Our Virtual World

A Toolkit for Implementing Virtual Group Services

How to Use This Guide

This guide reflects the considerations and action of the Centre for Innovation in Peer Support (the Centre) during our ongoing transition to virtual service provision. It is our hope that you will be able to use this guide to help you inform your own considerations and actions.

Our considerations and actions reflect our community demographic and the needs of our community. Key Considerations for you to explore as you implement virtual services are listed throughout the document, for a full list of considerations please see Appendix G. We have also shared our actions as examples you can use. The Appendices includes some of our resources.

Through ongoing Quality Improvement (QI) efforts referenced in this document the Centre was able to enhance services. Investing in data collection, evaluations, feedback loops and reviewing of this information can help inform your work. This guide shares some examples you can easily implement, allowing you to enhance your services in this changing healthcare system and to better meet the needs of those you support.

To Cite this Document

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Legal

The views represented herein solely represent the views of the Centre for Innovation in Peer Support. Information in this document should not replace your own research and due diligence. The information used to create this toolkit draws on the experience of the Centre and public sources, referenced throughout. The materials in this toolkit are general guidelines only. This toolkit is not intended to provide legal advice. If there is a discrepancy between this document and any applicable legislation, the legislation will always prevail.

We would like to thank our entire team for their grit, determination and dedication to those we serve that made this fast paced transition possible. Special acknowledgement to Ethan Hopkins, Alyssa Gremmen, Richard Adair, Cheryl Kozell and Betty-Lou Kristy for assembling this toolkit.

If you have questions about this resource please contact
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About the Centre

The Centre for Innovation in Peer Support (including TEACH programming), housed at Support & Housing – Halton, is mandated to ensure active engagement & empowerment of lived experience and/or family expertise, and integration of effective peer support services in the mental health and substance use/addictions system (MH&A). The Centre is funded to support 12 formal HSP partners that include hospital psychiatric inpatient units, addictions residential treatment, supportive housing programs, central access, employment support programs, community mental health and addiction providers, and self-help education and support groups. We currently support over 60 peer support staff and 40 peer support supervisors across 30 different programs.

The Centre is focused on building capacity of People with Lived Experience, People Engaging in Services, Peer Support Workers, Peer Support Supervisors, Health Service Providers, Mississauga/Halton LHIN MH&A system (now part of Ontario Health Central Region) and Provincial Healthcare Systems through identified priority areas of: Training, Implementation, Evaluation & Research, Capacity Building, Knowledge Brokerage and Quality Improvement. This includes engaging in regional and provincial system planning tables and building meaningful relationships with peer initiatives regionally, provincially, nationally and internationally.

The Centre continues to ensure that the lived experience of peer support workers and the values (fidelity) of peer support work are viewed as assets that facilitate the journey of individuals to what they see as health and good quality of life. (Life worth living). With those values and priorities, the Centre continues to champion social and healthcare change that fosters person-directed care to ensure every person will be recognized, appreciated and respected for the unique person they are on their unique journey; and to ensure that care provision is adaptable to the fluctuations in peoples' wellness and needs. The Centre knows that the roots of equality & inclusivity are found through engaging the people who "know what it's like," and how that can promote values driven/person directed service delivery, inform quality improvement, co-create service provision, inform policy change, encourage cultural humility and transform organizations and systems.

About a year ago, the Centre underwent an amalgamation with TEACH (Teach, Empower, Advocate for Community Health) to now include direct service peer programming. The Centre now oversees both peer-led psychosocial rehabilitative programming plus the Volunteer and Peer Mentor Training & Internship programs. TEACH is the recognized Consumer Survivor Initiative (CSI) for Mississauga Halton LHIN Region. TEACH has been providing peer support since 1997, offering quality regional programs that are designed, developed, implemented and evaluated by People with Lived Experience. However, TEACH has always been more than a set of regional programs; it is about building community and connection through creating safe spaces to heal and grow for people navigating mental health and substance use/addiction challenges, as well as the supporters/families.

The Centre's QI Lens, Provincial Footprint and Awards

The Centre's leadership has been trained and coached extensively in quality improvement with the Excellence through Quality Improvement Project (E-QIP) for 2 cohorts. Leadership are also certified in LEADS Healthcare Leadership and are certified in Lean Six Sigma Green Belt. The Centre has been identified as a Promising Practice by Provincial System Support Programs (PSSP) Evidence Exchange Network (EENet) @ Centre for Addiction & Mental Health (CAMH), has co-authored on the 2017 Health Canada-Drug Treatment Funding Programs (DTFP) Performance Measurement in Peer Support, and was featured in the Ontario Excellence through Quality Improvement Report – An inspiring look at Quality Improvement in action.

The Centre has been the recipients of the 2017 Ontario Peer Development Initiative (OPDI) Lighthouse Innovators Award, 2017 Recipients of the Addictions & Mental Health Ontario (AMHO) President's Shield Award and 2016 Association of General Hospital Psychiatric Services (AGHPS) Summit Award. The Centre partnered with Evidence Exchange Network (EENet) @ Centre for Addiction & Mental Health (CAMH) to identify core elements of peer support programs across different health sectors such as mental health and addictions, diabetes, chronic disease and cancer; positioning this work to support breaking down healthcare silo's.

About Support & Housing-Halton

Support & Housing - Halton is directed by our core values. They guide our agency's decisions and actions, unite our staff, define our brand, and inspire our culture. We put people first – our supports are person directed. We connect and engage and start conversations to build and maintain relationships. We focus on health and wellness practices to inspire our culture. All employees are required to adhere to our Oath of conduct tied to our values.

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Creating "Our Virtual World"

Our Journey….

When the Centre for Innovation in Peer Support, was informed of the need to work from home due to the seriousness of the global pandemic, we immediately focused on our direct service programs. Our foremost priority was to ensure those who depend on our services were not left without important connections in a very uncertain time. This would require that we adapt our in person peer-led groups to a virtual curriculum and environment.

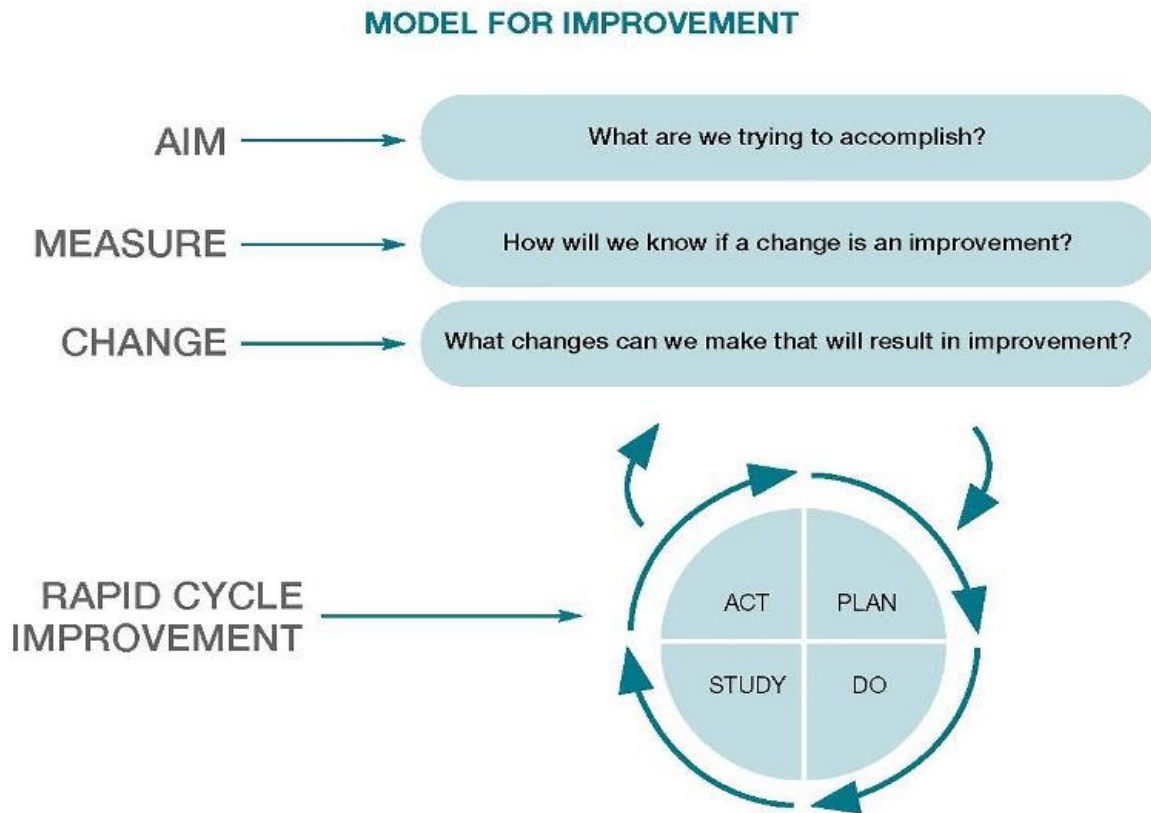### Covid-19 Phase 1 Response (March – June 2020)

- On Monday March 16th the Centre staff began daily Team Huddle (ie. rounds) with a focus on mapping strategic priorities for new Centre virtual programs.

> **Our Guiding Questions**
>
> - How do we stay true to our values?
> - How do we ensure privacy?
> - How do we maintain sustainability?
> - How do we operate as a team?
> - What do we need to change?
> - What services do we want to move virtual?

- Staff working within Centre Provincial, System and Partner Support/Programming were redeployed to assist in developing new programing and to support quality improvement initiatives for Phase 1 Pilot of virtual programing offered through Centre Direct Service Programming.

- Approval from our agency was given to hire relief staff with previous working relationships and training with the Centre.

- Pandemic Pilot of virtual programing launched at end of March, inclusive of open topic discussion Wellbeing closed groups and, a new stream of Social Connection style open groups.

- Additional programming was developed in the form of a Peer Warm Line and augmenting our existing one-to-one peer support program (Peer Support Navigation team) began.

- The Centre staff, in partnership with the early experiences of participants within our groups co-created the designer Virtual Facilitation & Participant guide grounded in the Values of Peer Support.

- Revisions were made to our existing systems supports through accelerated and increased frequency of our Communities of Practice meetings; we moved from monthly meetings to weekly lunch sessions while also expanding an invitation for both of our networks across the province (Peer Staff and Peer Supervisor).

- Centre staff took a Health Quality Ontario (HQO is now a part of Ontario Health) lens to ALL programs through ongoing evaluation, quality improvements and capacity building to ensure low or no barrier access to all supports. For more Health Quality Ontario (Ontario Health) Quality Improvement Resources see **Appendix K**

MODEL FOR IMPROVEMENT

AIM →	What are we trying to accomplish?
MEASURE →	How will we know if a change is an improvement?
CHANGE →	What changes can we make that will result in improvement?

RAPID CYCLE IMPROVEMENT →

ACT | PLAN
STUDY | DO

- Live time quality improvement measures drawn from Health Quality Ontario's (Ontario Health) Model of Improvement were put into place to monitor group dynamics with an emphasis of Lean Six Sigma practices to minimize wasteful practices.

- Virtual Program evaluation measurements were put into place which included live time polling feedback from group participants and survey options for more in-depth experiential feedback.

- Phase 1 adjustments were fed by data utilizing Plan Do Study Act (PDSA) cycles to adjust programming on the fly with direct feedback from persons experiencing services within the virtual group settings.

- Virtual Programing was opened up to all residents in Ontario with an aim of lowering barriers for all individuals experiencing wellness challenges as a result of Covid-19.

- Full Phase 1 programing capacity was 23 virtual programs and 2 communities of practice per week. Direct service programming became open to any individual navigating their wellness

journey including family care givers in support roles, along with system partners and staff within Ontario.

- In consultation with our internal Privacy Officer and through direct consultation with a Health Privacy systems consultant we confirmed that all virtual programs, data collection methods and protocols were PHIPA and PIPEDA compliant.

- Using practices of Lean Six Sigma we conducted an extensive analysis of data findings from evaluations, live time data collection, time studies, staff capacity, sustainability and a volumes assessment to determine a more sustainable model. We launched Phase 2 of our virtual programming in concert with the provincial reopening on June 15th (20 sessions offered during the day, evening, and weekends each week).

Centre Pandemic Staffing Roles & Re-deployment Highlights

Director
- Provided weekly provincial and organizational updates during daily team huddle meetings each week.
- Promoted and directed staff to open all Centre programing to the province during pandemic crisis.
- Provided oversight and direction around staff re-deployment descriptions and responsibilities.

Manager, Operations & Service Integrity
- Implementation of quality improvement initiatives, along with coordination of daily team huddles, facilitation/participant guide, managing staff capacity and re-deployment.
- Established protocols, procedures and documentation revisions for virtual service deliver in consultation with privacy officer and consultant to ensure PHIPA and PIPEDA compliance.

Communications & Marketing Administrator
- Revamped website to reflect all new programs offerings and updated promotional materials for province.
- Re-deployed to support daily team huddle meetings, management of all virtual group scheduling in zoom accounts, and as backup host for Social Connection Mindful Moments groups.

Supervisor, Direct Service
- Supervised Direct Service and Peer Intern team as Phase 1 virtual programing pilot launched. Acted as liaison between direct service team and the Centre leadership team.
- Supported team in problem solving, planning and implementation. On call to support immediate direct service needs.

Group Facilitators
- Responsible for facilitation and hosting of closed psycho-educational Self-Help Groups.
- One Group Facilitator was re-deployed to also support psycho-social Social Connections group and to build & facilitate Chair Yoga as part of the Mindful Moments series as a Trained Yoga instructor.
- Cross trained during Phase 1 Pilot to assume facilitation role in Phase 2 of pandemic for open Social Connection groups.

Peer Support Navigator
- One to One Peer Support & System navigation, Peer Warm Line and Group facilitation/hosting as needed.
- One Peer Support Navigator in addition was re-deployed in psycho-social Social Connections group to build & facilitate/host Mindfulness Mindful due to Mindfulness Trainer certification.
- Additional Peer Support Navigator hired on as relief staff to support pandemic crisis and virtual programing.

Facilitator, Education & Skills Development
- Part time position (April-September) created to support group facilitation and Manager, Operations & Service Integrity in Time Study, Facilitation & Participant Guide and Toolkit design.

Peer Integration and Systems Lead
- Increased frequency of our Communities of Practice meetings; moved from monthly meetings to weekly lunch sessions while also expanding an invitation for both of our networks across the province (Peer Staff and Peer Supervisor).
- Provided consultation related to the implementation and sustainability of peer support positions to partners within Ontario
- Re-deployed to support direct service groups through hosting role, provided Zoom cross training for all Centre staff and co-created Virtual Toolkit and Zoom protocols.

Community Engagement Coordinator
- Re-deployed to plan, create and implement new virtual psycho-social recreational program offering (Social Connections).
- Provided stability and sustainability of Phase 1 programing as sole facilitator and curriculum builder for all Social Connections groups during Phase 1.
- Cross trained and mentored Group Facilitator staff to assume facilitation of Social Connections role during Phase 1 in preparation of launching Phase 2.

Our Lens of Health Equity

Image Source: Health Quality Ontario. https://www.hqontario.ca/What-is-Health-Quality/Health-Equity-and-Quality

As an organization we are committed to health equity and understanding the barriers members of our communities may have when accessing services both at the community and system levels. With this in mind, all of our programming was implemented with a Health Equity lens.

Some things we did well:

- Offered a Peer Warm Line 5 days a week & Peer Navigator Support for individuals who could not connect virtually.

- Opened our groups to be both video and call-in (non-video) compatible.

- Offered technical support for navigating virtual platform in group.

- Offered support to individuals without technology in gaining access to needed devices for online participation.

- Open programing to all residents of Ontario.

Some things we could do better:

- Gain a better understanding of the needs of diverse groups not accessing our virtual programs.

- Gain a better understanding of how to advocate for technology poverty and privilege.

- Better understand potential language and cultural barriers.

Key Areas of Focus
Technology

- What platform do we use? Do we use different platforms for different services?
  - What do we need to know about these platforms? Ex. Security, cost, how many accounts etc.
  - What are our agency needs in a platform regarding policy, procedure, security and privacy, ethics and values? Ex. Security, cost, how many accounts etc.
  - Is the platform user friendly?
- Does staff have the hardware to move virtual? Computer/laptop, Webcams, Wifi, microphones
  - For a list of popular platforms see **Appendix K**

Our Action

After ongoing research and dedicated exploration from designated team members. We chose Zoom and later Zoom Healthcare as the primary virtual service platform. We found this platform to be user friendly and meet our facilitation needs. Zoom has a variety of account and in meeting settings **(See Appendix H)**. Zoom reassures that their healthcare accounts are compliant with PHIPA and PIPEDA standards.[1]

To learn more…

Zoom Website www.zoom.us
- Resources: video tutorials, articles, live demos and trainings, FAQ etc. – top right hand corner of home page
Zoom Healthcare[1]: https://zoom.us/healthcare   includes PHIPA/PIPDA information sheet
Zoom Security Page https://zoom.us/security
Zoom Privacy Policy https://zoom.us/privacy
Zoom Settings: https://support.zoom.us/hc/en-us/articles/201363253-Account-settings
Zoom Youtube Channel – video tutorials - click "how to zoom" playlist
https://www.youtube.com/user/ZoomMeetings/playlists

For more on how we navigated implementing the use of zoom, see Staff Involvement & Process (pg 16)

Security and Privacy

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Considerations

- What security concerns do we have?
- What experts or resources are available for us to consult with? The Centre, privacy officers, privacy lawyers, etc.
- What policies, procedures and processes need to change/be created to support virtual service delivery?
- Will we have different security protocols for different services? Ex. Social rec group vs. curriculum based groups, vs. one to one supports
- How do we transparently share the limitations of confidentiality when using a virtual space? Ex. Forms, in group, etc.
- How are we gaining <u>informed</u> consent? Ex. Verbal, written, email, documents
  - What are the legal implications of these consent processes?
- What are we going to do if someone cannot give consent using our current process? Ex. PDF errors, lack of technology needed, etc

Our Actions

- Using Zoom Healthcare for increased privacy and encryption measures
- Our organization sought legal consultation specific to privacy and compliance with PHIPA and PIPEDA
- Zoom Privacy Features (for more information and other features **see Appendix H**):
  - Waiting room – allows you to admit people to the meeting or decline
  - Password protected "meetings" – requires a password to enter
  - Remove participant feature – removes someone from meeting – settings determine whether or not removed participants can rejoin the session
  - Lock room – stops anyone from entering meeting even with a password
- We schedule two staff per group – Host & Facilitator **(see Appendix A and B)**
- Confidentiality is addressed in the following places:
  - Participant Guide **(see Appendix C)** – given to participants before group
  - Service Agreement – our confidentiality form
  - Waiting room message (viewed by all people before entry to the room)
  - In Group – Conveying Duty to Report, etc
  - Staff protocols **(see Appendix A and B)**

Participant Experience

- How will we support accessing technology?
- How will we support technology/platform related challenges in groups?
- What are we offering individuals who cannot access online technology? Ex. Care packages, warm lines, phone services etc.
- How are we promoting virtual services?
- How are we able to support concerns from the community about virtual service? Ex. Comfort, confidentiality, etc
- How do we ensure we are meeting the need of our participants? Ex. Listening to informal feedback, formal data collection, etc

Our Action

Based on ongoing feedback from the community and system needs, the Centre created two streams of online service. Self-Help Groups and Social Connections. All groups and activities are facilitated by trained peers. Mindfulness Moments are facilitated by peers with yoga and mindfulness certifications. For more information and full schedule: https://cips-shh.wixsite.com/cips/our-virtual-world

Self- help groups (Wellbeing Group, Navigating Stress and Anxiety, Daily Wellness Planning)
- Registration required, stronger privacy settings and protocols
- Psycho-educational support and wellness drop in groups (once registered).
- Staff facilitate supportive discussions based on group needs, sharing resources and information.
- Peer Interns help to support the facilitator to role model our values and support any participant that needs one-to-one support during the group.

Social Connection Groups (Mindful Moments, Centre Café, Games Room, Sharing Circle)
- No registration required
- Psycho-social recreation drop in groups for supporting overall wellness and mental health through socializing, mindfulness and recreation activities.
- Staff facilitate activities with support from Peer Interns and both staff and interns role model our values.

* = Specific to Self-help groups

Promotion

- Reached out to all past participants and emailed partners updated group information as it evolved
- Use of website
    - o Updated with all current information
    - o Links to groups

    Tip: having links on your website rather than flyers allows you to update and troubleshoot technology when necessary. Ex. Instantly update a link that is not working

Pre-participation

- Participant Guide to navigate our values, virtual housekeeping, FAQs and online etiquette (see Appendix C)
- Peer Support Navigators - guide registration and answer virtual service related questions
- Staff support peers wanting to access services in navigating technology and platform as needed
- Creation of an online registration process via our website in addition to our existing phone and email methods*

Access

- Password-free links on website for Social Connection groups
- Fillable PDF Service Agreement*
- "How to Create a Digital Signature" guide* (see Appendix E)
- Welcome Letter* - gives registered participants the password for all groups and other important general group information. Ex. Information about locking the room (see Appendix D)
- Peer Support Navigators support individual barriers to access and warm transfer into group supports

In Group

- Creation of a welcome slide that orients participants to platform controls
- Revised roles of facilitation team to better fit virtual context
    - o Facilitator – Leads conversation and stays present with group
    - o Host – Maintains security and safety of group, tech support, back up if facilitator technology fails
    - o Peer Interns* – Supports facilitator and participants, one to one support as needed via private chat

Staff Involvement and Process

- What does our staff team need to facilitate virtual groups?
- How will we communicate changes to our entire team?
- What resources does the team need to be successful?
- What training and orientation is needed?
- How will we offer supervision and support regarding changes?
- How will we support employee wellness through changes? (pace, expectations, policies, group activities, check- ins etc)
- Who on our staff team can support the different parts of the process? Consider strengths and capacity Ex. Administration processes, technology and program development
- What is the capacity of our team to support changes needed? Who can be "redeployed" differently? Or who has been redeployed elsewhere (pandemic specific)?
- What unique skillsets does our team possess that we can draw on? Ex. Certifications, Area of Specialities, Skills, etc
- How we will we "roll out" our new programming? All at once? Soft Launch?
- Do you have the capacity to back-up groups if a staff person is sick/ on vacation?

Our Action

Supporting our Shift to Virtual Services

- We implemented daily team huddles – Troubleshooting, planning, ongoing staff feedback loop for resources and program development
- Delegation and small working groups
    - Identified staff members who could develop guides, checklists for participants and staff etc.
        - Virtual Facilitator Checklist
        - Virtual Host Checklist
        - Participant Guide
        - Data entry collection and input guides
        - Quality Improvement initiatives
        - Consultation with embedded evaluator
    - Identified staff who could easily develop new programing
        - Mindfulness
        - Yoga
        - Psycho-social recreation

- o Facilitation team used previous, in-person curriculum to inform new virtual psycho-educational groups
- o Identified two staff members to support technology platform related materials, orientation and training
  - ▪ Ongoing Ad hoc staff practice sessions with the platform with staff who are knowledgeable about Zoom
  - ▪ Participant guide and sharing existing zoom resources
  - ▪ Offered a zoom training

Launching our Virtual Services

- Pilot – Started with a few groups, offered to existing registered members (kept continuing service), increased groups each week
  - o Allowed for shared learning and feedback with existing trust
  - o Allowed for more time to further develop virtual program, resource development, orientation and further training
- Scheduled time for pre and post debrief for the facilitation team (facilitator, host, volunteer peer interns) to meet, communicate, debrief and discuss feedback
- Created a shared schedule to outline all virtual our programming and the facilitation team involved
- Scheduled intentional time prior to group to navigate participant technical challenges

Moving Forward

- Listened to peer and system feedback and developed widely and easily accessible programming accordingly
- Increased groups based on comfort and capacity
- Evaluated staff capacity / workload distribution and revised the group calendar for the following season in correspondence with peer feedback and attendance data.

Data Collection and Evaluation

- What data does our organization collect for reporting purposes?
- What data do we collect for quality improvement and evaluation of our services?
- What protocols does your organization have in place to secure data when in program polling technology is used?
- Will we create evaluation pathways for new virtual services?
- How will we collect the chosen data? In session, virtual survey platforms, phone etc.
- How can our chosen platform support this process? Ex. Zoom polls
- How will we use the data we collect?

Our Action

We use the data collected to inform programing, receive feedback and for reporting purposes

- Survey Monkey – post-group evaluation form **(See Appendix F)**
- Zoom Polls (Social Connection groups) – quick feedback questions. **(See Appendix F- Step 1)**
- Zoom polling data **(Appendix F - Step 1)** was then entered anonymously into a survey monkey online. The data collected enable leadership to have real time response rates and provided opportunity to understand volume flow and participant experiences during every Social Connection group to assist with quality improvement initiatives. **(See Appendix F - Step 2)**
- Reviewed and enhanced our data entry and collection to align with our PDSA and provide real time data to the system
- Data was used to chart FTE equivalents with volume of contacts to assist in staff resourcing of virtual direct service groups and staff capacity in relation to workload.
- We were able to use the data collected to evaluate which groups, days and times had higher participation **(Volumes Assessment)** and cross reference this with staff capacity and sustainability to inform our Phase 2 group calendar **(Time Study).**
- Ad hoc focus groups which included our Volunteer Peer Interns enabled us to gain key insights into areas of improvement not considered or identified by staff or participants partaking in virtual group supports.
- Verbal feedback from participants for troubleshooting and consideration

Please note: you cannot guarantee other people are not recording meetings using third party applications

Appendix A: Facilitator Checklist

The role of the Facilitator is to guide the group. The Facilitator remains focused on the peers in the room and the flow of discussion. They lead the creation of a safe and inclusive environment so that peers can feel comfortable sharing.

Before Group

Registration-based Groups

☐ Navigate to Zoom and join appropriate meeting ID **30 minutes** before the group starts

☐ Ask interns to open their chat window so that they can see any requests for one-to-one support

☐ Remind the team that if someone goes into a supportive one-on-one conversation, they are to notify the Host, turn their video and audio off and change their name to UNAVAILABLE

☐ Check in with interns to make sure they have a resource list accessible (i.e., COAST, etc.)

☐ As a team, establish who will support leading the conversation in creating our "I will support myself by…" document and the who will scribe in the chat window

Social Recreation Groups

☐ Review the guide for the specific social rec activity you are hosting (Ex. Scattegories) 24 hours prior to hosting the scheduled group. This can be found on the Agency Server in the TEACH 3.0 folder – All Groups Folder – Social Connection Folder.

☐ Navigate to Zoom and join appropriate meeting ID **20 minutes** before the group starts

☐ Briefly check-in with Host regarding format for social connection activity and potential technical issues that could transpire during group.

☐ Download and set up the Zoom app on your work phone as a back-up in the event you lose internet connection through your home internet provider. (Your phone has data)

☐ Change your name to: **Name – Facilitator**, direct interns to change their name to: **Name – Peer Intern**

☐ Open the **SHH Participant Guide for Virtual Groups** for quick referral of Values in Action and housekeeping at the start of group

☐ If you are using a second screen/account to share game boards or documents confirm the host has designated this account as a Co-Host to allow the share-screen feature.

During Group

- ☐ When the group starts introduce yourself and the team

- ☐ Review our Community Values and Housekeeping document

- ☐ Let participants know that you may call on them to share or engage in the activity. Inform them that when called upon, they have the option to pass or not engage if they wish.

- ☐ At the end of the group prompt the Host to launch the group poll/paste the survey link in the chat. Let participants know the purpose is to gather feedback, which then informs our programming

- ☐ Highlight upcoming groups and other groups/services offered by the Centre. Prompt Host to post website information, warm line and peer navigator contact information in the chat box.

*In Social Rec groups use your discretion to evaluate the group dynamic and level of engagement. The group is set for a certain time period but this does not mean it has to last the full time. If the group energy is losing momentum, ask the group if they are comfortable with ending the group for that session.

Appendix B: Host Checklist

The role of the Host is to support the Facilitator. They support the background and technical aspects of the group so that the Facilitator can remain focused on the discussion and peers in the room. The Host is also back-up facilitation in cases of Facilitator technology/internet challenges.

PRE-GROUP

*For Social Recreation Groups please review the guide for the specific social rec activity you are hosting (Ex. Scattegories) 24 hours prior to hosting the scheduled group. This can be found on the Agency Server in the TEACH 3.0 folder – All Groups Folder – Social Connection Folder.

Registration-based Groups	Social Recreation Groups
☐ Log in to the appropriate zoom account at www.zoom.us **30 minutes** before the group starts. Please be sure to use the Zoom website *NOT* the Zoom app.	☐ Log in to the appropriate zoom account at www.zoom.us **20 minutes** before the group starts. Please be sure to use the Zoom website *NOT* the Zoom app.

☐ Assign the Facilitator and interns as Co-hosts

☐ Change your name to: **Name – Host**

☐ Change *Chat* and *Share* permissions to "Host only" – Keep the chat window open to see any messages from participants

☐ Open **Attendance Sheet** and enter the group information

☐ Open **Participant Guide** in order to troubleshoot participant IT challenges

☐ Click the *Participant Window* to view the waiting room

As Peers Join (15 minutes before group starts)

☐ Peers will appear in the "Waiting Room" when they attempt to join the group, admit peers into the room

☐ Enter participants' information on the Attendance Sheet

☐ Assist peers through any technical issues that occur

☐ Check the teach@shhalton.org inbox to see if there are any notifications that someone has navigated to the incorrect zoom room. If their name or email is displayed in the notification use their contact information to assist them in getting into the correct room.

☐ If anyone dials into the group ask them for their first name and let them know you are changing their screen name for the group to see

*Zoom has a function that allows participants to use their phone as a speaker & microphone for a meeting they are attending on another device. If you see someone "on the phone" while in a meeting politely inquire if it is being used for the purpose of the group.

During Group

Registration-based Groups

☐ 10 minutes after the group has started engage the "Lock Room" feature – nobody else will be able to enter the waiting room/group.

☐ If people "drop out" of the group unexpectedly turn off your camera, mute your mic and use EMHware to find their contact information and offer whatever support may be needed (technology, peer support, etc)

Security Protocol

In the event that someone in the group has not completed our registration package or is behaving inappropriately (prejudice/discrimination, refusal to follow guidelines or displaying graphic content) we have options available to us:

- If a peer joins who is not known to us, the host will mute them and turn off their video. They will then move them to the waiting room and message that individual. From here we can either suggest registering via the website, accessing social connections or calling the warm line.

Please note you will be messaging the entire waiting room, if there are others there they will see your messages. Participants cannot respond to your messages - please direct them to call your work cell to have a one-to-one conversation

- If a peer is registered and refusing to follow the guidelines we can move them to the waiting room. Here we can message the waiting room to engage in a conversation and possibly re-admit.

Please note you will be messaging the entire waiting room, if there are others there they will see your messages. Participants cannot respond to your messages - please direct them to call your work cell to have a one-to-one conversation

- If a meeting is "Zoom Bombed" – protocol is to "remove" the individual from the group. This removes them from the entire live session, unable to rejoin. We then lock room. This is done for the Self-help and Social Connections groups.

At the End of Group

Registration-based Groups	Social Recreation Groups
☐ Paste the link to the Survey Monkey in the chat: https://www.surveymonkey.com/r/virtual20	☐ Launch the Zoom Poll
☐ Change chat settings to "Everyone." Let the peers know that if they would like to connect with each other outside of the Centre they are welcome to hang back for a minute, we will open up the chat and you are welcome to exchange emails.	

Post-Group

☐ Review Attendance Sheet with the team to ensure it is accurate

☐ Enter all data (Attendance, poll data, etc)

☐ Save the attendance sheet in the agency drive, in the S:\TEACH 3.0\Confidential\Data folder

- Use the date as the first part of the name in this format YYYY-MM-DD
- Add "Attendance" and the short form code for the group (see chart below)
- Example of a completed file name: **2020-04-01 Attendance VSH-DWP**

VSH = Virtual Self Help
WB = Well BEing
DWP = Daily Wellness Planning
NSA = Navigating Stress & Anxiety

SC = Social Connections
MM = Mindful Moments
GR = Games Room
VC = Virtual Café
TSC = The Sharing Circle

VALUES IN ACTION

FOR

GROUP PARTICIPATION

Support & Housing - Halton's

Agency Values

our agency core values

person directed supports
we put people first

connection + engagement
we start conversations,
build and maintain relationships,
and are reflexive and responsive
in our practice

health + wellness
we focus on practices that inspire
our culture

Support & Housing - Halton
shhalton.org

diversity • integrity • respect
quality improvement
advocacy • collaboration
self-determination
effective communication
lifelong learning
mutual trusting relationships
accountability • safety
personal growth • hope
equity • accessibility

Support & Housing - Halton
shhalton.org

VALUES IN ACTION
FOR GROUP PARTICIPATION

As a community, we are grounded in our values. These values create a safe and inclusive environment for us to gather and share our journey. Our community values the following:

Integrity, Authenticity & Trust

- We will be respectful of each other's privacy.
- SHH Staff will only break confidentiality if someone expresses they are at risk of serious harm to themselves or others; or if a child under the age of 16 is at risk of being harmed.

Dignity, Respect & Social Inclusion

- We will support an environment that is free from stigma, prejudice and discrimination.

Empathetic & Equal Relationships

- We will be open-minded to each other's journey and experiences.
- We will share our time together equitably so that there is space for all to share.

Lifelong Learning & Personal Growth

- We recognize that differences of opinion are an opportunity to hold space for each other without judgement.

Health & Wellness

- In support of each other's wellness: we will share the <u>impact</u> of the traumatic experiences we have been through rather than the details of the experience itself.

Self Determination

- Everyone is invited to speak and share as they are comfortable. Silence is OK and we have the right to 'pass' if we would prefer to just listen.

**In collectively upholding these values, we create a space of
Hope & Recovery for everyone here today.**

WHAT IS DIFFERENT
ABOUT VIRTUAL GROUPS

Please make sure you are in a space that is private, where we can share without others hearing or seeing the group from our device.

- Remember that the space behind us is on camera and visible to the group.
- The Team will mute participants to prevent background noise/feedback so that we can all hear each other. You can unmute yourself to share at any time!
- The Facilitator will not respond to chat messages, they are focused on the group discussion. If you need assistance, please contact the Host or one of the other team members.
- Sometimes the internet drops its signal, meaning that the meeting could end abruptly or one of the staff or participants could suddenly disappear. If this happens, please close your Zoom window and follow the initial steps you followed to re-join the meeting.

Registration-based Groups	Social Recreation Groups
→ To engage in one-to-one support please use the drop down menu in the chat to message one of our interns.	→ At the end of the group we will **launch a poll**. It is completely anonymous and allows us to collect feedback on your virtual experience today.
→ If you suddenly go off camera while looking upset or distressed someone from the team will try to check in and see if they can be of support. Please be aware that if we do not have your contact information we will not be able to connect with you.	
→ When leaving the group early or taking a break, please send a chat message to the Host and turn your audio and video off.	
→ At the end of the group we will **post a link to a survey**. It is completely anonymous and allows us to collect feedback on your virtual experience today.	

- We have a variety of groups and services available (ie Social Connections, Self-help)
- One-to-one peer support is also available to you through our alternate peer programs:
  - → Our Peer Warm Line is available from Monday to Friday from 12:00pm (noon) until 5:00pm and can be reached by calling 289-644-1480
  - → Peer Support Navigators are also available for short term one-to-one appointments

From time-to-time we update the zoom links to our groups, all of our up to date information is available on our website at t-e-a-c-h.org

HOW DO I SET UP ZOOM?

To start using Zoom on your desktop computer, laptop, tablet, iPad or phone, you will first need to download the free Zoom application. (A Zoom account is not required to access our meetings)

<u>Download sites:</u>

For the iOS app: https://apps.apple.com/us/app/id546505307   The app uses this icon -
ZOOM Cloud Meetings

For the Android App:
https://play.google.com/store/apps/details?id=us.zoom.videomeetings

For PC: https://zoom.us/support/download

OKAY, I HAVE THE APP…NOW WHAT?

Joining is easy! Navigate to our website to get the latest links and updates: www.t-e-a-c-h.org

You can also access the following tutorials:

How to Join a Zoom meeting:
https://www.youtube.com/embed/hIkCmbvAHQQ?rel=0&autoplay=1&cc_load_policy=1

Navigation of Zoom on a cell phone will look slightly different than navigation of Zoom on a computer. Here is a tutorial for using Zoom on your phone/iPad:
https://support.zoom.us/hc/en-us/articles/201362993-Getting-Started-with-iOS

TECHNICAL TROUBLESHOOTING:

What do I need? (System requirements)
https://support.zoom.us/hc/en-us/articles/201362023-System-Requirements-for-PC-Mac-and-Linux

Ensuring your webcam permissions are activated:
https://support.zoom.us/hc/en-us/articles/201362313-How-Do-I-Test-My-Video-

Testing and using your microphone. Turning on and off microphone and video:
https://www.youtube.com/watch?time_continue=7&v=-s76QHshQnY&feature=emb_logo

You can also use a phone to act as a speaker/mic once in the meeting, if your device does not have this function.

HOW TO USE A PHONE TO DIAL IN:

- If you have access to the internet you can navigate to our website and find the group you wish to join. From the numbers listed, dial the number with the area code closest to you. If you do not have access to the internet, please contact one of our Peer Support Navigators at 905-845-9212, ext 390 Mon-Fri 8:30a-4:30p and they will help connect you with groups via phone.

- You will be prompted to enter the Meeting ID and then click #, the Meeting ID is also on the website. You then will be prompted to enter a personal ID, you do not need to do so, simply click #

- In our peer-led Self-Help groups you will then be asked to enter the password and then click #, this is in your Welcome Letter. (This does not apply in our Social Connections groups)

- You will then enter the waiting room for the group, the facilitation team will let you in shortly.

Our staff are happy to support you through testing technology in a one-to-one setting before group if you would find it helpful. Our staff are available to assist you in navigating technical challenges as you join, 15 minutes prior to the group starting.

GROUP ETIQUETTE FOR ONLINE SESSIONS:

Online privacy is a group effort: Reminder that we cannot 100% guarantee that all participants are abiding by the group agreement to maintain a private space when connecting virtually, we trust that others feel the same way about our participation. We do address this during the member registration process, in the group guidelines and at the start of every session.

What privacy protocols does SHH have? We have two paths of service. To create as safe a space as possible we use ZOOM features such as "waiting room" to admit participants, "lock room" to secure the space and utilizing the "remove participant" feature, if needed. These features are used in all of our groups. Please note that although Zoom has a recording function, this is disabled in our groups to ensure privacy and comfort. In addition to the zoom features, our Virtual Self-Help Groups have a registration process. This process ensures participants have signed a confidentiality agreement and are on the same page in terms of privacy. A password is issued for our Self-Help Groups, we ask that no one share the password.

What if my friend could benefit from the group? Can I give them the password? We want your friends and family to get the support they need too. They can access our groups by registering via our website! One of our peer navigators will contact them to complete their registration and welcome them to our community.

How can I help support group privacy? Our virtual groups are held in a space where confidentiality is a group responsibility. To do so, it is essential for all participants to support the creation of a safe space. We ask that all participants ensure that they are connecting to the session in a private space, or in a way that other people in their own environment cannot hear or see the group from our device. We will also be mindful that the space behind us in our own setting can be seen on camera and is visible to the other participants in the group.

How to notify someone that you need additional support and what is available to you? You will have the option to use a "chat" feature to get in touch with the host for any technical challenges during the meeting. If you would like emotional support you can use the same "chat" feature to message a Peer Mentor or Group Supporter, their roles will be side their name in the group.

What do you need to know about the virtual environment? In order to respect and honour each other's healing journeys, we request that you attend our virtual groups in a way that is similar to how you would attend an in person group. We invite you consider others regarding your attire and conduct, including not having anything that looks like a substance (i.e., cigarettes, alcohol, drugs) in view of others while attending our virtual groups. When needed you are welcome to turn off your camera. The reason that we request this is to ensure that everyone in the groups feels safe and welcome to attend.

WHAT DO I NEED TO KNOW
ABOUT VIRTUAL GROUPS

Something to be mindful of when in the virtual group room is the function of the microphone and on-screen video windows. We ask that you mute yourself when not speaking, as background noise (example: keyboard sounds, phone ringing, etc.) will cause interference and potentially cut off another speaker. The facilitation team will also mute participants for this purpose. Due to the functionality of Zoom on different platforms, some of you may need to navigate through different screens to see all participants or the facilitation team. We will navigate all technical issues together, as comfortably as possible.

How can I get additional support outside of the virtual group? Self-advocating for our needs will be important when accessing a virtual support space. As peers, we are our own experts and know our own needs best. When participants feel that additional support may be helpful, they have optional one-to-one peer support available to them. Our Peer Warm Line is available between 12:00PM and 5:00PM from Monday to Friday at 289-644-1480. The warm line is NOT a crisis line – it is for conversations up to 30 minute that offer a confidential and safe place to connect, be heard and have someone who can offer supportive listening. Additional one-to-one short term support appointments are also available with our Peer Navigators. To connect and setup an appointment please call 905-845-9212, ext 390 or email us at TEACH@shhalton.org.

Taking a break? In the virtual space we will not have a scheduled break. If you are stepping away from the screen for a bio-break, to stretch, etc., please message the group host, mute your mic and turn your camera off.

I can't stay for the whole session…what do I do? If you need to leave early, for any reason, during the group session, please initiate a chat with the group host in the chat box letting them know. This will let the staff know that you are well and do not require additional support. Staff do have the duty to report safety concerns and may have to share details if you are at risk of serious harm to yourself or others. We want to ensure everyone's safety and wellbeing while we are together in this virtual space.

Please connect with us anytime if you would like more information or support in connecting with our peer-led programs.

Telephone: 905-845-9212, ext 390

Email: TEACH@shhalton.org

Website: t-e-a-c-h.org

Welcome to the Centre

Thank you for completing your membership registration, your community awaits!

Appendix D: Welcome Letter

All of our programming is peer-developed and peer-led.   As a team we are grounded in the values of peer support. Knowing there is an increased need for services right now we are continuing to create new programming, please visit the website for the latest updates!

The password for all of our Virtual Self-Help Groups is_____. Please do not share, post or distribute.
Our virtual waiting room opens 15 minutes before the session and the groups will start on time. To preserve the safety of our group space, we will be using a Zoom feature to "lock" all groups after they have begun.

Our Core Values

Hope & Recovery

Empathetic & Equal Relationships

Integrity, Authenticity & Trust

Lifelong Learning & Personal Growth

Self-Determination

Dignity, Respect & Social Inclusion

Health & Wellness

**As a Member You Have
Access to All of Our Services**

Peer Navigation

Virtual Self-Help Groups

Peer Warm Line

Drop-In Social Connections

* Use Ctrl + Click on any of the above programs to be connected to our website*

You can connect with us Monday to Friday from 8:30am until 4:30pm at:
Email: teach@shhalton.org   Phone: 905.845.9212 x 390

Appendix E: How to Create a Digital Signature

To create a digital signature the file will need to be opened in Adobe. If this is not your computer's default please follow the steps below. If your computer does default to Adobe, skip to the next page.

OPTION 1 - To open with Adobe Acrobat manually (one-time only):

1. Right-click over the file you want to open to display the options window
2. Hover open the "Open with" option
3. Another window should appear next to the first one
4. Click on "Adobe Acrobat"
5. The file will open up with the selected program (but the default program is still the same)

Archive	2020-04-21 2:34 PM	File folder	
Participant Service Agreement - Email Version	2020-04-21 2:11 PM	Microsoft Word Docu...	17 KB
SHH_How to Create a Digital Signature	2020-04-20 11:54 AM	Adobe Acrobat Docu...	685 KB
☑ SHH_Virtual Group Participant Service Agreement	2020-04-17 12:05 PM	Adobe Acrobat Docu...	230 KB
The Centre_Virtual Grou		Adobe Acrobat Docu...	528 KB
The Centre_Virtual Parti		Adobe Acrobat Docu...	443 KB

Open with Adobe Acrobat Reader DC

Open
Print
Share
Open with   >   Adobe Acrobat Reader DC
Scan with Emsisoft Anti-Malware   Google Chrome
                                              Microsoft Edge
Always available offline   Word (desktop)
Restore previous versions
                                              Search the Microsoft Store
Send to   >   Choose another app
Cut
Copy
Create shortcut
Delete
Rename
Properties

If you are unable to print, physically sign and scan back your completed forms, digital signatures will be accepted for these fields:

Participant's Name: _____ (Please print)   Participant's Signature: _____   Date: _____ Day / Month / Year

If participant is under 16 years of age: Parent/Guardian's signature: _____

Agency Staff Name: _____ (Please print)   Agency Staff Signature: _____   Date: _____ Day / Month / Year

Witness Name: _____ (Please print)   Witness Signature: _____   Date: _____ Day / Month / Year

When you click with your mouse in any of the signature boxes, the following window will pop-up. Select the "Configure Digital ID" button:

Digital ID Configuration Required

This signature field requires a digital signature identity.

Would you like to configure one now?

[Help]   [Configure Digital ID]   [Cancel]

Select "Create a new Digital ID" and click "Continue"

Configure a Digital ID for signing

A Digital ID is required to create a digital signature. The most secure Digital ID are issued by trusted Certificate authorities and are based on secure devices like smart card or token. Some are based on files.

You can also create a new Digital ID, but they provide a low level of identity assurance.

Select the type of Digital ID:

○ **Use a Signature Creation Device**
Configure a smart card or token connected to your computer

○ **Use a Digital ID from a file**
Import an existing Digital ID that you have obtained as a file

○ **Create a new Digital ID**
Create your self-signed Digital ID

[Cancel]   [Continue]

Select "Save to File" and click "Continue"

Enter your personal information and click "Continue"

First and Last Name

Email Address

Country

Click Continue

Enter a Password of your choice (this is saved on your local device) and then click "Save"

Save the self-signed Digital ID to a file   ✕

Add a password to protect the private key of the Digital ID. You will need this password again to use the Digital ID for signing.

Save the Digital ID file in a known location so that you can copy or backup it.

Your Digital ID will be saved at the following location :

C:\Users\ehopkins\AppData\Roaming\Adobe\Acrobat\   Browse

Apply a password to protect the Digital ID:

Confirm the password:

⑦   Back   Save

Select Your Signature and click "Continue"

Sign with a Digital ID   ✕

Choose the Digital ID that you want to use for signing: Refresh

⦿ 📄 **Your Name** (Digital ID file)   View Details
        Issued by: Your Name, Expires: YYYY.MM.DD

⑦   Configure New Digital ID   Cancel   Continue

Input your Password and click "Sign"

Save your file and email it back to us at our secure and confidential email:_____

CENTRE for
INNOVATION
in PEER SUPPORT
SUPPORT &
HOUSING -
HALTON

Appendix F: Data Collection (1) Psycho-Social – Social Connections Groups

Step 1 - Zoom Poll

1. The virtual space provided me with access to supports I would not otherwise have had at this time (Multiple choice)

☐ Strongly agree

☐ Somewhat agree

☐ Neither agree or disagree

☐ Somewhat disagree

☐ Strongly disagree

2. I was comfortable in the virtual space today

◯ Strongly agree

◯ Somewhat agree

◯ Neither agree or disagree

◯ Somewhat disagree

◯ Strongly disagree

3. I will return again for virtual Social Connections support (Multiple choice)

☐ Strongly agree

☐ Somewhat agree

☐ Neither agree or disagree

☐ Somewhat disagree

☐ Strongly disagree

Step 2 – Survey Monkey

Social Connections poll results

1. Social Connections group name:

2. Date and time of group

Date / Time

Date	Time	AM/PM
MM/DD/YYYY	hh mm	-

3. Facilitator name

4. Host name

5. Total participants in attendance

Please use this form to fill in the number of entrants in each of the topics below

6. The virtual space provided me access to supports I would not otherwise have had at this time

Strongly agree	
Somewhat agree	
Neither agree or disagree	
Somewhat disagree	
Strongly disagree	

7. I was comfortable in the virtual space today

Strongly agree	
Somewhat agree	
Neither agree or disagree	
Somewhat disagree	
Strongly disagree	

8. I will return again for virtual social connection support

Strongly agree	
Somewhat agree	
Neither agree or disagree	
Somewhat disagree	
Strongly disagree	

The Centre for Innovation in Peer Support values your feedback and is committed to ensuring that your answers are kept anonymous. Your participation in this survey allows us to use your voice along with the voices of other peers to develop and improve our programming. Thank you for participating!

1. Session Date

Date / Time

Date

MM/DD/YYYY

2. Session type (Social Connections/Self-Help)

3. Session Name

4. Session Location

5. Considering the statements below, how would you rate today's session?

	Strongly agree	Agree	Neither agree or disagree	Disagree	Strongly disagree	N/A
The handouts were useful	○	○	○	○	○	○
The videos were useful	○	○	○	○	○	○
Self-directing my learning was appealing to me	○	○	○	○	○	○

6. Considering the statements below, how would you rate today's session?

	Strongly agree	Agree	Neither agree or disagree	Disagree	Strongly disagree
My understanding of the content has increased	○	○	○	○	○
I will apply what I learned today in my practice	○	○	○	○	○
The session provided me with opportunities to practice my skills	○	○	○	○	○
The session was effectively presented	○	○	○	○	○
An appropriate amount of time was provided for discussion and questions	○	○	○	○	○

7. Were there specific things that you liked about the session? Please tell us:

8. Are there some things that would have improved the session? Please tell us:

9. What other topics would be of interest to you? Please tell us:

Appendix G: Quick Print Key Considerations

Our Guiding Questions

- How do we stay consistent?
- How do we ensure privacy?
- How do we stay true to our values?
- What do we need to change?
- How do we operate as a team?
- What services do we want to move virtual?

Technology

- What platform do we use? Do we use different platforms for different services?
  - What do we need to know about these platforms? Ex. Security, cost, how many accounts etc.
  - What are our agency needs in a platform regarding policy, procedure, security and privacy, ethics and values? Ex. Security, cost, how many accounts etc.
  - Is the platform user friendly?
- Does staff have the hardware to move virtual? Computer/laptop, Webcams, Wifi, microphones

Privacy & Security

- What security concerns do we have?
- What experts or resources are available for us to consult with? The Centre, privacy officers, privacy lawyers, etc.
- What policies, procedures and processes need to change/be created to support virtual service delivery?
- Will we have different security protocols for different services? Ex. Social rec group vs. curriculum based groups, vs. one to one supports
- How do we transparently share the limitations of confidentiality when using a virtual space? Ex. Forms, in group, etc.
- How are we gaining <u>informed</u> consent? Ex. Verbal, written, email, documents
  - What are the legal implications of these consent processes?
- What are we going to do if someone cannot give consent using our current process? Ex. PDF errors, lack of technology needed, etc

Participant Experience

- How will we support accessing technology?
- How will we support technology/platform related challenges in groups?
- What are we offering individuals who cannot access online technology? Ex. Care packages, warm lines, phone services etc.
- How are we promoting virtual services?
- How are we able to support concerns from the community about virtual service? Ex. Comfort, confidentiality, etc
- How do we ensure we are meeting the need of our participants? Ex. Listening to informal feedback, formal data collection, etc

Staff Involvement & Process

- What does our staff team need to facilitate virtual groups?
- How will we communicate changes to our entire team?
- What resources does the team need to be successful?
- What training and orientation is needed?
- How will we offer supervision and support regarding changes?
- How will we support employee wellness through changes? (pace, expectations, policies, group activities, check- ins etc)
- Who on our staff team can support the different parts of the process? Consider strengths and capacity Ex. Administration processes, technology and program development
- What is the capacity of our team to support changes needed? Who can be "redeployed" differently? Or who has been redeployed elsewhere (pandemic specific)?
- What unique skillsets does our team possess that we can draw on? Ex. Certifications, Area of Specialities, Skills, etc
- How we will we "roll out" our new programming? All at once? Soft Launch?
- Do you have the capacity to back-up groups if a staff person is sick/ on vacation?

Data Collection & Evaluation

- What data does our organization collect for reporting purposes?
- What data do we collect for quality improvement and evaluation of our services?
- What protocols does your organization have in place to secure data when in program polling technology is used?
- Will we create evaluation pathways for new virtual services?
- How will we collect the chosen data? In session, virtual survey platforms, phone etc.
- How can our chosen platform support this process? Ex. Zoom polls
- How will we use the data we collect?

The Centre will be offering a virtual zoom orientation based on our learnings, for more information please visit our website.

We recommend signing into your web portal and reviewing your account settings to learn more about the features and options available to your organization.

Zoom Settings: https://support.zoom.us/hc/en-us/articles/201363253-Account-settings
Zoom Youtube playlist, featuring short videos on various features: https://www.youtube.com/playlist?list=PLKpRxBfeD1kEM_I1lId3N_Xl77fKDzSXe
Zoom hosts daily trainings on how to use the platform: https://support.zoom.us/hc/en-us/articles/360029527911

Feature	Setting Options – Our observations * = manage in account portal settings	How we use it
Scheduling Zoom meetings	• Start a meeting and invite someone (find in participant box) or schedule meetings in advance - Meetings can be recurring • Tip: easy to see all meetings in web portal meetings page • Tip: With extensions you can create zoom meetings from your calendar directly • Meetings can include computer and/or phone options • Choose country for relevant phone numbers • You can create meeting templates to ensure consistency • https://www.youtube.com/watch?v=XhZW3iyXV9U	• We use the web portal to schedule all of our meetings and have created meeting templates to ensure consistency in set up
Password Protected Meeting	• Meetings are password protected by default, however requirements for passwords can be disabled and managed in web portal settings* • https://www.youtube.com/watch?v=fhZk1tUtto8&list=PLKpRxBfeD1kEM_I1lId3N_Xl77fKDzSXe&index=37	• We use password protected rooms for our Self-Help closed groups • We do not use passwords in our social connection groups
Security Icon In meeting control	• **Lock room feature** - Once a meeting is locked anyone trying to join will be notified the room is locked and they cannot join • **Enable waiting room** (see below) • **Enable or Disable participants' ability to share, chat or rename themselves** (see below) • https://www.youtube.com/watch?v=6JbDfXIElT0&list=PLKpRxBfeD1kEM_I1lId3N_Xl77fKDzSXe&index=39	• Our Self-help groups are locked after 10 minutes • We will use the lock feature if there has been an incident in our Social Connections groups to ensure additional comfort for that session

Waiting Room	• Control when participants enter the meeting • Send participants back to the waiting room • **Send a message** to the waiting room • Customize a **welcome message** with a meeting title, logo and description* • Enable through: Account portal, scheduling a meeting, in meeting security icon • https://www.youtube.com/watch?v=ySas2Rgi6yA&list=PLKpRxBfeD1kEM_I1lId3N_Xl77fKDzSXe&index=35	• We use the waiting room message in the waiting room as part of our privacy and consent process: • Include our waiting room message? + please reference our legal disclaimer if needed • We use the waiting room to monitor who is entering the space • If there is a concern, facilitators/host can send a participant back to the waiting room and then invite the participant to call the facilitator for feedback to rejoin the group
Chat Box	• **Manage who can chat with who** in the meeting- click "…" in chat box or manage in web portal settings* • **Upload and share files** to the chat box for easy download • The chat can automatically save to your account* • Prevent participants from saving or copying chat* • Disable chat, file sharing etc. (security icon and web portal settings*) • https://www.youtube.com/watch?v=DkuY4nedWbo&list=PLKpRxBfeD1kEM_I1lId3N_Xl77fKDzSXe&index=33	• We set chat to host only – allowing participants to • We use chat for one to one conversations, tech support and notifications between staff/volunteers • We disable any saving and copying • We share flyers and resources through file uploads
Managing Participants	• **Manage participant names, camera, microphone** etc. (click"…" in video tile or participant name in participant box) • **Invite participants** to the meeting • **Remove participants** (removed participants can be allowed to rejoin or not allowed to rejoin the meeting*)	• We rename phone participants or assist people in changing their names if they wish to do so • If there is a concern in a group, a camera can be shut off right away
Audio and Phone	• Meetings can be set to allow phone call participation – manage while scheduling meeting or in web-portal settings* • Participants can join with a combination of phone (as microphone and speaker) and computer (visual)	• We allow people to self-determine the ways in which they are comfortable attending and offer all options if there are identified technology barriers
Screen Sharing	• You can allow participants to share or only host (Click the "^" next to screen share icon or manage in web portal settings*) • You can share: • your entire screen, a program window (no one will see anything else on your screen), a portion of your screen (customizable)	• We set this to host only • We use this to share materials and game screens during groups and meetings • Host Only

	- a white board - videos (click optimize for video), - just sound ex. Music - Any visual being shared is outlined in green - https://www.youtube.com/watch?v=YA6SGQlVmcA&list=PLKpRxBfeD1kEM_I1lId3N_Xl77fKDzSXe&index=9	
White board and Annotation	- Whiteboard shares a blank screen with annotation tools - Annotation allows you to draw, stamp symbols, and type over any screen being shared - Annotation can be disabled, available to host only or to all participants - https://www.youtube.com/watch?v=QGQkAsKtriU	We use this for games
Polls	- Can be created in advance or during meeting - Results save as a report in the reports section of the web portal - Video: https://www.youtube.com/watch?v=erz4xtQHoVs	- Quick data collection for our social connection groups - other groups are directed to a survey on survey monkey for more robust feedback - We manually input the data into survey monkey
Breakout Rooms	- Host can automatically or manually assign participants to smaller meetings/groups - Breakout rooms can be created during scheduling of the meeting or within the meeting - Variety of settings available in meeting click "options" while setting up the breakout rooms - Video: https://www.youtube.com/watch?v=jbPpdyn16sY	- We use breakout rooms for small group discussions/games in staff meetings, communities of practice and are will be piloting using them in our direct service groups - We will be piloting the use of breakout rooms one to one conversations
Recording	- Meetings can be recorded using in meeting record icon - Manage settings in web portal settings, access recordings in the web portal recordings - If a meeting is recorded, participants are notified in the meeting https://www.youtube.com/watch?v=lZHSAMd89JE&list=PLKpRxBfeD1kEM_I1lId3N_Xl77fKDzSXe&index=15	- We have disabled recording* - We do not record groups and ensure this information is shared with participants **Please note: you cannot guarantee other people are not recording meetings using third party applications**

Additional Virtual Service Delivery Resources

We have included these additional resources for your consideration, although they are not exclusive to peer support, they offer insights into what healthcare and social services professional organizations have considered.

Guidelines for Uses of Technology in Counselling and Psychotherapy, Canadian Counselling and Psychotherapy
https://www.ccpa-accp.ca/wp-content/uploads/2019/04/TISCGuidelines_Mar2019_EN.pdf

Member Resources: Considerations for Electronic and Digital Counselling, Ontario Association of Social Workers
https://occccco.files.wordpress.com/2020/03/member-resources-considerations-for-electronic-and-digital-counselling.pdf

Electronic Practice Professional Practice Guideline, College of Registered Psychotherapists of Ontario
https://www.crpo.ca/wp-content/uploads/2019/03/FINAL-Electronic-Practice-Guideline-approved-01MAR2019.pdf

Toolkit for E-Mental Health Implementation, Mental Health Commission of Canada
https://www.mentalhealthcommission.ca/sites/default/files/2018-09/E_Mental_Health_Implementation_Toolkit_2018_eng.pdf

Popular Virtual Service Platforms

Ontario Telehealth Network (OTN)	https://otn.ca/
Go To Meeting	https://www.gotomeeting.com/en-ca/meeting/healthcare
Microsoft Teams	https://www.microsoft.com/en-ca/microsoft-365/microsoft-teams/group-chat-software
	https://techcommunity.microsoft.com/t5/microsoft-teams-blog/new-capabilities-to-empower-healthcare-organizations/ba-p/1217115
Google Hangouts - Healthcare	https://gsuite.google.com/industries/healthcare/
Adobe Connect	https://www.adobe.com/products/adobeconnect.html
Skype for Business	https://www.skype.com/en/business/
	https://www.microsoft.com/en-us/microsoft-365/blog/2017/02/16/new-virtual-health-templates-extend-skype-for-business-as-platform-for-developers/
Cisco Webex	https://www.webex.com/ https://www.cisco.com/c/en/us/about/trust-center/webex.html#%7Edata-protection-and-privacy

Appendix K Quality Improvement Resources - Health Quality Ontario (Ontario Health)

Health Quality Ontario (Ontario Health)
https://hqontario.ca/Quality-Improvement

HQO (Ontario Health) Quality Improvement Framework.
http://www.hqontario.ca/Portals/0/documents/bp/bp-webinar1-presentation-intro-en.pdf

Quality Improvement Guide. (2012).
http://www.hqontario.ca/portals/0/Documents/qi/qi-quality-improve-guide-2012-en.pdf
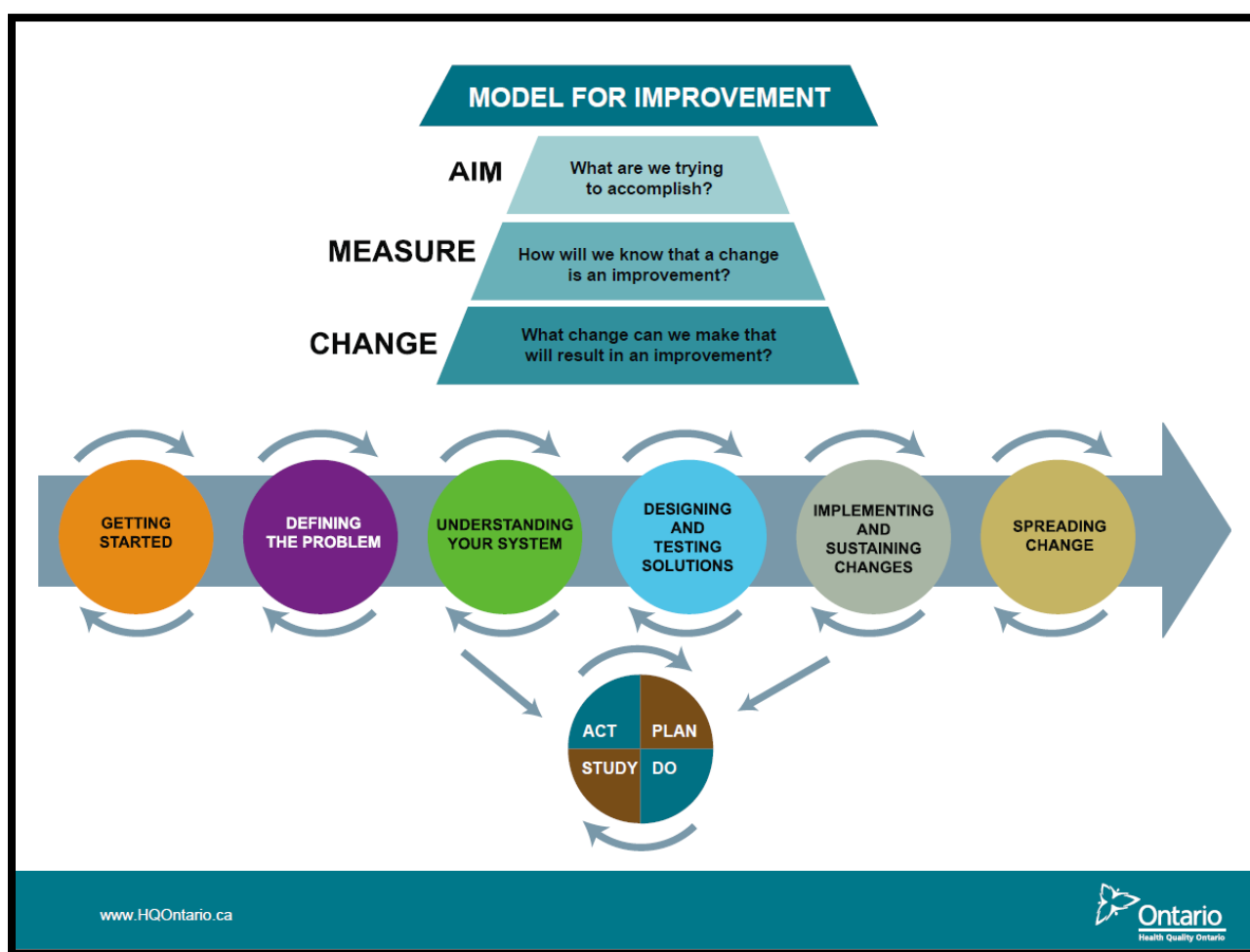

Image Source: HQO Quality Improvement Framework. Health Quality Ontario. [slideshow] retrieved from:
http://www.hqontario.ca/Portals/0/documents/bp/bp-webinar1-presentation-intro-en.pdf