, welcome to LiveHelp New York. I can help you find basic information about the law and your legal rights.  
Using this service does not mean that I will act as your attorney. I can't give you advice about your specific situation or tell you what you should do. Please don't tell me anything confidential.  
The other side in your case may contact LiveHelp to ask for information. In that case, we will also give him or her information.  
Is this okay? Please type YES if you would like to continue.

[09:46:57] user: yes

[09:47:04] tsmith: Hello! How can I help you?

[09:48:10] user: I have been unemployed for two years and am way behind on credit card debt. i need to talk to lawyer to do something.

[09:49:00] tsmith: Are you looking for information about bankruptcy?

[09:49:25] user: yes, bankruptcy

[09:52:55] user: my former spouse before, before petitioning back to court

[09:53:17] tsmith: Please wait while I find some information for you...

[09:57:38] tsmith: [Click here for information to help you determine if bankruptcy is right for you.](#) If you are having problems with creditors, I can give you information that might help resolve them.

[10:06:47] tsmith: Does this information help to answer your question?

[10:09:06] user: Yes b ut I need a lawyer please.

[10:12:36] tsmith: [Click here for information about the New York City Bar's Consumer Bankruptcy Project, which may be able to help you.](#)

[10:12:07] tsmith: Can I help you find anything else?

[10:12:46] user: No thank you very much

[10:12:49] tsmith: Good luck to you.

[10:12:52] tsmith: Please remember: this service helps people find information on their legal problems. The operator cannot give you legal advice. If you need legal advice, look through the Find a Lawyer information on LawHelp.org/ny .

[10:12:52] tsmith: We value your feedback on this service – please take a moment to answer the post-chat survey that will pop up when you close this window.

Once the logged-in operator clicks on the "Take" icon, the user sees this message.

This is the pre-chat disclaimer canned chat. The user must respond "yes" before you can continue with the chat.

If the user is unclear about what information they need, ask them for clarification.

This canned chat contains a link to a bankruptcy pamphlet.

This link was sent using the "Send link to visitor" button. (see earlier on how to do this)

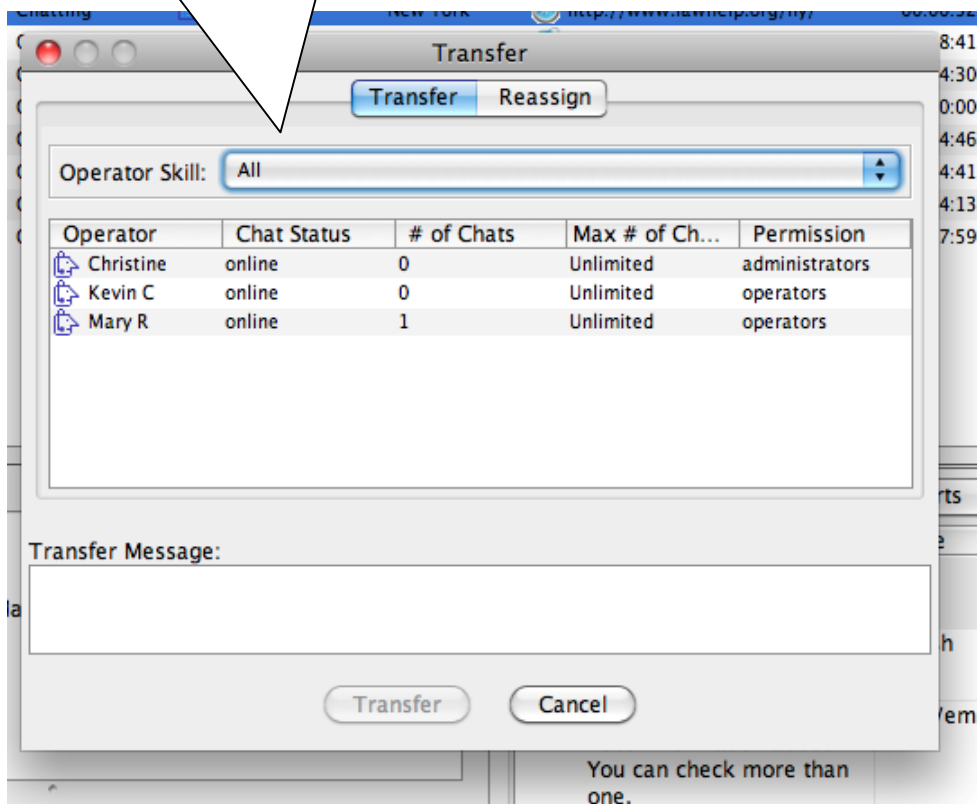
As you can see from the time stamp, this chat took nearly 30 minutes. If the user doesn't respond to you after 5 minutes or more and has not closed the chat window him/herself, you can click the 'Stop' icon in the Operator Chat Area to end the chat.

## Transferring or Ending Chats

You can transfer a chat to another user if you are at the end of your shift and you must leave (although operators are asked to stay on for an extra few minutes if necessary to finish a chat). You can also transfer chats to Spanish speakers as needed.



A 'Transfer' window will open and show any other available operators. **Make sure you use the Skill Filter to look for a user in 'New York' or 'New York Spanish,'** as needed. To transfer, click on an operator, add a message if necessary, then click 'Transfer'.



## Transferring or Ending Chats (cont'd)

Once the chat is over, the Visitor will automatically be presented with a short survey about their chatting experience

Person Exit Survey Window

Por favor, participe en nuestra encuesta para ayudarnos a mejorar el sitio de LawHelp.org/NY.

Which language do you prefer? ¿Cuál idioma prefiere?

English

Would you like us to email you a transcript of this chat? ¿Quiere usted una copia de esta conversación?

☐ yes  
☐ no

If yes, please provide us with your email so we can send you a copy. Si quiere una copia, por favor, escribe su dirección de correo electrónico.

Did you use this service for yourself to help another person?

☐ Self  
☐ Another person

How satisfied were you with the information you received? Rate 1 to 9, with 9 being the most satisfied and 1 the least satisfied.

☐ 9  
☐ 8  
☐ 7  
☐ 6  
☐ 5  
☐ 4  
☐ 3  
☐ 2  
☐ 1

Did the LiveHelp service make your use of the website faster?

☐ Yes  
☐ No

Where are you accessing this website? Please check one.

☐ Home

After each chat has ended, you should take the post-chat survey, found under the 'Operator Survey' tab in the Information Panel.

Info Variables Navigation Alerts Operator Survey History

Operator Chat Survey

Required items indicated with \*.

Navigator name: \*

What type of information was the visitor looking for? Check all that apply. \*

☐ Legal information  
☐ Attorney  
☐ Community resource  
☐ Court  
☐ Other

Were you able to answer this question with information on LawHelp.org/NY? \*

☐ Yes  
☐ No

-If no, what information needs to be added, clarified or improved? \*

Site Edit View

Login...  
Logout  
Change State...

BE SURE TO LOG OUT AT THE END OF EACH SHIFT!!!

Log out by clicking on the 'Site' tab in the upper left-hand corner of LivePerson. Then select 'logout'...

LivePerson Site Edit

About LivePerson

Preferences... ⌘,

Services ▶

Hide LivePerson ⌘H  
Hide Others ⌘H  
Show All

Quit LivePerson ⌘Q

...then click on the 'LivePerson' tab and select 'Quit LivePerson'

