

Origins

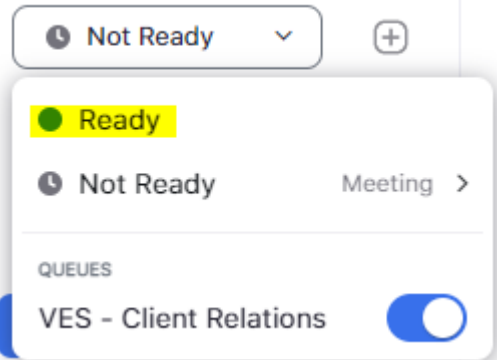
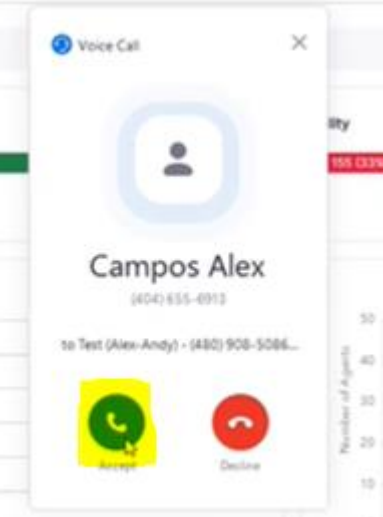
Standard Operating Procedure Zoom Video and Screen Sharing	
Department Employee Relations	SOP Number
Effective Dates 2/28/2023	Quality Review Date
Created By Tricia Rush	Version Number 1

Purpose of the Standard Operating Procedure (SOP)

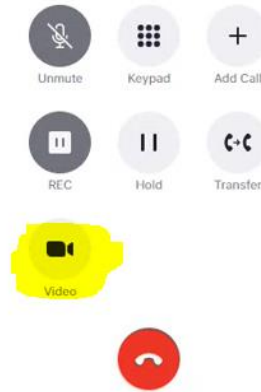
The purpose of this SOP is to provide instructions on how to engage the video feature within Zoom, for the purpose of viewing our worksite employees and client's screen. The ability to see their screen will make it easier to assist with problem resolution and supports the 'one call resolution' movement. This feature will also help us deliver great service and faster response times.

This feature is not used for sharing your screen.

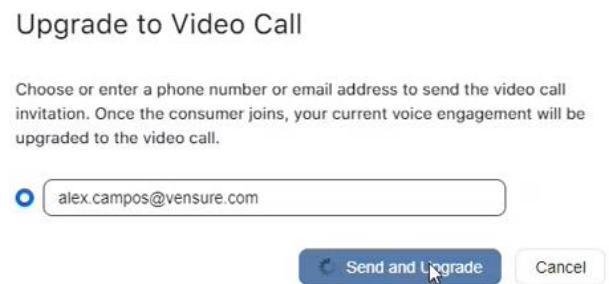
Process Workflow

Instructions	Visual Details
<p>1. Log into Zoom mark yourself as ready</p>	
<p>2. Once you receive a call, you would click answer</p>	
<p>3. Once the caller has been verified and the client or employee has agreed to screen sharing, you can enable the video feature. Clients do not need to be using Zoom to accept your video call.</p>	

3.1 Click the video icon

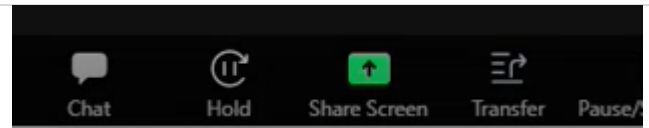


4. Enter the email address of the caller and click Send



5. The caller will receive an invite, via email. Once the caller accepts the invite, the call will automatically convert to a video call.

6. Once the call is active, you can instruct the caller on how to turn on the share screen feature.



7. Once their screen is visible, you will be able to assist the client/ or employee with their request.

8. End call

NOTE: Please DO NOT share your screen with the client or worksite employee. Ask them to avoid sharing their screen that contains personal information we don't already have or would not normally collect.

Roles and Responsibilities

Below defines any roles and responsibilities ONLY associated with the process or procedure outlined in the SOP.

Roles	Responsibilities
Employee Relations Representative	ER reps will be taking most of these calls and utilizing this feature the most.
Client Relations Representative	CR reps will be available as back-up for the ER team; however, the CR does engage in voice calls with the client and can utilize this feature as needed.
Payroll Representative	Payroll Reps engage in voice conversations with clients regarding payroll and will be able to utilize this feature as needed.

Vensure Standard Operating Procedure Template



Any other client-facing team member	Any team member assisting a worksite employee or client may use this feature.
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Technology

Zoom
Video chat

Reference Documents

Abbreviations and Definitions

SOP – Standard Operating Procedure

Additional Resources

The following resources or links are to additional documentation or resources to related actions, procedures, or processes.

Document Name	Link / Location

Verification and Approval of the Standard Operating Procedure

Department Head	Date
System Expert	Date

Standard Operating Procedure Change History

SOP Version: Record the new SOP version.

Significant Changes: State key elements or edited sections

SOP Version	Significant Changes	Training Needed? (Y/N)	Acknowledgement Needed? (Y/N)
1		Y	N