

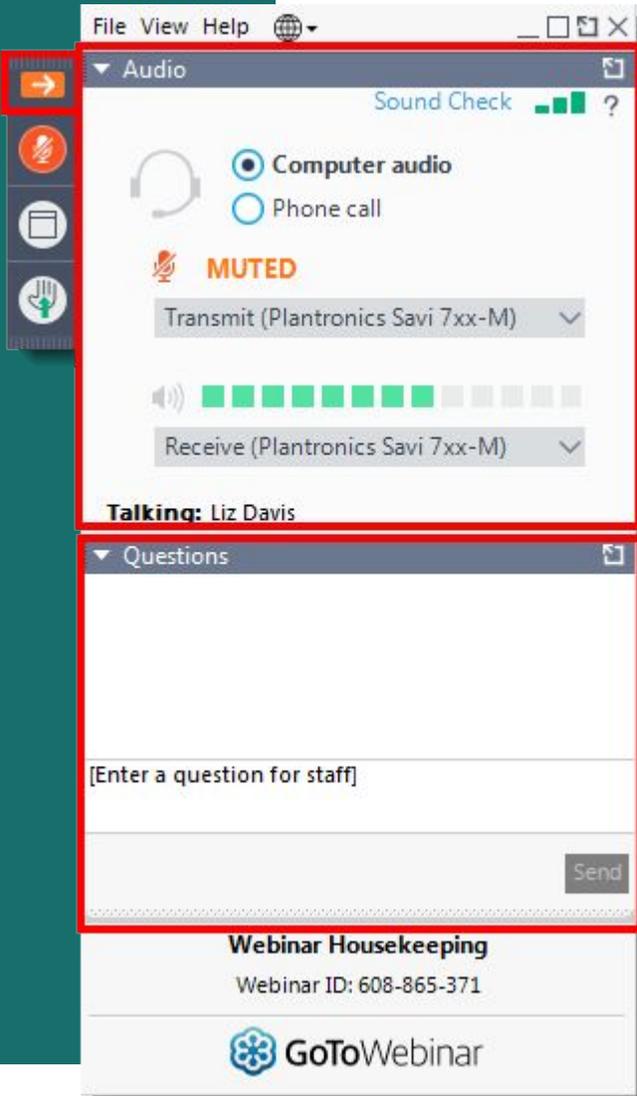
AIRS Webinar: Successful Transition to a Virtual Office

April 7th, 2020



*Setting the Standards for
Information and Referral Services*

GoToWebinar Housekeeping: Attendee Participation



Your Participation

Open and close your control panel

Join audio:

- Choose **Mic & Speakers** to use VoIP
- Choose **Telephone** and dial using the information provided

Submit questions and comments via the Questions panel

Note: Today's presentation is being recorded and will be provided within 48 hours.

211

211 Tampa Bay Cares



**GET CONNECTED.
GET HELP.**

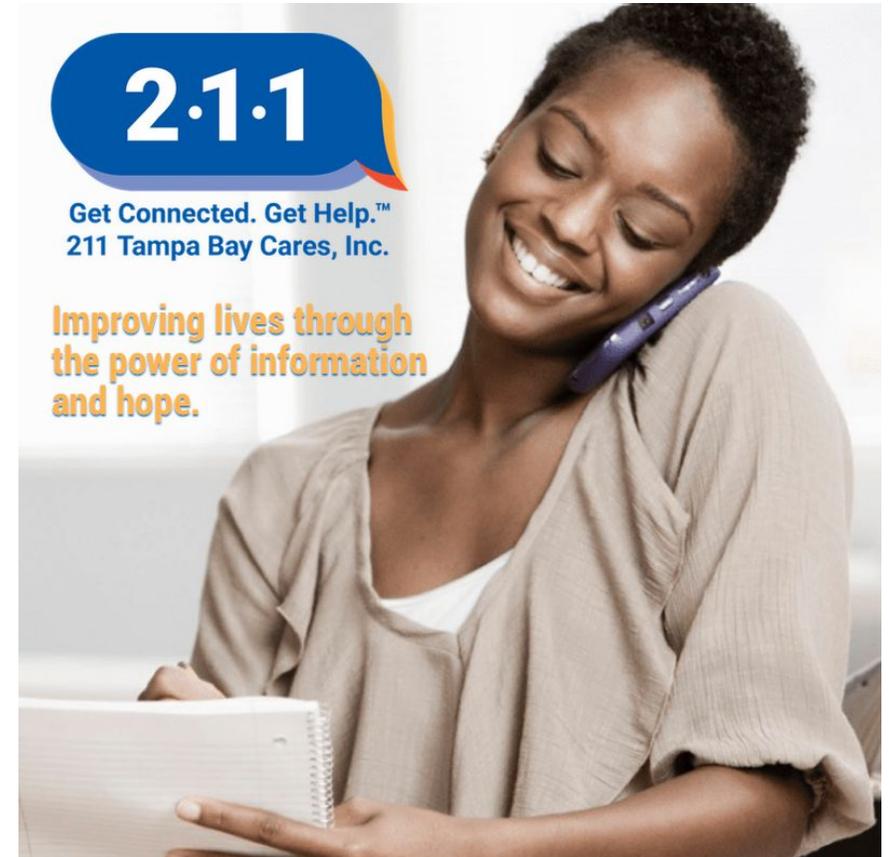
211

Remote Work

211 Tampa Bay Cares Experience

What have we done?

- 85% staff remote as of March 18, 2020.
- 100% staff remote as of March 27, 2020.
- Monitor staff illness and call outs.
- Worked with funders to extended shifts and allow overtime.
- Deployed emergency Go Kits for all admin staff and call center (on standby year round).

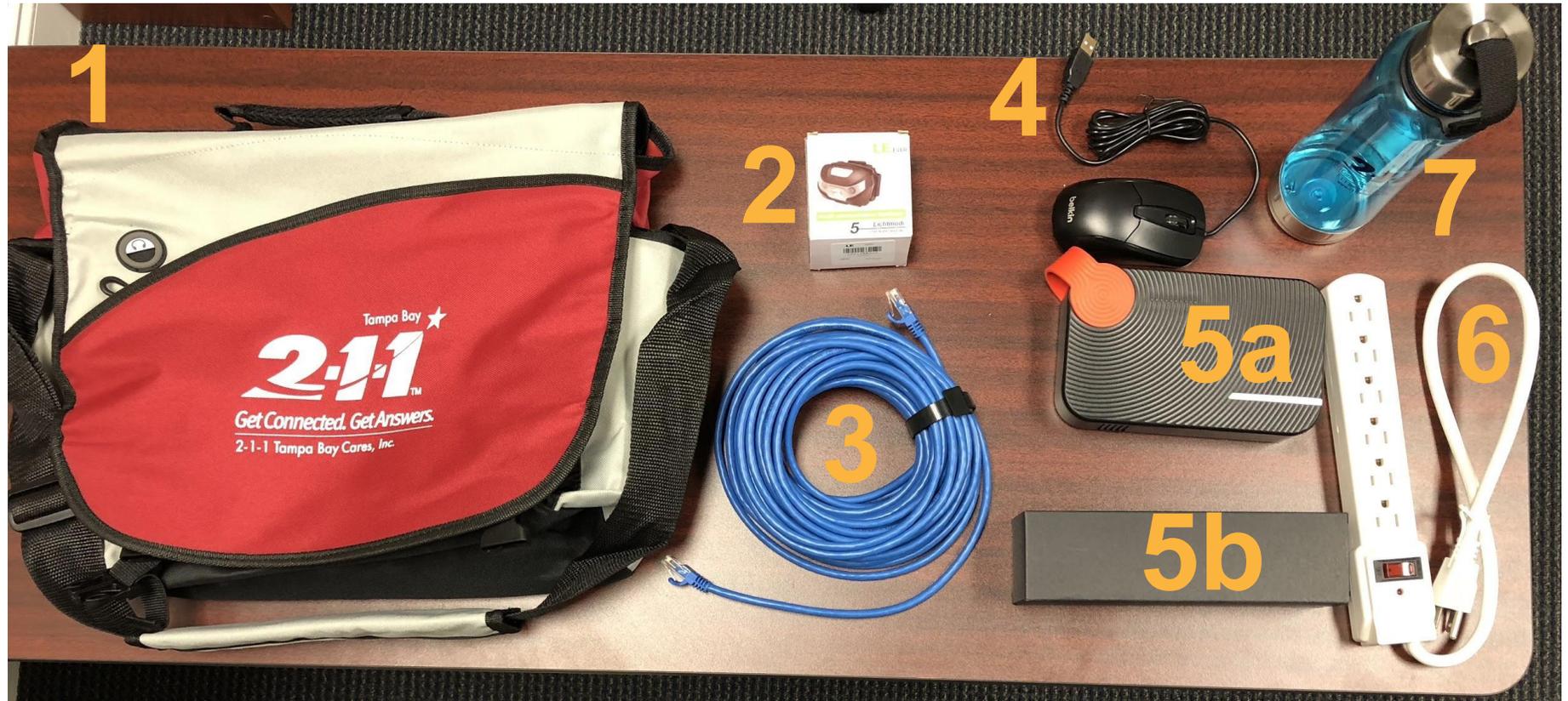


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Go Kits

What is
in our
Go
Kits?



- 1. 211 Bag
- 2. Headlamp
- 3. 50ft Ethernet Cable

- 4. Wired Mouse
- 5a. Battery Backup
- 5b. Battery Backup Power Supply

- 6. Power Strip
- 7. Your Water Bottle

Hardware issues

- Deployed all Go Kits (laptops & cell phones included).
- Deployed the training room laptops to those without home equipment.
- Staff who can not would not take calls should focus on answering texting.
- Purchased ethernet adaptors for computers without port and had them shipped to everyone's home.
- Required staff to hardwire plug directly into a router to ensure optimum work conditions.

Software/technology/management

- Staff already use softphones & Google Apps.
- Staff was already used to working remotely during disaster drills.
- Purchased Zoom Virtual Meeting Accounts for all management staff.
Check-in with staff at least every two days (wellness and work check).
- Purchased DocuSign accounts for each department to ensure documentation processing.(onboarding, incident reports, contract amendments, w-9, etc.).

Software/technology/management

- Doubled down on Workplace by Facebook to streamline internal communication.
- Started a COVID-19 Group on Workplace. Post daily updates.
- Posted work policies, guidelines, and graphics to Workplace on Working Remote, IT Management, and Zoom Meetings.
- Posted training videos for those doing virtual meetings.
- Resource department posts community updates to Workplace by Facebook.

Software/technology/management

- Resource department posts community updates to Workplace by Facebook.
- Holding a virtual webinar (coffee chat) with staff as a check-in and answer questions. Led by Executive Management team. Holding multiple sessions to get to all staff.

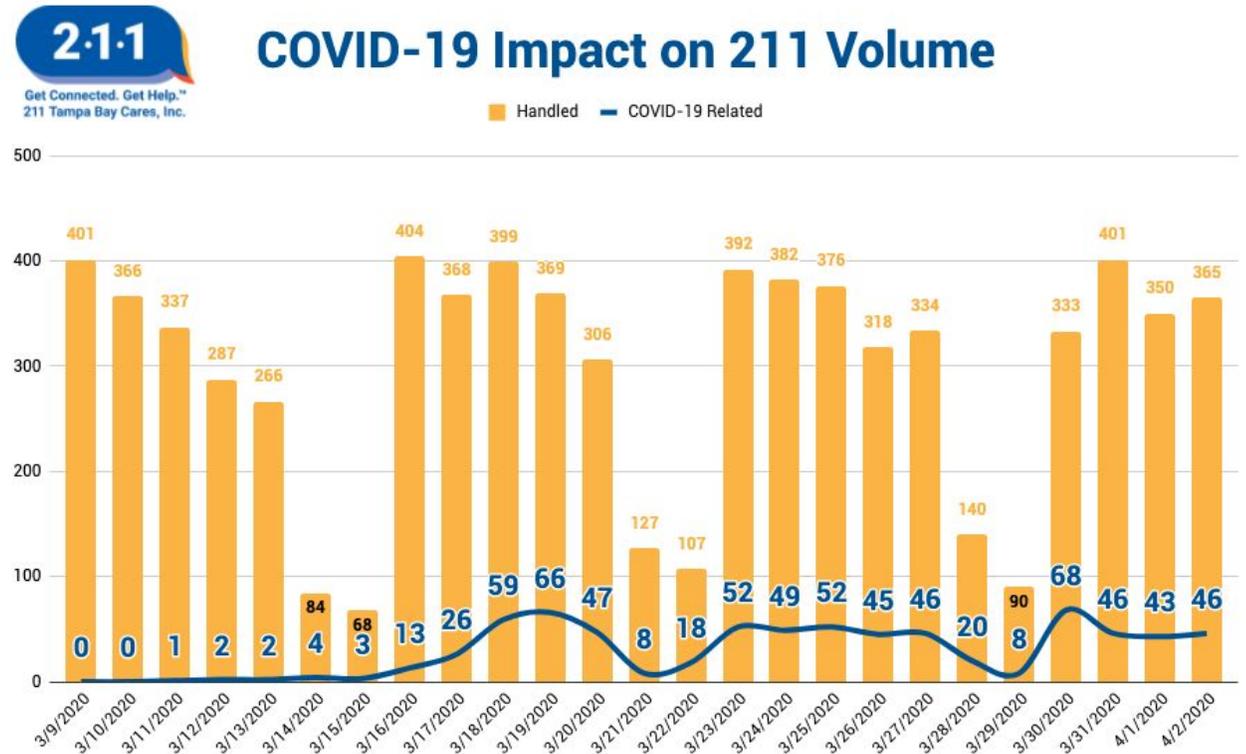
What have we done?

Publish Weekly Flash Reports to funders regarding our COVID-19 volume.



What have we done?

Tracking call volume changes daily and COVID-19 impact (simple excel chart).



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What have we done?

Deployed virtual training opportunities for volunteers since everyone is home (onboarding, training, volunteering are remote).

The screenshot shows the 211 website with a yellow banner at the top that says "Click Here For COVID-19 Information & Resource Changes". Below the banner is a blue navigation bar with a phone icon and the text "Need Help? Call 2 1 1 Or Text Your Zip Code To 898211.", a "Contact Us" link, and social media icons for Facebook, Twitter, YouTube, and LinkedIn. The main content area features a blue header with the 211 logo and the text "2-1-1 Get Connected. Get Help.™ 211 Connects You To Help.™". Below this is a navigation menu with links for "HOME", "ABOUT US", "NEED HELP?", "PARTNERS", "GET INVOLVED", and "HOPE FUND", along with a red "DONATE NOW" button. The main heading is "Become A Lifeline To Someone In Need." followed by a sub-heading "Individual Virtual Volunteer Opportunities". The text below reads: "Providing accurate information to the community is critical especially during community emergencies and Events. We're seeking dedicated community members to help disseminate information." There are two volunteer opportunity cards. The first is "Community Resource Volunteer" with the description "Assist 211 in tracking program changes with local health and human service organizations in order to provide accurate and up-to-date information to the community." and a "Sign-up Here" button. The second is "Emergency Response Volunteer" with the description "Assist 211 to answer text messages from people seeking help. We'll provide you training videos, a remote training session with one of our staff, and access to our information and tools to help our".

211

Thank you



END EPILEPSY

Epilepsy & Seizures 24/7 Helpline

Providing HELP, HOPE, and SUPPORT to people with epilepsy and seizures and their families nationwide.



the
information
center



Virtual Call Center Transition Timeline



Virtual Call Center
Hardware & Software



Virtual Call Center Management



Measuring Success



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information
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Telecommuting
Fast Track Deployment
April 7, 2020

Renee Knight, MHA, NHA
ElderSource
Jacksonville, FL



ElderSource
start here for help

Who Are we?

- ElderSource is the Area Agency on Aging and the Aging and Disability Resource Center, ADRC for Northeast Florida
- A nonprofit organization
- Serves the 7 counties of Northeast Florida
- Federally funded from Older Americans Act and State of Florida funded as well as private donations and grants
- Has 54 full time employees



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Our Role as an ADRC?

Area of Service	Number of Employees	Monthly Performance
Helpline (Information & Referral)	8	7,000 calls
ADRC Intake/Assessment (Screening for In-home Service—Medicaid Waiver and FL funded)	12	750 assessments
EMS (HCBS-Eligibility Medicaid)	4	Work 400 cases
SHINE [Serving Health Insurance Needs of Elders (SHIP)]	4	400-450 Contacts 10-15 Outreach Presentations
Senior Crisis Intervention	2	20-30 clients



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Hardware & Software

Hardware	Software
Laptops	REFER (RTMDesigns)
Dual Monitors	Fl Client Information Tracking System (CIRTS)
Wireless Headsets	TimeTap (Scheduling Software)
PBX Phone System & Polycom Phones	Microsoft 365
Fax/copier	Shared Drives

- ElderSource outsources both IT support and phone support
- HelpLine Voicemails to Email Box
- Fax to Email Box
- VPN (Virtual Private Network) Capability - Only a few staff
- PayChex Application - TimeCard
- BambooHR - Coaching/Performance Goals/Assessments



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Set The Plan

- March 6th - Met with Full Leadership Team
 - Determined what was needed to work from home and surveyed staff regarding their personal WiFi
 - VPN (Virtual Private Network)
 - WiFi
 - Scanners
 - PO Box vs Office Address
 - File Lockboxes
 - Printers
 - Fax Capability/Services
 - Access to Medicaid Program
- March 13th - Met with IT Team and Phone Team
 - Determined softphone options
 - Completed successful test of use of Bria softphone within VPN



AIRS Standard 24 Personnel Mgmt.

8. Off-Site Staff

In order to ensure the public experiences no discernible difference in the quality of service, special requirements for off-site I&R service delivery are in place including provisions for specialists to:

- Make three-way calls to connect the inquirer to external services including language translation services. [Softphone](#)
- Contact emergency services while maintaining a connection with the inquirer. [Softphone](#)
- Work in a distractions-free environment. [Call Listening](#)
- Access supervisory assistance, when required, and for supervisors to exercise quality assurance measures. [Teams](#)
- Have personnel policies and training opportunities that reflect off-site circumstances. [VPN - Office drives](#)



Inform Staff & IT/Phone Setup

- March 16th - the CEO, Linda Levin met with all ElderSource staff
 - Presented and reviewed the telecommuting policy
 - Outlined guidelines
 - Required staff signature
 - Demonstrated Microsoft 365 Teams (chat, calls/video, Team file sharing)
- March 17th - 19th - Phone vendor set the softphone configuration for all ADRC staff
 - Tested, retested to get one computer, softphone and VPN working without errors
 - Install on staff computers



Test in Home Environment

- March 18th & 19th - Setup offsite test environment where staff connected to WiFi using Verizon Jetpack - each team separately with supervisor. All ADRC staff must operate within the VPN to access softphone, phone system panel, policies & procedures.
 - IT technician connected virtually to each users computer and installed VPN, softphone, and other software
 - Phone technician available via phone to work
 - Each staff person had to login, access each database/application and shut down until they were comfortable **Champions - Champions - Champions**



Staff Sign Off

- Created a spreadsheet listing functionality and staff initialed each once they could access
 - WiFi
 - VPN
 - Forward Office Phone to Softphone
 - Voicemails to Emails
 - Softphone
 - Inbound
 - Outbound
 - Three-way
 - Second line
 - Microsoft 365 Teams
 - Chat
 - Calls/Video
 - CIRTS (FL Client Database)
 - REFER (I&R Database)
 - FMMIS (FL Medicaid)
 - Access to Employee Handbook
 - Access to Policies & Procedures & Scripts



“Go Live” and Monitor

- March 20th - All ElderSource staff work from home
- Monitor daily productivity/Measure Success
 - Phone calls (inbound/outbound/missed)
 - Assessments
 - Referrals
 - Supervisor Call Listening/quality assurance
 - Chat
 - Microsoft 365 Teams communications
- Analyze IT service tickets after one week
 - Softphone
 - VPN
 - WIFI
 - Connectivity & Application access



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Challenges & Solutions

- WiFi Speed - Some staff did not have WiFi - Issued WiFi Jetpacks to staff who did not have fast internet
- VPN Speed - Non ADRC Staff use VPN sparingly leaving VPN for ADRC
- Softphone Hearing - CEO ordered USB headsets for ADRC staff
- Management & Supervision - Ability to assist staff in realtime in live environment with new issues especially with COVID-19 and service availability constantly changing - ADRC HelpLine Supervisor “Team Huddles” via Microsoft Teams Calls/video to discuss operations and updated resources.
- COVID-19 Resource Changes - List of new resources maintained on Microsoft Teams Group
- Laptop Screen vs Dual monitors - Most staff are working with laptops only



QUESTIONS?



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Contact Information

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Wrap Up and Questions...



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