Massachusetts Community Voice Mail

Handbook for Participating Agencies

Massachusetts Housing and Shelter Alliance

community voice mail

reconnect • achieve • results

Contents

Section 1: Introduction

What is CVM? 3
Why Partner with CVM? 3
Who Uses CVM? 3

Section 2: Participating With CVM

How CVM works 4
Goals and Objectives 4
Which Clients Should Receive CVM 4
Responsibilities of Participating Agency 5
Responsibilities of Host Agency 5

Section 3: Using CVM

Setting up Your Voice Mail Box 6
Enrolling a Client on CVM 6
Removing a User from CVM 7
Unsubscribing a Client 8
Completion of Outcome Form 8
Tracking Clients 8
Reporting A New Client to CVM Administrator 8
Entering Client Information in CVM Security Log 9
Monitoring Client's Messages 9
Subscriber Reports 10
Instant Reply 14
Email Notification 15
Sending a Broadcast Message to a Distribution List 16
Broadcast Email Messages 17
Sending Voice Surveys 18
Setting up Hotlines 18

Section

1

Introduction

What is Community Voice Mail?

Community Voice Mail is a personalized, confidential, dignified, and easy to use tool for people who are homeless or others who have no access to their own phone, to communicate with the world around them.

Community Voice Mail numbers are provided on a Voice Over Internet Protocol system, managed by a local host agency who then distributes blocks of local phone numbers to partnering agencies interested in this service for their clients. It takes less than three minutes to activate a line and is accessible from any touch tone phone.

Why partner with CVM?

- **A tool to help clients achieve self-sufficiency**
- **Helps case managers stay in contact with clients**
- **And much more!**

Who uses CVM?

Community Voice Mail is designed for any individual in need. This program empowers individuals and improves their ability to conduct the business of their lives.

Users of Community Voice Mail are those who:

- **Are seeking employment**
- **Are seeking shelter, transitional or permanent housing**
- **Are seeking healthcare services**
- **Are seeking safety from domestic violence**
- **Want to maintain contact with friends and family**
- **Want to provide a stable number for childcare and school contacts.**
- **Want to maintain contact with social service agencies.**

Section

2

Participating With CVM

How CVM works

The **Massachusetts Housing and Shelter Alliance** provides Community Voice Mail to your agency and your clients. You enroll your clients and track their success. You decide how long clients may keep CVM as they transition to self-sufficiency.

CVM is easy to use. The enrollment process usually takes under 10 minutes. Usage is simple to track and client outcomes are a great way to show how well you and your agency are helping your clients to help themselves.

CVM Goals and Objectives

CVM is a mainstream service tool designed to eliminate phonelessness as a barrier to employment and delivery of social services.

CVM can reduce the time that clients spend in the supportive social service system by:

1. Increasing the number and timeliness of job, housing, and social service leads delivered to clients.
2. Increasing clients' ability to solve their own problems.
3. Increasing the ability of case managers to monitor and work with the hardest to serve clients.
4. Facilitating the transfer of voice-mail technology as a case management and community organizing tool for human services agencies.

Which Clients Should Use CVM?

Agencies (staff and case managers) have a great deal of discretion in deciding which clients can receive CVM. They should choose clients who they believe will be able to use CVM to fulfill an important objective. We also encourage clients to give their phone number to family and friends, because hearing from loved ones can maintain a person's self-confidence while going through a difficult job or housing search. However, clients are expected to use CVM for more than just personal reasons.

Because CVM is meant to be a tool to aid case managers in their day-to-day work, we have set no restrictions for eligibility. Anyone who is a client of a participating agency, and who a case manager believes will benefit from the system, is eligible to use CVM. Similarly, we set no minimum or maximum time limits for clients. As long as they continue to be clients of a participating agency and a case manager agrees to be responsible for tracking their progress, clients may use CVM.

- If a case manager in a participating agency thinks that a client can benefit from CVM, that client will be eligible to get CVM, but must agree to have their messages monitored (visually only).

Responsibilities of Participating Agencies

1. Protect the integrity of the Community Voice Mail (CVM) program by determining eligible clients, assign them a CVM voice mailbox, assist them in recording a greeting and setting a security code, and train them to retrieve their messages.
2. Obtain client signature on all CVM forms (see Client Agreement of Understanding on Intake/Outcome Form).
3. Maintain strict confidentiality and privacy regarding CVM clients and the messages they receive.
4. When a CVM client completes use of CVM, complete the "Exit & Outcomes" sections of the original CVM Intake/Outcome sheet, a client survey (if applicable), and reset the appropriate voice mailbox with your agency security code to protect the vacant CVM number.
5. Notify the CVM office of new or closed clients by completing all the necessary forms for <u>each</u> CVM client. Fax the forms within 24 business hours to the CVM System Manager at 617-367-5709.
6. Upon need, request additional telephone numbers and retraining from the CVM Manager.

Responsibilities of Host Agency

1. Provide excellent customer service and technical assistance to the local CVM network of participating agencies and clients.
2. Train and retrain participating agency staff.
3. Provide participating agencies with a CVM monthly report showing system activity to promote consistent record keeping among participating agencies.
4. Maintain strict confidentiality and privacy regarding CVM clients and the messages they receive.
5. Update materials, policies, and procedures with feedback from the CVM Participating Agencies and Clients.

Section

3

Using CVM

Setting up Your Agency CVM Box

Setting up your agency's CVM voicemail box will help you to stay in better touch with the CVM Program Manager as well as to take advantage of advanced system features including instant reply, broadcast messaging, email notification, sending voice surveys to your clients, setting up hotlines and receiving messages from CVM users.

On the Contact Sheet given to you by your local CVM Program Manager, you have been provided with a "Reset Number", an "Agency Extension" and an "Agency Password". You will need to have these numbers in front of you in order to proceed.

1. To begin, call your "reset number" and press * (star key).
2. Enter your "agency extension" then press # when prompted. ***NOTE: The prompt asks for a "10 digit extension", instead enter the "agency extension" provided to you on the contact sheet.***
3. Enter your "agency password" then press # when prompted.
4. Since this is the first time you are accessing this account, you will be asked to go through the enrollment process, which involves recording a name and outgoing voice message. Follow these instructions. *When asked during enrollment to record your name, say* "[the name of your agency]". *This is necessary because when the message is delivered, the client will first hear "this is a message from* [whatever you have recorded as your name]."
5. Your voicemail box is ready. You can now utilize the system to send broadcast messages, send out voice surveys, set up hotlines and receive replies from CVM users.

In order to receive email messages notifying you when you have voicemail messages in your community voicemail box, verify that your CVM Manager has activated the "Email Notification" feature for your agency extension.

Enrolling a Client on CVM

Agencies utilizing designated staff (counselors, case managers, out reach workers, etc.) will enroll clients in CVM and train them to use it.

Follow these simple steps to open a client voice mail box and put your client on CVM *(If you are enrolling a client on a number that has never been assigned previously, you can skip to Step 2)*:

Step 1: Reset the CVM Number to be assigned:
This process will clear all recordings and reset the box to your agencies default password. Make sure your Agency Extension and Agency Password are not revealed to clients. Follow these steps:

1. Call the **RESET NUMBER ______________**
2. When prompted, Press 1.
3. Enter the four digit AGENCY EXTENSION which is-**_______-** followed by # *(the system will prompt you to enter your "phone number" but is referring to your agency extension).*
4. Enter your six digit AGENCY PASSWORD which is- **________-** followed by #.
5. Enter the 10-digit client mailbox number to reset, followed by #. The system will verify the number for you *(the system will prompt you to enter the "extension" of the mailbox you want to reset but is referring to the 10-digit mailbox number).*
6. Press 1 to confirm reset. Press 1 to reset another box or, ***** to exit the system.

*** If the system will not let you access the voicemail box after resetting, DO NOT reset the box again. This will break the voicemail box. Potentially it could take up to several hours for the box to complete the reset process. If the box has not completed the reset process, find another unused number to give to your client.**

Step 2: Assist Client with CVM Enrollment:

1. Complete and have the client sign the Client Intake/Outcome form
2. Log the client's name in the Security Log sheet in the CVM binder
3. Fill out a Client Wallet Card with the CVM number and have the client choose a password.
4. Help the client prepare a short greeting to record.

Step 3: Set up the voicemail box: (It helps to be on a speaker phone)

1. Have the client dial their CVM number. When the system answers, press *.
2. When prompted, enter the clients full 10-digit CVM number again and Press #
3. Enter the default client password. The default client password for your agency is **_____________**
4. Have client follow the prompts to finish the set-up process, including the selection of a new security code.

Step 4: Leave client a message and assist client with message retrieval

1. Call and leave client a message using their new CVM Number. Have client refer to wallet card or quick guide for retrieval instructions.
2. Help client retrieve message by following instructions on wallet card or client quick guide.

Step 5: **After your client has left your office:** Fax or email the CVM Intake/Outcome form to the CVM Manager at: **617-367-5709 (fax) or cgolden@mhsa.net**

Remember, when the client completes use of CVM, please fill out the <u>Outcome portion</u> of the Client Intake/Outcome form and fax it to the CVM Manager.
After clients are trained, they can get their messages or change their personal greetings from any public or private touch-tone phone. It takes most clients an average of 10 minutes to learn to use CVM, including initial set-up of security code and greeting and a few practice calls.

Removing a User from CVM

Different agencies have different guidelines for determining when a client no longer needs CVM. In some cases, clients will tell you when they have their own phone and no longer need CVM. In other cases, clients can use voice mail only as long as they are enrolled in an agency program. Case managers who have concluded their work with clients, usually successfully, will want to give clients a short transition period to stay on CVM until they either get settled in new housing or get their own telephone. In still other cases, case managers leave messages telling clients to check in with them or their voice mail service will be stopped. Your agency must determine how long and under what circumstances clients can use voice mail. The important principle here is that you maintain responsibility and contact with all clients using your CVM numbers.

Unsubscribing CVM Client and Resetting Voice Mail Boxes

Once you decide that a client is finished with CVM, there are a few steps to follow to prevent former clients from continuing to use voice mail boxes after they have left your agency, and protects the privacy of the next client who uses the same number:

1. Reset the voice mail box as described on page 6.

2. If you do not immediately turn over the box to a new client, put your agency security code on the box and change the greeting to reflect that **"This number is no longer in service"** or **"This number has been changed to** (client's new number, if known)" to let people who call for the last client know that he or she no longer uses this number.

3. If you follow step 2 above for a particular number, and later are ready to reassign the voicemail box, remember to reset the number so that the next client will hear the CVM enrollment introduction. These measures will protect the privacy of all clients who will subsequently use it.

Complete Outcome Form and Send to CVM Administrator

Once a client is off CVM, fill out an outcome form, which is the bottom right half of the CVM CLIENT INTAKE/OUTCOME FORM. Please be as specific as you can - any information you are able to provide about how clients did or did not benefit from CVM will be useful in identifying the program's strengths and weaknesses. Send the outcome form to the CVM Administrator within a few days of the client's exit.

FAX TO: 617-367-5709

EMAIL TO: cgolden@mhsa.net

Tracking Clients' CVM Phone Numbers & Progress

Two important steps will help you and the CVM Administrator keep track of your clients and your CVM numbers:

1. Reporting a new client to the CVM Administrator and

2. Entering the client's name, CVM number, and security code in your agency's CVM SECURITY CODE LOG.

Both processes are very simple; here's how.

Reporting a New Client to CVM Administrator

After putting a client on CVM, case managers must inform the CVM Administrator by Faxing the Client Intake/Outcome form. Although it is not necessary to give the information to the CVM Administrator while the client is still in the office, case managers should fax this form as soon as possible so that the system is up to date. This allows the CVM Manager to keep track of how many people are using the system, and to troubleshoot if a client seems to have trouble accessing the voice mail box.

- Ensure that client signs the agreement at the top of the Intake form.
- Always give new client information to the lead CVM agency after putting a new client on the system.

Entering Client Information in CVM Security Code Log

Once you have notified the CVM Administrator, enter this client information in your CVM SECURITY CODE LOG. This will enable your co-workers who are also using your agency's CVM numbers to know what numbers are being used and which clients are on them. Also, you and your co-workers will be able to reassign CVM numbers if you know for sure who is and who is not on them, and you will not inadvertently remove active clients from the CVM system.

Monitoring Client's Messages

Visual monitoring involves regularly looking at the usage patterns of voicemail numbers. Visual monitoring of a client's CVM usage lets the case manager see how frequently their clients are using their CVM number, to pinpoint client difficulties, know if the client is still using CVM and, if not, give the number to another client.

The CVM Manager will provide Subscriber Reports (see sample and description below) once per month to each agency to show client usage. Additionally, the CVM Manager will review usage data and provide agencies with anomalies on specific numbers.

Subscriber Reports

The example below reflects what the basic subscriber report looks like. CVM Managers should send subscriber reports to each participating agency monthly. CVM Program Managers should train participating agencies on how to interpret the results.

XXXXX Hope House
Subscriber Report

1234 Main Street	**Primary Contact:**	**John Doe (206)555-5678**
All Town, USA, XXXXX		**jdoe@yahoo.com**
Main: (206)555-5555	**Secondary Contact:**	
Fax: (206)555-1234		

----------------Previous 30 day statistics-----------

Phone number	Client name	Time of last client login (GMT)	Logins	New messages	Saved messages	Deleted messages	Enrollment date	Box setup completed	Client exited	Language
Client logged into their voice mail box within the past 30 days:										
2065554567	John Smith	Apr 13 2007 02:47AM	15	2	1	4	12/2/2006	Yes	No	English
2065553456	Juan Lopez	Apr 13 2007 07:44PM	10	0	0	3	1/15/2007	Yes	No	Spanish
Client has not logged into their voice mail box within the past 30 days										
2065552345	Client_2065552345	Mar11 2007 01:11AM	0	5	0	0		Yes		English
2065555678	Client_2065555678		0	0	0	0	3/07/2007	No	No	English
2065559876	Client_2065559876		0	0	0	0		No		English
2065554321	Jane Doe	Feb 12 2007 1:46AM	0	0	0	0	1/29/2007	Yes	Yes	English

Total number of DIDs:	**6**	**Clients served YTD:**	**8**	**Employment goals met:**	**1**
Percent assigned:	**66.67%**	**New clients YTD:**	**3**	**Housing goals met:**	**2**
Active count:	**2**	**Exits YTD:**	**2**	**Healthcare goals met:**	**0**
Percent active:	**33.33%**			**Other goals met:**	**0**
				Safe Communication goals met:	**0**

Reading a Subscriber Report

(This sample report was run on April 14, 2007)

Hope House is the Participating agency

Report Sections

Phone Number
These are the phone numbers that have been previously assigned by the CVM manager to the agency listed on the report.

Client Name
The client name that appears is the name or identifier that the CVM manager typed into the CVM database. If there is no name listed and it appears as Client_xxxxxxxxxx, either the number is not in use, the data has not yet been entered into the database, or the data was entered into the database before the client enrolled in the voicemail box over the phone. This may be a signal to the CVM Manager that the participating agency has enrolled someone without sending the intake form. If the intake information has been sent to the CVM Manager and that a client name *should* be showing up then inform the CVM manager that they should try re-saving the data and check again the next day.

Time of Last Client Login
This is the last date and time that the user called in to check their messages. If it has been more than 30 days since they called in, this can be an indicator that the client no longer needs the number, or needs assistance.

The time and date listed on this report are reported in Greenwich Mean Time (GMT). For the correct time in your time-zone you will need to subtract 5, 6, 7 or 8 hours.
For Eastern Time, subtract 5 hours.
For Central Time, subtract 6 hours.
For Mountain Time subtract 7 hours.
For Pacific Time, subtract 8 hours.

Previous 30 Day Statistics
The following categories always report activity within the last <u>30</u> days. Even if you are reading a report showing clients who checked their messages within the last 15, 45, or 60 days, the following categories will always report the last 30 days of *activity*.
<u>Logins</u> – How many times clients have logged in over the past 30 days
<u>New Messages</u> – How many new messages have come in over the past 30 days. Broadcast messages will not appear in this column as new messages, only messages from external calls will count toward new messages
<u>Saved Messages</u> – How many messages the user has saved over the past 30 days. Broadcast messages will be included in the number of saved messages. *Note that the totals in this category might seem high compared to new messages, because broadcast messages appear here, but not in the new message category.
<u>Deleted Messages</u> – How many messages the user has deleted over the past 30 days. Broadcast messages will be included in the number of deleted messages. *Note that the totals in this category might seem high compared to new messages, because broadcast messages appear here, but not in the new message category.

Enrollment Date
This is the date which was entered into the CVM database for the client's start date.

If the report shows an enrollment date for a user, <u>but no client name</u> listed this indicates that the data was entered into the database BEFORE the client enrolled in the voicemail box over the phone OR that there was never any information entered and the enrollment date is actually showing from the previous client. Work with your CVM manager to correct the data error.

If the report shows a blank in the enrollment date field this indicates that the intake data is missing from the CVM database for the most recent client and needs to be entered. Your CVM manager will request for you to send the missing intake form in this case.

Box Setup Completed
This refers to whether or not the client/CVM user has gone through enrollment over the phone (recorded a name, greeting and personal pass code).
Yes = Client has completed enrollment, voicemail box is in use.
No = Client has not completed enrollment, voicemail box is available.

Client Exited
This refers to whether or not an exit date has been entered into the CVM database.

Yes = Client has exited, voicemail box is available
No = Client has not exited, voicemail box is in use.
Blank = Either the box has been properly reset (all info cleared and ready for next client) or there has never been a client assigned to that voicemail box.

*Note: if you see activity for a voicemail box (recent logins, time of last call, client name listed) but the report says that the client has exited ("Yes"), **<u>you will be notified that the voicemail box needs to be reset.</u>**

Language
This refers to whether the voicemail box is currently set for English or Spanish prompts.

Client logged into their voicemail account within the past X days
Each client that appears in this category has logged in and checked their voicemail at least once in the last X days (whatever number of days were selected by the CVM Manager). The Time of Last Client Login column will tell you exactly when they logged in (when adjusted for local time).

Client has not logged into their voicemail box within the past X days
Each client that appears in this category HAS NOT logged in and checked their voicemail at least once in the last X days (whatever number of days were selected). The Time of Last Client Login column will tell you exactly when they logged in (adjusted for local time).

This category of clients will be highlighted for participating agency case managers as clients that potentially need assistance or no longer are using CVM. In addition to looking at the time of last login, also check to see if they have new messages. This could indicate that they still need the number but have forgotten how to log in/lost password.

Total Number of DIDs
This is the total voicemail box inventory for the participating agency.

Percent Assigned
This refers to the percentage of all the agency's voicemail boxes that have been distributed to clients (how many have gone through enrollment)

Active Count
This refers to how many of the voicemail boxes are not only enrolled, but actively in use (how many have been logged into in the last X days)

Percent Active
This refers to the percentage of the total inventory that is actively in use for this agency (percent of how many have been logged into in the last X days)

Clients Served YTD
This refers to how many clients in total have been served since the beginning of the calendar year. This number includes clients being carried over from the previous year and new clients since the beginning of the year.

New Clients YTD
This refers to how many new clients have been enrolled since the beginning of the calendar year.

Exits YTD
This refers to how many clients have been exited from CVM since the beginning of the calendar year. This data is pulled from the database. Be sure to inform the CVM manager of all client exits and outcomes by faxing in the completed Intake/Outcome form.

Goals Met
This refers to how many successful employment, housing, healthcare, other, and safe communication goals have been reported by the participating agency to the CVM manager. This information is transmitted when the case manager sends the CVM manager an updated intake and outcome information, and the CVM manager enters this information into the CTK database.

Examples of how to read this report

John Smith
He is using his CVM number well. He has logged in 15 times over the past 30 days. He received 2 new messages, saved one message and deleted 4 messages (possibly messages from last month that he no longer needs.) He has been using his CVM number for about 5 months.

Juan Lopez
He is also using his CVM number well. He has logged in 10 times over the past 30 days. He didn't receive any new messages, nor did he save any messages. He deleted 3 old messages. He has been using his CVM number for about 3 months. His voicemail box is set for Spanish prompts.

Client_2065552345
This voicemail box has several interesting things to note.

- A client is enrolled in this box, which we know from "Box setup completed" saying "yes" and that there are 5 new messages waiting in the inbox.
- No intake data was ever input for this client into the CVM database, which we know because the Client name is still Client_2065552345, and because there is no enrollment date listed. Remember, the enrollment date is the date that is entered into the database, not the date that the box was enrolled on the phone.
- This client has not logged into this voicemail box within the past 30 days, although they have 5 new messages.

The CVM manager needs client intake information from the participating agency.

Client_2065555678
This voicemail box was given to a client, and the intake form was sent to the CVM manager. However, the client never actually enrolled in the voicemail box. We know this because under Box setup completed it says "no". There is an enrollment date because the CVM manager has already input the client intake information, noting the enrollment date that was listed on the intake form.

Basically, what happened here is that the case manager at the Hope House gave their client the number and the instructions on how to enroll, but didn't walk through the enrollment process with the client – instead they told them to do it later. An intake form was faxed to the CVM manager and the CVM manager entered the data. But if data is entered into the database BEFORE a client enrolls over the phone, the system will "kick" identification information out (client name).

The CVM manager should, in this case, instruct the agency case manager to make sure that the client goes through enrollment, ideally by doing it with them in their office.

Client_2065559876
This number is currently not in use. This number is ready to be given to a new client.

Jane Doe
She hasn't logged into her voicemail in the past 3 months, which we can tell from her time of last login. She doesn't have any new messages. Technically, she has been exited from the program because there is a client exit on file. The fact that her name still appears in this report means that the case manager at the Hope House **has not reset this phone number for new use**.
The CVM manager should remind the agency to reset this number in order to clear out any old messages and Jane's outgoing greeting.

Instant Reply

The Reply feature allows Clients, Case Managers and CVM Managers to automatically reply to a voice message in their box. By pressing the 4 button after the message has finished playing, the message recipient can leave a message in the CVM voice mail box of the person who left the original message. Importantly, the Reply feature *only* works when replying to messages generated from within the Centralized System (only messages created once the sender is logged-in to their voice mail box). Only CVM Managers and Case Managers can create voice messages on the Centralized System; Clients can reply to messages, but cannot create them.

Two important notes about the Reply feature:

1. You cannot "reply" to a message left from an outside phone number; it only works when the original message we generated within the system (a broadcast message or individual message created by a CVM Manager or Case Manager). If an employer (for example) picks up her phone and leaves a voice mail message with a CVM client about a job, the Client cannot "reply" to the message by pressing the 4 key.

2. There is no prompt following the message instructing the Client to press 4 to reply. The feature is enabled, but there are no instructions. Instead, if a CVM Manager or Case Manager wishes to receive a response, he/she should say at the end of the original voice message "To reply, press 4 when this message ends."

1. **Clients can reply to a message without hanging up and redialing**. This is particularly useful for clients who are calling from a payphone (no need to deposit $.50 more to return the call), or who don't have a pen ready to capture the return phone number of the person who left the message (simply reply).

2. **Clients and Case Managers/CVM Managers can keep "replying" to each other**. In the scenario above, the "replies" ended with the CVM Manager thanking the Client for his RSVP, but both parties could have continued to reply to each other and exchange more information. The Reply feature therefore allows a client and his CVM Manager/Case Manager to communicate with each other in a time- and cost-efficient manner.

Why use the reply feature?

Saving money for clients

This feature can be very valuable for Clients who receive broadcast or individual messages from their Case Manager or CVM Manager. It can save them time and money, and make it easier for them to stay in touch with those who are trying to provide them with services. When sending messages to Clients, a request for a response should be included whenever it is appropriate, and Case Managers should routinely check their CVM voice mail box for reply messages.

Gathering Feedback/Survey Data from Clients

The Reply feature is an efficient tool for Case Managers to gather simple survey data from their Clients, the kind of questions that can be answered with a "yes," "no" or short response. For example, a CVM Manager might want to gather basic statistics about the number of Clients who have email addresses ("Do you have an email address? Press 4 at the end of this message and answer Yes or No."). Or, what kind of phone the client uses most often to check their voice mail ("Do you use a free phone, a cell phone or a payphone?"). There is also a CVM Survey Feature that allows a CVM Manager to set up a multi-question survey which can be accessed after a client listens to a broadcast message. Contact the CVM National Office for more information about this survey feature.

Reply can also be used to gather more qualitative data from Clients about their experiences as CVM users. Open-ended questions can elicit lengthy responses that can help inform program design decisions, or provide powerful quotes for promotional or fundraising materials.

Email Notification

The Email Notification feature is for CVM clients and Case Managers/CVM Managers who have an email address and wish to be notified by email every time they receive a voice mail message in their CVM voice mail box. Some Clients have indicated that they check their email at least as frequently as their voice mail, and Email Notification will make it unnecessary for these Clients to search for a phone or pay to use a payphone just to check if they have voice mail waiting. For case managers, email notification can be a useful tool that will tell them when there are messages in their voicemail.

The email message that is automatically generated by the CVM Centralized System when a voice mail arrives looks like this:

```
From: Unity Messaging System - CLUSTER4-UNITY
Sent: Wednesday, June 13, 2007 11:08 AM
To: [Client ID]
Subject: Message Notification

You have a voice mail message waiting for you in your CVM box.
Voice Count: 3
```

No confidential data is transmitted as part of Email Notification; just a simple note indicating that a voice mail message has arrived. ("Voice count" indicates the total number of unheard messages in the voice mail box).

To Activate Email Notification

For Clients
The client intake form includes an input line for the Client's email address, as well as a consent disclaimer indicating how the email address will be used. If the Client provides his or her email address on the intake form, email notification will become active as soon as this data is added to the system by the CVM Manager. The Client will begin to receive a brief email message every time a new voice mail message arrives in his/her inbox.

If a Client has signed up for Email Notification and decides that he/she wants to stop this service, contact your CVM Manager and make this request.

For Case Managers at Participating Agencies
Case Managers at every Participating Agency are given a voice mail box extension, and email notification can be enabled for this box so they receive notification when a Client or CVM Manager has left them a voice mail message in their CVM box. Case managers should tell their CVM Manager that they want to activate Email Notification for their voicemail box, if it is not automatically enabled.

Sending a Broadcast Message to a Distribution List

A Broadcast Voice Message in the Centralized System is a message that is automatically sent to multiple people at the same time. By creating a voice message, entering the extension of the broadcast voice messaging list and sending the message to that list, a CVM Manager or Case Manager is able to reach a large number of Clients with minimal effort. Because of this ability to easily communicate directly with Clients, Broadcast Voice Messaging is one of the key differentiators between our service and other options (mobile phones, other "free" voice mail providers). Moreover, it provides the CVM Federation with a great opportunity to use this technology and our national network to deliver valuable information to our clients for less money, in less time and with the least amount of technical overhead (nearly everyone knows how to use a phone and can be trained to use voice mail).

When your agency participates with CVM, an "Agency Client" broadcast messaging list is created that will reach all the clients associated with your particular Agency (only). The CVM Manager can send messages to any Participating Agency list, but only the Case Manager for a given Agency can send to the list for that agency.

Your Agency Broadcast Message List will be given a unique extension number in the Centralized System (e.g. 66440). The person wishing to send a message to the agency client list must first log on to the Centralized System (agency extension and password). Clients are not able to send messages to any Broadcast Message List, nor are they able to create messages and send them to any other individual on the system.

How Does It Work?

Broadcast Messaging is currently available to everyone on the Centralized System. Again, only CVM Managers and Case Managers can create and send broadcast messages; Clients can only receive them. The following scenario illustrates how it works:

A Case Manager at one of the Participating Agencies (an employment-focused agency, in this example) has learned about an job opening at a local business. He decides that most of his CVM clients may be qualified for this job, and he decides to send them a message about the job. Instead of calling each CVM number and leaving a message, he decides to create a single voice message and send it to the Broadcast Messaging List for his own agency. As in the example above, he writes a quick script (90 seconds or less) about the job, signs in to the Centralized voice mail system using his extension and password, selects the Broadcast Voice Messaging list extension for his own agency, creates the message, and sends it. Instantly, each of his CVM clients has received this message, and when they next check their voice mail, they can take action to apply for the job. (Ideally, the Case Manager will suggest that his clients use the "Reply" feature to return a message to him indicating their interest in applying for the job so he can alert the employer and perhaps arrange for the job interview).

In the scenario described above, a Client checks her voice mail to discover that timely, important information has been made available to her by her own Case Manager. With this information, she can now act to find out about job opportunities in her area, or to directly apply for the opening at the local business.

How to Send a Broadcast Message

1. Dial your Reset Number. This will connect you to the voice mail system.

2. When the system answers, press the ***** key. **Note: you will not be instructed to do this in the prompts. Do it anyway.**

3. Enter your agency extension, then press #. *The prompt will ask for a 10-digit number, but enter your 4-digit extension.*

4. Enter your agency password, then press #.

5. Go through the enrollment process. **Note: this is only necessary the first time you access your CVM voice mail box.** When asked during enrollment to record your name, say [the name of your agency]". This is necessary because when the message is delivered, the client will first hear "this is a message from [whatever you have recorded as your name]."

6. Press 2 to "make a message".

7. Enter the extension of the "distribution list" (broadcast voice messaging list) to which you want to send, then press #. *Each broadcast messaging list has a 5-digit extension assigned to it. These were provided to you by your CVM Manager.*

8. To confirm the distribution list, press#.

9. To record a message, press #.

10. Record your message, then press #. **You have 90 seconds to record your message**. Consider practicing and timing your message before recording it.

11. To send your message, press #. Your message will automatically be sent to everyone on the broadcast list.

Why should Case Managers use Broadcast Messaging?

Case Managers can use Broadcast Voice Messaging to quickly and easily communicate information of general value to their clients. Instead of calling each Client CVM number and leaving a message, or trying to speak with the Client directly, sending a Broadcast Voice Message is a highly time-efficient way to communicate information to Clients. As more valuable information is provided to Clients in this fashion, Clients will begin to check their voice mail more often, and this will create a positive feedback loop that will enhance the value of CVM for all parties. When valuable information is sent routinely to clients, they will check their voice mail more often, which will enable them to take advantage of the information provided, which will enhance the value of the services provided by the Case Manager. Using the "Reply" feature in conjunction with Broadcast Voice Messaging further increases the power of this tool.

Broadcast Email Messages

Each CVM Manager can create an email distribution list. Email broadcasting allows the CVM Manager to reach a large number of clients and/or agencies with one message and provide them with information and links to useful services or simply as a way to communicate with all CVM participating agencies. Each client that provides an email address will be added to the client distribution list. Case managers will also be added to the client distribution list as well as to an agency distribution list. Ask you CVM Manager if this is available in your city.

Sending Voice Surveys

This feature allows you to create a survey to send out to CVM users. You can gather information from clients about satisfaction levels with the program, whether they find a particular service useful, and much more. This feature is available for use by CVM managers as well as Case Managers at participating agencies.

How to set up a survey

a. Ask your CVM Manager to set up a survey for you.

b. Pick an unused phone number (DID) from your inventory that you want to use for the survey.

c. Send the text of the opening greeting script and list of survey questions to your CVM Manager. *See script example below.*

d. The CVM Program will record your prompts, set up your survey and send you an email when it is ready for your clients. **Please allow 2 weeks for the CVM Program to create your survey.**

Script Example:

Welcome to the__________ Community Voice Mail Client Survey. We will be asking a series of questions about your experience using your voicemail. Please answer the question and press # when finished to go to the next question. Thank you for your time.

Question 1: ________________________________

Question 2 :________________________________

Question 3:_________________________________

Question 4:_________________________________

Note: The sample script below only has 4 questions. ***You may include as many as 7 questions****, but remember that you will have to listen to all of the messages to tally the data.*

Setting up Hotlines

This feature allows you to create a hotline using one of the available voicemail numbers (DID's) from your inventory, where clients can call to find out important information about such things as hours of operation for your program, daily shelter bed availability, disaster relief and much more. This feature is available for use by CVM managers as well as Case Managers at participating agencies.

How to set up a hotline

a. First, choose one voicemail number from your inventory to preserve as the hotline number (be sure to clearly mark this number in your inventory as the hotline number to prevent it being given to a client for individual use).

b. Ask your CVM Manager to set up a hotline for you on this number.

c. P***lease allow 1-2 weeks for the CVM program to set up your hotline.*** They will designate the number (DID) you provided as a hotline number in the centralized system, and send you the extension numbers (3 to 4 digits) that correspond to the menu options for your hotline.

How to record the main greeting for your hotline

a. Call your Reset Number and Press 5 for the Greetings Administrator.

b. Enter your agency extension and password when prompted.

c. Enter the ten digit number (DID) you have chosen to be the hotline number and press # (*the system will ask you to enter the "call handler"*).

d. Press 2 to change the standard greeting.

e. Record the main hotline message as you would like clients to hear it when they call in. (*This message should include a basic greeting, as well as the list of menu options available on the hotline, e.g. "This is the hotline for ________. Please press 1 for information about x. For information about y, press 2. For information about z, press 3.)*

f. Press 2 if you need to rerecord the main hotline message.

g. Press * to return to the previous menu.

h. Press * to exit to the main menu.

How to record the menu options for your hotline

The CVM program will send you a list of extensions (3 to 4 digits) that correspond to the number of menu options you requested. You will need to record the information for each menu option separately, following the same procedure as is explained above. The first time you set up the hotline, recording the main message as well as each menu option may take some time, but in the future, the system will permit you to change the message ONLY for the menu option you need to update.

The first time you create your hotline follow these steps:

a. Stay on the line after recording the hotline main greeting

b. Press * until you get to the main menu.

c. Enter the extension of the first menu option and press # (*the system will ask you to enter the "call handler"*).

d. Follow steps 4-8 from "How to record the main greeting for your hotline" above

e. Enter the next extension of the next menu option and press # (*the system will ask you to enter the "call handler"*).

f. Follow steps 4-8 from above.

g. Continue until all menu options have been recorded.

h. Hang up when finished.

To change menu option information in the future

a. Call your Reset Number and Press 5 for the Greetings Administrator.

b. Enter your agency extension and password when prompted.

c. Enter the 3 to 4 digit extension that corresponds to the menu option you want to change and press # (*the system will ask you to enter the "call handler"*).

d. Press 2 to change the standard greeting.

e. Re-record the menu option as you want clients to hear it.

f. Hang up when finished.

<u>Main Hotline Message Script Example:</u>

Welcome to: ________. *Explain purpose of the hotline.*

PRESS 1 for: ______________________________

PRESS 2 for: ______________________________

PRESS 3 for: ______________________________

PRESS 4 for: ______________________________

You can press * at any time in order to return to this main information line.

<u>Menu Option Message Script Example:</u>

Include program/available service information here.

Important: At end of message say…. "*Please press * now if you wish to be returned to the main information line.*"