McGill

McGill Psychoeducational and Counselling Clinic, Department of Educational and Counselling Psychology

La Clinique de psychoéducation et de counseling de McGill, Département de psychopédagogie et de counseling

# RECORDING AND SHARING VIDEOS WITH CLINICAL SUPERVISOR

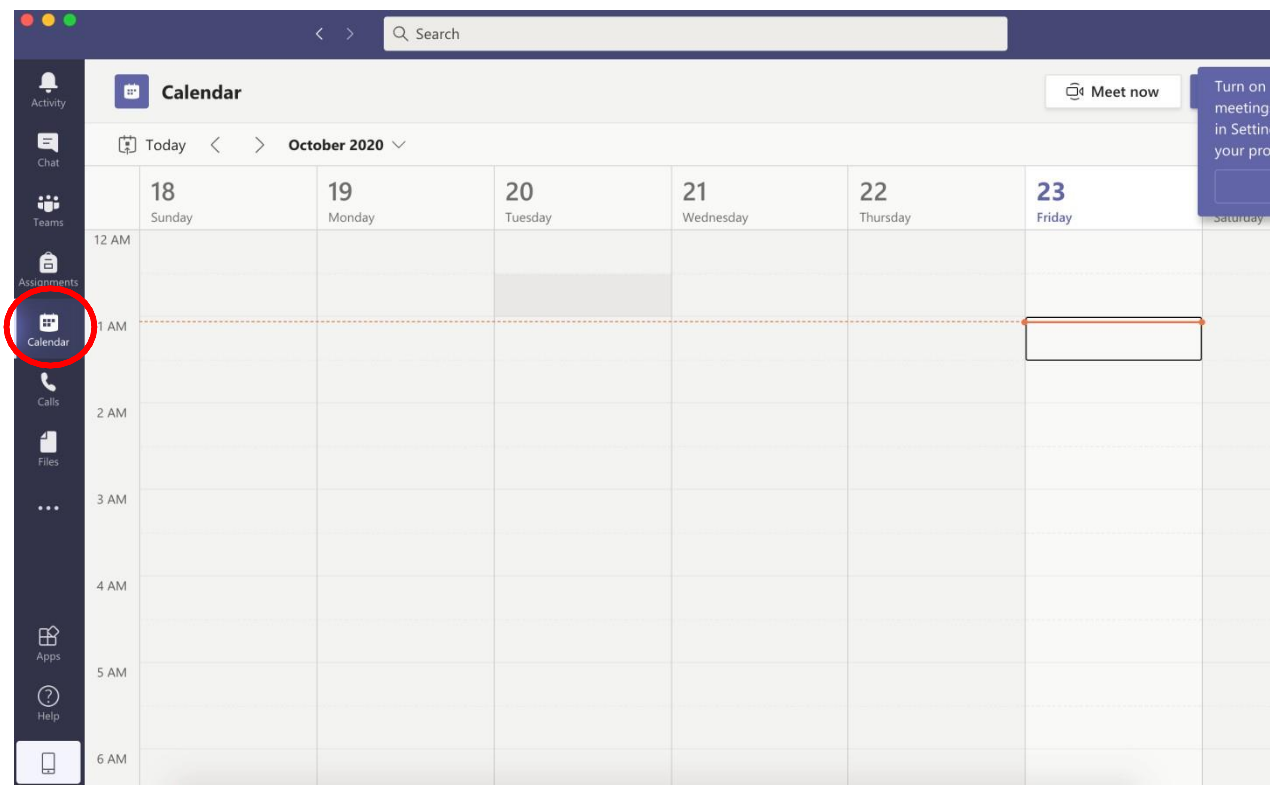
*Download Microsoft Teams https://teams.microsoft.com/downloads*

## Step One: Set up a Teams meeting with client on Microsoft Teams

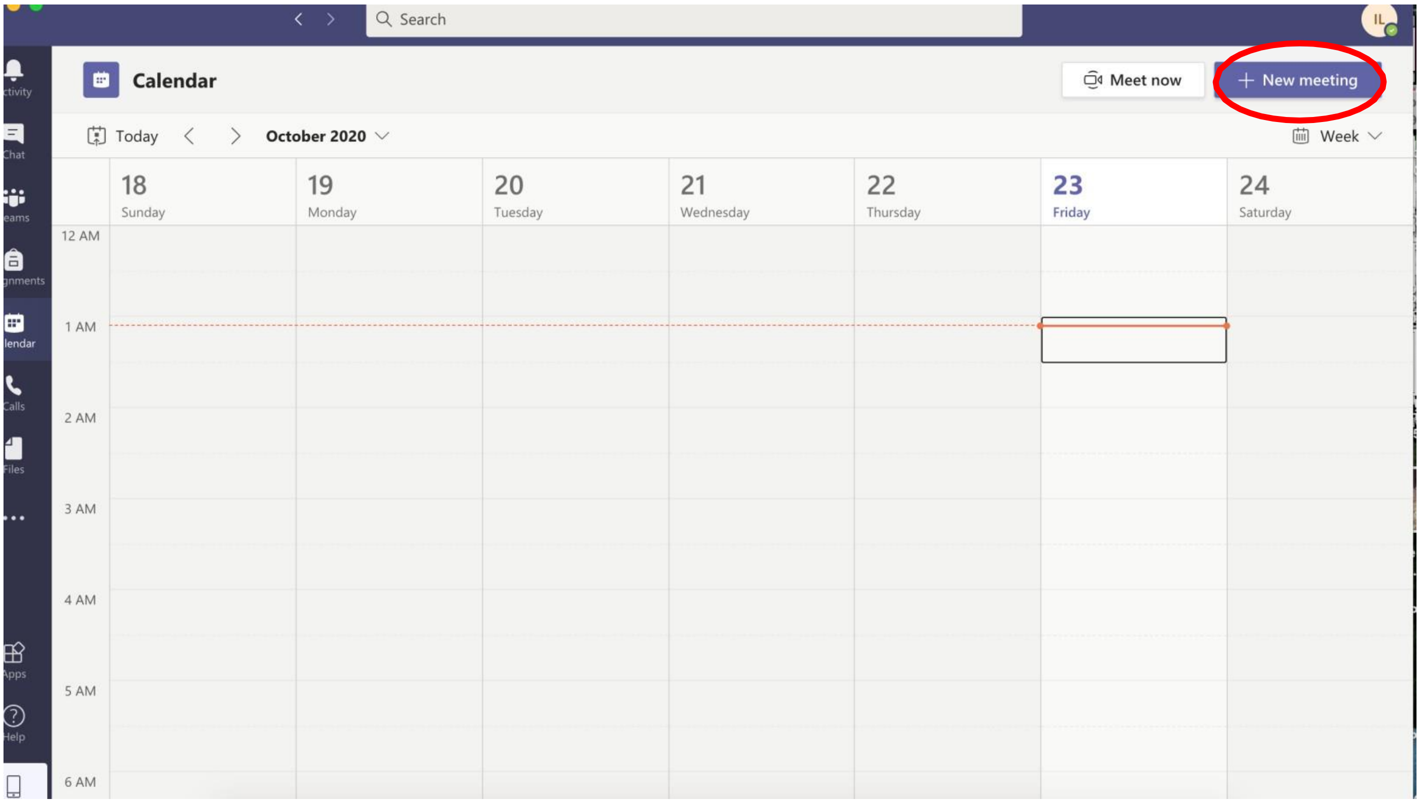
1. Open Microsoft Teams app.

   NOTE: In some courses, such as EDSP 682 and EDSP 705, you will be assigned a designated clinic resource email account/address that differs from your McGill student email account/address. For ALL clinical activities, students in these courses MUST login to Office 365 using your clinic email accounts. If you are a student who was assigned a resource account in a previous practicum, you resource account will have been renewed for you by your sponsor and you will continue using this same account. For students who were recently registered to an entry-level or first practicum, your instructor will have sponsored a newly created resource account for you and this information will be shared to you during your first few classes. This ancillary resource account will follow you throughout your clinical training.

2. Depending on your software/computer type (i.e, PC or Mac), you will see an icon called "**Calendar"** either on the side bar or top bar of the Teams application**; Click on that icon**. This will take you to a calendar laid out in week form.



3. Set up the meeting by clicking "**New Meeting"** on top right of screen. This step will promptly open up a "New meeting option."



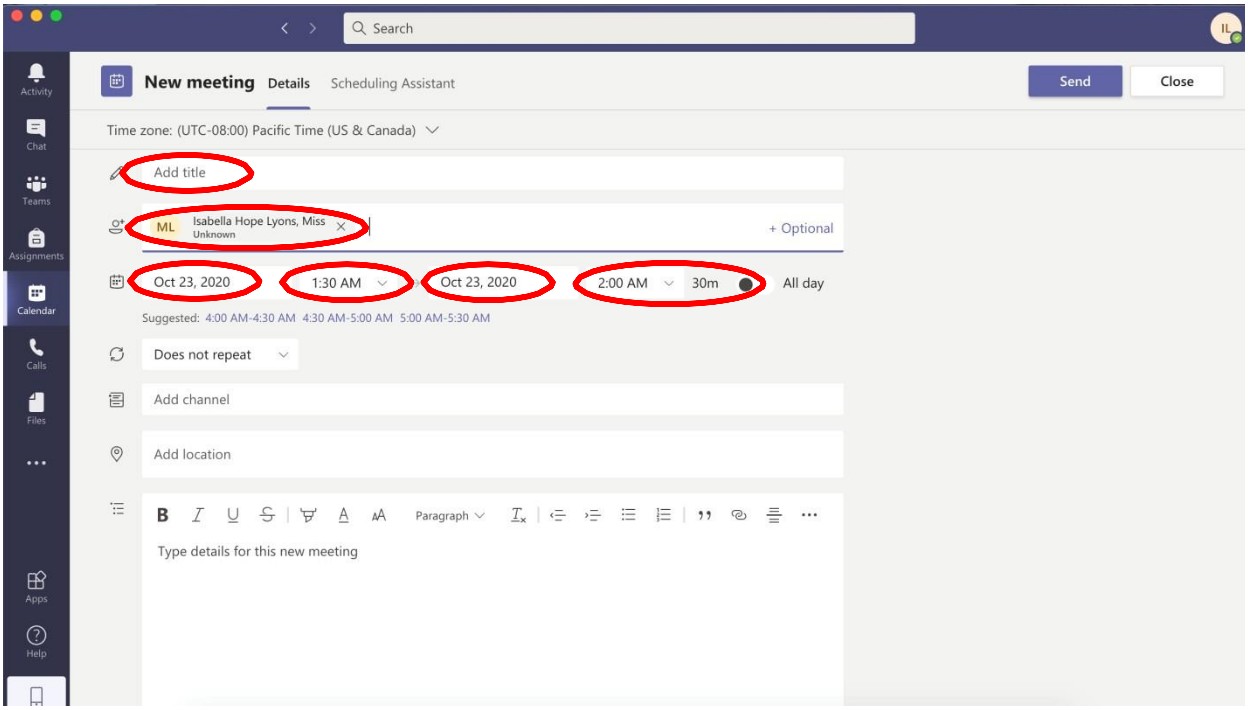

**4.** Enter the meeting details: *Title*[1], Date, Time, add Client's email *address*[2] and Clinical supervisor's email[3] and the supervisor trainee's email[4] (when applicable), click "**Send."**

[1] The new meeting title **MUST** follow this naming convention: **Virtual meeting ECP[Trainee's first name initial][Trainee's lastname][Client code][Course number][DD MM YR HH:MM]**

[2] For security reasons, the Client **must always be invited using a non-McGill email address.** Even if the client is a McGill staff or student, you must invite them with a non-McGill email address, such as gmail or hotmail address, etc. This means that the Client's email (used in the invitation) **MUST NOT** be a McGill address.

[3] You **MUST** and without exception add your course instructor (i.e., clinical supervisor that signs your reports) to the invitation. Otherwise, whether they can attend in person or not, they will not be granted access to your recording once your session is completed.

[4] If you are registered to EDSP 682 or EDSP 705, you will need to also share your invitation with your supervisor trainee (i.e., EDSP 715). Be sure to also add their email address to the meeting should this apply.

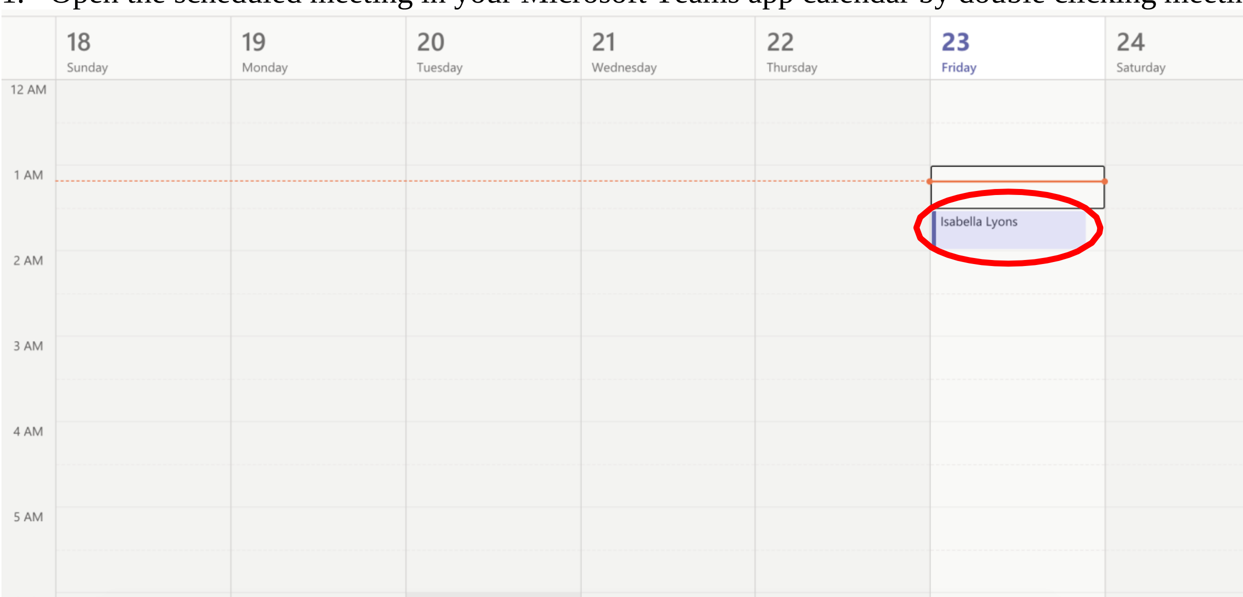



5. Client, trainee, and clinical supervisor (and supervisor trainee – if applicable) will be alerted by an automatic RSVP email, as well as a pop- up message that a meeting has been set up, prompting them to "Accept", "Decline" or "Maybe" the invitation.

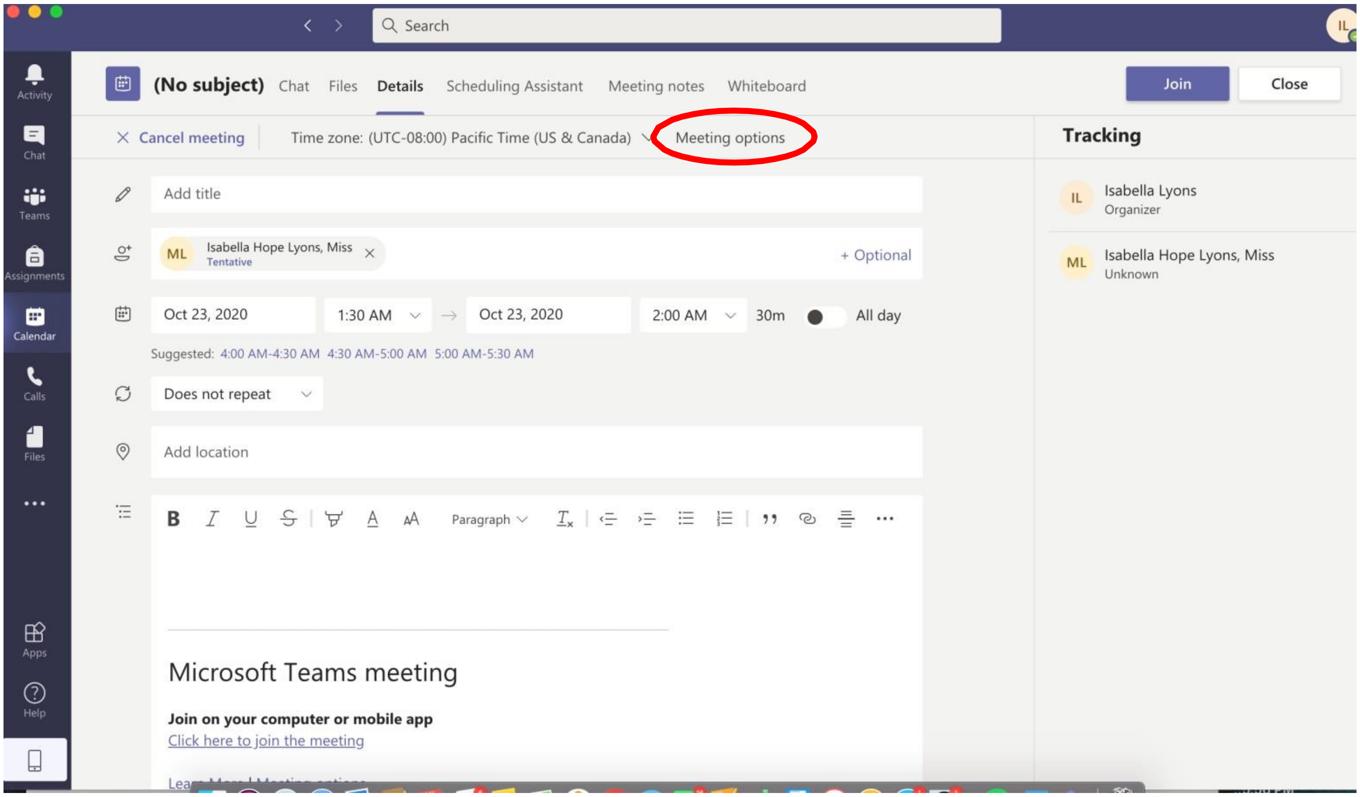
6. Be sure to alert client to verify their "Junk email" as the email may end up in that location if your email is not recognized. They should be advised to check that folder, in case they do not see your email. They can remediate this by indicating that the email is not "junk" and this should correct the situation for the receipt of future invitations.

**Step 2: Setup the "Present" option to allow yourself to record the meeting**

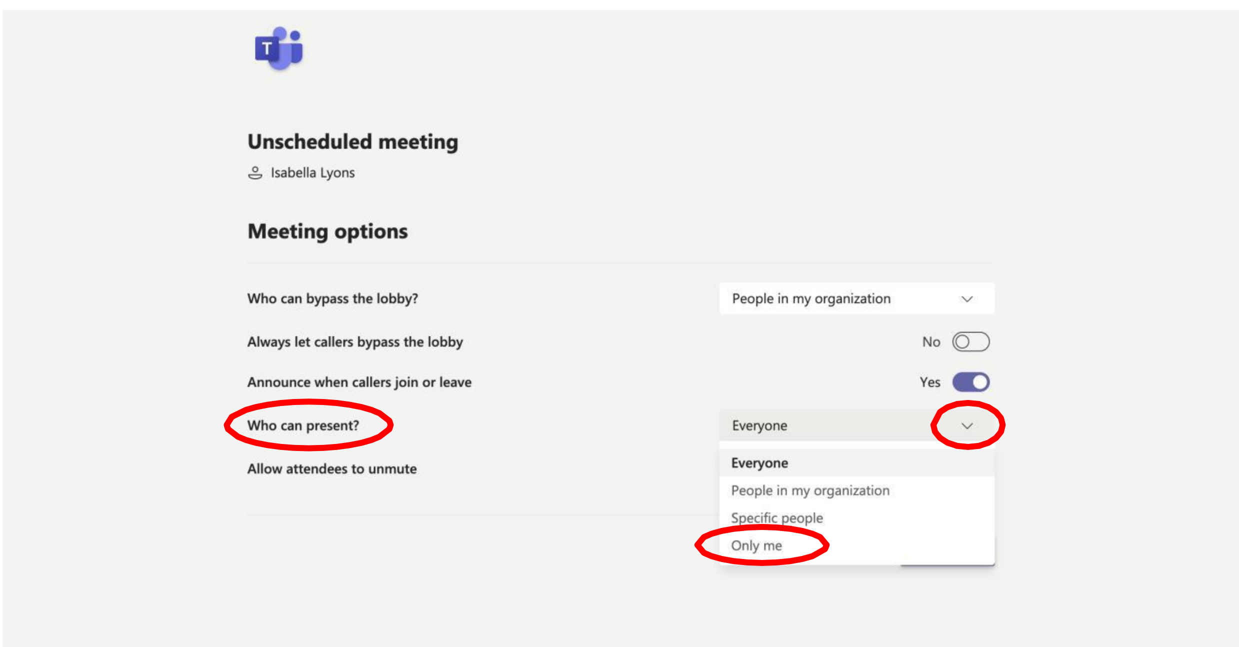
1. Open the scheduled meeting in your Microsoft Teams app calendar by double clicking meeting.



2. Click the meeting you are attempting to modify, then find the "**Meeting options**" button near the top center of the screen.



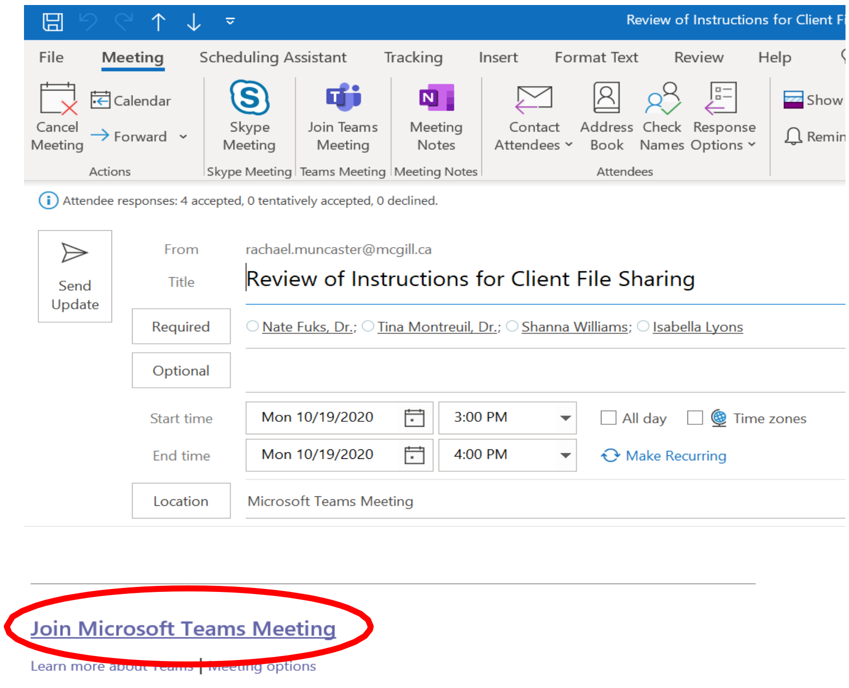

3. Under "**Meeting options"** there will be a question: "**Who can present?**" Click on the downward arrow for the scroll down options and choose "**Only me**." Then click "**Save.**"



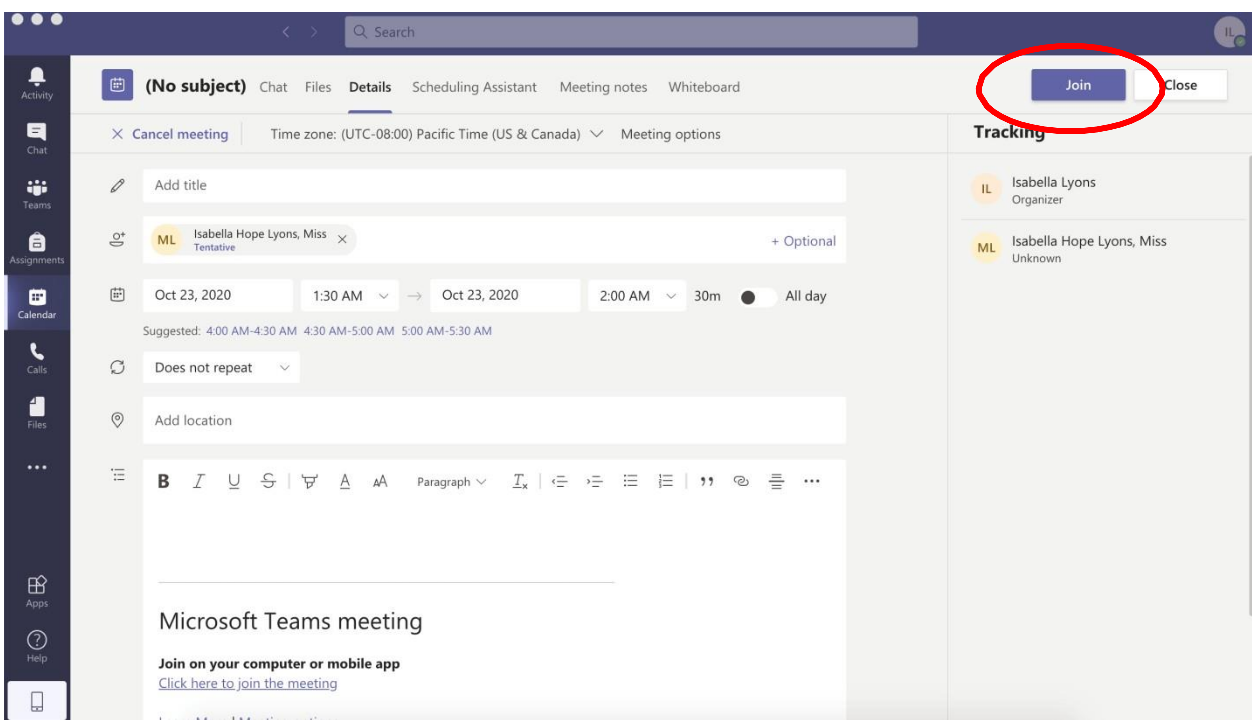

Note: To change the date or time of a scheduled meeting: Click the meeting in the **Teams Calendar**, and choose "**Edit**," and then proceed to changing the date/time as required.

## Step 3: Join the scheduled meeting

1. At the time of the scheduled meeting, both the Trainee and Client can open the RSVP email and click on the "**Join Microsoft Teams Meeting"** link to join the scheduled meeting.



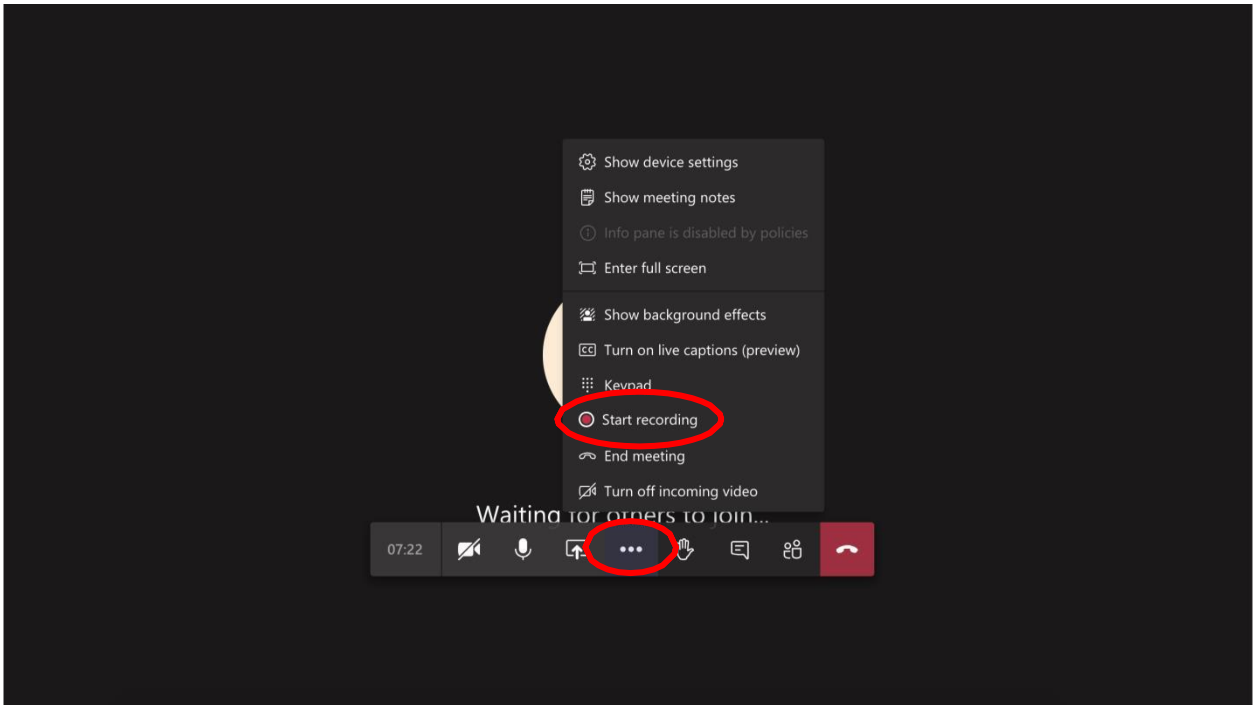

2. There is also an option to join the meeting directly from the MS Teams Calendar by selecting the scheduled meeting calendar entry and then clicking the **"Join"** button, which will take the Trainee and Client to a video window and prompt each parties to start the meeting.



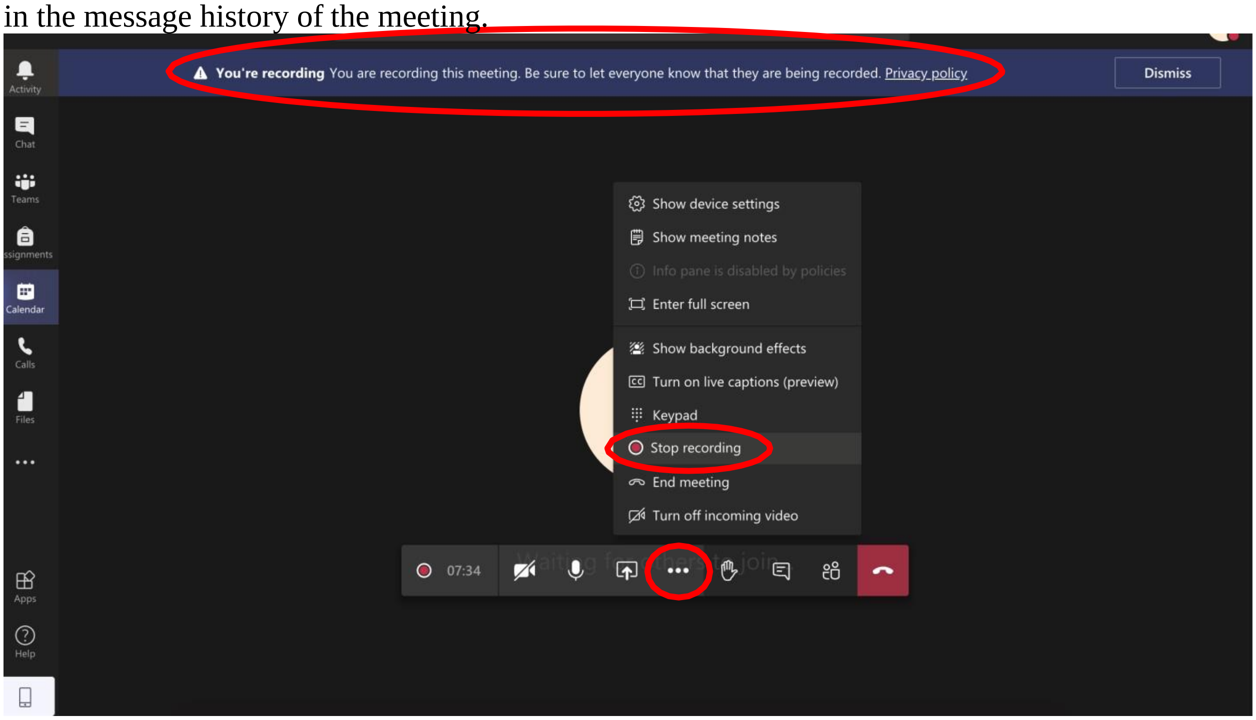

***Before starting the recording of the meeting, **be sure that the applicable consent form(s) are signed**.

## Step 4: Recording the meeting

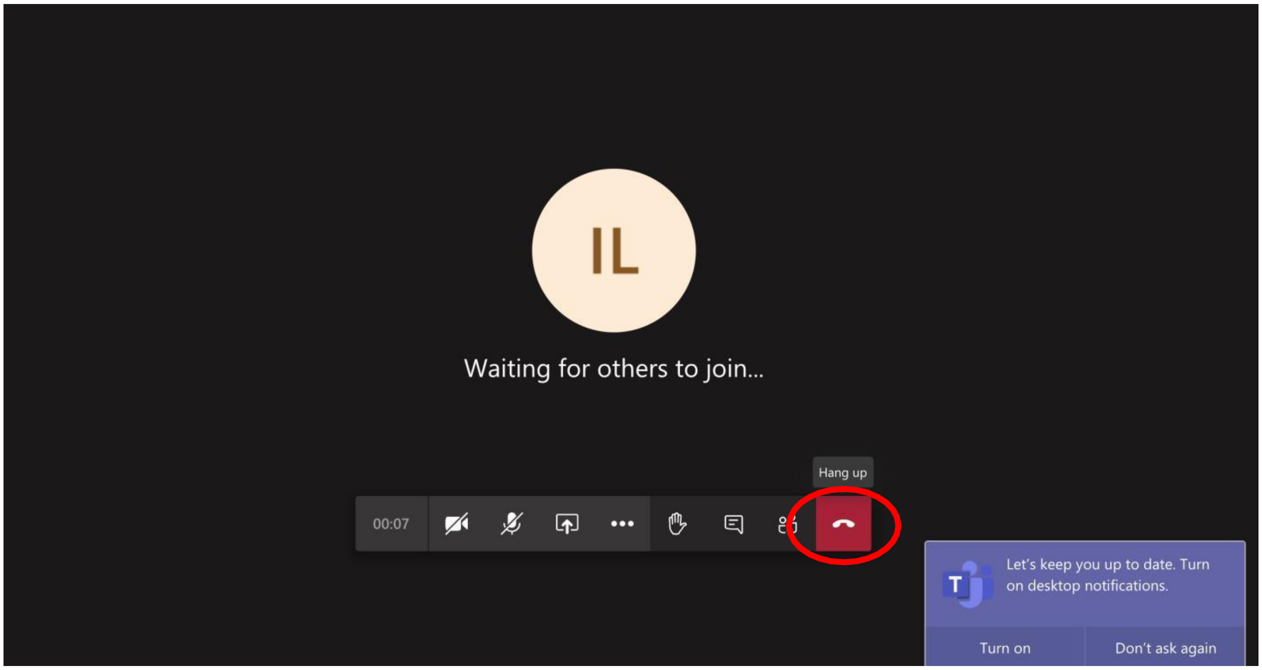
1. Once in the meeting, click the button with three dots on the central bar called the "**More actions**" button.




2. Choose "**Start recording,**" and you will see a blue bar appear at the top of the screen alerting you that the session is now being recorded. To end the recording, click the "**More actions**" button (same location as before) and click" **Stop recording.**" A blue bar will then appear at the top to alert you that the recording has stopped and that you can find the recording in the *link form* located in the message history of the meeting.

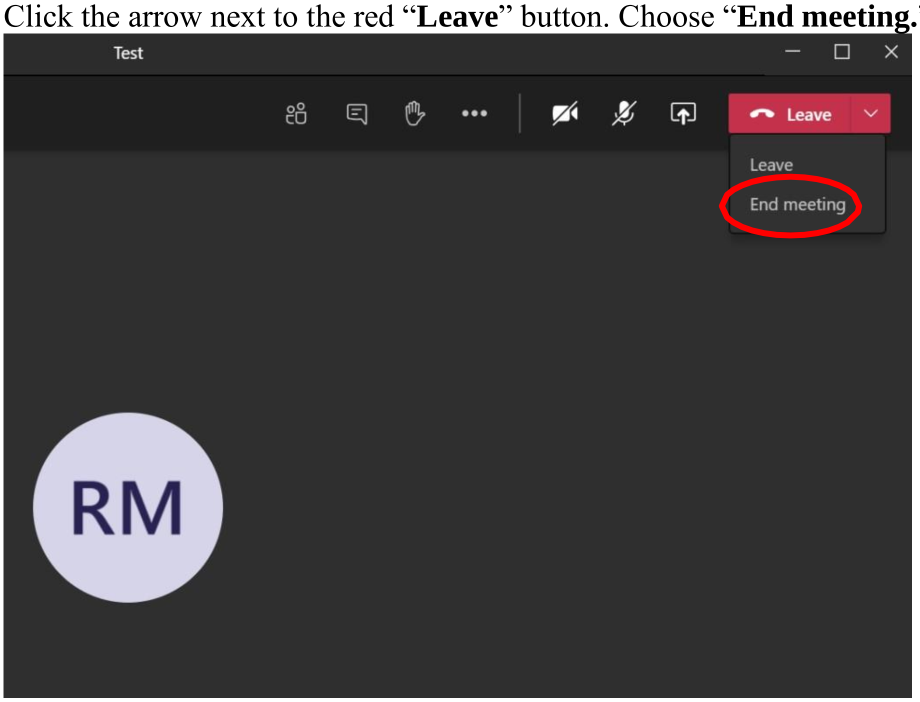


3. To end the meeting, click the "**Hang up**" button (**not just "leave meeting"**). You must click the red box with a phone pictured on it, when done to end the meeting.

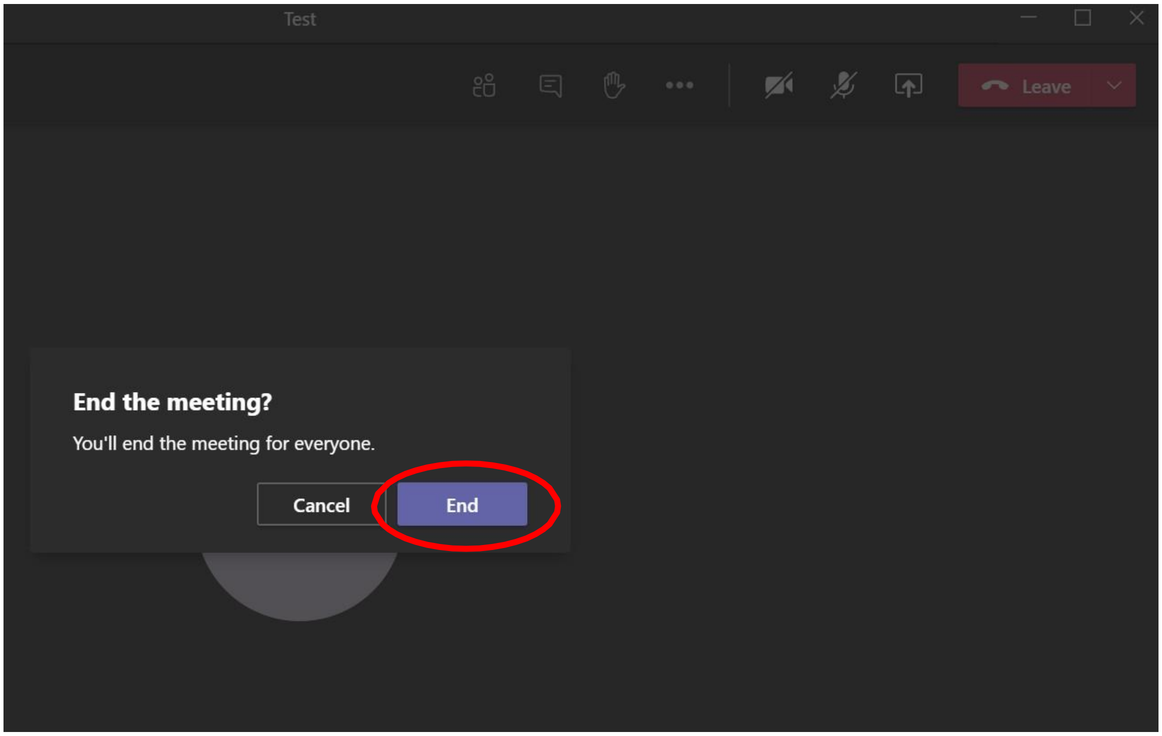



If your desktop looks different from the above, follow the instructions below to end the meeting:

a. Click the arrow next to the red "**Leave**" button. Choose "**End meeting.**"




b. Confirm "**End**."




**<u>Step 5: Sharing the recording/access the recording</u>**

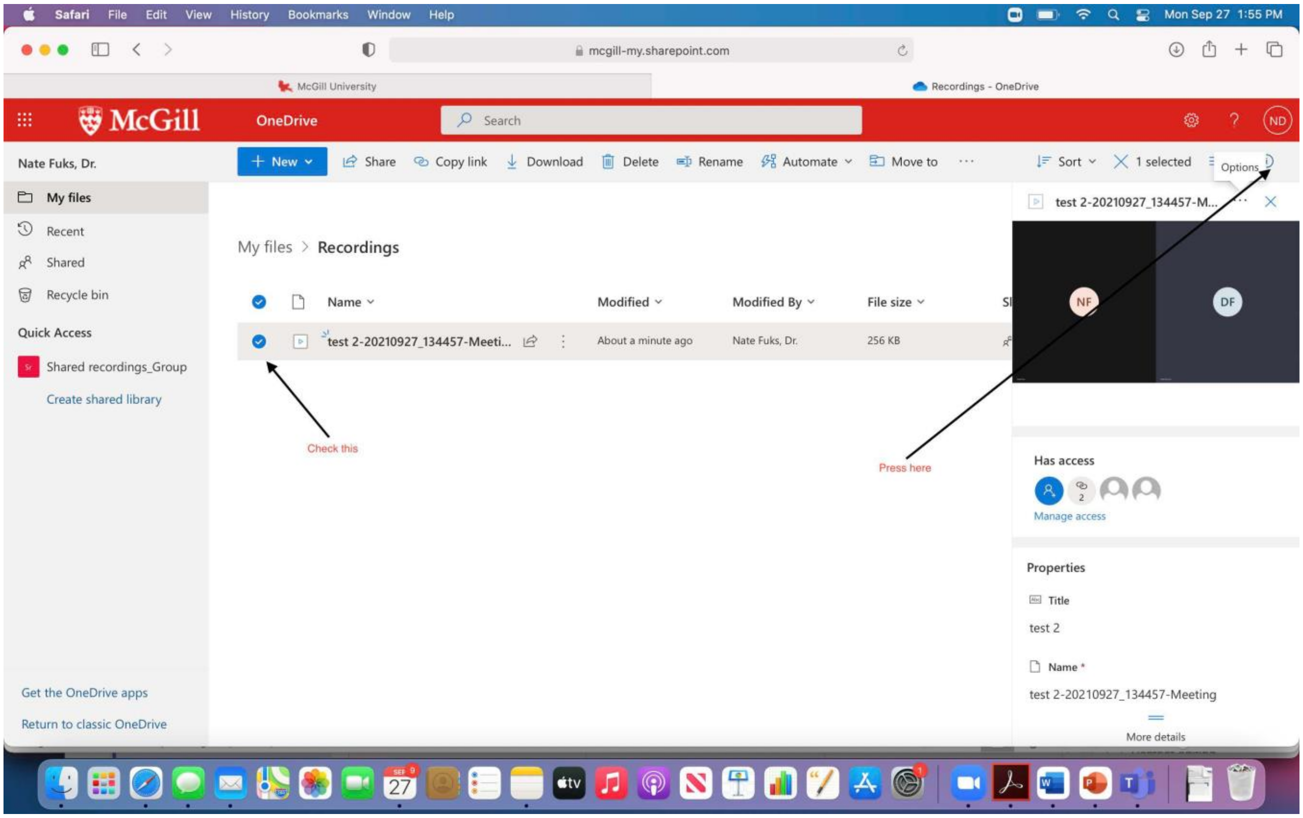
**NOTE: ******** Make sure NOT to share the video with anyone in the organization!!!**

**Video is automatically shared with your supervisor, you NEVER have a reason to use the "share" or "download" functions for the videos that are automatically stored in your "Recordings" folder **********

**<u>Step 6: Locate your video and verify access permissions</u>**

1. Go to your OneDrive account. Note: for students using a clinic resource email (EDSP 682, EDSP 705), you will go to your *resource* OneDrive account. You can find and view your video in the "Recordings" folder.

2. Check to make sure the video was not shared with anyone else but your supervisor by mistake



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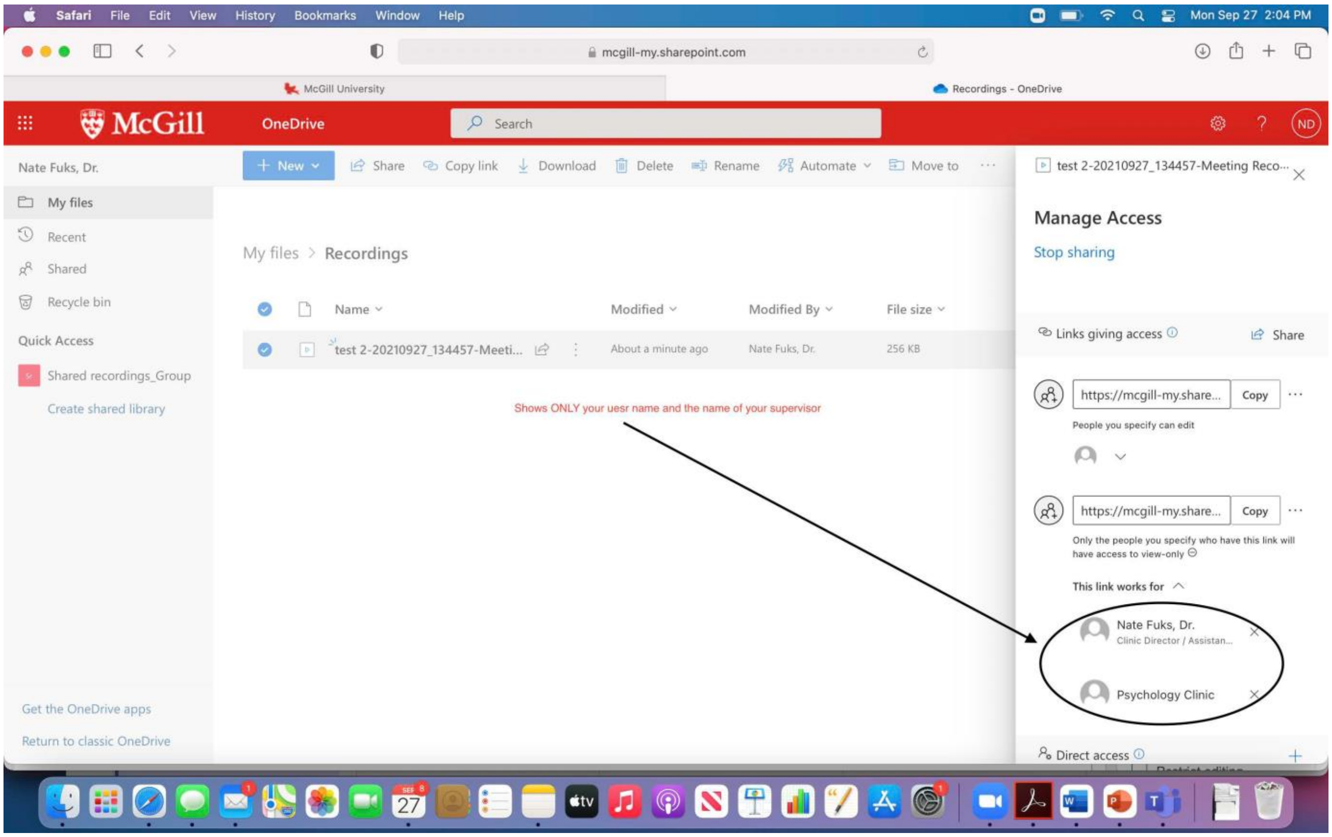
3. Click on "**Manage Access**" and ensure that you are the only and one along with your supervisor who have access to the file (your Buddy and/or peer supervisor can share access to the recording, but NO OTHER trainees should be granted access to the recordings).

4. If the client (or family member if 14yrs -) or other username appear in the list, Click on the "**x**" next to it, to delete it.




**<u>DO NOT EVER</u> DOWNLOAD THE RECORDING**: McGill IT will perform a weekly audit to determine if any videos have been downloaded. This audit report will be reviewed by the Clinic Director. Trainees must follow all the provided guidelines related to video recording, file maintenance, and file sharing outlined in this document. **Failure to do so will result in serious consequences that may include failing a Clinical course. Decisions concerning the consequences of transgressing Clinic policies will be made by the Clinic Director who may also consult the Clinical Program Committee.**