



CAPTAIN'S GUIDE

Last Updated: October 11, 2022

Thank you for agreeing to serve as a Hotline Captain in the Election Protection contact center. With your help we are going to help tens of thousands of people vote during this election cycle. As captains, your work in the contact center is a critical component of contact center operations. We need captains to be active, engaged, precise, and calm throughout the shift. As a Captains, you should be familiar with the information in this *and* the Volunteer's Guide.

This guide spells out the routine for a captain shift on non-election days. Guidance given on an election day might differ from these procedures.

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1) YOUR ROLE AS A CAPTAIN

Both EP Captains and EP Volunteers are volunteer roles, however, Captains have a different set of responsibilities than Volunteers. As you know from your time as a Volunteer, the focus is responding to voter’s calls, using the available resources to find answers, and knowing how to use the contact center platform and OVL. Captains use the same tools and resources, but in different ways.

Captain shifts differ from Volunteer shifts in a number of ways:

- Captains spend most of their shifts **assisting volunteers**
- Captains are responsible for **monitoring**
 - Call volume
 - Volunteer activity
 - OVL tickets
 - Voicemail
- Captains **quality control** OVL tickets
- Captains **review and report** in the Captain’s Log
- Captains do not take incoming calls from voters

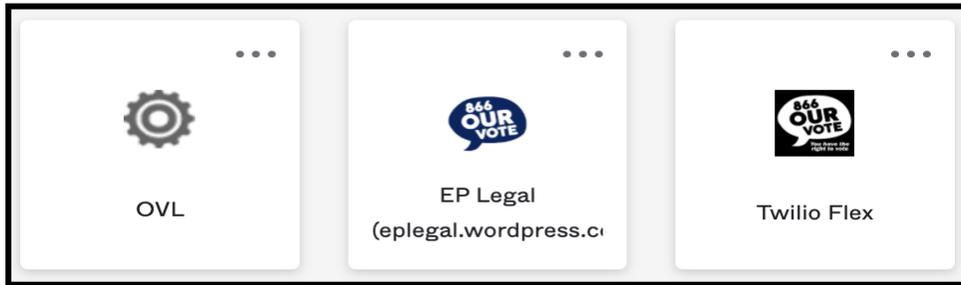
Assisting and coaching volunteers so they can successfully help voters is a priority for Captains.

2) WHEN YOUR SHIFT STARTS

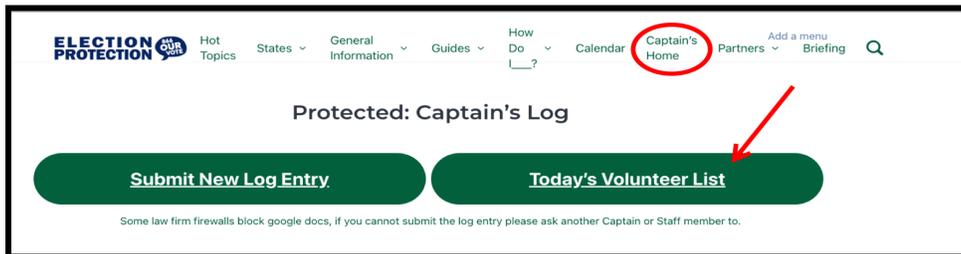
Captain shifts start 15 minutes before Volunteer shifts. There is normally a 30-minute overlap between the end of the previous shift and the beginning of the next shift. This is your opportunity to review the logs from previous shifts, review the captains chat and coordinate with co-captains on duties.

Lawyers’ Committee hotline staff may schedule video briefings during this 30 minutes, so arriving on time for your shift ensures you do not miss important information.

- a) Log into Okta then open in separate tabs - Twilio Flex, OVL and EP Legal



b) Go to the Captain’s Home on EP Legal to view the day’s volunteer list.



c) Review the Hot Topics and the Captain’s Log on EP Legal.

Protected: Captain's Log

[Submit New Log Entry](#) [Today's Volunteer List](#)

Some law firm firewalls block google docs, if you cannot submit the log entry please ask another Captain or Staff member to.

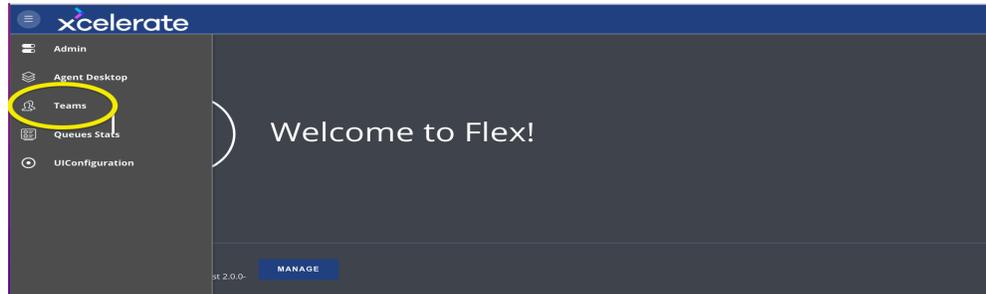
Captain's Log (Viewable)

Date	Shift Time	Adjective Summary (please use 3 adjectives to describe your shift)	Shift Summary (please be concise and focus on substantive issues)
4/8/2022	9:45 AM EST	quiet, quiet, quiet	none
4/8/2022	12:45 PM EST	Slow, quiet, uneventful	Few informational queries, no substantive/systemic issues
4/7/2022	9:45 AM EST	quiet, quiet, quiet	nothing substantive to report
4/7/2022	12:45 PM EST	very very quiet	3 calls, all routine
4/6/2022	9:45 AM EST	quiet, quiet, quiet	no substantive issues to report
4/6/2022	12:45 PM EST	Slow	There was one escalated ticket --137271--which involved electioneering and a bit of intimidation by a

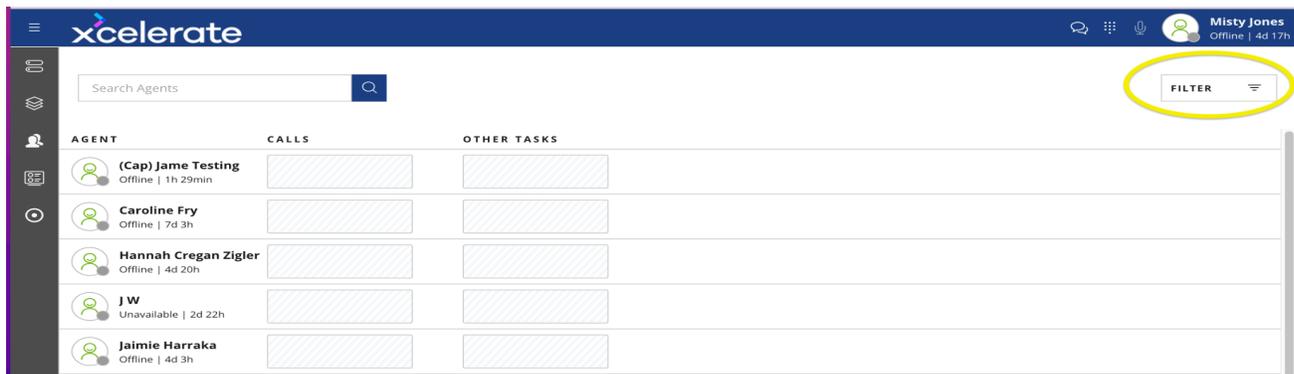
d) Post the welcome message in the shift chat.

- i) The welcome message can be copied and pasted into the chat from the template at the [end of this document](#).

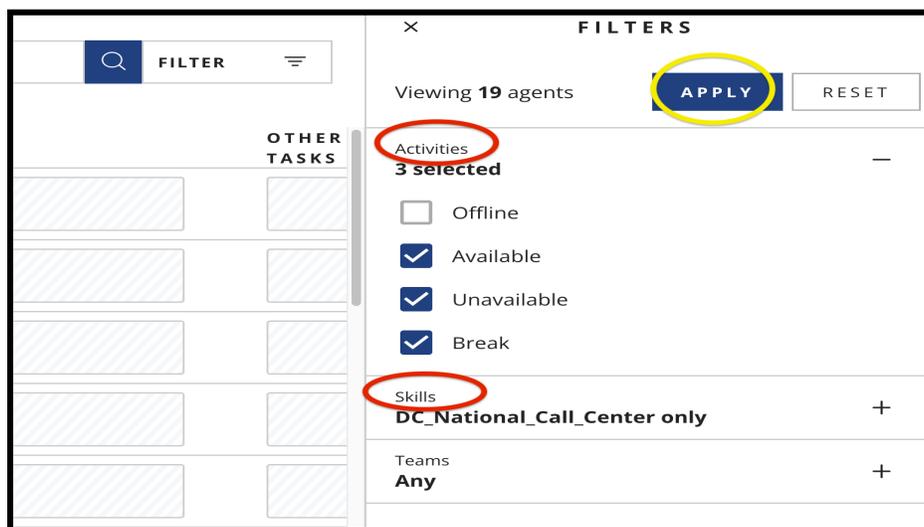
- e) Greet volunteers as they log into the shift chat.
 - i) You can see who has logged in by going to the Teams screen in Twilio Flex.



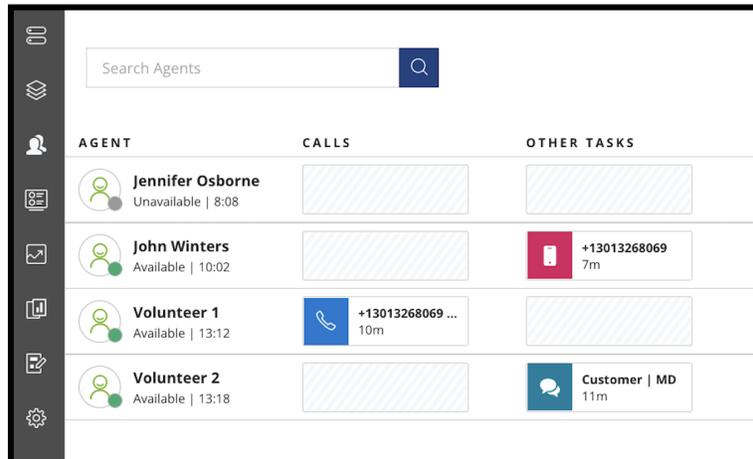
- ii) In the Teams view, you will see the list of all Twilio Flex users and the Filter option.



- iii) Select Filter, then select Activities and filter for Available, Unavailable, and Break; then in Skills, select your contact center name and select Apply.



This will show you who is logged into Twilio Flex and what they are working on.

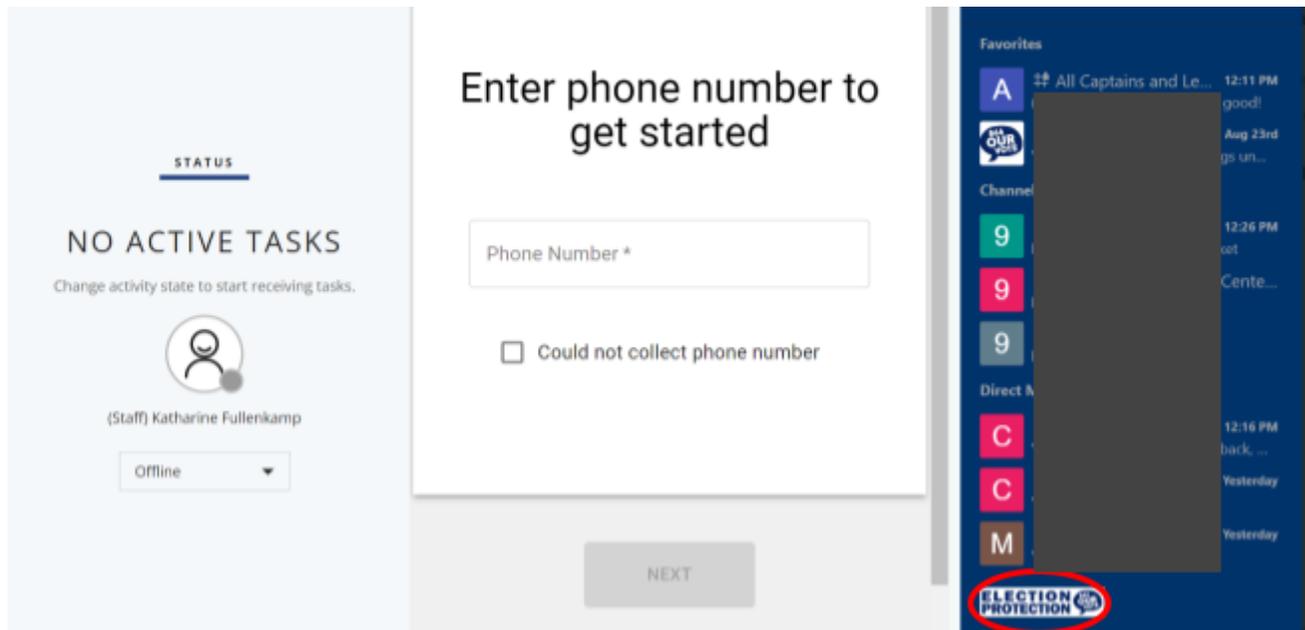


The Routine of the Captain's Shift

- Review information from the previous shift
- Repost important notices on the virtual blackboard.
- Manage and coach Volunteers
- Monitor the back-end of OVL
- Monitor and assign voicemails
- Report shift highlights in the Captain's Log

3) FINDING YOUR TEAM CHAT

- a) Open Twilio Flex and open Rocket Chat as a separate tab by ctrl clicking (command click on a mac) the box that says election protection in the bottom left of the rocket chat pane.



- b) Captains will be automatically loaded into the necessary chats but if you need to find others (or have a lead account), you can search for and join them yourself. Click on the Directory (book with number sign icon in the upper left corner) to search for chat rooms:



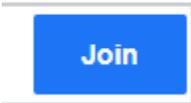
- c) This will open the directory. You will need to search by the date first, then click on the chat room you'd like to open.

Directory

Channels Users Teams

- Name ▾
-  # 9/8 1:15 PM DC_National_Call_Center - Team 1
 -  # 9/8 1PM DC_National_Call_Center - Team 1
 -  # 9/8 9:30 AM DC_National_Call_Center - Team 1
 -  # 9/8 9:45 AM DC_National_Call_Center - Team 1
 -  # 9/8 Announcements
 -  # 9/8 DC_National_Call_Center Tech Help
 -  # C & L DC_National_Call_Center 9/8

d) Once you are in the room, click join in the bottom right corner:



i)

e) Repeat the process until you are in all the chats you need.

4) VOLUNTEER COMMUNICATIONS AND COACHING

Volunteers remain engaged with Election Protection because they find the experience rewarding. As the first point of contact for volunteers, captains play a significant role in shaping the volunteer experience during the shift. Captains should work to ensure the experience in the contact center is positive, engaging, and rewarding.

Communications - When communicating with volunteers in the contact center, remember, they are donating their time and may choose not to volunteer again if the experience is not gratifying. Captains help maintain a positive environment by communicating respectfully with everyone in the contact center and responding accurately and with alacrity to volunteer questions. Nuance may be lost so it is important to keep messages in the chat clear and concise.

- (a) It is important to take the time to research a volunteer’s question if you do not know the answer.
- (b) It is equally important to respond quickly to volunteer queries in the chat letting the volunteer know that you see the question and that you must research to find the answer.

First-time Volunteers

We have first-time volunteers identify themselves in the shift chat to ensure captains know who they are because they may need more assistance and coaching than a seasoned volunteer. This is also when captains should confirm that volunteers have completed the training and signed the [Volunteer Code of Conduct](#). Pay particular attention to the OVL tickets of new volunteers to ensure they meet established standards.

Coaching - New volunteers require coaching and guidance until they develop a solid understanding of where to find specific information on EP Legal website and government websites; are familiar with the questions on the FAQ; and know what to do if they have doubts about the information they are about to give. Coaching has numerous benefits, including it:

- (c) Increases a volunteer’s knowledge, skills, and confidence; and helps them understand and comply with contact center guidelines.
- (d) Can help if a volunteer is anxious because they feel the training did not really prepare them for the experience of taking a live call;
- (e) Helps familiarize volunteers with the resources available on the EP Legal website.

Remind volunteers that it is more important to provide a **full** and **accurate** answer, than to work quickly and give out bad information. This is particularly true of SMS and webchat interactions which allow the voter to screenshot and share the information.

5) MONITORING & REVIEWING

Most of a captain’s time during the shift is spent monitoring contact center activity and reviewing OVL tickets.

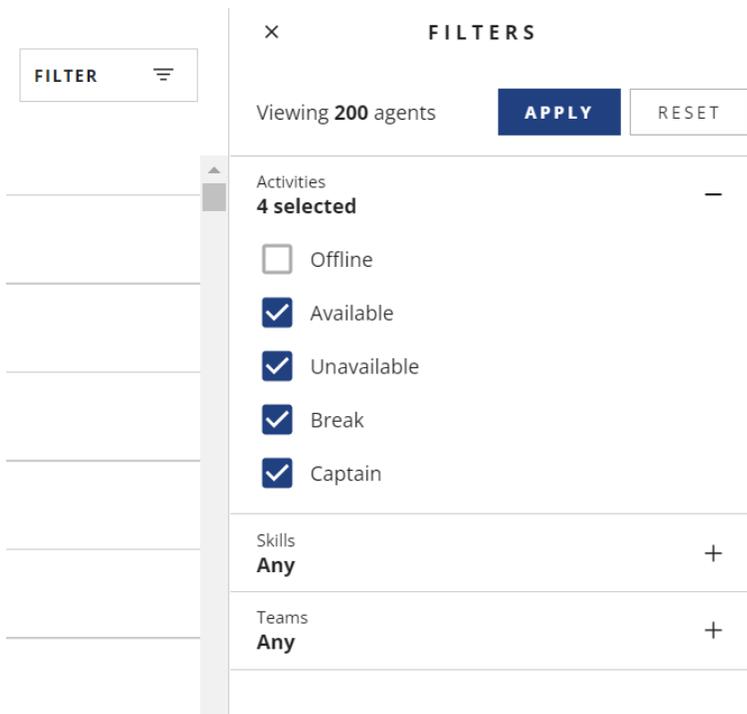
Monitoring Contact Center Activity - There are several ways to view contact center activity in Twilio Flex.

Teams Tab



To assign skills and monitor volunteer status, use the Teams tab in Twilio.

After you open Teams, use the filter in the upper right. Filter by activity to see who is online. We recommend you select everything except offline: available, unavailable, break and captain. Select the activities and click apply:

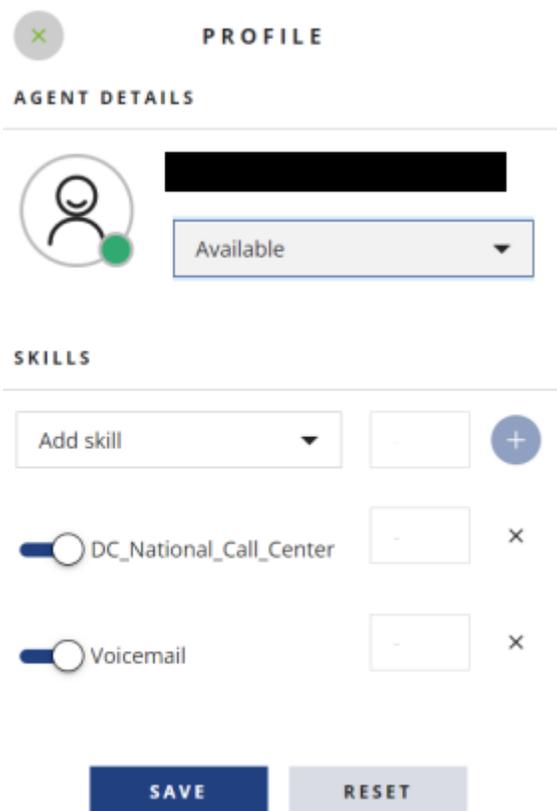


Now you can see who is online and their status: Available (which means they can receive interactions), Unavailable (which means they missed an interaction and should be checked in with), or Break. You can also see the length of time they’ve been in that status. This can be useful for instance if someone says they were taking a 5 minute break, and is still on break 30 minutes later. Check in with them; they may have been waiting patiently for an interaction but had forgotten to change their status.

Assigning Skills

You also use the Teams Tab to assign skills such as voicemail. To assign or turn on a skill, click on the agent’s name. Their profile details will open on the right. They should have a call center skill turned on. If not, or if it says “worker schema mismatch,” please inform a Staff member. NOTE: Everyone should automatically be assigned the skill for their call center, never remove this skill.

If they already have the voicemail skill, simply slide the circle to the right and click Save. This profile is ready to receive interactions including voicemails:



The screenshot shows a user interface for an agent's profile. At the top left is a close button (X) and the word "PROFILE". Below that is the section "AGENT DETAILS", which includes a profile picture placeholder, a name field (redacted with a black box), and a status dropdown menu currently set to "Available". The "SKILLS" section below features an "Add skill" dropdown menu, a plus sign button, and two existing skills: "DC_National_Call_Center" and "Voicemail". Each skill has a toggle switch (currently turned on) and a minus sign button. At the bottom are "SAVE" and "RESET" buttons.

If the agent does not have the voicemail or other needed skill, click on add skill, select it from the drop down menu, and click the plus sign in a circle. Click Save, and that agent is now loaded with that skill.

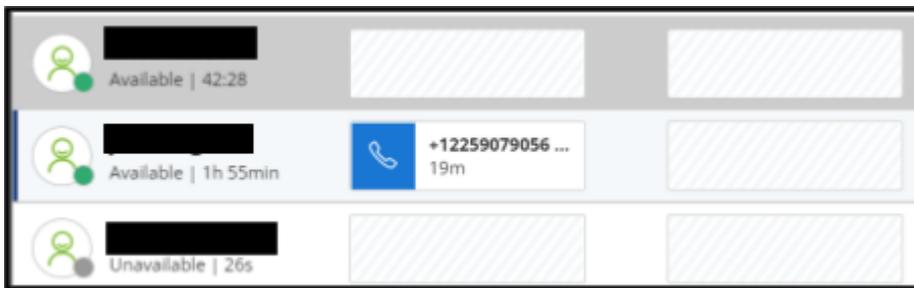
NOTE: Please make sure you turn off (slide the circle by the skill to the left, hit save) the voicemail skill at the end of the shift before the volunteer logs off. Otherwise, they will start receiving voicemails the moment they log in for their next shift.

You will also use Teams to monitor call volume and volunteer availability. Here you can see how many of the volunteers have active interactions, how long the interactions have been going, how many are available, and who has unwrapped tasks. Sometimes volunteers need a reminder to wrap interactions, especially with voicemail tasks when they've also placed an outgoing call. Unwrapped interactions are gray and say Wrap up.

Here is an example of someone with an unwrapped task:



Here we can see one agent is available for an interaction, one has been on a call for 19 minutes, and one is unavailable:



Here is someone with a voicemail who is also on an outgoing call:



And here is an example of when someone doesn't wrap the tasks when they've been answering voicemails:



Different types of interactions

The different types of interactions are:

Incoming Call



Outgoing Call



Call on Hold



Text



Webchat from the 866OurVote.org Website



Multi-Party Call



Voicemail



Unwrapped Call



Unwrapped Text



Unwrapped Chat



Queue Stats



To see how many voicemails are pending, use the Queue Stats tab. Scroll down the page to find your call center:

^	📁	DC National Call Center	1	1	13s
	📞	voicemail	0	0	0s
↓					
	💬	Programmable Chat	0	0	0s
	📞	Voice	1	1	13s
	📞	callback	0	0	0s

Click on the green down arrow to “drill down” and find more details. Here you can see the tasks in queue, the different type of tasks (including voicemails), and how long they’ve been waiting.

DC National Call Center



Tasks In Queue

2

Task Type



Ch	Customer	Wait	Answer In
📞	+19513990084 CA Pending	26:50	-
📞	+15105866435 CA Pending	26:40	-

Wait Time
Until Canceled

Avg	Max
0s	0s

Another important stat here is the Wait Time Until Canceled at the bottom of the middle section. Some of the other metrics can be skewed by waiting voicemails, so this is the main one to monitor. This indicates how long callers are on hold before they give up and leave a voicemail. The goal is to keep this under a minute.

Dashboard



The last tab captures use to monitor is the Dashboard.

Here you can see more metrics including total calls, median waiting time, volunteer missed call %, and others. This information can also give you an idea of call volume. You can filter at the top by queue, time, and agent.

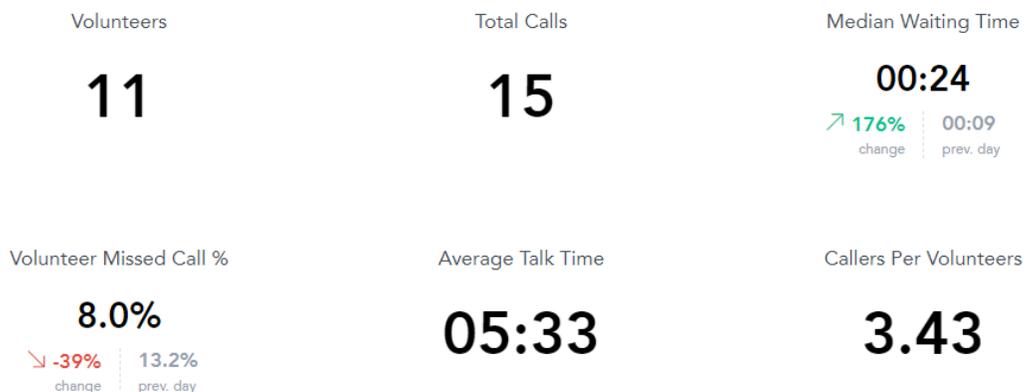
Captain's Dashboard  Shared

 Share 

Date range **Today** Queue **All** Hour **All** Direction **All** Agent **All**

Queue Metrics (All info in the dashboard updates every ~15 minutes)

Some of these metrics are skewed by overnight voicemails, particularly early in the morning.



The most frequently used part of this tab is the Call History. If you scroll down the page, you will find the Call History section. This allows you to find a phone number for a volunteer if they need to look up an OVL entry or call someone back and hadn't written down the number.

Captain's Dashboard  Shared

 Share 

Date range **Today** Queue **All** Hour **All** Direction **All** Agent **Jamin Agosti**

Call History

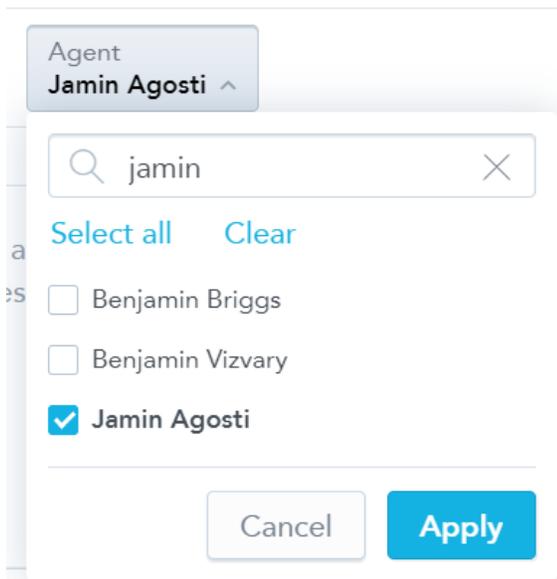
NOTE: The State and Area in the call history are assumptions based on Area code not information collected on the call! Outbound calls and texts go from the "Everyone" queue. Includes calls that rang for but were not answered by the volunteer.

Call History

Agent ▲	Time	Customer Phone	Queue	Communication Channel	Direction	State	Area
Jamin Agosti	14:23	+12128739042	DC National Call Center	Call	Inbound	New York	Clay County
	14:38	+16267557472	DC National Call Center	Call	Inbound	California	Los Angeles County
	15:03	+12259079056	DC National Call Center	Call	Inbound	Louisiana	East Baton Rouge Parish
	15:23	+12259079056	Everyone	SMS	Outbound	Louisiana	East Baton Rouge Parish

Using the search parameters at the top to select only the agent in question helps. Clear the search first if everyone is applied (the default setting), then search at the top by agent name, click by their

name and click on Apply.



Agent
Jamin Agosti ^

Search: jamin

Select all Clear

- Benjamin Briggs
- Benjamin Vizvary
- Jamin Agosti

Cancel Apply

Monitoring OVL Tickets

All tickets entered into OVL by hotline volunteers are reviewed during the same shift by the shift captain(s). To view the tickets created during the shift open OVL and create a search for tickets created on the day. Tickets are monitored for proper escalation and complete ticket data.

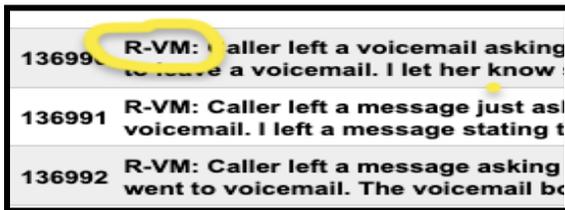
- (a) **Ticket Escalation** - Volunteers must consult a captain before escalating a ticket. This is covered in the volunteer training, but sometimes volunteers need to be reminded.
- (b) **Ticket Review** - Tickets are reviewed for clarity, accuracy, and sufficiency and completeness of information given to the voter. Has the volunteer described concisely and correctly indicated:
 - ii) The question/issue of the voter
 - iii) The information provided by the volunteer to the voter
If the volunteer engaged with elections officials, it should be noted in the ticket, including the name of the election official and the phone number/email, etc. used to contact them.
Ensure the volunteer provided complete information to the voter, including information on in-person voting options, if applicable.
 - iv) The proper status (open or resolved)
Was a captain consulted before the escalation?
 - v) Demographic information

Note if a specific volunteer consistently fails to include demographic information

- vi) The organizational affiliation of EP field volunteers if they call the hotline to report an issue.

Reviewed tickets are indicated by an R (for Reviewed) when viewing the list of tickets created during the day. **For instructions on how to indicate a ticket has been reviewed, [see this guide](#).**

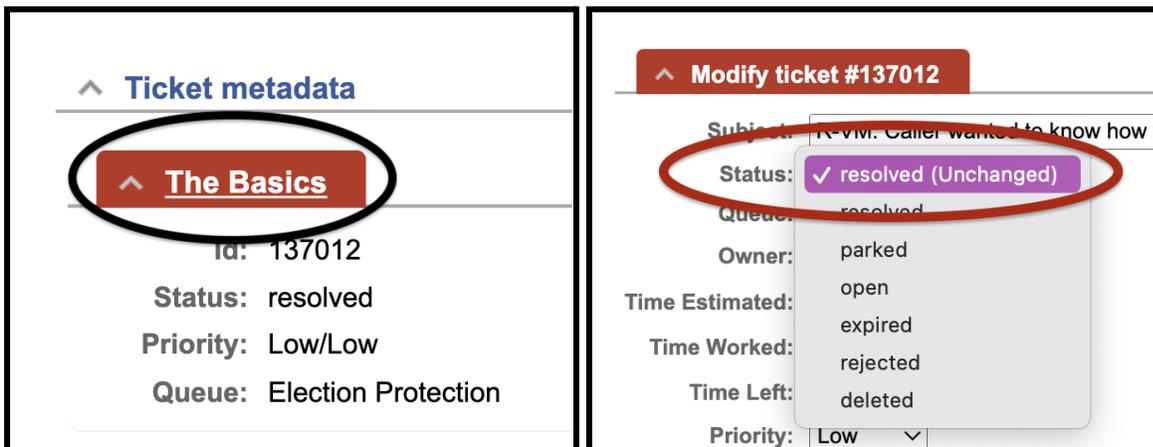
When viewing tickets for the day, the status is indicated and shows the ticket as resolved, parked,



open, or in progress.

Intimidation - in person Electioneering	R - A man is standing outside of the doors with gear for a particular candidate aggressively approaching voters with the gear as they walk into the polling place. Voter already voted b	Greene County Missouri	mary.sprouse@hscblackwell.com	open
Intimidation - in person	R - Voter is dealing with voter intimidation at polling place parking lot. She estimates that the person was about 50' from the entrance of the polling place. He's staying in the parki	St. Charles County Missouri	mary.sprouse@hscblackwell.com	open
(Question) In-Person Voting Intimidation - in person	R - The caller often assists with ensuring access to voting in her area. She said two women (one was white and one was black) were intimidated while waiting in line to vote. The person	Missouri	brannagaddy1@gmail.com	open
(Question) In-Person Voting Registration Issue	R - Went to the polling place today and was told there was no record of her registration (despite having voted many times and never running into this issue); voter had to fill out a ne	Monominee County Wisconsin	stephanie.chen@wsqr.com	parked
(Question) In-Person Voting	R-VM: Caller wanted to confirm whether she was in the district holding a special election today. // I looked up the caller's house district and confirmed that she was not in the dis	Fulton County Georgia	erica.clark@kirkland.com	resolved

Ticket status can be changed by selecting the ticket from the list which will take you to the backend of OVL. Go to ticket Basics, select Status and then the appropriate option from the drop down menu



A Note on Escalated vs Open Tickets

Escalation is the act taken in the contact center by the hotline volunteer who, after consulting with a captain, is told to escalate the ticket. The volunteer’s action on the frontend creates an open ticket in the backend. Hotline Volunteers never see “Open” tickets, these can only be viewed on the backend after the ticket has been created and submitted as “Escalated” by the Volunteer.

6) OVL TICKET STATUS DEFINITIONS

- (a) *“Resolved”* tickets need no further action. The Volunteer was able to provide the voter with the information requested or take a report of an issue. The issue may not have been resolved in the voter’s favor, but there is nothing more the hotline can do and it is not a problem likely to prevent other voters from registering to vote or from voting.
 - (i) **The status of resolved tickets can be changed to open if a captain determines upon reviewing the ticket that the issue should have been escalated.**

- (b) *“Parked”* tickets are tickets that have been worked as much as possible to resolve the issue reported by the voter. The issue may have been satisfactorily resolved for the voter, but parking it indicates the type of issue presented might be worth looking at later for policy, advocacy, or litigation purposes.
 - (i) **Tickets should only be parked by Lawyers’ Committee staff, EP Partner staff, or state command centers.**
 - 1. Captains should not change the status of parked tickets.**
 - (ii) **All parked tickets should include in the comments the reason the issue is parked and who parked the ticket (name and organization).**

- (c) *“In progress”* tickets are open tickets that have been “claimed” by someone, (usually in a state command center on election days, or by a Partner organization or OVL Lead during non-election seasons). These tickets are being actively worked on. Anyone working an open ticket must change the status to in-progress and note in the comments what they are doing to resolve the issue.
 - (i) **Tickets that are in progress must be changed to resolved or parked when all work that can be done on the issue is completed.**
 - (ii) **Captains should not change the status of in progress tickets.**

- (d) *“Deleted”* - **Only Lawyers’ Committee staff can delete OVL tickets. Tickets are**

deleted if the ticket description or resolution fields includes voter PII or partisan information. In such cases, the hotline captain will ask the volunteer to re-write the ticket without the deficiencies then, after the new ticket is in OVL, the captain will ask a staff member to delete the problem ticket.

- (e) *“Expired”* - Election Protection contact centers do not currently use this status. It will be introduced in 2023.
- (f) *“Rejected”* - Election Protection contact centers do not use the rejected status and once rejected, the status cannot be changed. If a ticket is accidentally rejected a new ticket must be created.

A Note on PII and partisan language in OVL tickets

- Voter PII should never be in the ticket notes, only in the form fields in OVL. The voter’s political affiliation should not be mentioned in the ticket narrative, unless it is relevant to the issue, (i.e. during a primary election, if voters of one party are facing long lines while the other party has no lines). It is okay to have the voter’s first name or zip code in a ticket description. It is not acceptable to have the full name and zip code or name and date of birth.
- It is acceptable to name election officials, poll workers, and elected officials in the OVL narrative as they are serving in a public capacity and may need to be contacted again.
- It is acceptable to note that partisan activity is taking place at a polling location. The political party suspected of partisan activity does not need to be named in the ticket unless it is pertinent to the report. It is okay to indicate that people are wearing partisan attire (i.e. “Trump hat” is okay).
- If a campaign is suspected of partisan activity at a polling place, it is acceptable to name the campaign in the OVL ticket.

7) COMMENTING IN TICKETS

Captains making changes to a ticket should include a comment explaining the update or change to the ticket information. This is important because on election days there are multiple people in command centers or contact centers viewing tickets. Keeping track of who is doing what in a ticket ensures no one is duplicating efforts or working at cross purposes. The status of all claimed open tickets must be immediately changed to in progress to ensure only one person is working on it. **For instructions on how to comment or edit data in a ticket, [see this guide](#).**

NOTE: Tickets automatically archived in OVL once submitted, so information can be added to but not removed from the notes. If PII is accidentally added to the notes a new ticket will need to be created.

8) BEFORE YOUR SHIFT ENDS

- a) Report in the Captain’s Log on the EP Legal site. This will include any highlights of the shift, recurring issues with voters or technical issues experienced by volunteers, and listing volunteers who did not show up for the scheduled shift.
 - i) **There is normally overlap between captains shifts, please try to post your log entry 30 minutes before the end of your shift so the next captain will see it when they log in.**
- b) Thank volunteers for their time and remind them to close Twilio and log out of OVL.
 - i) **Captains and Volunteers should NEVER log out of Rocket Chat in Twilio. You only need to set your status in Twilio to “offline”.**
- c) Check OVL to ensure all tickets have been reviewed.

9) BEST PRACTICES FOR HOTLINE CAPTAINS

- a) Twilio Flex
 - i) Chat
 - Tag volunteers into the shift chat when you post your welcome message.
 - Alert Volunteers of any upcoming elections.
 - Respond to volunteer messages quickly, even if you cannot provide a substantive answer, let the volunteer know you see the question and are working to get an answer.
 - Avoiding partisan language in the chat is important
 - For basic voter questions, **do not** find the answer for volunteers; instruct them where to find the answer in EP Legal.
- b) OVL
 - i) Via Okta - open OVL in a separate tab using the OVL tile in Okta and navigate to the “Ticket Home” (button in the top right corner). This will allow you to review and edit tickets using the guidance linked previously in this document. (The backend of OVL is available through Twilio Flex, but the OVL panel is small.)
Captains should log into OVL via Okta and use the ticket home interface to review tickets.
 - ii) When reviewing tickets, pay particular attention to
 - Open tickets

Tickets entered by first-time volunteers
Demographic data to ensure that all volunteers are asking the demographic questions.

If you have to change the status of a ticket from resolved to open, coach the volunteer, explaining why you made the change and why they should have consulted a captain before resolving the ticket.

c) EP Legal

i) Check the election calendar

If there are elections happening in a state, look at the state page and the Hot Topics to familiarize yourself with the state information.

(a) Also, let volunteers know, via the shift chat, that an election is happening.

Check the Captain’s Log at the beginning of your shift to familiarize yourself with news from the past few days of hotline activity. Pay particular attention to any entries that are highlighted yellow or red as those have been flagged by previous captains.

Things to consider when looking at the election calendar:

- Early Voting - Is there an election in a week or two, if so, is early voting happening now?
 - Check the state page and look for the early voting dates.
- Absentee Voting - If there is an upcoming election, when is the Absentee ballot deadline?
 - Check the state page and look for Absentee ballot application information.
 - Check for “Post-marked” vs “Received by” dates, etc.
- If there is a municipal or state legislative election happening, check the county BoE to see if voters can look at sample ballots, check registration, etc.
 - Voters often do not know their legislative and municipal boundaries, this is why volunteers should ALWAYS FIRST check the voter’s registration status if they receive a call that the voter’s “regular” polling place is not open.
 - Use the county/township BoE voter lookup tool to check a voter’s eligibility to vote in municipal and state legislative elections.
 - Use the Secretary of State/State Board of Elections lookup tool for statewide and federal elections.

d) Coaching Volunteers

i) Be patient - it will take a new volunteer approximately three shifts to gain the comfort that comes from knowing the topics in the FAQs, how to find

information easily on EP Legal and to understand that voters are generally quite patient when seeking help and will wait while the volunteer looks up information. These shifts are the optimal time to coach volunteers on hotline basics.

- ii) Remind volunteers - accuracy more important than speed.
- iii) If a volunteer needs coaching, DM the volunteer rather than calling them out in the group chat
- iv) If the knowledge is worth sharing with the team, you should do so without mentioning the volunteer.
- v) Remind volunteers that all escalated tickets must first be discussed with the captain. Be knowledgeable about the resources and general guidance information on EP Legal so you can correctly direct volunteers.
- vi) Be knowledgeable about the information in the “How do I . . .?” section and the information in the volunteer guides on EP Legal.
- vii) On non-election days, the volunteer always has the option, if the voter is willing, to call the voter back after they find the information, or of contacting the board of elections (BoE) with the voter if the volunteer cannot answer the voter’s question.
- viii) If a volunteer cannot find an answer with your help, remind the volunteer that they can request to call a voter back during the shift if it will take more than ~3 minutes to find accurate information.

10) WELCOME MESSAGE TEMPLATE

Use this linked template to post the [welcome message](#) in the shift chat. Staff may update with new information as needed, so please always go to the template, don’t use a saved previous message.

- NOTE: If you are the only captain you will have to make edits to the welcome message text once pasted in the shift chat. **(Do Not make changes to the template in the document.)**
- Copy the text below, beginning with “ALL VOLUNTEERS” and ending with “Let’s go help some people vote!”, and paste it into the Rocket Chat shift chat, then edit, adding captain’s name(s), reminders based on the election calendar, etc.
 - You are welcome to ADD to the message but please don’t remove any of the key pieces of information