# COSAction TelePatriot Basics (iPhone)

Getting Started

1. Install from the Apple App Store (search for COSAction, then tap on **Get**).
2. Tap on the app icon on the Home screen to open.
3. Sign in using your CitizenBuilder email/password, or Facebook.
4. For first sign in, tap on **Allow** to accept Notifications.
5. Tap on the TelePatriot icon at middle-bottom to display your Teams (you must be assigned the *TelePatriot Volunteer* role to use TelePatriot).
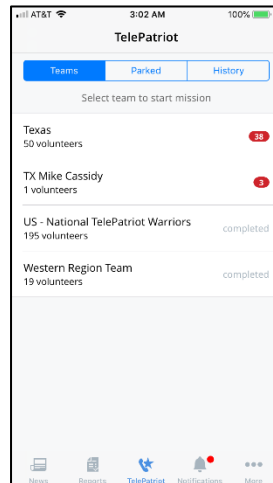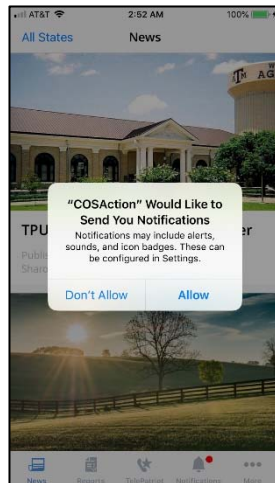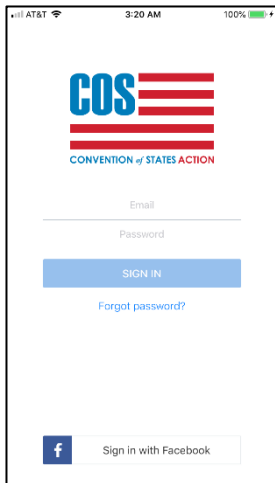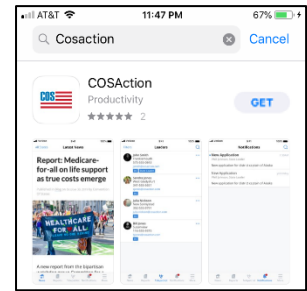
Teams, and Selecting a Call

All teams that you are a member of are displayed, showing the number of calls remaining for all active missions for the team, or "completed" if no active missions are available. Tapping on a team with available calls will display the first available call.

This call is now *On Hold*, assigned to you. If no further action is taken, the call will remain assigned for up to 48 hours, after which it will be returned to the queue, available for someone else. Thus, **if you're not going to make the call, you should tap on Close** at the upper-left, which will immediately release the call back to the queue.

The **Skip** button will immediately release the call and present the next available call. There is no particular order to how the calls are presented, so you may see the same call multiple times with repeated taps on **Skip,** though you'll never see the same call consecutively, unless it's the only available call.

The mission script can be expanded by tapping on the … immediately above the name.
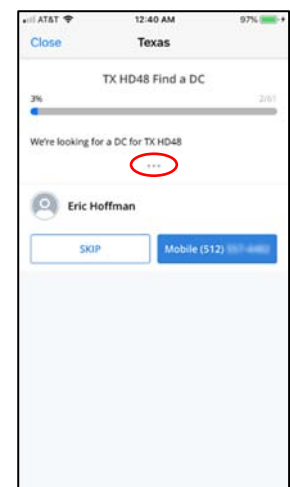
Making a Call
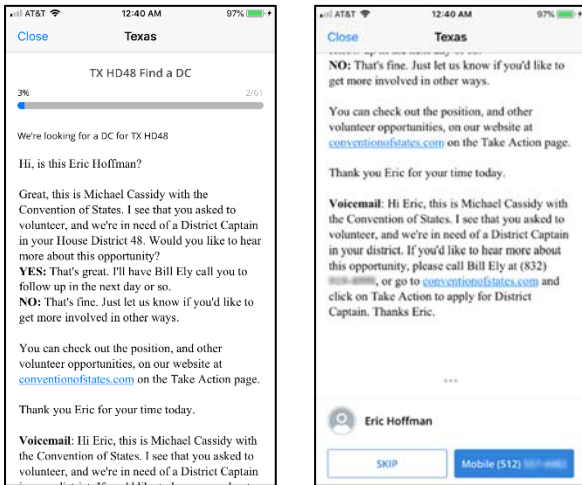
Begin by first reviewing the script. Notice that scripts can contain *merge tags* which are substituted with contextual information. In this example, the name of the person to be called is shown, as well as the name of the caller (you).

There could be hyperlinks for reference materials, or just web links to convey to the person being called. Tapping on them will open in your browser.

The script can be collapsed by tapping again on the … above the name.

To begin the call, tap on the blue button showing the phone number.

Completing a Call

After the call has concluded, there can be several different outcomes. Immediately after disconnecting from the call, the *Response type* screen is presented, allowing you to select the appropriate outcome. The ones shown in red indicate the call was not successful. Following is how the call is handled for each *Response type*:
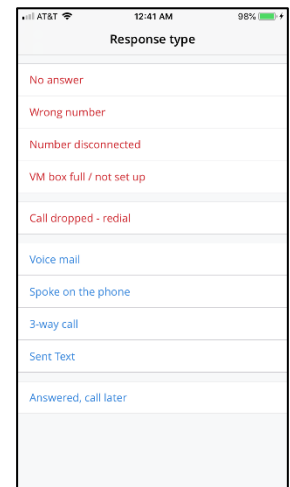
No answer – call returned to the queue

Wrong number – call completed

Number disconnected – call completed

VM box full / not set up – option provided to return call to the queue

Call dropped – redial – returns to the mission page allowing redial

Voice mail * – left a voicemail, call completed

*Spoke on the phone ** – spoke with the desired person, call completed

3-way call * – completed a 3-way call

Sent Text * – person may or may not have answered, but a text message with information was sent, call completed

Answered, call later * – will *park* the call in your personal queue for up to 48 hours

* requires entry of a note

For all of the above, except for *Call dropped – redial*, the Call Summary screen is presented next, allowing entry of a note that will be recorded on the person's profile, and if optional tags are defined for the mission, they may be selected. Tap Done to complete the call.
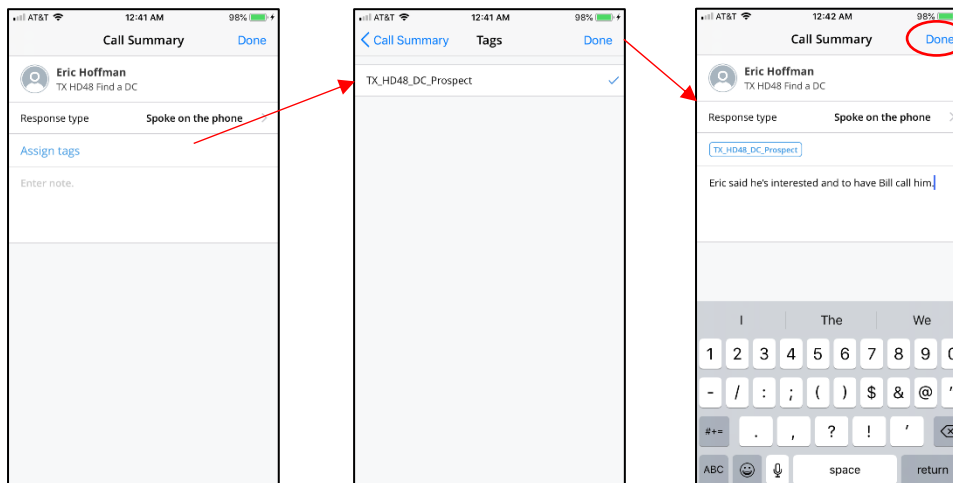
Parking a Call

If your call is answered, but the person doesn't have time to talk with you right then, or maybe the person you are trying to reach is not available, you can *park* the call by selecting a response type of *Answered – call later*, which will allow you to enter a private note (not recorded on the profile) and leave the call assigned to you for up to 48 hours. All your parked calls are shown from the Parked tab.

When it's time to try the call again, tap on the call in the Parked tab, which will bring the call back up. If you decide you no longer are able to continue handling this call, you can tap on the Unpark button, which will immediately return the call to the queue. The note that you entered is discarded. You may also tap on Close at the upper-left to leave the missions screen, and the call will remain parked.

You may park the same call any number of times, and the 48 hour period starts over each time.
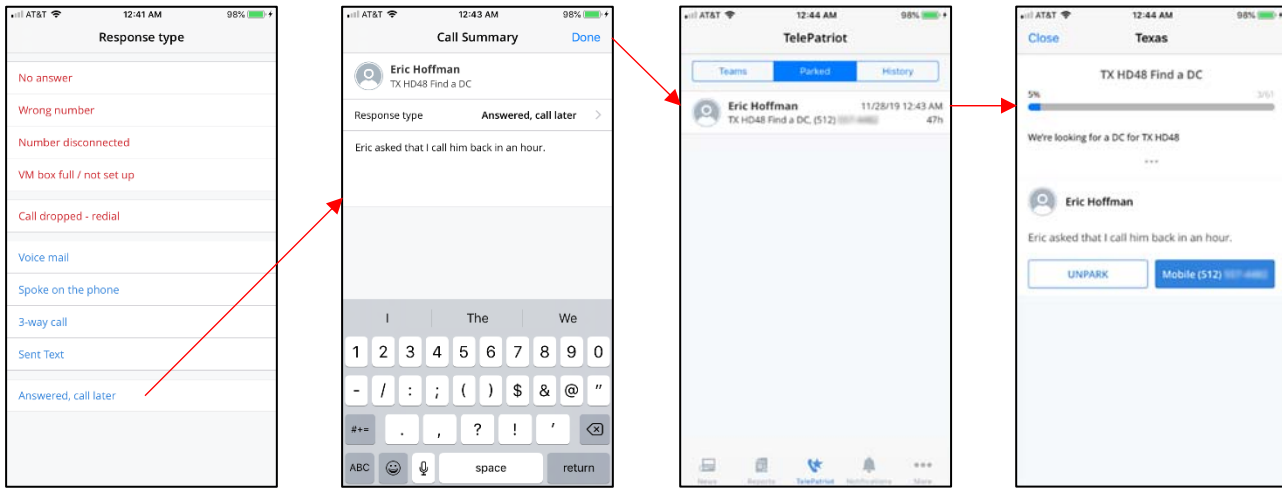
Call History

After a call has been completed, it will appear at the top of your History tab for reference. Tapping a history call will open the Call Summary page, allowing you to call the person again. This can be useful if you needed to follow up for any reason, but this call is not recorded as a TelePatriot call; it is strictly a *personal* call. You may however add a supplemental note for the person's profile, and update the mission tags, if any are defined for the mission. [dialing and update features coming in the next release]

Calls remain in the History list for 14 days.

v1.1 12/15/19 (iOS v1.0.1)
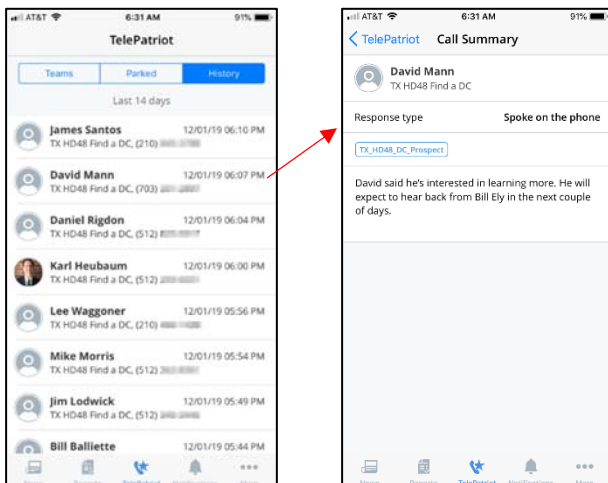
Dropped Call

If during a call you lose signal or for whatever other reason the call is interrupted, the Response type screen will be presented. You should select the *Call dropped – redial* option, which will take you back to the Mission screen where you can tap the dial button to call out again. In this case, the Mission screen will not display the Close or Skip buttons, since the call is already in process.

Revoked Call

An assigned call can be revoked from the TelePatriot tool in the CB Dashboard. This could be for a single call, or for all active calls for a mission. When this is done, a notification message is displayed in TelePatriot, and if the call is in *Call Finished* status (after call has ended but before the Call Summary is complete), an option is offered to delay for a short time, to allow for the note and tags to be entered.

If these notification messages are not acknowledged within 2 hours, the call is released. When the call is in *On Hold* status, it is just released back to the queue, but for *Call Finished* status, a note is recorded in the profile with no response type.
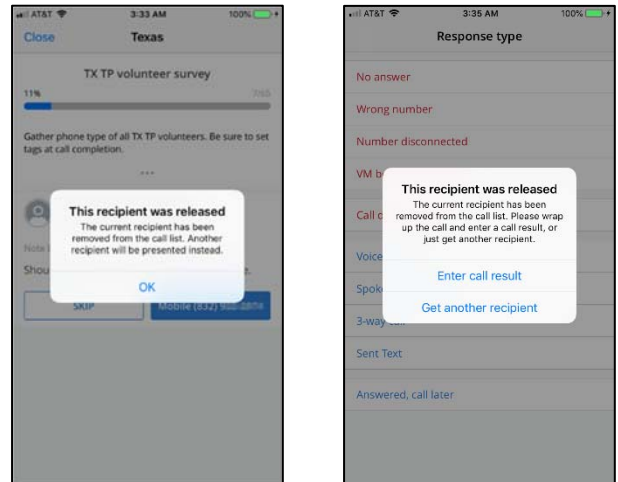
Interruption During Call Summary

If TelePatriot gets interrupted during the Call Summary process, such as a loss of power to your device, or closing the app, the call will be returned to the point where you left off, after restarting TelePatriot **and** selecting the same team. If this is not done within 48 hours, the call will be handled in the same manner as described above for a revoked call that is not acknowledged.

Hints and Tricks

Mission goal to add tags -- If a mission's primary goal is to record an appropriate tag on a person's profile based upon the conversation, you will want to take care in how you select the *response type* when the call has ended. Ideally you spoke with the person and were able to determine which tag(s) to apply, and the call is then complete. However, if you got their voicemail box, you would generally not want to select *Voice mail* because that will complete the call without knowing what tag(s) to add. Instead, you should consider one of the following choices:

- Don't leave any message and select *No answer* as the response type – no note is needed. This will leave the call in the queue for someone else to call.
- Leave a message that you will call back again (or not), and park the call with the *Answered, call later* response type.
- Leave a message stating why you called, and state that someone else will be calling them, then select *No answer* as the response type, and include in your note what you left in the VM. The next caller will see your note.

Review script during call – Once you've dialed the number, the Phone app will take focus on your phone. If you immediately double-click the home button, you can select COSAction as the foreground screen to allow you to reference the TelePatriot script while speaking. You can return to the Phone app in a similar manner, in case you need to access the mute or other features of the Phone app.