



NORTH CAROLINA
BAR ASSOCIATION



2025 WNC Disaster Recovery Hotline “Ask A Lawyer” Event Call Screener Volunteer Instructions

These instructions, along with additional resources, can be found on the DLS Volunteer Resources webpage at:

<https://www.ncbarfoundation.org/our-programs/disaster-legal-services/attorney-resources>

Thank you for serving as a call screener volunteer for the WNC Disaster Recovery Hotline “Ask A Lawyer” Event. Please read these instructions carefully so that you are prepared to answer calls on the day of the event. If you have any questions about any of these instructions, please email us at probono@ncbar.org.

As a call screener volunteer your role is to:

1. Greet the caller;
2. Ask the caller for a BRIEF description of their legal issue or question; and
3. Transfer the caller to the appropriate attorney practice area queue/extension.

Call screeners are the first line of assistance to WNC Disaster Recovery Hotline callers; a high degree of professionalism and customer service is required.

There are two shifts for this event: 12n-3pm and 3pm-6pm.

WNC Disaster Recovery Hotline will be conducted using the [Telzio](#) online phone system. If you have volunteered for the NCBF 4ALL-Lawyers on Call program in recent years, you will use the same Telzio login as you used for that event. If you are new to Telzio, you will receive a separate email directly from Telzio that invites you to set up your Telzio account for WNC Disaster Recovery Hotline event (be sure to check your Spam filter if you have not yet seen your email invitation from Telzio). If you did not receive the Telzio user set up invitation email within a few days of completing the volunteer registration form, please email us at probono@ncbar.org and we will resend it.

Note: if you previously used Telzio via the mobile phone/tablet app you will need to delete the old app and download the new version, which you can find in your app store.

Sign In

Please do a “trial run” of signing in to the Telzio platform prior to your volunteer shift. If you experience technical difficulties, please email Telzio support at support@telzio.com.

There are two ways that you can access Telzio to take calls on the day of the event: the mobile phone app or the Telzio.com website. If you have a computer with speakers and microphone capability, we encourage you to use the website to answer calls (the interface is slightly easier to use).

Login to the website (Telzio.com) or the app (download on your mobile device) using your username and the password that you created. DO NOT set up voicemail in your Telzio user account.

• Option 1: Log-on to the Telzio.com Website from Your Computer

- Log in using username and password from your Telzio registration email.
- Be sure that your computer’s microphone is turned on and your audio volume is turned up. You may have to give permission for Telzio to access your microphone. Locate permissions in your computer setup.
- After you log in you will see a box with the header “My Queues”. To the right of the text “My Queues” is a white toggle box within the blue field. Click the toggle box so that it turns green.

Note: you must use a Google Chrome, Mozilla Firefox, or Microsoft Edge browser to access Telzio.com. *Do not use Safari*. We also suggest that you disable “pop up blocker”.

If you do not have a computer with speaker and microphone capability or access to Google Chrome, Mozilla Firefox, or Microsoft Edge, please download the Telzio app onto your mobile device/phone prior to the event to take calls through the app.

• Option 2: Log-on to the Telzio Phone/Tablet App:

- Log in using username and password from your Telzio registration email.
- Select the “Keypad” symbol at the bottom of the app, dial *1 (“star one”), press SEND, listen for the prompt, and press 1 to sign into all queues.

Speak with the Caller

WNC Disaster Recovery Hotline calls will be directed to the next available Call Screener. If no Call Screeners are available, a caller will wait on hold until a Call Screener becomes available. In order to limit caller hold time, please be efficient when answering your calls and moving the caller to the appropriate attorney practice area queue.

The way the Telzio system works, every caller’s call will hit every Call Screener’s line all at one time – the first Call Screener to answer the call will speak with the caller. If you attempt

to answer a call and it appears that the caller “hung up” it is because another Call Screener got the call first. Please just hang up quickly and keep trying to answer until you have a caller on the line.

Answer the Call

- “Hello. My name is FIRST NAME. Can you please share a short description of your legal need, question or issue so that I can transfer you to an attorney who can help answer your questions?”
 - You do not need to identify yourself as a law student or paralegal; please do not give out your full name.
 - Assess the caller’s legal need, question, or issue.
- If the caller is a Spanish speaker, transfer him/her to the Spanish queue (ext. 352)
- If a caller has multiple areas of need, explain that the attorney volunteer can assist with only one legal issue at a time. Transfer the call to the caller’s primary area of need.
- If the caller’s need is NON-LEGAL, please do your best to refer the caller to an appropriate resource. Examples of non-legal needs are food assistance, assistance locating housing, mental health resources, or transportation issues. The following are useful resources for non-legal referrals:
 - NC 211: <https://nc211.org/>
 - [NCBF Resource & Referral Sheet](#)
 - [PLS Disaster Recovery Resource List](#)

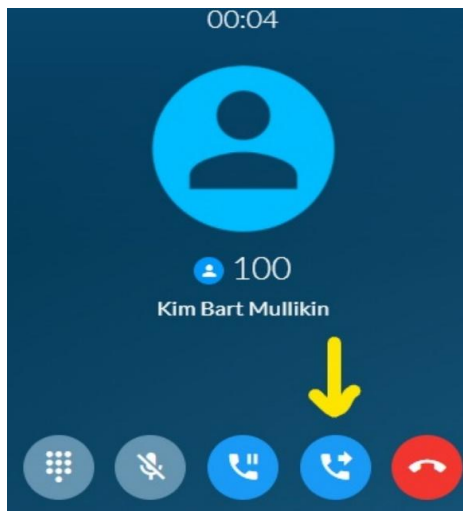
Transferring a Call

Transfer the caller to an appropriate attorney practice area queue by pressing BLIND TRANSFER and then the extension (see extension list below) and then SEND, and then hang up. **Do not use “ATT TRANSFER”** which is attended transfer; this will only connect you yourself to the next extension, not the caller. Here are specific instructions for transferring calls:

Web version:

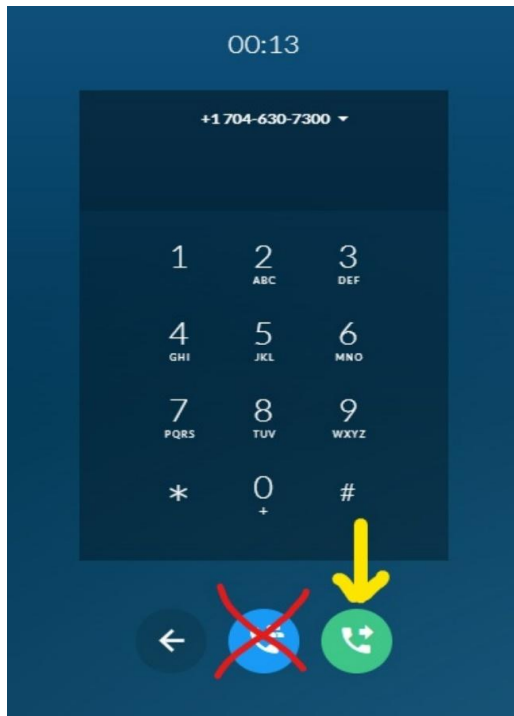
Use a browser such as Google Chrome, Mozilla Firefox, or Microsoft Edge. Do not use Safari.

- When the line rings and you answer it, you will see a screen that has three buttons on the bottom: a blue button receiver icon with a pause symbol (places caller on hold); another blue button receiver icon with an arrow (transfers the call); a red button (hangs up on the caller). The screen looks like this:



- To transfer your call, press the blue button receiver icon with the arrow (the Transfer button). This will put the caller on hold.
- Next you will see a screen with keypad numbers and two options for transferring: a blue button with people icons on it (**NO**) and a green button with an arrow on it (**YES**).
 - First: press the numbers of the extension you want to send to.
 - Second: press the green button with the arrow on it (the Blind Transfer button) to send the call to the extension.
 - Hang up and wait for the next call.

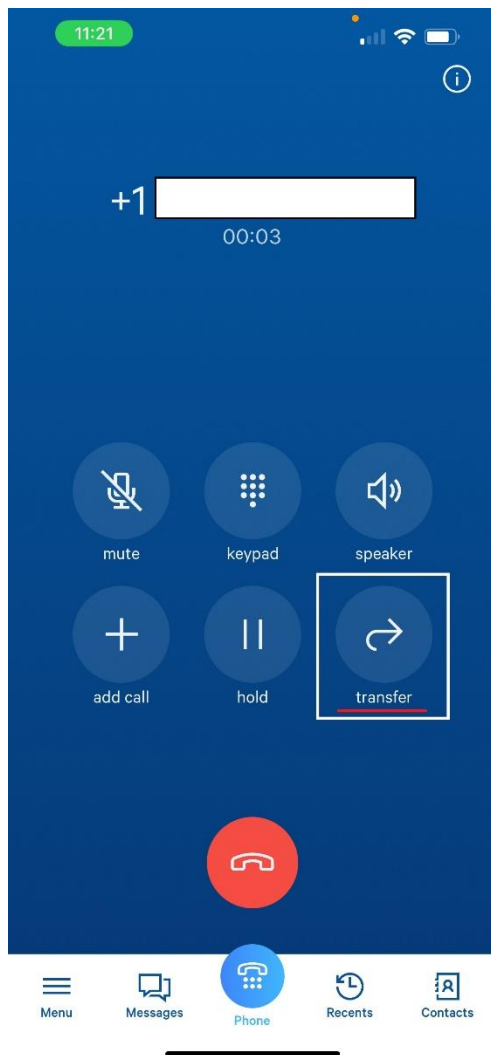
This is what the screen looks like:



Mobile version (iOS or Android):

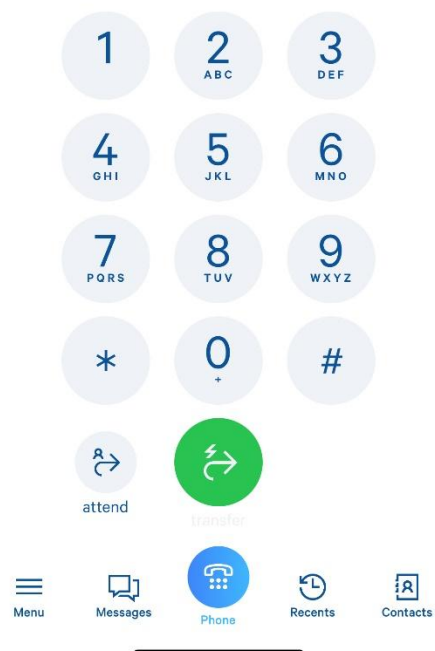
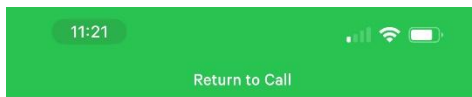
Reinstall or download the Telzio app through your iPhone or Android app store to ensure you obtained the latest version of the Telzio Mobile app.

- When the line rings and you answer the call, you will see a screen with a few options on it (mute, keypad, speaker, add call, hold, and transfer).

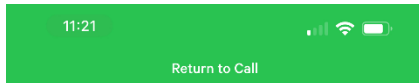


- Tap on the button for "transfer".

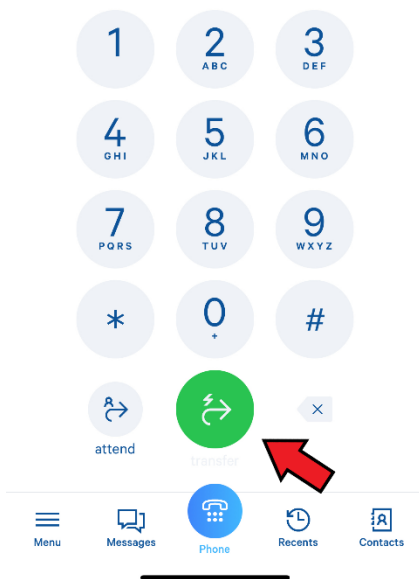
- When you press the Transfer button it will put the caller on hold and you will see a new screen showing the keypad. It looks like this:



- Next, press the numbers of the extension you want to send to (see below for extension numbers by practice area) and then press the green transfer button that has a lightning bolt to connect the caller to that extension (this is a blind transfer).



123



- The caller will be transferred to the dialed extension and the call will automatically end and bring you to the original screen for you to be ready for the next call.

DLS - Spanish	352
DLS - FEMA -- Claims	354
DLS - FEMA -- Appeals	355
DLS - FEMA -- Roads & Bridges	356
DLS - Housing -- Tenants	357
DLS - Housing -- Homeowners Mortgages	358
DLS - Housing -- Homeowners Foreclosures	358
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DLS - Consumer -- Bankruptcy and Debt	360
DLS - Consumer -- Contractor Disputes	361
DLS - Insurance Claims & Disputes	362
DLS - Other/Misc./Unsure	363

Sign Out

At the end of your shift, be sure to SIGN OUT. You will continue to receive calls until you sign out of Telzio.

- If you are using the website, go to the top right of your screen, select the down arrow and “logout”.
- If you are using the mobile app, sign out by selecting the “keypad” symbol at the bottom of your phone. Dial *1 (“star one”), press SEND, listen for the prompt, and press 2 to sign out of all queues.

Troubleshooting/FAQ's

1. If you are logged in to Telzio, but no calls are coming through, double check that you are logged in to your queues. To do this on the website, toggle the ‘Queue’ button from white to green. To do this on the app, dial *1 (“star one”), listen for the prompt, and then press 1 to login. Note: if call volume is low then it may just be that no calls have yet come into your particular area; please be patient.
2. The Telzio site functions best if the “pop up blocker” feature is turned OFF.
3. If you are a volunteer on an early shift and you would like to continue to volunteer through later shifts, you are welcome to do so. If you are a volunteer on a later shift and wish to login early, you are welcome to do so. If you need to step away from your calls for whatever reason, first just log out of your queue (and log back in when you return).

Thank you for your service!