

*****Please note that this document is a draft, and more information will be added as the website and processes are finalized. The final draft will be complete by February 18th, 2021 when there will be no more changes to the site.**

Introduction

RootsTech Connect will take place from February 25th-28th, 2021. This is the first year the event will take place virtually. Volunteers, missionaries, and employees will support the event by answering attendee questions and providing help virtually through the Community and Chat features.

This job aid provides step-by-step instructions for volunteers and missionaries about how to log in, create accounts, designate their skill(s) for helping attendees, and locate the knowledge base in the Community to assist in answering questions to support attendees of RootsTech Connect 2021.

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Learning Objectives

After reviewing this job aid and applying its instructions, you should be able to:

- Log in to the RootsTech Connect site.
- Register and set up a volunteer account.
- Understand how to assist with general questions.
- Demonstrate the escalation path for chats.

Volunteer Expectations

Shift Options

- HQ and North America Employees
- Support Missionaries
- Ask Me Anything Backup

Note: Each employee is required to work 8 hours per day and 4 hours on standby for each day of the event.

Employee Overtime

Employees should not need overtime during RootsTech. The pay period resets Friday at midnight so hours worked at RootsTech should not exceed the 40-hour work week.

Scheduling

Timeframe Coverage

Wednesday: 7 PM – 12 AM MDT

Thursday: 6AM – 12 AM MDT

Friday: 6AM – 12 AM MDT

Saturday: 6AM – 9 PM MDT

Anticipated Peak Hours

Wednesday: 7 – 9 PM MDT

Thursday: 6 PM – 12 AM MDT

Friday: 6 PM – 12 AM MDT

Saturday: 6 PM – 9 PM MDT

Click [here](#) for additional information on key dates, times, and events.

Accessing the RootsTech Connect Site

Step 1: Click on the following link: <https://www.familysearch.org/rootstech/rtc2021/>

Step 2: Sign in using your FamilySearch.org account credentials.

Volunteer Account Creation for Live Chats

Step 1: Go to <https://www.familysearch.org/rootstech/rtc2021/volunteer>.

Step 2: Log in to your FamilySearch account to register or sign in.

Step 3: In the Languages tab, select the languages in which you are fluent and can provide support.

Step 4: In the Research help tab, select the research help in which you are an expert.

Step 5: In the FS.org tab, select the FamilySearch topics in which are an expert.

Step 6: In the Callings/Temple tab, select the topics that in which you are an expert.

Step 7: In the RootsTech tab, select the options in which you will volunteer.

Note: For missionaries, select the **Ask Me Anything** option under the RootsTech tab.

Note: Headquarters Volunteers will be instructed by your team leads of the options you should select.

Note: Multi-area operations managers will instruct their employees and volunteers what options they should select.

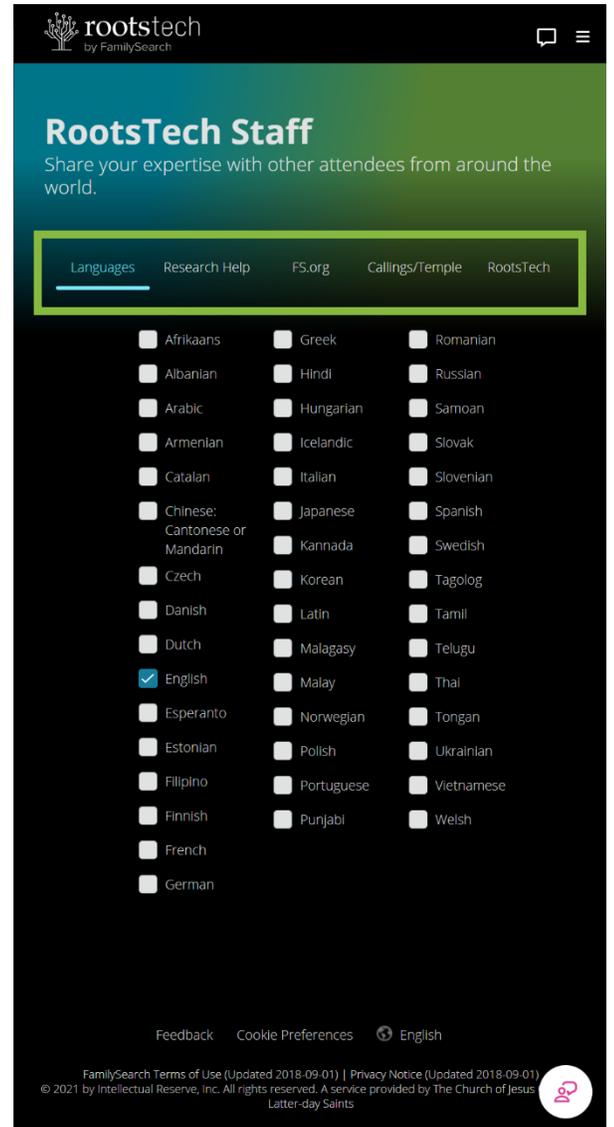
Locating Chats

Step 1: In the top right corner of the browser, click on **Menu**.

Step 2: Select **Connect**.

Step 3: To start receiving chats, select **Available**.

Note: You will only be able to take one chat at a time. Once you end a chat you will be able to receive a new chat request.



Resource Map

More information will be provided later.

Additional Chat Options

Direct Chats

Direct chats will be available for volunteers to directly chat with other available experts. This can be a useful tool to collaborate, find help answer questions, and resolve attendee's issues. To send a direct message, select the **New Message** button.

Chatrooms

This is a useful tool when helping attendees who have questions or issues that you cannot answer or resolve quickly through the Community or other resources. This will be especially helpful for Data Quality issues. You can set up a chatroom with a Data Quality expert to help an attendee resolve those issues. To set up a new chatroom, select the **New Chatroom** button.

Escalation

More information will be provided later.

Providing a VIP Experience

Providing a VIP experience is essential for attendee interactions at RootsTech. Review this [video](#) to learn more about how you can provide a VIP experience with every attendee interaction.

Click [here](#) for additional RootsTech Ask Me Anything instruction.

Note: When interacting with attendees on live chat it is important to remember to direct them to the Community for help with research or questions about specific family history areas..

Finding the Answer to Any Question

There are many resources available to help you answer attendee questions. Utilize the following resources to help you find answers. The following is a list of resources that you can use to help answer questions:

- [FamilySearch Help Center](#)
- [FamilySearch Community](#)
- FAQs
- Other experts via Direct Chats

Transferring Live Chats

Step 1: In the top right corner of the browser, click on **Menu**.

Step 2: To start receiving questions, select the **Available slider**.

Step 3: Click on your **name and image** button.

Step 4: Click on the **vertical ellipsis**.

Step 5: Select the **Hand-off Conversation option**.

Step 6: Select the **appropriate expert to answer the question**.

Click [here](#) for additional information on transferring chats.

Volunteer Basecamp

Here is the link to the base camp for employees and volunteers:

<https://familysearch.vanillacommunities.com/en/group/217-rootstech-staff-base-camp>

This page is still under construction and currently shows as a public group. Before the conference, this page will become private and will only be accessible to employees and volunteers.

Summary

Now that you have accessed the RootsTech Connect site, successfully logged in, and created your volunteer account, you are ready to help RootsTech attendees. As you help support RootsTech attendees through the Chat, strive to provide a VIP experience with each attendee interaction. Utilize all the resources available to help you as you interact with and provide an unforgettable experience for every attendee.