

2026-2027

Counseling and Consultation Service

The Ohio State University

**CCS Training Program Policies and
Procedures Manual**

The Counseling and Consultation Service training program is designed to build upon the academic foundation trainees have, to enhance existing skills, and to develop new areas of competence. One of the goals of the training program is to prepare the next generation of competent mental health professionals.

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Overview of Training Program

Mission, Goals, and Objectives of Training Program

The mission of the CCS training program is to develop clinicians to provide the highest quality care for OSU students. The interdisciplinary training program provides training to the disciplines of psychiatry, psychology, social work, and mental health counselors.

The training program provides generalist training for emerging clinicians for practice within a variety of mental health disciplines. This is accomplished through experiential learning through supervised professional practice—an experiential “learning by doing” process and an awareness of and appreciation for the rich diversity of humanity.

Statement on Self-Disclosure

In accordance with the 2003 APA Ethical Guidelines including the 2010 Amendments, CCS does not require the disclosure of personal information. We do believe it is useful to share information about how CCS views self-disclosure in the supervisory experience, so candidates are fully informed about the CCS supervision model:

- With awareness that professional activities may be impacted by personal experiences, beliefs, and values, trainees may choose to disclose and are encouraged to do so long as the trainee feels the information has a bearing on their professional functioning.
- Supervisors may notice significant incidents and patterns in a trainee’s professional behaviors that suggest behaviors may be influenced by personal experiences, beliefs, and values. Supervisors may ask interns to reflect on this in the defined context of encouraging professional growth.
- Trainees choose how much and what to disclose. Trainees are not penalized for the choice not to share personal information. Supervision is never viewed as psychotherapy.

Training Timeline

The Training Timeline can be found in the training drive. Training > Program Info and Forms > Training Timeline. We use the timeline to make sure we are staying on track of our tasks.

Goals and Objectives of the Training Committee

The Training Committee oversees the foregoing programs, as well as specific training goals and objectives. The committee is composed of the Director of Training, Assistant Director of Training, Coordinators of all the training programs, Senior Staff members, and trainees. Senior Staff make

semester commitments to the committee. Trainees may choose varying commitments, which range from a year to a shorter-term project. Senior Staff members are responsible for specific training areas including the Counselor, Psychology, and Social Work Intern Programs, as well as Practicum Programs, Psychiatry Residency Program, and Post-Graduate Clinical Residency Program. Senior staff members also serve on task groups generated by the various training projects.

Separate Selection Committees are established for each training program. The Psychology Internship Selection Committee usually consists of the Assistant Director and Director of Training, Senior Staff members, and Psychology Interns. The Social Work Internship, Counselor Internship, Clinical Resident and Practicum Selection Committees contain the cohort Coordinator and 2-3 Senior Staff members.

Trainee Recruitment and Selection

Search Timelines

Search timelines can be found in the Training Timeline, as well as in the following sections for each training cohort.

SignUpGenius

SignUpGenius has been used for applicants to sign up for interview slots. Applicants do not need a username for SignUpGenius in order to use this service.

- I. Login (information kept in Selection folder of Training drive)
- II. Access Existing Sign Up
 1. Select "Sign Ups"
 2. Select the Sign up that you have created
 3. Select pencil to right of desired sign up to go into editing mode
- III. Create a New Sign Up
 1. Top right corner, select "Create Sign Up"
- IV. Design Tab
 - A. Title the sign up
 - B. Group: Select 'The Ohio State University Counseling and Consultation Service' (if creating a sign up for the first time, you will need to create a group. You can do this by selecting "Groups" on the left side of the screen)
 - C. Type/Category: Select General; Select Education

- D. Theme/Design: Search among “free”; select “Buckeye Red”
- E. Within the preview box, click the pencil icon and update the information you wish to appear at the top of the SignUpGenius. We typically include zoom info, deadline for sign up, a request to only sign up for one spot, and an indication that the times are in Eastern Standard Time

V. Slots Tab

- A. Select Add Dates
- B. Select Dates of Interviews on calendar
- C. Hover over boxes where you would add times, and select “add another timeslot on this date”
- D. Fill out information, including location
- E. Hit Save
- F. Back on previous screen, select “Add Slots”
- G. Title “Interview Slot” and add 1 to all dates. This will allow one (1) interview slot to be added to each date/time.
- H. To edit multiple times/dates after they have been created, select the check box in the time/date section header, select all, click edit. You can add the location this way.
- I. Click “Save and Continue”

VI. Settings Tab

- A. Ask Participants For
 1. Select ask participants for Name, Email, Phone.
 2. Change editable fields to applicant pronouns, applicant program name
 3. Make any/all fields required
 4. Select “Hide names and comments from participant view” to prevent other applicants from seeing who else has signed up
- B. Preferences
 1. General Settings – uncheck “allow people to “swap” slots
 2. Notifications – update
 3. Restrictions – Require users to enter access code to view my sign up.
We typically do not check boxes for “require creating an account” and “reject sign ups other than ones in my group.
 4. Integrations – I do not select anything in this section.
 5. As you can see, there are various options for paid version of SignUpGenius. We have done fine using the free version.

- VII. Publish
 - A. Select Publish
- VIII. Share Tab
 - A. Copy link and paste anywhere. Be sure to include the access code when sending email to sign up.
- IX. View Tab
 - A. Displays preview
 - B. You will only be able to see applicants' names if you are signed in
- X. Edit Content
 - A. Orange button located across the top of the sign up
 - B. You can use this to go back and edit the previously described tabs
- XI. Reports & Stats
 - A. Click this to generate a report of those who have signed up
 - B. Generate a New Report or View Recently Generated Reports
 - 1. Click desired sign up under "include the Following Sign Ups"
 - 2. Update date range
 - 3. Select, "List of Sign Ups for Export to Excel"
 - 4. Select "Create Report"
 - 5. Select "Export data as CSV file", which will download the file named as "Sign Up Genius"
 - 6. Rename file and save where you want it to be saved

Update Training Website Videos

To edit the training video that is shown on the website, contact OSU SL Marketing, who helped with this project. After filming the segment of video that is to be changed/updated, the clip must be sent to OSU SL Marketing, and they will insert new footage. Make sure to be very specific about what you are changing/updating. Film the video horizontal on a smartphone.

Clinical Residents

Clinical Residency Search

November	• Complete Exception to Hire form and forward to Center's Director • Prepare Job Description • Finalize search timeline, block time in Ti and ask Training Program Assistant to update website. • Update HR representative and recruiter on updated timeline
December	• Recruit two senior staff of various disciplines for search committee • Update Ti • Complete Job Req in Workday to be posted first week of January
January	Applications Due 3rd week of January Upload application materials to 'Selection' folder on training drive as they are received. Review and determine whom to offer interviews. Contact by phone or email to schedule Provide Clinical Services a list of candidates in order to protect client charts if needed.
January-February	Conduct interviews. • Interview questions can be found in 'Selection' folder on training drive
February	Identify selected candidates: • First, review choices with Center Director and Training Director • Contact by phone to offer position, follow up with offer letter by email (ask for return within 2-3 business days) • Signed offer letter is needed to confirm placement
After signed offer letters are received	• Inform Director of CCS and Training Director/Assistant Training Director of selection by email • Send emails to candidates not selected. • Inform training program assistant of selection so trainee files can be created. • Inform training program assistant of selection so trainee files can be created. • Inform CCS staff of selection by email & thank search committee

ROOM ASSIGNMENTS

Clinical Residents are assigned rooms at Lincoln Tower amongst Senior Staff members. For evening hours (5pm-7pm) and when needed, room reservations for Younkin Success Center (YSC) are made via "SharePoint," an intranet resource that will be presented during orientation. Room assignments are coordinated with the administrative staff.

TRAINEE LICENSE

All Counseling and Social Work Clinical Residents are required to obtain their Licensed Professional Counselor (LPC) license or Licensed Social Work (LSW) license for placement at CCS. This should be obtained by the first day of orientation. The instructions for applying for the LPC or LSW are included on the [CSWMFT website](#). Post Doctoral Psychology Residents are not required to obtain licensure. If a Clinical Resident obtains a license to practice independently during residency, they will continue supervision with a Senior Staff until completion of residency.

EVALUATIONS

Supervisors will evaluate each Clinical Resident's performance on assignments for each competency at the end of fall, spring, and summer semesters. Once the evaluation is signed by both the resident and supervisor, it should be sent to the Training Program Assistant to be uploaded to the Clinical Resident's file.

EXIT INTERVIEW

An exit interview will be completed with the resident and a member of the training committee before the residents last day of residency. The completed form based on interview will be given to the Program Assistant and Assistant Director of Training.

Counseling Interns

Counseling Intern Search

November	Reach out to Director of Field Placement for Clinical Mental Health Counseling to confirm when selection is due
December-First week of January	Recruit 2 senior staff of various disciplines for search committee Finalize search timeline, block time in Ti and ask training program assistant to update website
About 7-10 days before interviews	• Counseling Intern Applications Due • Upload application materials to 'Selection' folder on training drive as they are received. • Review and determine whom to offer interviews. • Contact by phone or email to schedule • Provide Clinical Services a list of candidates in order to protect client charts as needed
<i>Historically conducted on a Friday morning</i>	Conduct Counseling Intern interviews: • Interview questions can be found in 'Selection' folder on training drive. • Review HR benefits package in interview
1 week after interviews	Identify selected Counseling Intern candidates: • First, review selections with Training Director and Director of Field Placement for Clinical Mental Health Counseling. • Contact by phone to offer position, follow up with offer letter by email (ask for return within 2-3 business days) • Signed offer letter is needed to confirm placement

After signed offer letters are received	• Inform Director of CCS and Training Director/Assistant Training Director of selection by email • Inform training program assistant of selection so trainee files can be created. • Inform training program assistant of selection so trainee files can be created. • Inform CCS staff of selection by email & thank search committee
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SUPERVISIONASSIST ACCOUNT

Counseling interns track all their hours (direct, indirect, and supervision) online in SupervisionAssist. Accounts should be created for each supervisor after we inform the program of our supervision matches. However, if an account is not made or a supervisor cannot access their account, contact the **Graduate Teaching Associate (GTA) for Clinical Supervision** in the Counselor Ed program for assistance.

ROOM ASSIGNMENTS

Counseling Interns are assigned rooms for individual therapy and share a common workspace for administrative tasks. Room reservations are made via "SharePoint," an intranet resource that will be presented during orientation. Room assignments are coordinated with the administrative staff.

COUNSELOR TRAINEE LICENSE

All Counseling interns are required to obtain their Counselor Trainee (CT) license for placement at CCS. This should be obtained by the first day of orientation. The instructions for applying for the CT are included on the [CSWMFT website](#). There is no charge for obtaining the CT. The Counselor Education program can assist students who have difficulty with the licensing process.

EVALUATIONS

All Counseling Intern Evaluations are completed in SupervisionAssist. Supervisors will evaluate the intern's performance at the end of fall and spring semesters. Once the evaluation is signed by both the intern and supervisor, it should be sent to the Training Program Assistant to be uploaded to the intern's file.

EXIT INTERVIEW

An exit interview will be completed with the intern and a member of the training committee before the intern's last day of internship. The completed form based on interview will be given to the Program Assistant and Assistant Director of Training.

Counseling Practicum

Counseling Practicum Student Search

August	Reach out to Director of Internship Placement for Clinical Mental Health Counseling to confirm when selection is due
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September	- Recruit 1 senior staff Counselor and Psychology Interns who will be supervising for search committee. - Finalize search timeline, block time in Ti and ask training program asst to update website
7-10 days before interviews	- Counseling Practicum Student Applications Due - Upload application materials to 'Selection' folder on training drive as they are received. - Review and determine whom to offer interviews. - Contact by phone or email to schedule - Provide a list of candidates to Clinical Services in order to protect client charts as needed.
October	Conduct Counseling Practicum Student interviews 2nd week of October: - Interview questions can be found in 'Selection' folder on training drive. - Review HR benefits package in interview
1 week after interviews	Identify selected Counseling Practicum Student candidates: - First, review choices with Training Director - Contact by phone to offer position, follow up with offer letter by email (ask for return within 2-3 business days) - Signed offer letter is needed to confirm placement
After signed offer letters are received	- Inform Director of CCS and Training Director/Assistant Training Director and Internship Placement for Clinical Mental Health Counseling of selection by email - Inform training program assistant of selection so trainee files can be created. Inform training program assistant of selection so trainee files can be created. - Inform CCS staff of selection by email & thank search committee

SUPERVISIONASSIST ACCOUNT

Counseling Practicum Student track all their hours (direct, indirect, and supervision) online in SupervisionAssist. Accounts should be created for each supervisor after we inform the program of our supervision matches. However, if an account is not made or a supervisor cannot access their account, contact the **GTA for Clinical Supervision** in the Counselor Ed program for assistance.

ROOM ASSIGNMENTS

Counseling Practicum Student are assigned rooms for individual therapy and share a common workspace for administrative tasks. Room reservations are made via "SharePoint," an intranet resource that will be presented during orientation. Room assignments are coordinated with the administrative staff.

COUNSELOR TRAINEE LICENSE

It is recommended Counseling Practicum Student obtain their Counselor Trainee (CT) license for placement at CCS. This should be obtained by the first day of orientation. The instructions for applying for the CT are included on the [CSWMFT website](#). There is no charge for obtaining the CT. The Counselor Education program can assist students who have difficulty with the licensing process.

EVALUATIONS

All Counseling Practicum Student Evaluations are completed in SupervisionAssist. Supervisors will evaluate the intern's performance at the end of the fall and spring semesters. Once the evaluation is signed by both the intern and supervisor, it should be sent to the Training Program Assistant to be uploaded to the intern's file.

EXIT INTERVIEW

An exit interview will be completed with the Counseling Practicum Student and a member of the training committee before the practicum student's last day of internship. The completed form based on interview will be given to the Program Assistant and Assistant Director of Training.

Psychology Practicum

Candidate Criteria- The Psychology Practicum trainees are typically 3rd and 4th year graduate students in doctoral programs in clinical, counseling, and/or school psychology. On occasion we will accept 2nd year students who have already obtained a terminal Master's degree from another program; however, they are required to have completed of a minimum of two semesters of recent, supervised counseling, clinical, or school practice prior to the practicum at CCS. They are also required to be in current good standing within their academic program. Typically, students from neighboring universities, such as Wright State University, Ohio State University, and Ohio University, seek out the CCS practicum experience; however, occasionally students from other universities are accepted into the program if communication between CCS and the home program is strong.

Search Process- Application deadlines are dependent on applicants' academic programs, and typically range from early February to mid-April. Occasionally graduate students interested in applying will reach out throughout the calendar year, at which point the coordinator will answer any questions they have and direct them to the Psychology Practicum website for additional information (<https://ccs.osu.edu/training/psychology-practicum>). Interested applicants are asked to submit the following materials to the practicum coordinator for review: Letter of interest addressing interest in the practicum, training goals for the practicum, and long-term professional goals; updated resume or vitae; transcript (can be unofficial); and a letter of good standing from the applicant's home academic program.

From here, interviews will be offered on a rolling basis. Interviews are conducted via Zoom within the February-April time frame and typically consist of the student of interest, the practicum coordinator, a senior staff clinician, and a non-psychology trainee. Interview questions are typically done round-robin style between the three panelists. Interviews typically last 30-45 minutes, with the final 15 minutes being reserved for questions from the interviewee about the practicum experience and CCS as an agency.

Trainees' home programs vary in respect to their practicum placement process, and CCS makes effort to respect and collaborate these processes. Following interviews, some programs may defer to practicum sites to reach out with offers, and others request practicum sites to email the Director of Clinical Training (DCT) directly with the names and rankings of students of interest. Once a student accepts an offer, they are sent a formal offer letter to sign and return via email, which is stored in their trainee file. Decisions regarding which and how many students to extend offers to are dependent on agency/training needs, prior experience or interest in UCC work, along with an openness to learning, reflection/self-awareness, and cultural humility.

Evaluation Process- Provision of feedback is an ongoing process, extending throughout the practicum student's placement. Beginning at orientation, trainees are not only informed of this, but encouraged to provide feedback to their supervisors on an ongoing basis as well to enhance the supervisory relationship and improve the trainee's experience at CCS. That said, there are two formal points of exchange of feedback per academic year: mid-semester check-in and the end-of-semester evaluation. In the mid-semester check-in, the primary clinical supervisor solicits feedback from the practicum student's group supervisor and case conference facilitator (typically the psychology practicum coordinator). The primary clinical supervisor then relays this feedback to the trainee, along with their own feedback, to provide the opportunity for the trainee to address any growth areas prior to the end-of-semester evaluation, which is communicated to their home program. End-of-semester evaluation forms are deferred to the trainees' home programs; however, if the home program does not have an official evaluation form, the CCS evaluation form is used (this rarely happens). Once completed and reviewed with the trainee, both written and orally, the evaluation form is signed by all relevant parties (typically the trainee, primary clinical supervisor, group supervisor, and case conference facilitator) and is sent to the trainee's home program. The primary clinical supervisor is again responsible for soliciting feedback from supplementary supervisors/facilitators and including this in the written evaluation to enhance comprehensiveness of the evaluation. All signed evaluations should be stored in the trainee's folder.

Should the need arise for a concern to be addressed with a practicum student's DCT outside of that communicated on an evaluation form, this is typically arranged between the practicum coordinator and/or the trainee's supervisor, the training director, and the home program DCT. In most cases the practicum student should be informed that this meeting is being held and for what purpose.

Exit Interview-An exit interview will be completed with the practicum student and a member of the training committee before the practicum student's last day of internship. The completed form based on interview will be given to the Program Assistant and Assistant Director of Training.

Psychiatry Resident

Our Assistant Director of Psychiatry works with OSU and Nationwide Children's Hospital to select Psychiatry Residents.

Psychology Interns

Selection procedures for the Doctoral Internship in Health Service Psychology

Our training program is a member of the Association of Psychology Postdoctoral and Internship Centers (APPIC) and uses the National Matching Services Inc. (NMS) to fill our internship positions. Our selection process accepts the terms of the Match Agreements upon registration to

participate in the Match. As part of this system, our selection committee and applicants only communicate about matters that do not involve the sharing of ranking information.

In terms of our selection process, a team of CCS staff members review each application. The team is comprised of staff members of varying disciplines and identities. After this initial review, each applicant is informed if they are offered an interview prior to December 15th. Each applicant is then interviewed during the first two or three weeks of January by members of the selection committee with the addition of current interns. Each interview is conducted via Zoom and consists of the Training Director, a staff member, and a current psychology intern.

The selection team abides by guidelines set by the Office of Human Resources for all interviews. These guidelines avoid questions that may restrict or discriminate against potential interns. The interviews are standardized using the same questions for each applicant. After the completion of the questions by the search committee, the remainder of the time is open for questions from the applicant. At the end of each interview, applicants are encouraged to reach out to current interns and the Training Director to schedule time for any further questions they may have about the internship experience.

All interviews take place on Zoom to allow equal access to all applicants. Onsite visits are not required. If an applicant would like to schedule a time to visit the center, they are not introduced to members of the selection committee in fairness to applicants that are not able to visit.

The selection committee comes together three times to make selection decisions.

- The committee first meets to review the selection process and review human resource guidelines.
- The committee then meets after the application review process to which applicants are offered interviews.
- Finally, at the conclusion of the selection process, the selection committee meets to decide on the ranking of the applicants. All applicants are scored on the same rubric.

Rankings of applicants are submitted early in the process to allow the opportunity for applicants to reach out for informational meetings with current interns and the training director. Informational sessions are offered after the ranking submission and applicants are informed of this so they may freely acquire information without the concern of being evaluated.

All new employees of The Ohio State University are required to successfully pass the University Police background check as a condition of employment.

Social Work I Interns

MSW I Search

First week of August	Reach out to Field Placement Specialist and Field Placement Coordinator the first week of August
Last week of August	• Recruit GTA Coordinator, Clinical Resident/Psych Intern Supervisors of various disciplines for search committee

	• Finalize search timeline (first and second week of October), block time in Ti and ask training program assistant to update website • Book the basement room in Lincoln for Orientation (first Tuesday of Spring Semester) with assistance of Training Assistant
NOTES	• Recommend adding “Committee – Selection” time to your schedule to review applications & upload materials prior to interviews • Include search time on your GAA • Recommend adding several interview slots (as “Interview Candidate”) to search committee’s schedules ahead of time
Last week of September	• MSW I Applications Due, will also receive referrals from CSW • Upload application materials to ‘Selection’ folder on training drive as they are received. • Review and determine whom to offer interviews. • Provide a list of students being interviewed to Clinical Service in order to protection client charts if needed • Contact by phone or email to schedule • Create Sign Up Genius for interview scheduling
First week of October	Conduct MSW I interviews: • Interview questions can be found in ‘Selection’ folder on training drive • Interviews to be conducted by Zoom • Make sure the questions are asked the same for each candidate, follow up clarification is ok if needed. • Search committee should document summaries of responses/reactions on interview forms, coordinator uploads these to ‘selection’ folder
Fourth week of February	Identify selected MSW I candidates: • Contact by phone to offer position, follow up with offer letter by email (ask for return within 2-3 business days) • Signed offer letter is needed to confirm placement
After signed offer letters are received	• Inform Director of CCS and Training Director/Assistant Training Director of selection by email • Send emails to candidates not selected, provide feedback if asked • Inform training program assistant of selection so trainee files can be created. • Inform CCS staff of selection by email & thank search committee • Inform CSW staff of selected candidates • Email MSW1’s Self Assessment and ask for proposed schedule • Send individual supervisors completed self assessments and proposed schedules, ask them to

	decide who they want to supervise, then connect with their supervisee to schedule individual supervision Once selection is over begin saving items such as schedules and self assessments into individual files here Training > Trainees > MSW 1 Social work interns
January	
Before the Semester starts	- Send information regarding day, time, and location of Orientation - Connect with the Training Program Assistant to activate technology such as S account (for teams and email, regular.# for buckeyelearns and computer log in) and sharepoint. 911 Agreement for Teams Calling
First Week of the Semester	- Orientation - Buckeyelearns (may not be assigned but can look them up) and Training Manuals
Second and Third week	- Shadowing triages - Practice triages with each other to become comfortable with documentation; use brutus buckeye account - Complete learning agreements and send to Training Program Assistant
February	
First/Second Week (dependent on program selection deadlines)	GTA Applications Due (https://ccs.osu.edu/training/ohio-state-social-work-ii-internship) Candidates send application materials to GTA coordinator by email Schedule Mid Semester check in's with the college, CSW will reach out to student with a sign up link
Second/Third week	Move into being shadowed with triages
March	
Around Spring Break	Review hours and determine final week for the cohort. Set date and send to Training Program Assistant to coordinate Evaluations
April	
First Week	Set meeting with Individual supervisors to get feedback for learning agreement Set with MSW1's to complete learning agreement and exit interview during their final week
Second Week	Ensure no triages are scheduled on their last two days. Use this time to complete paperwork, evaluations, exit interviews, exit checklist, Sonia needs. Training Celebration - Have cohort members share kind words about one another to be shared at the celebration
NOTES	Set out of office message saying position has ended Send them the post trainee contact information to complete

SONIA ACCOUNT

Social Work interns track their internship hours, complete supervision logs, and complete their learning agreements online in [Sonia](#). Accounts should be created for each supervisor after we inform the college of our supervision matches. However, if an account is not made or a supervisor cannot access their account, email cswfield@osu.edu for assistance.

ROOM ASSIGNMENTS

MSW I Interns are assigned offices in Lincoln tower and may be shared spaces with staff who occupy them on different days. If they need to complete an appointment at Younkin Success Center, they are responsible for signing out a room. Room reservations are made via "SharePoint," an intranet resource that will be presented during orientation. Room assignments are coordinated with the administrative staff.

SOCIAL WORK TRAINEE LICENSE

A social work trainee license is not required for the MSW 1 internship placement at CCS. If an intern is accepted into the MSW II placement with CCS, they would be required to obtain a SWT license at that time.

EVALUATIONS

All MSW I Evaluations are completed in Sonia. Supervisors will evaluate the intern's performance on assignments for each competency at the end of spring semester. Once the evaluation is signed by both the intern and supervisor, it should be sent to the Training Program Assistant to be uploaded to the intern's file.

EXIT INTERVIEW

An exit interview will be completed with the intern and a member of the training committee before the intern's last day of internship. The completed form based on interview will be given to the Program Assistant and Assistant Director of Training.

Social Work II Interns

MSW II Search

First week of December	Reach out to Field Placement Specialist and Field Placement Coordinator around the first week of December to confirm when selection is due
First week of January	Recruit 2 senior staff of various disciplines for search committee Finalize search timeline, block time in Ti and ask training program asst to update website
First weekend of February	MSW II Applications Due Upload application materials to 'Selection' folder on training drive as they are received. Review and determine whom to offer interviews. Contact by phone or email to schedule Provide a list of candidates to Clinical Services to protect client chart's as needed
Third week of February <i>Historically conducted on Friday morning</i>	Conduct MSW II interviews: Interview questions can be found in 'Selection' folder on training drive
Fourth week of February	Identify selected MSW II candidates:

	• First, review choices with Training Director and Field Placement Specialist/Coordinator. • Contact by phone to offer position, follow up with offer letter by email (ask for return within 2-3 business days) • Signed offer letter is needed to confirm placement
After signed offer letters are received	• Inform Director of CCS and Training Director/Assistant Training Director of selection by email • Send emails to candidates not selected. • Inform training program assistant of selection so trainee files can be created. • Inform training program assistant of selection so trainee files can be created. • Inform CCS staff of selection by email & thank search committee

SONIA ACCOUNT

Social Work interns track their internship hours, complete supervision logs, and complete their learning agreements online in [Sonia](#). Accounts should be created for each supervisor after we inform the college of our supervision matches. However, if an account is not made or a supervisor cannot access their account, email cswfield@osu.edu for assistance.

ROOM ASSIGNMENTS

MSW II Interns are assigned rooms for individual therapy and share a common workspace for administrative tasks. Room reservations are made via "SharePoint," an intranet resource that will be presented during orientation. Room assignments are coordinated with the administrative staff.

SOCIAL WORK TRAINEE LICENSE

All MSW interns are required to obtain their Social Work Trainee (SWT) license for placement at CCS. This should be obtained by the first day of orientation. The instructions for applying for the SWT are included on the [CSWMFT website](#). There is no charge for obtaining the SWT. The CSW can assist students who have difficulty with the licensing process.

EVALUATIONS

All MSW II intern Evaluations are completed in Sonia. Supervisors will evaluate the intern's performance on assignments for each competency at the end of fall and spring semesters. Once the evaluation is signed by both the intern and supervisor, it should be sent to the Training Program Assistant to be uploaded to the intern's file.

EXIT INTERVIEW

An exit interview will be completed with the intern and a member of the training committee before the intern's last day of internship. The completed form based on interview will be given to the Program Assistant and Assistant Director of Training.

Trainee Onboarding

Onboarding Trainees

The onboarding process for trainees is managed by both the Training Team and the Administrative Team. This includes obtaining signed forms, accounts requested and set up, and schedules created. See below for details.

BuckeyeLearn

When each trainee starts, they will have a list of BuckeyeLearn Trainings to complete. These are required by the University. Please see list below.

- Understanding the Sexual Misconduct Policy*
- HIPPA and Institutional Data Compliance
- Institutional Data Policy
- The Ohio State University's Family Education Rights and Privacy Act (FERPA) Training
- eSignature Sender**
- Digital Accessibility Policy
- Email Accessibility in Outlook

*Please note that the sexual misconduct training may be unavailable at this time due to updating it for the new year. If you are unable to access it, then do not worry about it at this time. We will send out an update when it is available.

**Please do not complete the author training. Once you have completed the sender training, you will then submit an IT ticket to request DocuSign access. You are only asking for sender privileges, not author.

Link to BuckeyeLearn: <https://buckeyelearn.osu.edu/>

Email Listserves

The Administrative Associate and/or the Administrative Assistant are responsible for adding new trainees to the email listserves. We need to provide them with the names and dot numbers of the trainees and tell them which cohort they are in so that they can put them in the correct groups. They will then add the trainees to the listserves on their first day.

File and Video Storage (W Drive)

The W Drive is in the shared drive. Each trainee has their own folder, this is where they keep the recordings of their sessions for supervision, and they may keep other projects in their file. Anyone with access to the W Drive has access to anyone's file in the W Drive.

Microsoft Teams

Microsoft Teams is used for creating teams, messaging, and phone calls. Currently the Office Staff Coordinator is responsible for requesting Teams access for the trainees. For a full training on Microsoft Teams Calling, follow this link: <https://admin.resources.osu.edu/microsoft-365-formerly-office-365/teams/teams-calling> The Training Program Assistant can help with any Teams related troubleshooting, but for any major issues, it's best to put in a service ticket with technology services.

Orientation

CCS holds an orientation for all new trainees each year starting on August 1st. All new staff hired within the past year are encouraged to participate in the trainings, as well as any staff refreshing their memory on certain trainings. Orientation is to be completely scheduled by the end of June, and a letter is sent out in late June informing incoming trainees of the final details and what to expect, as well as a copy of the orientation schedule. Most, if not all, of the trainings of orientation in Younkin or Lincoln Tower. See the “Room Reservation” section for information on reserving space.

Senior Staff are contacted to sign up for trainings that will be held during orientation. Typically, there is a large full-day professional development event in the early part of orientation for all staff. These may require external reservations. See the “Professional Development” document for the process of organizing professional development events. In planning orientation, we review the previous year’s schedule as well as the orientation evaluation data. The schedule from the previous year is adapted, as needed.

To prep the orientation evaluation in Qualtrics, two evaluations need to be created. The first is the daily evaluation. Send out the link on Day 1 of orientation, and trainees will use the same link throughout the whole of orientation to evaluate the trainings of each day. When creating this eval, use the orientation schedule to create conditional formatting for the training of each day. View last year’s evaluation to get a better understanding for how this works. Essentially, there should be a drop-down menu for each day of orientation that directs the trainee to complete specified feedback for each training on that day. Training staff regularly checks in on the feedback periodically throughout orientation to keep an eye on some things that might be able to be addressed up front during orientation.

The second evaluation is the overall orientation eval, which is sent at the very end of orientation regarding the overall satisfaction of the whole month of training. This is a separate link that trainees complete once.

Room Assignments

Part-Time Trainees need to use sign-out rooms for sessions with clients. See below for instructions on how to reserve a sign-out room.

How to Sign Out Rooms

- Sign out Rooms-click on “Sign Out Rooms/Office availability.”



SharePoint

SECURITY PAGE

COUNSELING AND CONSULTATION SERVICE

Counseling & Consultation Service Sign Out Rooms/Office Availability Training Clinical Services Outreach page Community Resources Lincoln Tower Office ADMINISTRATION

Home

Group Fall 2022

+ new item or edit this list

Current View Find an item

File	Group lead(s)	Day of group	Room Requested	Time of group	Group Status	Start Date	Number of members
Queer Grad Group - In person	☐ Sampson, Mark G. ☐ Adams, Lauren E.	Tuesday	430B (large room)	3:15 to 4:45 PM	Closed/Full - FA 22	1/17/2023	10
ABD Group	☐ Urbanczyk, Barbara H.	Thursday	Zoom	2-3:30pm	Closed/Full - FA 22	9/25/2022	8
Latina+HS&T Graduate	☐ Lusk, Mary	Thursday	433	2:30-4	Accepting referrals - FA 22	9/15/2022	0-8
Buckeye Brothers - Undergrad and Grad	☐ Friedman, Jacob L. ☐ Carey, Christian	Wednesday	Lincoln Group Room B	2:30-4PM	Closed/Full - FA 22	9/12/2022	
I Thought it Was Me (gender concerns)	☐ Simon, Claire M. ☐ Wylfi, Colin	Tuesday	430A (Training Room)	3pm to 4:30pm	Accepting referrals - FA 22	9/12/2022	up to 10
Facing Our Fears (OCD Group)	☐ Arbogast, Courtney E. ☐ Betzel, Anna L.	Monday	433	3:00-4:30	Closed/Full - FA 22		8-10
International Graduate Student Group	☐ Yang, I Shan ☐ James, Cheryl	Thursday	Lincoln Group Room A	3-4:30pm	Closed/Full - FA 22	9/22/2022	8-10
Bringing Back Balance	☐ Young, Amy M. ☐ Stone, Suzanne J.	Thursday	200M	1-2:30pm	Closed/Full - FA 22	9/15/2022	0-6
Surviving to Thriving (gender inclusive, safe-structured)	☐ Ennscoe, Kaylee J. ☐ Abrahamowitz, Katie	Thursday	430B (large room)	3-4:30	Closed/Full - FA 22	9/22/2022	8-10
Queer Undergrad Group	☐ Peters, Sarah	Tuesday	Lincoln Group Room B	3:15-4:45	Accepting referrals - FA 22	9/13/2022	0-8
Eating and Body Image Concerns (gender-inclusive)	☐ Serpe, Kristen N. ☐ Richardson, Matthew	Tuesday	434 (small separate room)	3:00-4:30	Closed/Full - FA 22	9/27/2022	8-10
USO BIPOC	☐ Jackson, Amber ☐ Street, Zaneta	Friday	Lincoln Group Room B	2PM - 3:30PM	Accepting referrals - FA 22	9/16/2022	up to 10
Graduate Student Support Group II	☐ Hakkar, Sarvesh	Tuesday	Zoom	3-4:30	Closed/Full - FA 22	9/29/2022	8-10

Recent

30 RM 1000C

Business card order

Staff Contributions to

- Click on the room that is to be signed out (for example YSC Room 406)



SharePoint

BROWSE PAGE

Counseling & Consultation Service Sign Out Rooms/Office Availability Training Clinical Services Outreach page Community Resources Lincoln Tower Office ADMINISTRATION

Clinical Services
Community Resources
Lincoln Tower Office
Outreach page
Sign Out Rooms/Office Availability
SIGN OUTS
LINCOLN SIGN OUT
Group Rooms
People and Groups
Senior Staff/Youkin
Pictures
Documents
Senior Staff Lincoln
430A Training Room
Training
ADMIN
ADMINISTRATION
Site Contents

Counseling & Consultation Service > Sign Out Rooms/Office Availability

STAFF OFFICES/SIGN OUTS & GROUP ROOMS

YOUNKIN SIGN OUTS/GROUP	LINCOLN SIGN OUTS/GROUP	TRAINEES	LINCOLN SENIOR STAFF	YOUNKIN SENIOR STAFF
YSC ROOM 406	LT Group RM 1010B/SO	Sarah Vintar LT1000E Clinical Fellow	Lydia Garris RM 1000A	Shivani Edwards RM 404
YSC ROOM 408	LT Group RM 1021A/SO	Nicole Parish RM 1042 Clinical Fellow	Jake Friedman LT1000B	Courtney Arbogast RM 410
YSC ROOM 412	SO RM 1030D	Cheryl James LT1043 Clinical Fellow	Amber Jackson RM 1000D	I-Shan Yang 414
SO RM 413	LT RM 1010F/SO Limited SO	Katie Abrahamowitz YSC RM 411 Psychology Intern	Chelles Arnold RM1010C	Chavonne Gaines RM 418
YSC SO ROOM 416	LT SO RM 1030B	Lauren Adams YSC RM 415 Psychology Intern	Sarah Petras RM1010D	Amy Young RM 438
SO RM 417		Julie Engler YSC RM 419 Psychology Intern	Nicky Sharma/ Mary DeCenzo RM 1010E Limited SO	Clare Simon RM 482
SO RM 445		Matthew Richardson YSC RM 417 Psychology Intern	Jennifer Lang RM1022	Jane Bollen RM 444
SO RM 447		Christian Carvey YSC RM 427 Psychology Intern	Josh Bailey RM 1023	Kylee Siscoe RM 446
SO RM 449			Bansari Thakkar RM 1024	Mindy Farnick RM 450
SO RM 451			Shawn Lucas RM 1025	Darreon Green RM 452
SO RM 453			Brian Pitts RM 1032	Mandi Kidman RM 456
SO RM 470			Van Palmieri RM 1043	Stephanie Gossert RM 460
YSC RM 430A/Conference RM Multi-Use			Ryan Patel RM 1044	
YSC GROUP RM 430B/SO			Lesha Chiles RM 1050C	
YSC RM GROUP 431/SO				
YSC GROUP RM 434/SO				
ADMIN USE ONLY				

- Hover over the date desired to reserve the room and the icon “+Add” will appear.
 - Click on “+Add”



SharePoint

BROWSE EVENTS CALENDAR

Counseling & Consultation Service Sign Out Rooms/Office Availability Training Clinical Services Outreach page Community Resources Lincoln Tower Office ADMINISTRATION

YSC ROOM 406

November 2022

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY
30	31	1	2 6:30 am - 7:00 pm Harry	3
6	7	8	9 6:30 am - 7:00 pm Harry	10
13	14	15 9:30 am - 11:30 am Susan Hagos	16 6:30 am - 7:00 pm Harry	17
20	21	22	23 6:30 am - 7:00 pm Harry	24
27	28	29 Add	30 6:30 am - 7:00 pm Harry	1

Calendars in View
YSC ROOM 406

Clinical Services
Community Resources
Lincoln Tower Office
Outreach page
Sign Out Rooms/Office Availability
SIGN OUTS
LINCOLN SIGN OUT
Group Rooms
People and Groups

- Type in the name of the person reserving the room.
 - For example, under “Title”- staff member
- Start Time
- End Time
- If you want to make it recurring multiple dates, click “Recurrence.”
- If weekly, click “Weekly.”
- And type in “End by”
- Click “Save”

YSC ROOM 406 - New Item

EDIT

 Save

 Cancel

 Paste

 Cut

 Copy

 Attach File

 ABC

Commit

Clipboard

Actions

Spelling

Title *

Location

Start Time *

11 AM

00

End Time *

12 PM

00

Description

[Click for help about adding basic HTML formatting.](#)

Category

☒

☐ Specify your own value:

All Day Event

☐ Make this an all-day activity that doesn't start or end at a specific hour.

Recurrence

☒ Make this a repeating event.

☐ Daily

☒ Weekly

☐ Monthly

☐ Yearly

Pattern

Recur every

1

 week(s) on:

☐ Sunday

☒ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☐ Friday

☐ Saturday

Date Range

Start Date

11/21/2022



☐ No end date

☐ End after:

10

 occurrence(s)

☒ End by:

11/25/2022



Save

Cancel

.S Accounts and Sponsored Accounts

.S Accounts and Sponsored Accounts are different. .S Accounts are for enrolled students who are training at CCS. OSU students cannot use their student buckeyemail addresses for work purposes. Sponsored Guest Accounts are for non-OSU (not paid) workers/affiliates. It allows the individual to have an OSU email address. These are primarily used for our Psychology Practicum Students from other universities or colleges. The Administrative Associate and Administrative Assistant process .S and Sponsored Accounts. They are generally set up almost immediately--an email goes out to the trainee with instructions to set it up.

.S Accounts

1. All OSU students training at CCS must have an .S account.
2. If they have an .S account from a previous department, the student needs to work with that department to deactivate the former .S account for SLTS to set up a new one associated with CCS.
3. CCS should use their .S accounts when emailing these trainees.

Sponsored Guest Accounts

If they are a student from a different university or college, they will need a Sponsored Guest Account so that they have an OSU email account.

The sponsor/manager of an .S account is responsible for notifying the email team when the .S account is no longer needed and should be removed from service at the end of the traineeship. To maintain up-to-date address books and reduce no longer needed accounts, the email team will perform automated checks of .S accounts quarterly. Any .S account that has not changed their password in a year will be considered no longer needed and marked as no longer affiliated.

Once an account is marked no longer affiliated the following will occur:

- The account will be disabled, preventing its use.
- The account will be removed from all address lists.
- The account will be removed from all distribution groups.
- The account will no longer receive email. Any mail sent to the account will bounce generating a non-delivery report to the original sender.

Student Life Accounts

The admin team is responsible for requesting accounts for new trainees. The training team needs to send the trainees' info to the Administrative Associate. It is important to make sure that they know which trainees need standard OSU emails, .S accounts, or sponsored accounts. The admin team sends a request to OCIO to create a student life account, student ID, and email account for the new trainees. Once they receive those accounts, the admin team will request Titanium accounts through SLTS (See Titanium Access).

Titanium Access

Tickets are submitted through <https://slts.osu.edu> portal. Select "Hosted Application" and make sure to select "Titanium" in the program field.

New Trainee (except psychiatry residents)

We need to have a Titanium account created for <New Trainee>(EID 000000000 and user name user.#) as they will be joining CCS as a trainee starting on <start date>. They need to be added

to the "All Counselors (Psychiatry, Therapy & Students)", "Trainees", and "<Cohort specific group>" Titanium groups. <New Trainee> will need Titanium account permissions based on <Another Trainee>. Their signature license is <license/credentials>.

Psychiatry Residents

We need to have a Titanium account created for <New Psychiatry Resident>(EID 000000000 and user name user.#) as they will be joining CCS as a trainee starting on <start date>. They need to be added to the "All Counselors (Psychiatry, Therapy & Students)", "Trainees", "Psychiatry All", and "Psychiatry Residents" Titanium groups. <New Psychiatry Resident> will need Titanium account permissions based on <Another Psychiatry Resident>. Their signature license is <license/credentials>.

VPN

VPN (virtual private network) enables staff to remotely access their office computer to work from home. Currently, the Office Staff Coordinator is responsible for obtaining VPN access for trainees prior to their start date. The Office Staff Coordinator will submit a service ticket to Student Life Technology Services (SLTS). Trainees need to leave their office computers turned on to access from home. Once they get VPN access, a link will be emailed to them to access their VPN.

Trainee Departure

Exit Checklist

The Exit Checklist must be completed by each trainee before they leave their traineeship. The checklist can be found in the training drive under training > trainees > checklists.

Exit Interview

Each trainee needs to complete an exit interview before they leave the training program. The exit interview should be facilitated by the Training Director, Assistant Training Director, or cohort coordinator. The Exit Questionnaire Form can be found in the Training Drive. The completed questionnaire should be put in the trainee's file.

Trainee Files Checklist

The Training Program Assistant is responsible for keeping track of the trainee files checklists for each trainee throughout the year. Trainees must have everything on the checklist in their files before departure. A copy of the Trainee Files Checklist can be found in the training drive, Training > Trainees > Checklists.

Events

Campus Room Reservations

The Training Program Assistant is responsible for reserving rooms for training events. We typically use the Union or The Biomedical Research Tower for professional development events.

- **Ohio Union Room Reservations** <https://emsweb.studentaffairs.ohio-state.edu/EMSWebApp/>

- To follow up on a reservation made through the website contact Ohio Union Reservation Team at 614-292-5200 or through their website https://ohiounion.osu.edu/meetings_events/space_requests/
- It could take up to a week for the reservation team to finalize your request, but they are rather helpful when calling for confirmation.
- The Fiscal Associate can help with getting the PO for the room reservation if needed.
- **Biomedical Research Tower – Retreats and Professional Development (RM 105)**
 - Click on the link <https://wexnermedical.osu.edu/utility/footer/events-and-video-production/request-form/event-request-with-av>

Fill out all the information listed below:

Contact Information

* Name	* Email address	* Phone number

If you are not an OSU employee or if you are an OSU Student, please provide advisor/sponsor name, email and phone number.

About the Event

*** Event Name**

This is a for-credit OSU class Subject, course number or name
☐ Yes ☐ No (https://courses.osu.edu/)

Occurrence

☐ Single Event ☐ Recurring

If recurring, list dates, days of the week, etc.

*** Event Date** *** Estimated Attendance**

* Event Start Time

* Event End Time

Room Reserved Start Time (optional)

Room Reserved End Time (optional)

* Location Preference (OSUWMC Users: Online calendar for room availability:
<http://go.osu.edu/WMCrooms>)

Event Description and Comments

Agenda

For events with multiple speakers (sequential, concurrent, and/or panel), all-day events, recorded events, etc., please provide an agenda.

Copy and paste agenda

Billing Information

Organization (cost center)

Fund number

AV Support Selection

Self-Serve AV Access: Your group will have access to turn on and use the installed AV system themselves.

In-person Setup: EVP will provide an onsite tech to turn on the AV and assist presenters with loading presentations and ensuring the event starts successfully.

Operator Assistance: EVP tech will turn on system and remain onsite for duration of the event. This level of support is reserved for events with advanced technology and/or presenter needs. Support subject to EVP staffing resources.

Which service do you need for your event?

- ☐ Self-Serve AV Access
- ☐ In-person Setup
- ☐ Operator Assistance

Presentations (Powerpoint, applications, etc.)

We will make sure you have the appropriate technology (computer, projector, microphones, etc.) for a presentation in the location you are scheduled in. Users that bring their own devices are responsible for bringing adapters to connect to the AV system. Specifics can be provided for each room on auxiliary connection options.

Presenter(s) will use

- ☐ Installed or Provided Window Computer
- ☐ Personal Windows Laptop
- ☐ Personal Apple Laptop
- ☐ Other Device (iPad, Tablet, etc.)

Number of presenters

Audience response system

- ☐ TopHat

- Under AV Support Selection –Choose “Self-Serve AV Access.” (or they will charge for the services).

Web/Audio Conference

OSUWMC staff should schedule their Web/Audio Conference with OSUWMC's WebEx tool using the WebEx Productivity Tools plug-in for Microsoft Outlook (https://osumc.service-now.com/kb_view_customer.do?sysparm_article=KB24785) or through the WebEx website (<https://osumc.webex.com>).

Scheduled with

- ☐ OSUWMC's WebEx Tool
- ☐ Other Conferencing Platform

IP Standard-Based Video Conference

Remote site location

Remote site IP address

Remote Site Technical Contact

Name

Email

Phone number

Recording of Live Event

Video to be captured

- ☐ Screen capture (recording of Powerpoint or computer screen)
- ☐ Camera shot (recoding of presenter/speaker)
- ☐ Mix of screen capture and camera shot (recording performed by video director or live production crew)

Who is the audience for this video recording?

Will there be Q&A or audience discussion that needs to be recorded?

- ☐ Yes
- ☐ No

- This section typically does not need to be completed.

Where will the audience see this video recording and how long will it be available?

Live Webcast of Event

What is the estimated viewership?

- ☐ 1-5 people
- ☐ Over 5 people

How will the Live Webcast Link we provide be shared with your audience? (i.e. Email, OneSource, ThisWeek, social media, etc.)

Submit

- Click Submit to get a confirmation email stating that the room is reserved.

CEUs and Certificates

CEUs are attended by clinicians to maintain professional state licensure. CCS has board approval to hold events and grant CEUs as credit for attendance. The Board of Psychology is separate from the Board of Counseling, Social Work, and Marriage and Family Therapy (CSWMFT).

Pre-event:

Zoom Events:

For a Zoom event, sign-in information through Zoom's built-in registration feature. To use Zoom's built in features, navigate to <https://osu.zoom.us/> and log into CarmenZoom. Under "Meetings" on the left hand side, click "Schedule a Meeting". Here you can set the topic/title of the meeting, add a description, pick a date, time, and duration and change other options regarding hosts, audio/video, etc. Make sure you click "Registration required", and then hit "Save".

Once the meeting is saved, page with details about newly created meeting will appear. Scrolling down, there will be a portion labelled “Registration” which will allow for editing and viewing registrants. Editing Registration options allows you to add fields such as name, email, phone number, organization and job title, and other common details. To collect information needed for CEUs (mainly license numbers), go to “Custom Questions” and add a new short-answer question asking for attendees’ licensure numbers.

After the Zoom PD has ended, navigate back to CarmenZoom and click on “Reports” on the lefthand side. Here you want to access the registration reports which will give you the information registrants entered when signing up, as well as their log-in and log-out times for the events. This information is required by licensure boards to verify PD attendance for virtual events. Next to the meeting, click “Generate” to create a CSV file, useable in Excel, of the information provided at registration. This is the information needed to create and send CEU certificates as detailed below.

In-Person Events:

For each PD, sign-in sheets to collect CEUs are required for attendees of the event. The sheets are prepared in advance by compiling the information from attendees that RSVP’d for the event. A table is set up outside the event for people to sign for their CEUs. Use EventBrite to have attendees register for the event. Simply create an event, then add a section to ask if they want CEU’s, then have them input their license number and discipline. You can view this information before the event to get names and license numbers for the sign in sheets.

Post in-person event:

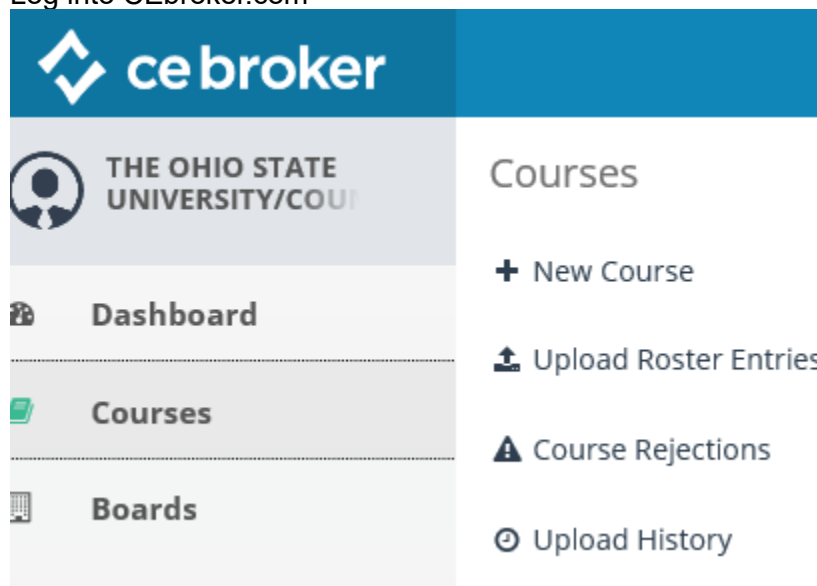
1. Scan the signed CEU sheets in the event file.
2. Send via email a copy of the Psychology sign-in sheet for the event to the Psychology CEU Coordinator on staff. The coordinator must send this sheet into the board within 30 days of the event for the credit to be applied to attendees’ licenses.
 - a. Note: The CSWMFT sheet is not sent anywhere but needs to be stored internally.
3. Create a blank CEU template in Adobe Acrobat for both CSW and Psychology credits. This can be done by copying the most recent event’s certificate template and changing the details. Save the new forms in the event file.
 - a. Note: Be attentive of the event details and note the number of credits when creating the forms.
4. Digitize the sign in sheet by typing the data into an excel sheet. This can save time in the CEU certificates and when using CEbroker. If you used Zoom, the Meeting Registration can be exported as a report as detailed above, and use the information collected in the Zoom registration link prior to the event.
5. Looking at the signed attendance sheets, complete the CEU form for each attendee, including name, full license number, and discipline. As each form is finished, instead of hitting Save, hit SAVE AS “Last name X-XX-XXXX Cert”. By using Save As, the original blank PDF is kept blank and can be reused. Repeat the process for each attendee. It is suggested completing all psychologists and all CSW’ers in two separate batches. You may also choose to create files within the event’s folder to organize these.
 - a. In the event of an incomplete or missing licensure number for counselors/social workers, (a social worker only entering “1234”, for instance), https://elicense.ohio.gov/oh_verifylicense can be used to look up and verify the number. Many times, this happens because there is a series of 0s in the full 7-digit number, so make sure to check what the full number should be for the certificate.
6. Once the certificates have been created, they can be sent out individually via email. This must be completed within a week of the event. This email can be a simple “Hello, attached

is the PDF of your CEU Certificate for [Event]. If you have any questions regarding your certificate, please contact [Training Director/Training PA/Designated contact person] or call our office at 614-292-5766.”

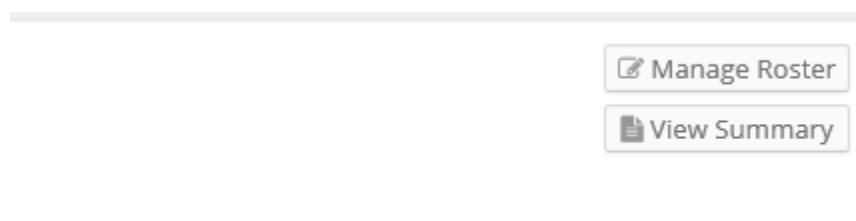
7. This process of making certificates can be delegated to someone on the front desk team but only after coordination with the Front Desk team. Certificates should be sent by the program assistant of training, or a member of the training team.
8. Go to <https://cebroker.com/> and use the sign-in information provided by OSU CCS Training Team.
9. Follow the instructions in CEbroker to use the digital sign-in sheet to get the information into ANOTHER excel file. Follow the instructions here to set up the excel sheet: https://secure.cebroker.com/help/provider/info_page_a.html

CEUs Accreditation and Renewals

- CE Provider Renewal is required every two years.
- Renewal must be submitted at least 45 days prior to the expiration date.
- Application for renewal is completed via the CE Broker Website.
- The CCS log in information for CE Broker:
- Log into CEbroker.com



- Add new course- follow prompts and finish. Click all boxes for counselors, MFTs, and social workers correct number of CEU's to offer.
- Click on course just added (active)



- Click on manage roster.
- Ensure that the date is correct and number of CEU's earned (this can be put in partial hours if someone left early or came in late)

- Add each individual attendee by license #
- In addition to completion of the application, you will need to provide supplementary materials including:
 - Titles and other required information related to all programs offered since the last renewal**
 - Topics for upcoming presentations
 - A sample blank CE certificate
 - Resumes for the Social Worker, Counselor and MFT in charge of reviewing programming (if they have changed since the last renewal)
- ** The summary of CE Programs offered since the last renewal should include the following information for every program:
 - Date of the CE program
 - Time of the CE program
 - Number of credit hours offered to participants (this must match the running time of the program, or you must note that the hours indicated included breaks for lunch, etc.)
 - The full title of the program as it appears on CE certificates given to attendees.
 - The presenters full name and credentials – you must also specify the degree program (ex: Clinical vs. Counseling Psychology).
 - A brief description of the program.
 - I have included a copy of the most recent past summary to be used as a guide.
- There is currently a \$250.00 fee required for renewal

Professional Developments

The Training Committee organizes all CCS PD events. Most professional development events will have a subcommittee derived from the Training Committee to plan the details of the event.

Pre-event:

- Gather information on the event: speaker information, event name, and audience. Start a file in the Professional Development file to start compiling information.
- Determine a location for the event and make reservation. Begin corresponding with venue regarding event details.
 - Note conditional status for Union and RPAC
 - Note required catering for some spaces
 - <http://planevents.osu.edu/> - can do “request for proposal” and hear back from venues within 48 hours on if they can accommodate your event. This is great if you don’t know where you’d like to have your event on campus or are looking for other options.
 - Can also use the EMS system to reserve a space:
<https://emsweb.studentaffairs.ohio-state.edu/emswebapp/Default.aspx>
- Develop the advertisement e-brochure that goes out via email.
 - You will need the speaker’s photo, goals/objectives, and agenda, etc. Go to the previous event’s e-brochure, copy to the new file, and change information/reconfigure for the new event.
- Create RSVP option. Zoom or EventBright can be used for RSVP. Customize questions for the event. Standard questions:
 - Fill in the blank – Name (last and first separate questions)

- Fill in the blank – Email
- Fill in the blank – Phone number
- Fill in the blank – Discipline
- Fill in the blank – License number
- Multiple choice – Payment method (personal check/money order, OSU e-request, employer paying via check, or waived fee) You may want to use conditional formatting here to prompt people with instructions based on whichever payment method they have.
- Distribute RSVP and E-brochure. If needed, navigate to “Invitation List”, copy relevant emails/department contacts, and BCC in an email.
- Note: It is always a good practice to use the BCC feature in emails that go to the public.
- Establish catering. Partnership with the fiscal associate is imperative for this. Will need e-requests and budget information.
- Order any remaining items that are needed. Name tags (hello my name is), pens, supplies.
- Order and prepare any printing needs for the speaker. UniPrint must be used for anything that gets distributed outside of CCS. Email uniprintcustserv@osu.edu for quote request, see purchasing how-to for more info.

During event:

- Display CEU sign-in sheets at a table outside the event doors
- Collect payment as needed (with help of fiscal associate)
- Ensure event details are being attended to. Make sure you have the contact for facility needs on the day-of.
- See “Professional Development Evaluations” section for information on PD evaluations.

Post-event:

- Send out Qualtrics feedback survey (see Qualtrics for instructions)
- Create and distribute CEUs (see CEU document for instructions)
 - Do within a week of event, be sure to make time for this ahead of time, coordinate scheduling away from front desk with front desk coordinator to make sure there is time for this the week following an event.)
- Send psychology CEU sign-in sheet to psychology CEU coordinator within a week after the event.

Invitations

All CCS Staff are invited to Professional Development Events. We also invite staff from the regional campuses, as well as previous OSU CCS Training Directors. See above section above about sending invitations.

Materials

We need the same materials from Professional Development Presenters that we need from Seminar Presenters.

- Goal and objectives
 - One objective must be multiculturally related.
- References
 - One must be within the last 5 years.
- Slides and/or handouts (if used)
- Guideline for the goal and objectives:

- <https://www.apa.org/ed/sponsor/resources/objectives.pdf>

Timeline

See the “Professional Development” section for the timeline for planning Professional Developments. The timeline for events during the year is listed below:

- Professional Development for all staff is in August during Orientation.
- Professional Development is at the end of the Fall Semester, usually the last Friday of the semester.
- FRED Talks is usually the first Friday that we are back in the office after New Years.
- Community Provider Day is biennial in July.
- Psychology Intern Projects in June.
- Trainee Celebration is during the last week of the Spring Semester.

Trainee Celebration

The Trainee Celebration takes place during the last Friday of the semester. All CCS Staff are invited, and this is a chance to celebrate the trainees and show appreciation for their hard work during their time as trainees. The training team and training committee oversee planning and executing the Trainee Celebration. A room will need to be reserved, previous locations have been Hale Hall and Younkin 150.

Traineeship Completion Certificates

Each Trainee receives a Completion of Traineeship Certificate at the end of their Training Program. You can find the template for certificates and past certificates in the Training drive, Retreats and Meetings > Trainee Celebration > End of Year Certificates. See the section on E-Signatures for instructions on how to add the signatures to the certificates. The Training Program Assistant is responsible for printing out the certificates on the certificate paper, putting on the seal, and placing each one in a certificate folder.

Seminars

Seminars

Seminars are generally held every Monday throughout the year. Monday seminars are from 10am-12pm.

Psychology Interns and GTAs attend Monday seminars and only psychology interns are required to attend Mondays. Clinical Residents do not attend Fall and Spring semesters unless by invite.

The seminar schedule for the year/semester is usually solidified well before the start of each semester. Speakers are lined up and space requests are made. Every effort is made to hold all the seminars in the same space. Rooms 210, 300, and 220 in Younkin work well. This is a guideline for the goal and objectives: <https://www.apa.org/ed/sponsor/resources/objectives.pdf>

Materials

In advance of each seminar, dates are confirmed, and seminar goals, objectives, competencies, and references are collected from presenters. At least one objective needs to have a multi-cultural component and at least one reference must be from the past five years.

The archive for seminar info is kept in “Training > Seminars > Goals/Obj/Comps/Refs folder”. References are also kept on Sharepoint. Keep updating this as new seminars are added. These documents may be sent out for the presenters of those topics to update or work from. See the section about Evaluations and Qualtrics for more information on putting the evaluations for seminars together.

Paper Evaluations

Paper Evaluations need to be made for each seminar. The template for the eval can be found under training > seminars > evaluations. The template needs to be filled in with the seminar title, presenters (with titles), goal, and objectives. Each objective needs to be turned into a question that the trainees can answer with a rating. The easiest way to do this is to turn the objectives into questions by starting them with “can you” or “are you able to”.

The paper evaluations should be passed out to trainees before the start of the seminar. After the presentation, the trainees must complete the evaluations before leaving the room. The program assistant then inputs the evaluation data into a spreadsheet.

Room Reservations

There are two ways that space is reserved in the building. For non-CCS rooms (rooms on any other floor of the building), the virtual request service must be used – EMS. For CCS rooms, SharePoint is used to reserve space.

YSC building requests:

- Use the following website to request space in Younkin that is not on the 4th floor. Note: This is also the same website used to request space in the Union, RPAC, and Lincoln Tower. See “Event Planning” document for more information on requesting other campus space.
 - <https://emsweb.studentaffairs.ohio-state.edu/emswebapp/>
- Best rooms to use:
 - YSC 210 – is the largest room in the building and is the only room that can hold our full staff. This room has a good presentation setup. Has lectern PC and drop-down screen/podium.
 - YSC 220 – this is a good classroom space for seminars and trainings. Lectern PC and podium.
 - SharePoint: <http://sharepoint/ccs/default.aspx>
 - Navigate to the page for the appropriate room and make a specified reservation at the date and time.
- Podium Access:
 - To use the podium, turn on the computer, log in as GUEST. DO NOT enter any password. Simply click next/sign on with all the spaces left blank. This will let you go directly to the guest user. Turn on the projector using the screen provided at the podium. Click Lectern PC if prompted to connect the projector to the podium.

Seminar Schedules

Seminar Schedules can be found in the Training Drive. Training > Seminars > Semester Seminar Schedule > Select Year

Set-up

To set up for seminars, collect all of the presenter's materials. Approximately ten minutes before the seminar, prepare the space and display their slides on the projector. Pass out paper evaluation to trainees as they come in and assign a trainee with the task of collecting completed evals and put them in the Training Program Assistant's mailbox. Stay in the room until the seminar starts to assist with any troubleshooting needs.

Evaluations and Surveys

Climate Survey

The Climate Survey is sent out along with the End of the Semester Surveys at the end of each semester. It is a separate survey through Qualtrics. A paper version of the questions can be found in the training drive, training > evaluations > climate survey. The Climate Survey on Qualtrics is updated for every semester and distributed.

End of Semester Surveys

The following is a list of the evaluations that each cohort (and supervisors) will need to complete:

Senior Staff:

- Evaluation of Trainee – must be signed.

Practicum Students (MSW 1 Interns, Counseling Practicum, Psychology Practicum):

- Evaluation of Traineeship
- Feedback for Training Director
- Feedback for Assistant Training Director
- Evaluation of Case Conference
- Feedback for Cohort Coordinator
- Evaluation of Supervisor – must be signed.
 - Psychology Intern/Clinical Resident Supervisor
 - Senior Staff Individual Supervisor
 - Group Therapy Supervisor

Social Work II/ Counseling Interns:

- Evaluation of Traineeship
- Feedback for Training Director
- Feedback for Assistant Training Director
- Evaluation of Case Conference
- Feedback for Cohort Coordinator
- Evaluation of Supervisor – must be signed.
 - Senior Staff Individual Supervisor
 - Group Therapy Supervisor

Psychology Interns:

- Evaluation of Traineeship
- Feedback for Training Director
- Feedback for Assistant Training Director
- Evaluation of Case Conference
- Evaluation of Sup of Sup

- Feedback for Cohort Coordinator
- Evaluation of Supervisor (for your direct supervisor) – must be signed.
 - Senior Staff Individual Supervisor
 - Group Therapy Supervisor
- Evaluation of Trainee (for your practicum supervisee) – must be signed.

Clinical Resident:

- Evaluation of Traineeship
- Feedback for Training Director
- Feedback for Assistant Training Director
- Evaluation of Case Conference
- Feedback for Cohort Coordinator
- Evaluation of Supervisor (for your direct supervisor) – must be signed.
 - Senior Staff Individual Supervisor
 - Group Therapy Supervisor
- Evaluation of Trainee (for your practicum supervisee) – must be signed.

Psychiatry Residents:

- Evaluation of Psychiatry Residency
- Evaluation of Supervisor
- Feedback for Training Director
- Feedback for Assistant Training Director
-

Psychiatry Resident Supervisors: (not applicable this year)

- Evaluation of Psychiatry Resident

Prior Psychology Intern Surveys (Distal Survey)

This is sent out each year to a previous cohort of psychology interns (1 year post traineeship). It is used to gather information about current employment, to assess how the internship training addressed the professional wide competencies, and how internship prepared them for future employment. The same Qualtrics link will be used to collect data, as the data will go to one place for the final report for the Self-Study. Do not change this survey until after next Self-Study. Simply distribute the link to interns as needed. Data will funnel into the same pool for analysis. See “Training > Evaluations>Prior Intern Survey”. Also see “Training>Trainees>Psychology Interns>“Former Intern Contact Database”” for list of former interns and record of survey being sent.

Professional Development Evaluations

The Training Program has been using Qualtrics to create evaluations for Professional Development events, but to ensure that the evaluations are filled out by all attendees, evaluations will be completed on paper. You can find the template for the evaluation in the Professional Development folder in the training drive. Just put in the specific questions and information for each event before printing. When the event is over, the people in charge of check-ins will keep track of who turns in a completed evaluation.

Qualtrics

<https://osu.az1.qualtrics.com/homepage/ui> – log-in link for Qualtrics.

Qualtrics General Overview:

Qualtrics is used to collect information at CCS. The university provides Qualtrics memberships for university staff and students as needed for jobs or projects. CCS has two affiliations with Qualtrics. One affiliation is a client satisfaction survey that is distributed to CCS clients via Clinical Services and is managed entirely by the Center for the Study of Study Life (CSSL). The other main usage of Qualtrics at CCS is through the training team. We evaluate nearly every aspect of the training program, and these generally happen through Qualtrics. The Training Program Assistant is the account manager and creator/distributor for these surveys involving the training program.

Qualtrics organization:

It is important to keep the surveys organized. It is advised to create various folders within the account that house the evaluations separately such as:

- Orientation
- Prior Experience Questionnaire
- Prior Intern Survey
- Professional Development (broken down into subfolders for years, example: 2017-2018, 2018-2019, etc.)
- Selection Process Survey
- Seminars (broken down into subfolders for years, example: 2017-2018, 2018-2019, etc.)
- The End of Semester Evaluation

The breakdown of the various evaluations is as follows:

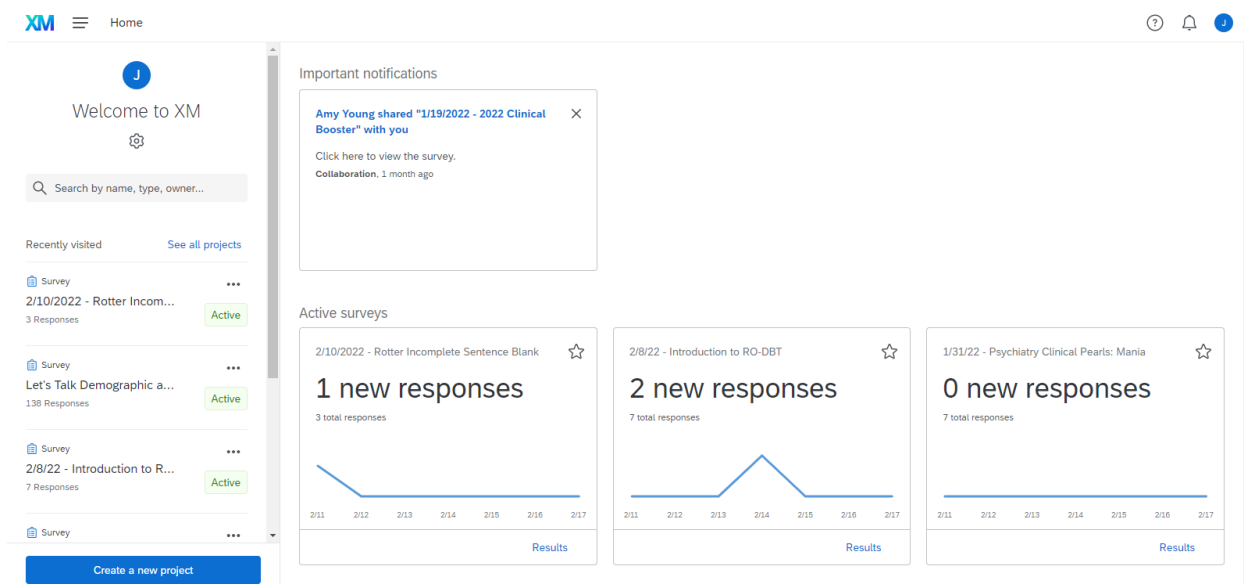
Orientation: There are two projects created for each orientation year. There is a session evaluation, which is completed by trainees at the end of each training day, and then one overall evaluation sent and completed after orientation is completed. This project will need to be copied for the following year and details will need to be modified (the dates of orientation and the flow/conditional formatting of each presentation). This may require assistance from CSSL.

Prior Experience Questionnaire: This sent over the summer before the new cohort of trainees arrives. This is intended to gauge the training interests and areas of strength/weakness of the incoming trainees. This is intended only to help us determine training areas and try to tailor the training experience and is not used to evaluate the trainees in any way. This used to be completed via hard copy/email in a packet.

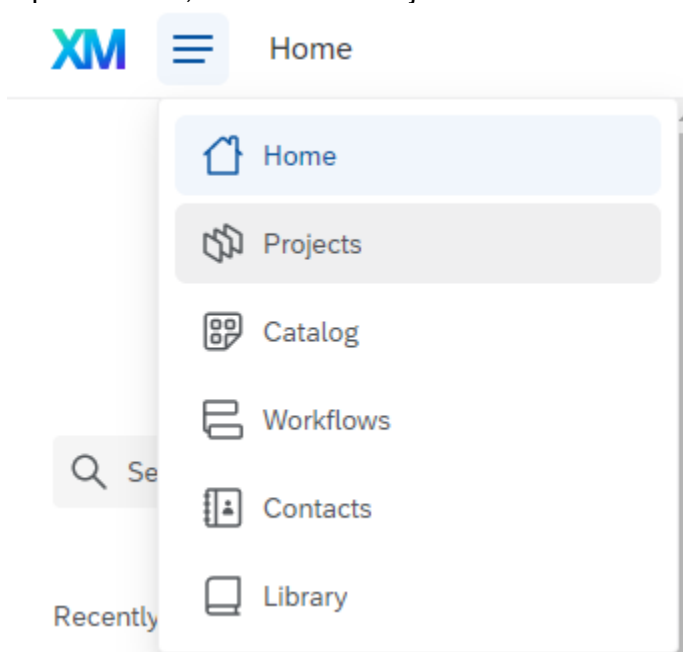
Selection Process Survey: This survey is distributed once psychology intern interviews are complete. It only gets distributed to the applicants who were interviewed. It is important to be clear when sending out the email that it is going to the right people. Do NOT send it to the entire applicant list. See Training>Evaluations>Selection Process Survey

Navigating Qualtrics

Qualtrics often undergoes UI and graphic design changes as updates are provided by its designers. As of Spring 2023, this is the launch screen when logging into Qualtrics for the first time to the home page:



To find the list of projects/existing surveys, click on the menu button of three stacked bars, in the top left corner, and click on Projects:



From here, the Project page will display any subfolders you have created, and a general list of existing projects:

Projects and Programs

All project types All statuses Search... Create project

Project name	Status	Responses	Type	Owner	Last modified	Creation date	
☆ Seminars	—	—	Folder	—	—	—	...
☆ Semester Evals	—	—	Folder	—	—	—	...
☆ Professional Development	—	—	Folder	—	—	—	...
☆ Search Committee	—	—	Folder	—	—	—	...
☆ Large-Scale Training Stuff	—	—	Folder	—	—	—	...
☆ Orientation	—	—	Folder	—	—	—	...
☆ Other?	—	—	Folder	—	—	—	...
☆ Outreach	—	—	Folder	—	—	—	...
☆ Summer 2021 Semester Evaluation	Active	0	Survey	Me	Apr 9, 2021	Apr 9, 2021	...
☆ Starting a Private Practice - SP2021	Active	—	Survey	Mark Sampson	May 3, 2021	May 3, 2021	...
☆ 10/4/2021 - Social Justice Issues in Therapy	Active	—	Survey	Amy Young	Feb 10, 2022	Oct 4, 2021	...
☆ 10/11/2021 - Psychiatry--Antidepressants/Anxiolytics	Active	—	Survey	Amy Young	Feb 10, 2022	Oct 7, 2021	...

There are two methods for creating any kind of Qualtrics project, but we will use a Seminar Qualtrics as an example. This can either be copied from a previously existing evaluation, or create one from scratch.

Creating a Survey from Scratch

Click on the blue Create Project button visible in the top right-hand corner of the Projects page, shown above, and you will be taken to a screen asking you what kind of survey you'd like to create. Qualtrics is a diverse software with multiple uses and contains numerous templates and examples for various kinds of surveys. For training purposes, it is easiest to create one entirely from scratch.

Create a project

From scratch

Survey
 Imported Data

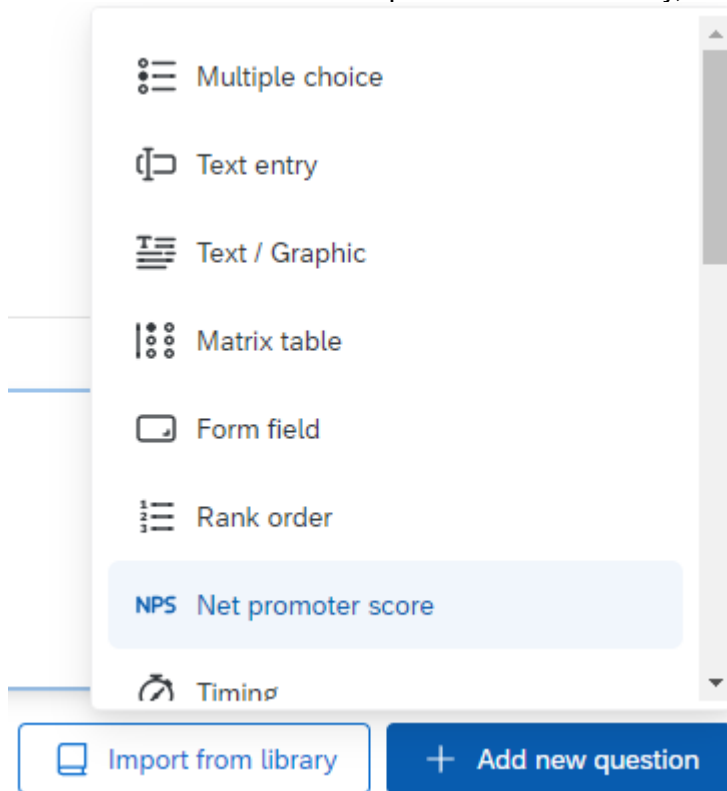
From here, title your project, select any subfolder you'd like the project placed into, and click Create Project. You will be taken to the survey creation page, where most of the work will be done.

The screenshot shows the Qualtrics 'Edit question' interface. On the left, a sidebar contains icons for Survey, Workflows, Distributions, Data & Analysis, Results, and Reports. The 'Edit question' panel is active, showing 'Question type' set to 'Multiple choice'. Under 'Answer type', 'Allow one answer' is selected. Under 'Choices', the 'Number of choices' is set to 3. The 'Format' section shows 'List' and 'Alignment' set to 'Vertical'. The main workspace, titled 'Untitled project', shows a 'Default Question Block' with a question text area and three choice text areas. At the bottom, there is an 'End of Survey' block with a thank you message: 'We thank you for your time spent taking this survey. Your response has been recorded.' The top navigation bar includes 'Tools', 'Saved at 9:03 AM', 'Draft', 'Preview', and 'Publish' buttons. An 'ExpertReview score' of 'Great' is displayed in the top right corner.

There are infinite ways to structure the survey, but the typical Training survey format will include an introduction (which will often include a list of the given Goals and Objectives for a given training), then demographics questions (including the user's position at CCS or elsewhere), a number of evaluation questions specific to the training, general questions regarding the presenter, and a final space for any comments the user wishes to provide.

There are multiple types of questions available to use within Qualtrics. For training, we primarily use Multiple Choice questions, Text Entry questions, and Matrix table questions. Matrix table questions provide a visual way for users to rate various specific aspects and will be explained in

further detail below. To add a new question to the survey, click the blue Add a New Question



button:

Multiple Choice Questions

A blank MC questions looks like this:

The image shows a blank Multiple Choice question form. It has a question text area and three choice text areas. At the bottom right are 'Import from library' and 'Add new question' buttons.

To change the settings of a given question, there are options available on the lefthand side of the screen:

Edit question

Question type

Multiple choice

Answer type

☒ Allow one answer

☐ Allow multiple answers

Choices

Number of choices

– 3 +

Edit multiple

Use suggested choices ☐

Format

List

Alignment

Vertical

Response requirements

Add requirements ☐

Add validation ☐

Question behavior

Display logic

Skip logic

Carry forward choices

Choice randomization

Recode values

Default choices

JavaScript

Most of these are not necessary to understand to create a simple survey, but experimenting with them may provide a greater knowledge of how Qualtrics works. These settings change various aspects of your MC question.

- Answer type “allow one answer” or “allow multiple answers” will result in the question either allowing one choice to be selected, or multiple choices selected. Multiple choices would be useful for a race/ethnicity question, for example.
- Number of choices increases or decreases the amount of options available for users to choose from.
- The format options change how the list is graphically presented (a list, a dropdown box, etc, or horizontal alignment).
- Response requirements can mark a question as required, which means users will not be able to submit the survey without answering the question.
- The options under question behavior are more complex logic options for use in complicated, multi-page or multi-path surveys, and while they are not necessarily used in typical training surveys, are useful choices to understand if you will be working with Qualtrics long term.

Text Entry questions

A blank text entry question will look like this:

☒ Q10

Click to write the question text

There are multiple options to customize your question on the lefthand side:

Edit question

Question type

 Text entry 

▼ Text type

Single line 

▼ Response requirements

Add requirements 

Add validation 

▼ Question behavior

 Display logic

 Skip logic

 Default choices

 JavaScript

The most useful settings here will be under the Text type drop down box:

▼ **Text type**

A screenshot of a dropdown menu titled 'Text type'. The menu is open, showing four options: 'Single line' (highlighted in light blue), 'Multiple lines', 'Essay text box', and 'Password'. The dropdown is set against a light gray background.

- A single line question will provide space for a single sentence or less and is useful for questions with short answers.
- Multiple lines will provide space for a few sentences at most.
- An Essay box will provide enough room for multiple paragraphs.
- The password option is not used within training Qualtrics but is available should it be needed.

Text / Graphic

This option can be used to introduce a survey, or an explanation of the following question/response options. It can also be used to include a picture or graphic if desired.

Matrix Table

Matrix tables are complicated tables which allow users to rate multiple statements on a variety of different scale points: think rating your car on the usefulness/not usefulness of its wheels, stereo system, engine strength, and mileage. A blank Matrix Table looks like this:

A screenshot of a blank Matrix Table in Qualtrics. The table is titled 'Q12' with a checkbox. Below the title is a text input field labeled 'Click to write the question text'. The table has three columns for scale points: 'Click to write Scale Point 1', 'Click to write Scale Point 2', and 'Click to write Scale Point 3'. There are three rows for statements: 'Click to write Statement 1:Right', 'Click to write Statement 2:Right', and 'Click to write Statement 3:Right'. Each cell in the table contains a radio button for rating.

	Click to write Scale Point 1	Click to write Scale Point 2	Click to write Scale Point 3
Click to write Statement 1:Right	☐	☐	☐
Click to write Statement 2:Right	☐	☐	☐
Click to write Statement 3:Right	☐	☐	☐

And the options on the lefthand side of the screen look like this:

Edit question

Question type

Matrix table

Matrix type

Likert

Answer type

Allow one answer

Statements

Number of statements

3

Edit multiple

Use suggested statements

Scale points

Number of scale points

3

Edit multiple

Use suggested scale points

Format

Standard likert

Add labels

Add statement group

Mobile friendly

Transpose table

Position text above

Repeat headers

Add whitespace

Response requirements

Add requirements

Add validation

Question behavior

Display logic

Skip logic

Carry forward statements

Carry forward scale points

Statement randomization

Scale point randomization

Recode values

Default choices

JavaScript

Matrix type: there are multiple types of Matrix tables available, each with their own purpose in a survey or evaluation, but for the purpose of training surveys, **Likert** tables are primarily used. Much like multiple choice questions, Matrix tables can allow one answer, multiple answers, a drop-down box, or users can drag and arrange text options in a preferred order. Training surveys **allow one answer** per statement.

A matrix table can have multiple statements or as few as one statement. A statement may include a generic question including “This training is applicable in my profession,” or a specific objective statement such as “Can you describe an empirically supported cognitive behavioral model of suicide?”. There are statements which are used in each version of a survey created for a given training, seminar, or professional development.

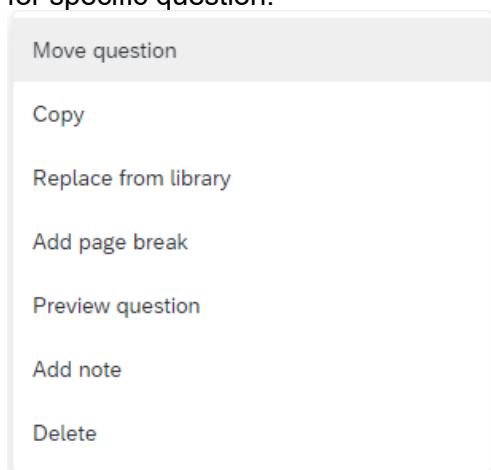
Scale points are used to indicate how much a user may agree or disagree with a given statement. For the purposes of tracking training data across multiple years and semesters, training surveys should use the following **scale points**:

- Not at all = 1
- A little = 2
- Somewhat = 3
- Mostly = 4
- Very Much = 5

The **format** of a Matrix table is vital to ensuring that all questions on a survey are considered accessible for screen-readers and other users with disabilities who might use programs or equipment to aid in the use of their device. For training surveys, Matrix tables should use the **Profile Format**. Questions should also be made **Mobile friendly** to ensure further accessibility.

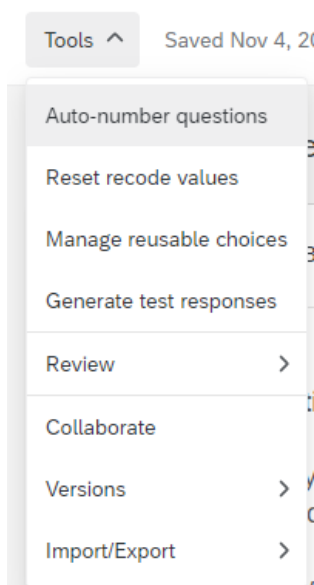
Question options/Additional tools

On the righthand side of every question is a three-dot button which provides a menu of options for specific question:



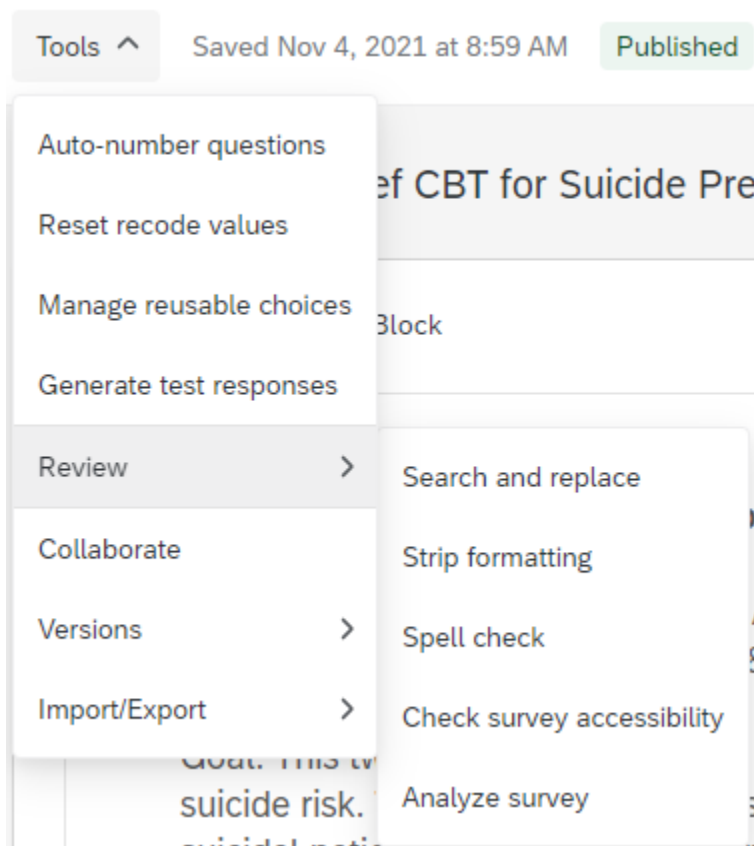
Here you can move a question to a different order within the survey, create a duplicate of the question, replace the question with an already-created question from the library, add a page break to separate the questions into two pages for the user, preview how the question looks to a survey user, and delete a question if it is no longer needed.

At the top lefthand side of the page, next to the Edit Question box, is a button which says Tools and provides an additional dropdown menu of options:



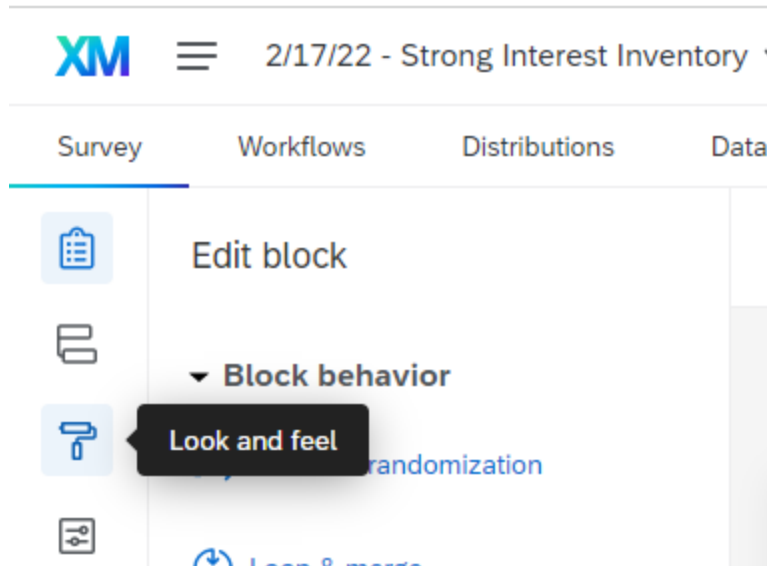
Auto numbering your questions will allow Qualtrics to number your questions in sequential order, and is useful if your editing has rearranged questions into a different order than they were previously. **Sequential Numbering (Q1)** should be selected as it is the only option Qualtrics deems accessible.

The Review option provides options for Qualtrics to review and assess the quality of your survey, including its accessibility:

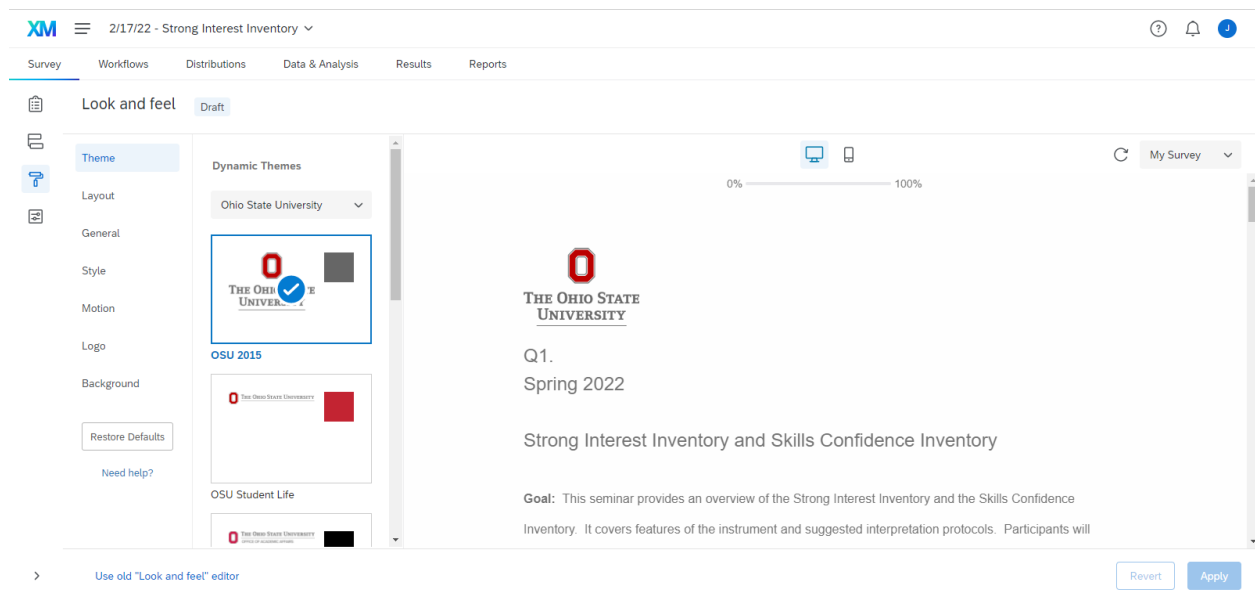


Survey Accessibility

Per OSU and Qualtrics policy, there are several options which must be formatted specifically to allow for general accessibility, as discussed above in the Matrix table section. Some of these options can be accessed from the Look and Feel option on the very lefthand side of the page.



Which will navigate to a page which looks like this:



The **theme** of the survey must always be the **OSU 2015** option.

Under the General option, the options should match these below:

General

Next Button Text

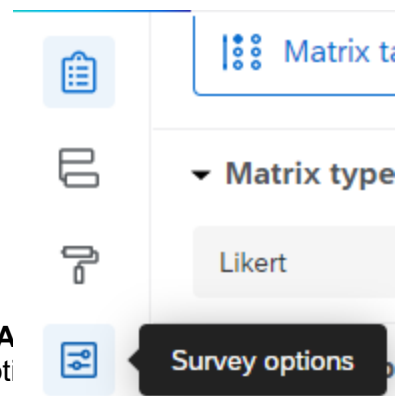
Next

Previous Button Text

Back

Progress Bar

With Text



Font for a survey can be changed in **Style** and should always use **A**. Next, the general survey options can be changed under Survey Options. Within Survey Options, there are several items which must be changed to match for your given survey.

Back underneath the Tools button discussed above, within the Review submenu, there is a tool to **Check for Survey Accessibility**. Clicking this will provide a pop-up at the top of the screen which provides a summary of your survey's overall accessibility:



This pop-up will identify any questions that are specifically inaccessible, or any general options which need to be changed for accessibility.

Note: to address the “4. Enable survey option to show export tags,” this can be changed when you turn on **Question Numbers** in Survey Options.

Display name

Enter a survey name to show in search results, social media posts, and on browser tabs.

Display name

Qualtrics Survey | Qualtrics Experience Management

Survey description

Enter a survey description to show in search results and on social media posts.

Survey description

The most powerful, simple and trusted way to gather experience data. Start your journey to experience management and try a free account today.

Question numbers

Show respondents the question number next to each question in your survey. ⓘ

☒ On

The Display name should be changed to match the title of the Survey, and Question Numbers should always be turned on.

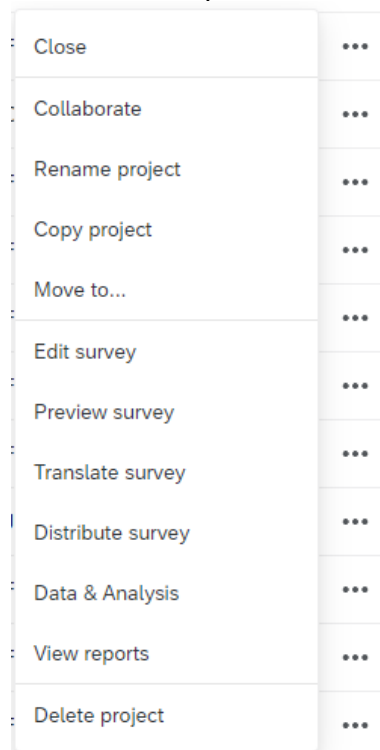
Under Responses (found on the lefthand side of the options menu for Survey Options), options should match the screenshot below:

Survey	Workflows	Distributions	Data & Analysis	Results	Reports
Options General Language, title, survey description Responses Survey expiration, incomplete responses, back button and more Security Passwords, file uploads, bot detection and more Post-Survey Thank you emails, completed survey messages, and triggers Advanced Scoring Attach point values to specific answers Quotas Set conditions you want responses to meet Translations Translate this survey into other languages Adobe Analytics Manage Adobe Analytics integration			Saved at 11:09 AM Draft Back button Add a back button to your survey to allow people to change their responses. The back button won't appear when you have survey flow elements between survey blocks. Learn more about the back button ☒ On Allow respondents to finish later Let respondents coming from an anonymous link leave your survey and re-enter to finish it later. Respondents with a personalized link will still be able to stop and continue at a later time, even when this option is off. ☒ On Custom error messages Show a custom message to respondents when they skip a required question or provide an invalid response. ☐ Off Incomplete survey responses Select what to do with incomplete responses and indicate when they should be considered incomplete. Learn more about incomplete responses What should be done with incomplete survey responses? ☒ Record ☐ Delete How much time should pass before they're considered incomplete? 1 Week		

The **Back Button** should be turned on, and **Incomplete survey responses** should be set to **Record** after **1 week**.

Copying an existing survey:

Sometimes, the easiest method is to copy an existing survey and only change specific questions/statements within that survey. This is typically how Seminar evaluations are created week to week. To copy a survey, navigate back to the Project Page and find a survey to duplicate. In the three-ellipses button on the very righthand side of the page, click “Copy project”:



Here options can be changed before the survey is created, such as the name of the survey and the folder in which it is placed:

Copy Project ×

Copy to

Account ▼

Project name

2/8/22 - Introduction to RO-DBT - Copy

Folder

2021-2022 ▼

Cancel

Copy project

Inside the new survey, two portions will need to be updated: the block of text at the beginning of the eval with the presentation title, the names of the presenters, the eval’s Goals and Objectives (G&Os), and then the actual questions themselves asking trainees to evaluate how well they meet

each objective. Seminar evaluation data is reviewed at the Training Committee Retreat and will need to be exported into reports at the end of the training year.

When editing the newly copied survey, it may be needed to add or subtract statements within the Matrix table. This can be done in the “Edit Question” submenu on the lefthand side of the screen, as show above when creating a Matrix table question from scratch.

Each seminar needs the following for the evaluation:

- 1 goal statement (purpose of the seminar) – is listed at the top of the evaluation for each seminar.
- 2-4 objectives (measurable skills participants will walk away with)
- At least 1 objective must be multicultural in nature.
- A list of references – this is only kept in the archive, not included in the online evaluation.
-

End-of-Semester-Evaluation: This is sent out at the end of each semester (Fall/Spring/Summer). There are many sub-evaluations included in this large project (why it’s called The Monster), and only trainees fill out evaluations within it.

As of the 2020-2021 year, this Qualtrics contains evaluations such as Evaluation of Traineeship, Feedback for Training and Assistant Training Director, and the Exit Interview (among multiple others). **NOTE:** this Qualtrics no longer contains the “Evaluation of Trainee” or “Evaluation of Supervisor”. These evaluations are now completed in a Word/PDF document, which can be found Training > Evaluations on the training folder.

The data from these evaluations is exported as reports as needed and discussed by the Training Committee near the end of the academic year.

Distributing the link for each eval Qualtrics is done through providing an anonymous link:

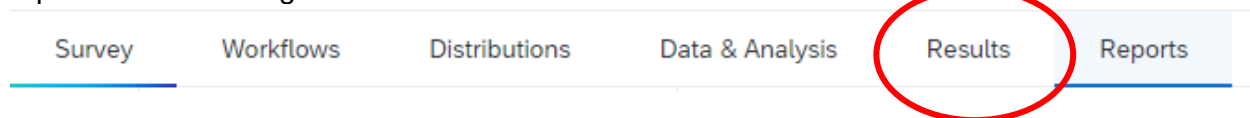
1. In Qualtrics, click on the survey you wish to send out.
2. In the top menu bar of options labelled “Survey,” “Actions,” etc, click on “Distributions”.
3. Qualtrics should automatically show you the anonymous link that can then be pasted into the email out to attendees. If it doesn’t, click on “Anonymous Link” on the left-hand side of the page.

Exporting Qualtrics Reports

Each year for the CCS Self-Study and general review of the training year by Training Committee, the various Qualtrics reports from the year need to be exported into reports so that staff can review the quantitative and qualitative feedback. This process looks different based on the Qualtrics data that is being exported.

Exporting a Qualtrics Report for a Seminar Eval:

1. For a seminar evaluation where there is just the one evaluation per link, exporting reports is done through the “Results” tab on Qualtrics



2. From here, there will be a landing page for your survey results that should look something like this:

The screenshot shows the XM survey results interface. At the top, the report name is '2.22.2021 Trauma II'. Below the navigation bar, there's a message about the new version of survey results. The main content area displays a table for 'Q2 - Your Position (optional):'.

#	Field	Choice Count
1	Clinical Fellow	0.00% 0
2	Counseling Intern	16.67% 1
3	Psychology Intern	50.00% 3
4	Social Work Intern	33.33% 2
5	Psychiatry Resident	0.00% 0
6	Practicum	0.00% 0
7	Senior Staff	0.00% 0
		6

On the left sidebar, there are options to 'Add Report Breakout', 'Search Questions', and 'Create Custom Page'. Below these, a list of questions is shown, including 'Q2 - Your Position (optional):', 'Q3 - Have you received prior training on this topic?', 'Q4 - Content of Training: Please rate the following on 1-5 scale with corresponding values below.', 'Q5 - Please provide additional feedback regarding the content of this training:', and 'Q6 - Feedback Regarding Presenter(s): Please rate the following on 1-5 scale with corresponding values below.'.

- The blue button in the top left corner will state the name of the report you are viewing. In this photo, it says "2.22.2021 Trauma II". To edit the name of the report, click on the gear button in the top right corner next to "Share Report" and click on "Edit Report..."

The screenshot shows the 'Share Report' dropdown menu. It includes a 'Response Counts' section with 'Total' and 'Filtered' counts, both showing '6'. Below this, there are several options: 'Edit Report...', 'Report Settings...', 'Hide All Pages', and 'Delete Report...'.

- Here there will be a menu of options for the selected report, including the name of the report and which questions should be included in the report.

Edit Report

Name
2.22.2021 Trauma II

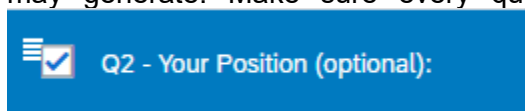
Search Pages...

[Clear All](#) Select Pages... SELECTED: 8

- ☒ Q2 - Your Position (optional):
- ☒ Q3 - Have you received prior training on this topic?
- ☒ Q4 - Content of Training: Please rate the following on 1-5 scale with correspond...
- ☒ Q5 - Please provide additional feedback regarding the content of this training:
- ☒ Q6 - Feedback Regarding Presenter(s): Please rate the following on 1-5 scale wit...
- ☒ Q7 - Please provide additional feedback regarding the presenter(s) of this train...
- ☒ Q8 - Overall Satisfaction with Training: Please rate the following on 1-5 scale...

Cancel **Save**

5. In this instance, we want to change the name of the report to “9/20/2021 – Trauma I – Eval Report” or something similar, to reflect the content of the report. All the questions for the evaluation should be check marked here in this menu. Hit save to continue.
6. The questions in the left-hand sidebar are selected and should be showing in black text. An unchecked question will show in gray text and will NOT be included in any report you may generate. Make sure every question you want selected has a checkmark.



- a. If a question is unchecked, it will look like this on the left:

Q3 - Have you received prior training on this topic?

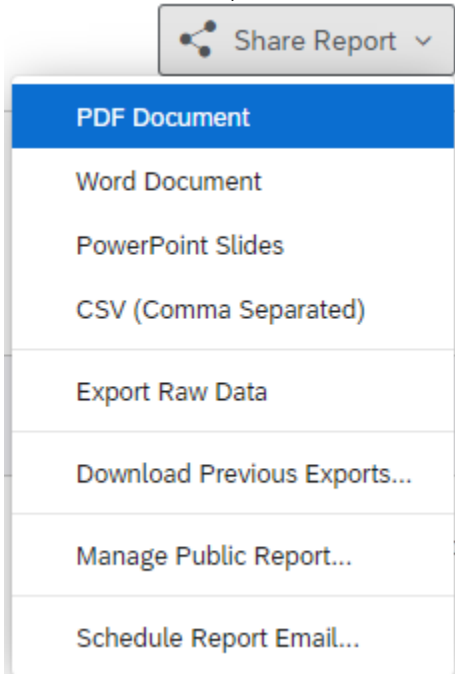
- b.
- c. When scrolling down within the report itself, there will be a yellow banner warning of the question's exclusion from the report:

Q3 - Have you received prior training on this topic?

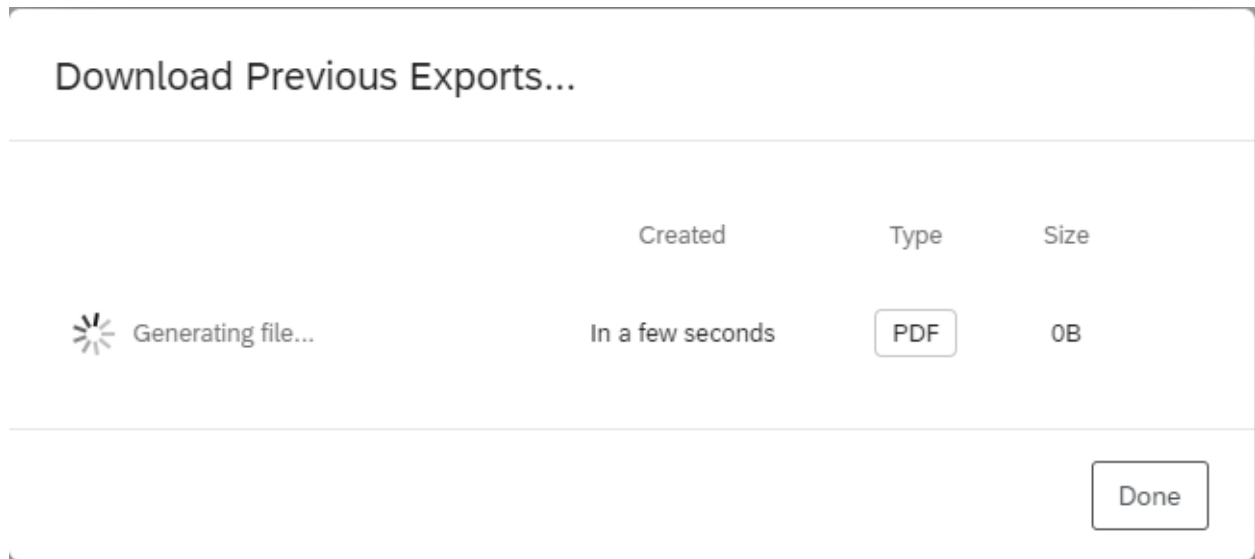
This page will not appear in public reports and will be deselected by default in report exports.

d.

7. Once every question needed is check marked and included, click on “Share Report” on the right-hand side of the page, and click “PDF Document” in the drop-down menu that opens. PDF is preferred to preserve formatting and reduce issues on the reader’s end but, if need be, a Word Doc version will work.



8. A pop-up box will appear to confirm which questions are to be selected. Make any changes that are needed (or not), and once you’re satisfied click “Export Pages.”
9. A new window will pop up as Qualtrics generates the report. Depending on the evaluation and the data, this could take anywhere from a few seconds to a few minutes or longer. Once the file is finished generating, click “Download,” and the PDF will download.



10. **OPTIONAL** – Qualtrics has options to include additional visualization methods if you want to add something like a pie chart or a bar chart to the report. To add a new visualization for a question, click the blue “+Add Visualization” button at the bottom of a question within your report.



11. A submenu pop up will appear to the right part of the screen:

Data Source

Q2 - Your Position (optional)

Metric

Default (Choice Count)

Decimal Places

Default (2)

Breakout By

Default (None)

Title

Default - Click to edit

Visualization

Sort Bar Values

Descending

Show X Axis

Horizontal

Show Y Axis

Show Bar Labels

Show Legend

Auto

Horizontal Bars

Color Palette

Reverse Colors

Axis Values

Clinical Fellow

Counseling Intern

Psychology Intern

Social Work Intern

Psychiatry Resident

Practicum

Senior Staff

Legend Values

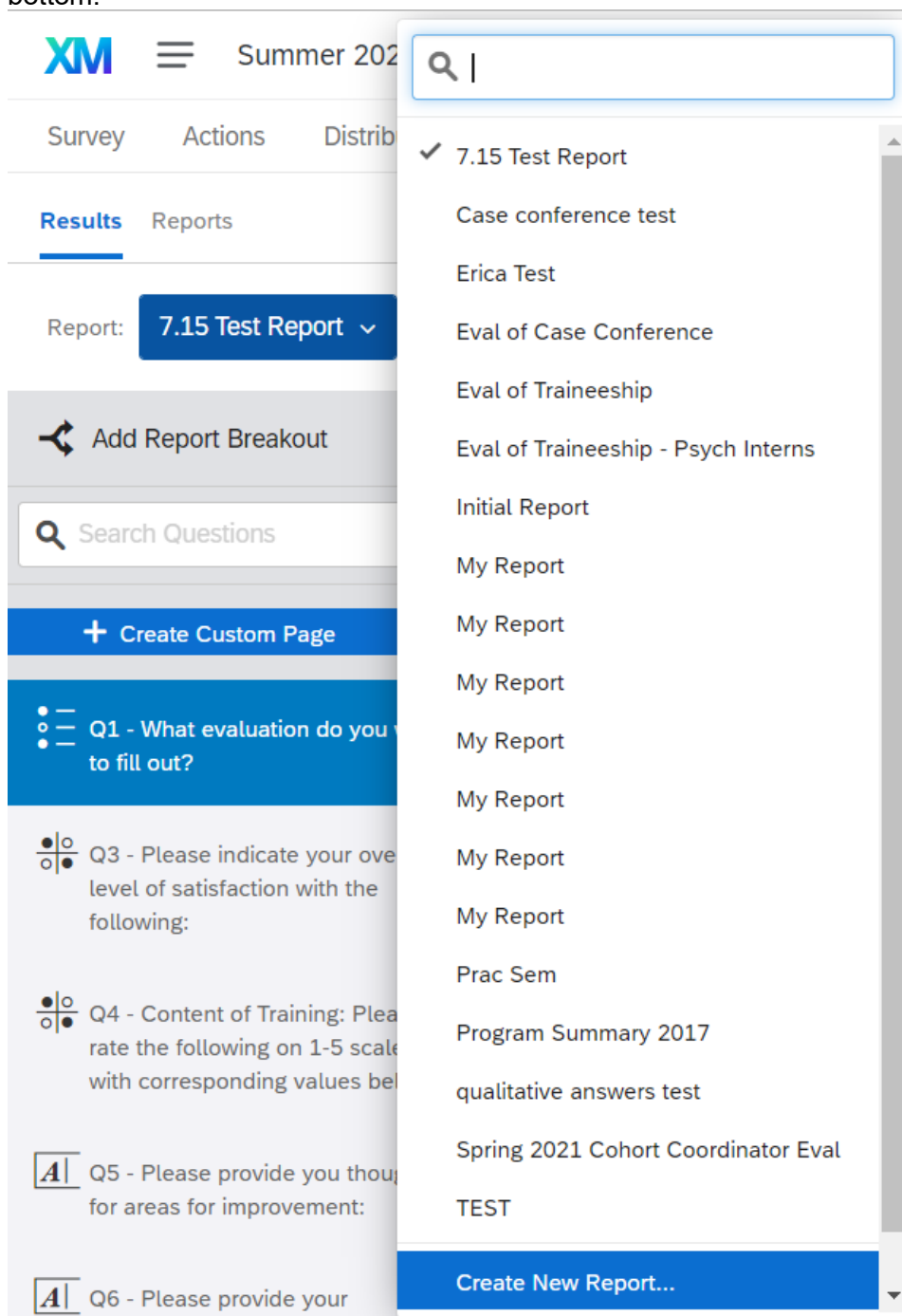
Count

Transpose

13. The type of chart can be changed via the icons underneath Visualization, include or exclude axis values through the checkbox options, and change additional things like the color palette, axis labels, or other quantitative options here. Again, this is optional and not necessary to understand, but our contact at CSSL can always provide further assistance if there are questions.

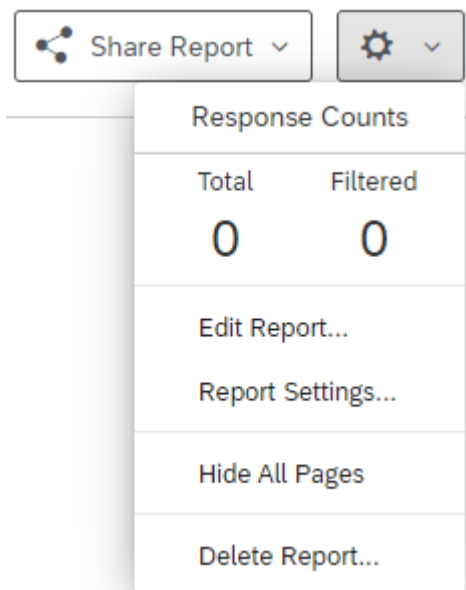
Exporting a Qualtrics Report from a Mega-Eval like a Semester Eval:

1. The process for exporting a report from the semester eval Qualtrics is similar to that for seminars, but with a few added steps. Navigate to the “Results” tab as shown above.
2. From here, find the blue box on the left-hand side of the screen and check which report is showing. There may be multiple reports created for the mega Qualtrics, so it may be easiest to click the blue box, and in the drop-down menu, click “Create New Report” at the bottom:

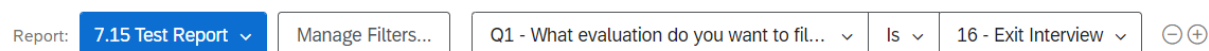


3. Determine which evaluation to filter for. In this example, we will add a filter for the “Exit Interview”. Start by going to the cog wheel on the right-hand side next to “Share Report”.

Click the cog wheel and in the drop-down menu, click “Hide Pages.” This will uncheck every question in the Qualtrics, allowing for a blank slate.



4. At the top of the page next to the blue button for the Report, click “Add Filter” and add a filter based on which response you want to the “What evaluation do you want to fill out?” question. In the box labelled “Select Operator,” choose “Is”. In the second box labelled “Select Operand,” choose the sub-evaluation.



5. Checkmark the questions in the left-hand sidebar to include them on the report being generated. Either write down which questions these are before starting this process or open a new tab to navigate through the Qualtrics to find which question numbers are needed. **NOTE:** questions in the eval which are just blocks of text will not show up as an option at this stage, so it may not be possible to checkmark every ‘question’.
6. Follow the steps above for generating a PDF document of the report. The “Share Report” button might just look like a drawing of dots on a line at this point:



7. In the “Export Report” window that pops up, double check that the check-marked questions are correct and hit “Export Pages.”
8. Due to the size of the mega-evals, the report generation may take at least a few minutes. I recommend keeping this Qualtrics page open and not navigating to another tab until the report is ready for download.

Note for exporting reports in general: if needed, download a previous report that has been generated in Qualtrics. In the Qualtrics you need a report for, click “Share Report” or the drawing of dots on a line, and in the drop-down menu, click “Download Previous Exports”. This will show the pop-up window of the different Download links – they will not be named but they will have a creation timestamp to know how long ago they were made.

Seminar Evaluations

For information on seminar evaluations, see the section titled “Paper Evaluations” under Seminars.

Supervisor Evaluations

Each trainee must fill out a supervisor evaluation for each of their supervisors at the end of each semester. Typically, they must fill out an eval for their individual supervisor and their group supervisor. This is the same form and can be found in the training drive, training > evaluations > supervisor eval. The evals must be signed by the trainee and supervisor, and then will be placed in the training drive, training > evaluations > senior staff evals > select year > supervisor’s name.

Trainee Evaluations

Each cohort has their own trainee evaluation. These can be found in the training drive, training > evaluations > eval of trainee > select cohort. Trainee evaluations are due at the end of each semester. The individual supervisor will complete the eval, and get feedback from the trainee’s group supervisors, assessment supervisor, etc. These evaluations need to be signed by the supervisor and trainee, Training Director/Assistant Training Director if applicable. These evaluations are stored in their trainee file for eternity.

Financial

Payment to External Presenters

Occasionally, presenters who are external to CCS will be scheduled. The Fiscal Associate oversees the payment process. This must be started well in advance of the seminar (at least 3 weeks, if not more) to ensure timely payment. For non-OSU presenters, payment for parking and a parking validation sticker must be made available to them.

Procedures for Internal (OSU) Presenters

If a presenter is also employee of OSU, the payment method will be different as it will be processed as an Additional Pay through their Payroll than a Miscellaneous Payment. The Fiscal Associate will work with HR to pay an internal presenter. Presenter payment is determined by the Director, Director of Training, and Assistant Director of Training.

Purchase of Materials

It is vital to work in tandem with the Fiscal Associate to purchase materials. Purchases need to be approved by the CCS Director before purchasing. It is recommended to have details about what the purchase, including why the purchase is necessary, before emailing the CCS Director and working with the Fiscal Associate.

Technology

How to Change Passwords

Please follow this link for instructions on how to change an OSU password:

https://osuism.service-now.com/selfservice/kb_view.do?sysparm_article=kb01521&gl=1*e1zfg5*_ga*NDg0NDQ1OTg

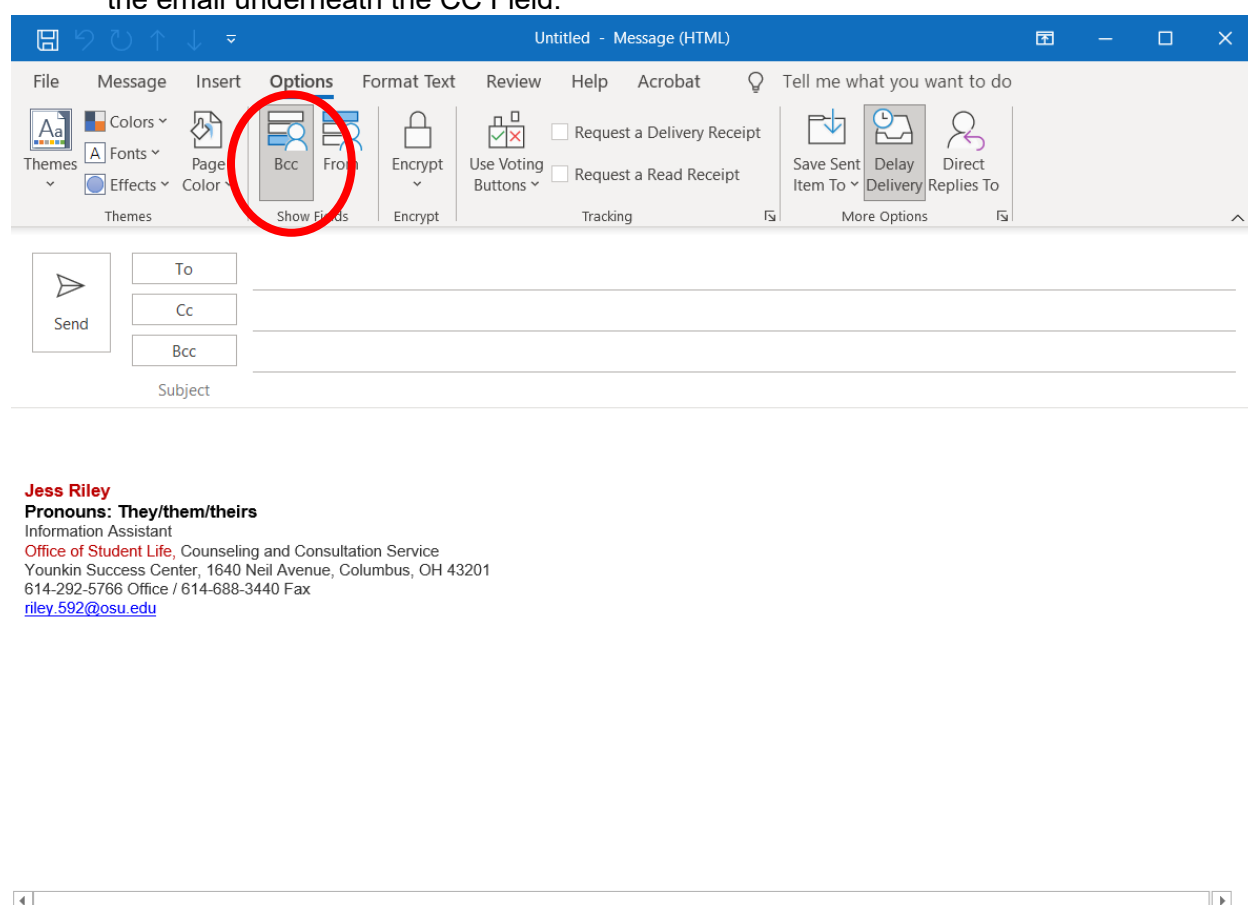
[3LjE2ODE4NDA5ODM.*_ga_09WC99HMPE*MTY4NjA4Mjc2My41NS4xLjE2ODYwODI3NzkuNDQuMC4w](#)

Titanium sends an alert, when logging in, on how many days there are left before a password must be changed. Click “Change Password” and follow the steps to change the password.

Mass and Delayed Emails

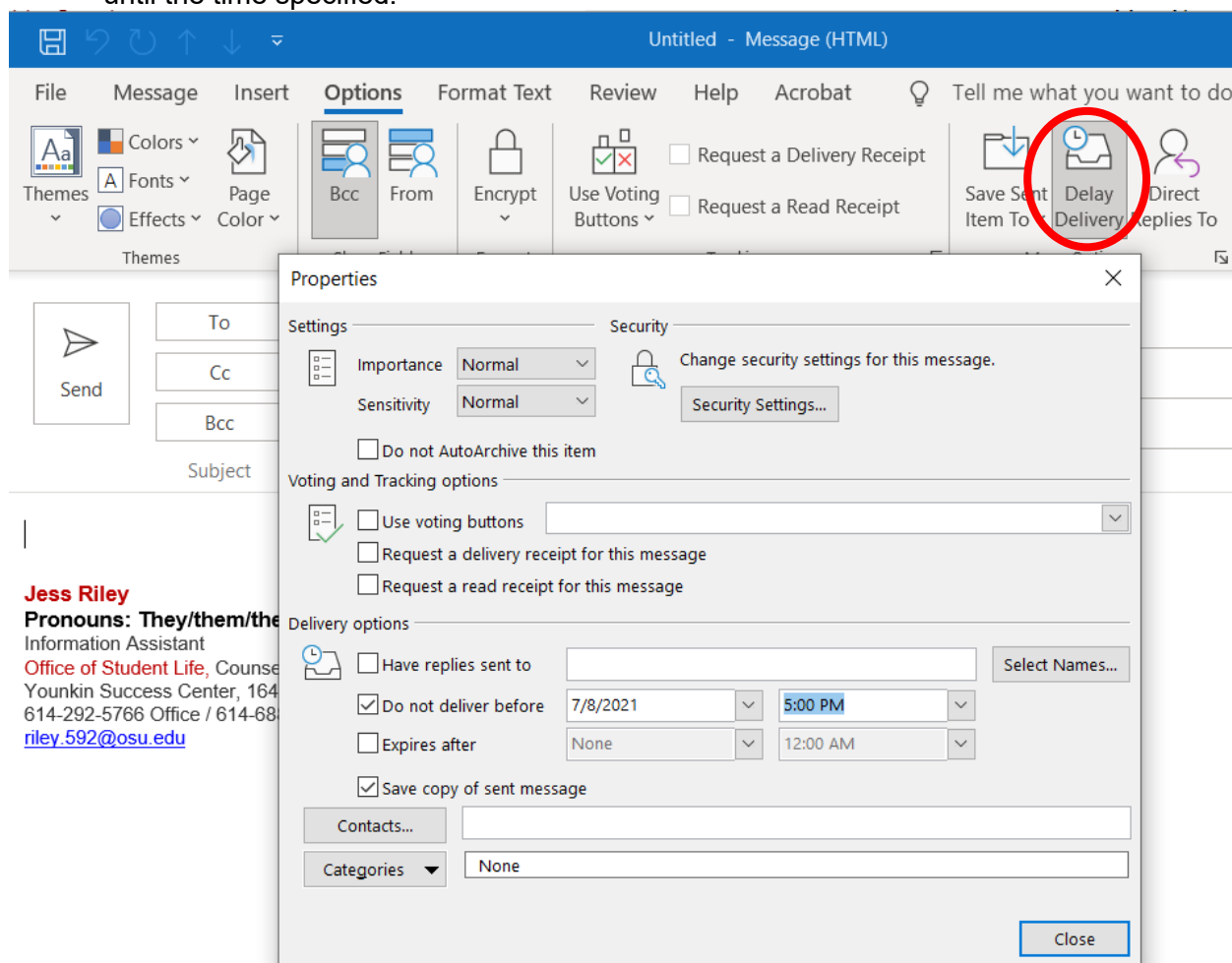
Mass uniform email from excel (rejection letters for searches, Psych phone interview sign-up)

- Select the cells in the Excel sheet that contain the emails by clicking and dragging the mouse over them.
- On the desktop version of Outlook, click on “Options” in the menu bar of options at the top of a blank email. Click “Bcc” as one of the options, and the BCC field should be shown on the email underneath the CC Field:



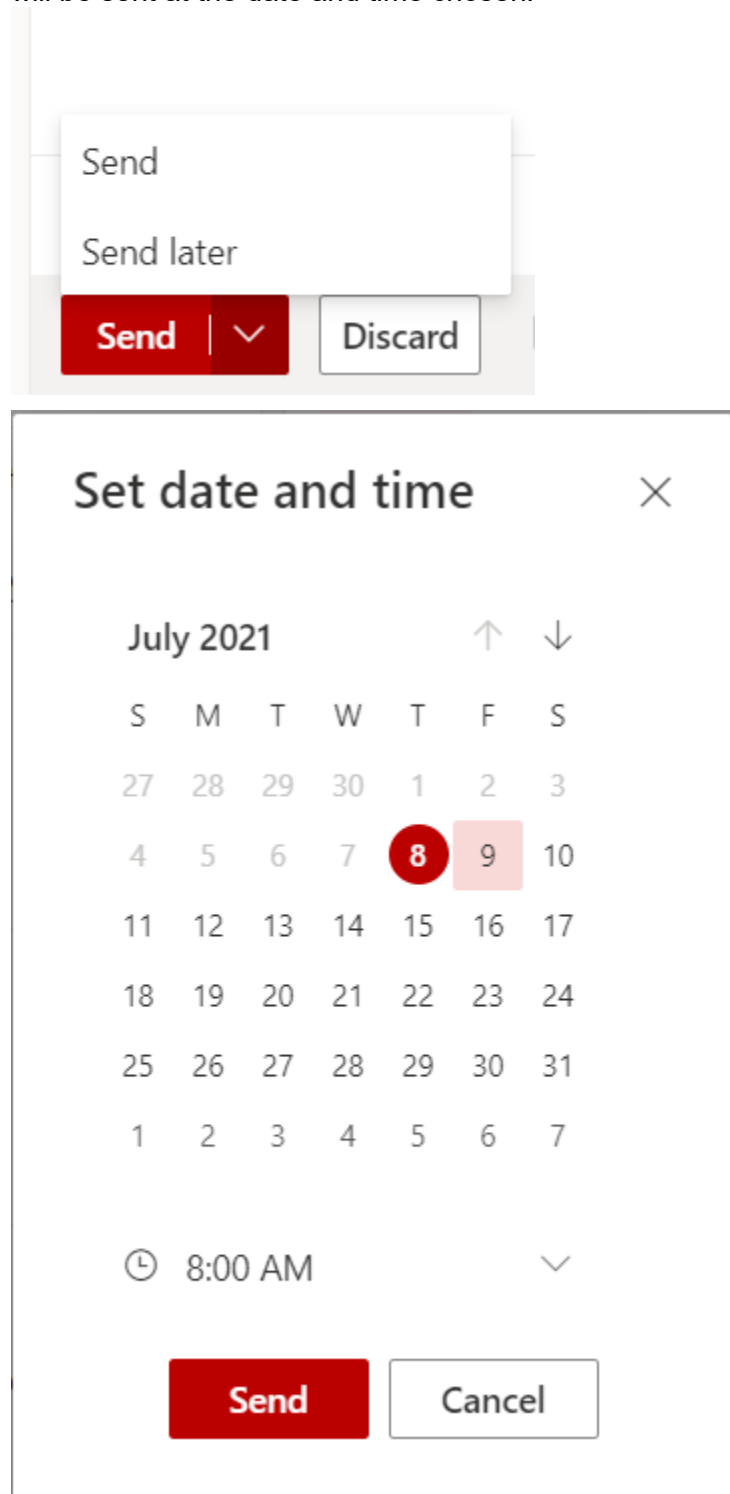
- Paste the addresses into the BBC field and hit the spacebar. The addresses should be underlined at this point to signify that they are valid. If any are not, double check the source of the email (application, APPI, etc.).
- Be sure that the message and any attachments are accurate and anonymous.
- **Personalized large quantity email (CEU certificates)**
- Create a template email and save it to the desktop (File > Save As). Have the folder with attachments ready, as well as the list of recipients. Open the blank template from the desktop, enter the address, attach the recipient’s document, and send.
- Repeat this process until complete.

- **Delayed email (for any purpose)**
- Outlook can schedule an email to be sent at a later date – for evaluation link emails, follow up emails, or anything else.
- On the desktop version of Outlook, this can be done through opening a blank email and clicking “Options” on the menu bar of options (in between Insert and Format Text). Click on “Delay Delivery” and choose a date and time to have your email sent. Click “Close”, and the “Delay Delivery” button should now be slightly shadowed indicating you have activated that setting. When you hit send, the email will be held by Outlook in your “Outbox” until the time specified.



NOTE: The process of your computer waiting to send an email can be taxing on a computer, so scheduling an email to be sent out a week in advance may cause lag or slow some programs. Keep this in mind when using this feature on the desktop version.

On the browser version of Outlook (<https://email.osu.edu/>), this can be accomplished through opening a blank email, and clicking the downward arrow next to “Send”. This sub-menu should show the option for “Send Later” – choose the date and time, and then click “Send”. The email will be sent at the date and time chosen.



Email Signature

Create an email signature using this template: <https://slmarcomm.osu.edu/secure/student-life-email-signature>

Once the signature is completed, go into the settings and add this at the end of the email signature:

Email is not a secure form of communication. The confidentiality of information transmitted by email is not guaranteed. Emails are normally checked Monday to Friday from 8:00 a.m. to 5:00 p.m.

 Please consider the environment before printing this e-mail

Printing

There are three printers located in Younkin: in the file room, the trainee pod, and the break room. In Lincoln there are two printers, in the file room and in the break room. At both locations, the break room printers are the only ones that print in color.

To send something to the printer, under the “Printer” selection, choose “Employee Follow Me Printing”. Printing will be available any of our printers once you tap your BuckID.

SLTS vs. OTDI

Student Life Technology Services (SLTS) and OTDI (Office of Technology and Digital Innovation) both provide IT help. SLTS manages Titanium, VPN, or Shared Drive issues. OTDI manages Email, OSU Devices, or Password issues. Service tickets are submitted for both services through their online portals. If in need of assistance, ask the Training Program Assistant or another member of the administrative team.

SLTS: <https://slts.osu.edu/>

OTDI: <https://it.osu.edu/>

Storage of Confidential Materials

Any physical confidential material (paperwork, etc.) must be kept behind two locks. Typically, this means a locked office door and a locked filing cabinet. Another option is in a trainee’s mailbox in the file room (behind two locked doors.)

Titanium Forwarding Notes and Task List Expectations

DOCUMENTATION TIME PARAMETERS INCLUDE:

1. All triage and urgent paperwork must be completed within 24 hours or one business day of the phone screening or urgent appointment.
2. All diagnostic evaluations, ongoing session notations, and other notes must be completed within 7 days of the session.

How to set note forwarding to supervisor:

In Titanium, go to “settings.” Then click on “user settings”

Under the “Default” tab, use the drop box next to “Default use forward notes to:” Click on person who will be reviewing/signing notes. Sign the note and it will be forwarded.

Zoom

1. Sign into the Zoom web portal and navigate to **Settings**.
2. Navigate to the Meeting tab and verify that the password settings that you would like to use for your meetings and webinars are enabled.

Require a password when scheduling new meetings

A password will be generated when scheduling a meeting and participants require the password to join the meeting. The Personal Meeting ID (PMI) meetings are not included.



Require a password for instant meetings

A random password will be generated when starting an instant meeting



Require a password for Personal Meeting ID (PMI)

- ☒ Only meetings with Join Before Host enabled
☐ All meetings using PMI



Embed password in meeting link for one-click join

Meeting password will be encrypted and included in the join meeting link to allow participants to join with just one click without having to enter the password.



Require password for participants joining by phone

A numeric password will be required for participants joining by phone if your meeting has a password. For meeting with an alphanumeric password, a numeric version will be generated.



If the setting is disabled, click the Status toggle to enable it. If a verification dialog displays, choose **Turn On** to verify the change.

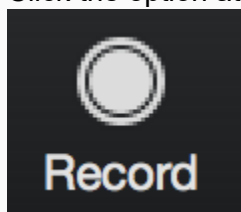
Note: If the option is grayed out, it has been locked at either the Group or Account level, and the Zoom administrator will need to be contacted.

Recording Instructions for Zoom

The host must record the meeting or grant the ability to record to a participant.

1. Start a Zoom meeting as the host.
2. If recording from home, log into your VPN, Join the meeting from your VPN and follow the instructions below from inside your VPN.

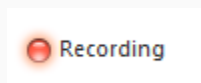
3. Click the option at the bottom of screen to **Record**.



4. If there is a menu, select **Record on this Computer**.
Hosts will see the following recording indicator in the top-left corner while recording is active.



Participants will see the following indicator in the top-left corner while the recording is active.



5. Click **Participants** to see which participants are currently recording.
Note: Dial-in participants will hear a message informing them that the meeting is now being recorded unless disabled by the host.
6. If recording from home, continue with the session from your personal device and let the Zoom in your VPN record in the background.
7. After the meeting has ended, Zoom will convert the recording so you can access the files.
8. Once the conversion process is complete, the folder containing the recording files will open.
Note: By default, the audio/video file (MP4) will be named **Zoom_0.mp4**. The audio only file (M4A) is named **audio_only.m4a**.

Note:

- If the meeting unexpectedly shuts down or if the conversion process is interrupted, the recording files could become corrupted and non-recoverable. Restarting or shutting down

the computer, putting the hard disk to sleep, or closing a laptop will interrupt the conversion process.

- If the conversion process is not successful after the meeting has ended, you can try to convert the files again by navigating to the recording location and double clicking the recording files.
- It is possible to record the meeting in different layouts including active speaker, gallery view, and shared screen. [Learn more about recording layouts.](#)

Policies for Videotaping of Clinical Content for Educational and Training Purposes During Remote Sessions and Telework

- 1.) Recordings of patients are only to be saved on the clinician's personal and secure device. No recordings may be saved on a device that is not personally owned and administrated by the clinician unless it is a laptop provided by CCS.
 - a. When recordings are created, they must be deleted from the temporary folder and the recycling bin must be emptied.
 - b. File name should not include client/patient name.
- 2.) Should patient recordings be used for an educational presentation, the audience must be CCS clinicians/CCS trainees or CCS approved supervisors only.
 - a. Videos are not to be embedded in any presentations or saved onto a thumb drive. They will be accessed only from the approved secure location.
 - b. The presenter will assure that the room where the presentation is can be adequately shielded from outside observers.
 - c. Recordings being presented via the screen share function on Zoom must be within a Zoom meeting that is password protected. This password must be secure (follow standard length and complexity parameters for creating passwords to ensure security.)
 - d. Any paper materials related to the case at the end of the presentation will be collected and appropriately disposed of according to CCS policy.
 - e. It is the responsibility of the presenter to request that any member of the CCS audience that may have knowledge of the patient outside of clinical contact to make this clear immediately during the presentation. It is the responsibility of the CCS audience to disclose this.
- 3.) Only the clinician who generated the recording shall present the recording as part of an educational presentation.
 - a. Should this clinician leave CCS, all patient recordings will be erased.
 - b. Recordings are not to follow a clinician ending their work at CCS.
- 4.) Should the recorded student revoke permission to record after the fact, their recordings will no longer be used for educational presentations beyond direct supervision.
 - a. Trainees and supervisors shall work together to erase videos that are no longer needed.
 - b. All videos must be erased before the clinician ends their time at CCS, including any videos that were saved on a device within the CCS office before the implementation of telework.

Security Reminders for Video Telehealth

- Conduct the sessions in a private location where others cannot listen or view you.
- Ensure that client is also in a secure location.

- Use Private OSU's Carmen Zoom at office and at Home-ONLY
- Protect your computer, tablet, phone, and any other device with a password that is unique.
- Always log out of your sessions.
- Do not have any software remember your password. Sign in every time.
- Do not share your passwords with anyone.
- Do not share your computer when you are logged on to any counseling software.
- Have all devices set to time out requiring you to sign back in after a set idle time.
- Keep your computer updated.
- Use a firewall and antivirus program.
- Only use a secure network for internet access using a VPN Connection when accessing client records
- Limit the range of your Wi-Fi by positioning it near the center of your home.
- Notify your supervisor if you suspect any breach in your security.

Policies and Procedures

E-Signatures

To get an E-signature on file, follow the instructions below:

- Photocopies of staff signatures are kept on file to use for CEU certificates, end of year Training certificates, and other documents which may need multiple bulk signatures. Image files of staff signatures are kept in the Training folder on the MyShares drive (MyShares > Counseling and Consultation Service > Training > E-Signatures).
- For any new or updated signatures, have the individual sign a blank piece of white paper with a pen (a pen is recommended over a Sharpie). Do not use a piece of lined paper or write it on a line.
- Scan the signature page into the folder as a PDF. Pull up the PDF on the computer.
- Using the snipping tool, crop as tightly as possible around the signature. It will save as an image. Save it in the e-signatures file. You can now delete the PDF paper that was scanned in. You now have an e-signature.
- To insert it into a document, access the document that you wish to put the signature into, use the Insert function > Insert Picture. Search for the e-signature you have saved in the file, and it will insert into the document. This process can be used in emails as well if needed.
- Save both as jpeg and pdf as certain programs only use one or the other.

In the case of needing the signature of a member of OSU Leadership (I.e. the VP of Student Life for the End of Year Training Celebration), we do not keep their signature on file, their office will need to be contacted to provide their signature. The CCS Administrative Assistant will be the contact for this process. It is recommended to start the process for End of Year Training Certificates as early as possible to ensure a timely response.

Non-discrimination Policies

The Ohio State University's Non-discrimination, Harassment, and Sexual Misconduct Policy can be found at the following link: <https://go.osu.edu/non-discrimination-policy>

Onsite Emergencies

An onsite emergency may occur at any time. The focus of this policy is to provide guidelines for keeping staff and clients safe and enlisting supports as soon as possible. Each CCS office is equipped with an alert button. Be familiar with the emergency alert equipment in your office. Under no circumstances, should any person physically enter a room if there is an actual emergency.

- **A code word will be used to describe an emergency so as not to escalate an already dangerous situation (Dr. EDNA: Emergency Developed, Needs Assistance.)**

Fire drill/bomb threat- All staff and clients will evacuate down the fire escape and meet on the corner of Neil Avenue & 11th Avenue (Current Location of Optometry Building).

Tornado- All staff and clients will meet by the restrooms on the first floor (as far away from the back doors as possible).

Younkin Procedure When Alerted of an Onsite Emergency

The following summary is for when a clinician presses the yellow “Front Desk” button located in each office, or when a clinician presses their personal “alert” button.

NOTE: At no time does ANY staff member enter the room if this is an actual emergency.

1. When the button is pressed by a clinician, an alarm or beeping sound will alert the front desk of the room in which the button was pressed. A front desk staff member will call 2-2121 and request officer response. The front desk staff member will alert Shivani Edwards, Assistant Director of Clinical Services, or an available senior staff member.

2. The senior staff member will knock loudly on the door where the “alert” is coming from and say, “Dr. EDNA needs to consult with you.”

3a. In a scenario in which the button was pressed on accident, the clinician inside the room will open the door, and come out of the office to tell the senior staff member that everything is okay. The front desk staff will then call OSU PD to cancel the call.

3b. In a scenario in which the clinician inside the room needs help, and the door to their office is unlocked, the senior staff member will knock on the door, open the door (if not already opened by the clinician), and say, “Dr. EDNA needs to consult with you.”

3c. If the clinician’s door is locked, the senior staff/front desk member will wait for the police to arrive and give them the key to the office. In the interim, the clinician will say again, “Dr. EDNA needs to consult with you” in the hope that the clinician inside the room can come outside.

3d. In a scenario in which any staff member detects an audible scream, shout, etc., with no button is pressed; they will go to the clinician’s office and knock on the door. If the clinician opens the door and says that they are okay, then no further action is taken. If the clinician does not open the door, then the staff member or front desk member will immediately contact the police.

Lincoln Procedure When Alerted of an Onsite Emergency

Fire Drill - All staff and clients will exit the building and meet on the east side by the Women's Field House (red building). If a staff member or client is unable to ambulate to the area, one of the Asst. Directors will need to be notified immediately. Fire personnel will be notified in case of emergency and be dispatched to assist the individuals as needed in the CCS area. Clients who exit the building should be informed of the meeting space and have the option to call to reschedule their appointment if their current appointment is unable to conclude.

Tornado Drill- All staff and clients will move towards the center of the building on the floor they are currently.

In case of client emergency- Staff will call the front desk and inform them of a need to consult with Dr. EDNA (Emergency Developed Needs Assistance). Front desk staff will alert a member of the leadership team on site or one at YSC, and call campus police with a location off the call.

When the emergency button is pressed at Lincoln, the police are immediately dispatched. As with YSC, attempts via Dr. EDNA will be made.

Defibrillators

- Available at each location to use for any person who is unresponsive
- Alarm sounds if opened. Turn on defibrillator and follow directions.
- Call 911 to get help.
- Seek assistance from other staff and alert front desk/leadership.

Requesting Leave Time on Workday

To request time off in Workday, follow these steps.

- Log in to Workday, then, from the menu options, click “Absence Request”.
- Click “Request Absence” and choose the day(s) you are requesting.
- Then choose from the available options about what kind of time off you’re requesting.
- Finally, ensure that the correct number of hours are being requested, then submit. You will get a notification when your supervisor approves or declines your absence.
- It is important to note, vacation request is subject to approval by HR Direct Report.

Informing Center of Absence

- Call the front desk at 614-292-5766 to leave a message as soon as possible. Do not select option 2 as this will take you to ProtoCall, our emergency response service.
- Email or text your individual supervisor, cohort coordinator, and any other person(s) who need to be informed of your absence for the day.

Requesting Training Drive Access for Coordinators

To request Training Drive access for Coordinators, you need to put in a service ticket with SLTS. Make sure to include the Coordinator’s name and dot number and that they specifically need access to the Training Drive.

Use of After-Hours Service

CCS phones will be set to link to the ProtoCall after hours services on weekdays, after business hours, weekends, holidays and when the university is closed. ProtoCall is a service used that is used at over 95 other university counseling centers in the U.S. and serving over 1.5 million students. Through use of ProtoCall, students who are in crisis and need immediate assistance will speak to master’s level clinicians and receive crisis consultation, information on emergency resources, or be directed to the Emergency Department, if appropriate. This service is available for use by students who are enrolled at OSU. The Director of Clinical Services will be contacted by ProtoCall in cases that are unclear for disposition. The morning of the next business day, CCS will receive reports generated based on a phone call, providing us with contact information, problem, and disposition. These reports will be reviewed by a Care Team member, and they will be uploaded into an existing client’s chart. Clinicians will be notified if your client has called and a report was generated. It is the clinicians’ responsibility to contact their client, if indicated, and follow up as necessary the same day. Individuals who use this service and are not clients will be

contacted by a Care Team member for follow up. This service can also be used as part of safety planning during ongoing or urgent appointments, when appropriate. This service should not be used as a replacement for emergency or urgent psychiatric care.

Verification Requests

As a training site, we often get contacted by former trainees to verify their time spent with us. This purpose is most frequently related to employment, student loans, or state board membership. We are sent a form either by the board or by the trainee. The forms vary in terms of the work required to complete the verification, but in general, they contain the following:

- Trainee contact information
- Director of Training contact information
- Number of hours of direct service / direct client contact / completed traineeship
- Summary of training experience
- Signature of Director of Training

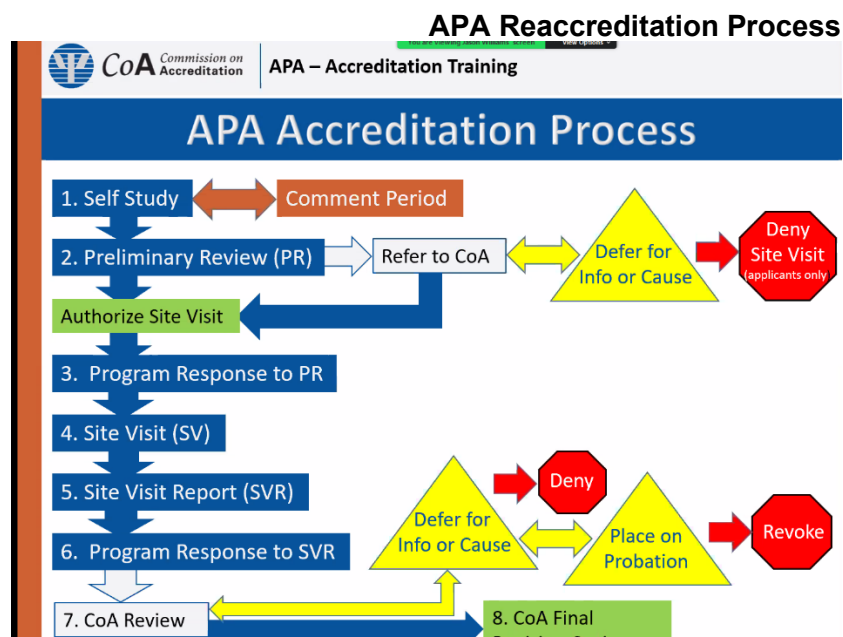
Once completed, follow the instructions listed on the form itself. It could be required to submit a hard copy to the board, completed via email, or returned to the trainee. Once it is sent, log the completion in the file called "Verification Requests." There is an excel file titled "Verification Log" that documents the verification details. It is a good practice to keep a record of this. Make sure the verification document(s) are saved in the trainee's digital file.

Reports and Forms

APA Annual Report

All Senior Staff Clinicians and any presenters from the past year need to fill out an Annual Report form. See the link below for a full tutorial on how to submit the Annual Report.

Tutorials for submitting annual report: <https://accreditation.apa.org/data-and-research/aro/submit/tutorials>



APPIC Website Update

This website is updated every June for the upcoming APPIC match for the psychology internship selection process.

Website: <https://membership.appic.org/login>

Username is the clinician's OSU email address.

Once logged into the website each of the following sections need updated:

Section	Status
Program Information	Complete
Training Director	Complete
Psychology Lead/Chief	Complete

Directory Profile

The survey has been submitted. As training director, you may alter the data.

Section	Status
Program Site Information	Complete
Staff & Faculty Information	Complete
Position Information	Complete
Applicants and Application Process	Complete
Credal Oath	Complete
Program Description	Complete
Training Experiences	Complete
Summary of the Characteristics of the Specified Training Class	Complete
Post Program Employment	Complete

Make sure all dates are updated for the upcoming year.

DocuSign Procedures

DocuSign Access Request Tutorial

A guide for ordering DocuSign roles through OCIO Self-Service

Intro

This tutorial covers the steps necessary to request specific DocuSign permissions within the Self-Service portal operated by the Office of the Chief Information Officer. This guide will provide step-by-step instructions with visual aids to assist both in navigating the web client and choosing the correct options.

Requirements

Please use the latest version of Google Chrome or Mozilla Firefox as your web browser for this process. Internet Explorer may have issues processing the Self-Service form.

Trainings

Three training courses must be completed to be eligible to send documents in the DocuSign system. If you do not meet these requirements, please click the links below to be taken to the respective BuckeyeLearn course pages.

- [Institutional Data Policy \(IDP\) Training](#)
 - [Click here for accessible alternate version of IDP Training](#)
- [eSignature Overview](#)
- [eSignature Sender](#)

If you also require the ability to create custom templates and/or create envelopes from scratch, please complete the eSignature Author training.

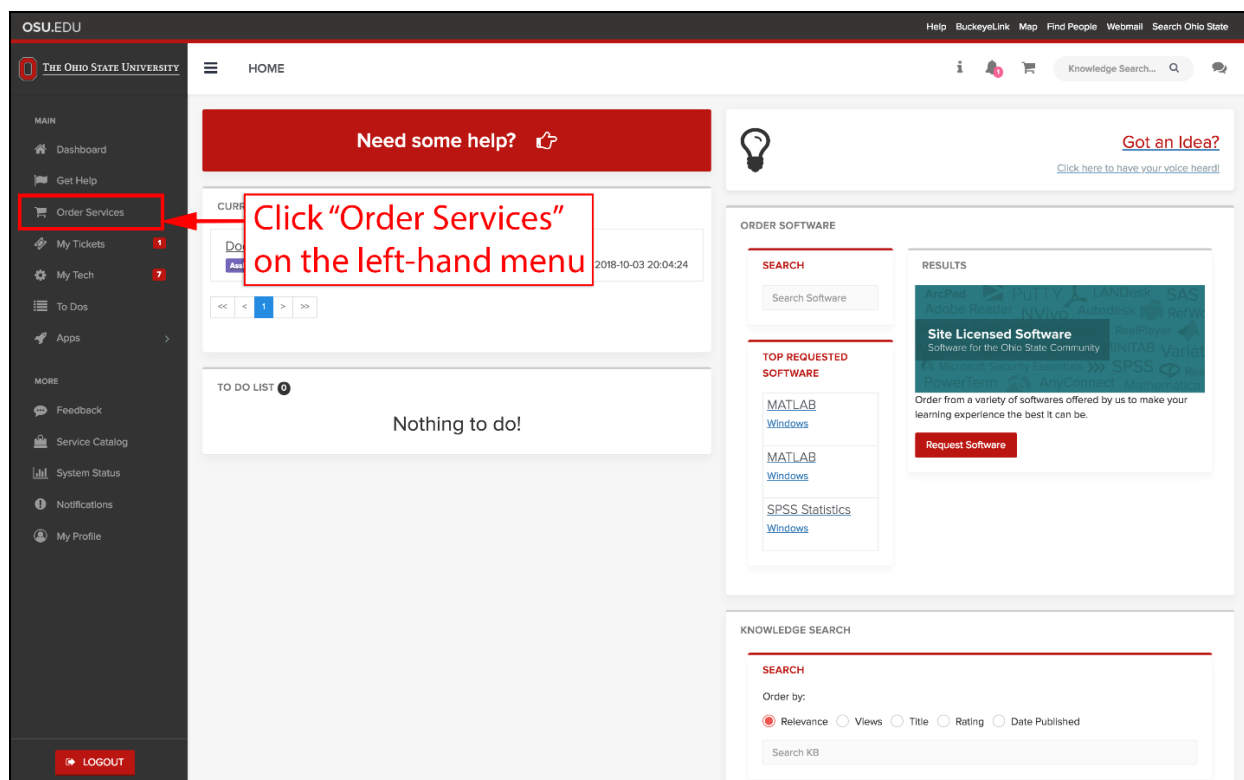
- [eSignature Author](#)

Start

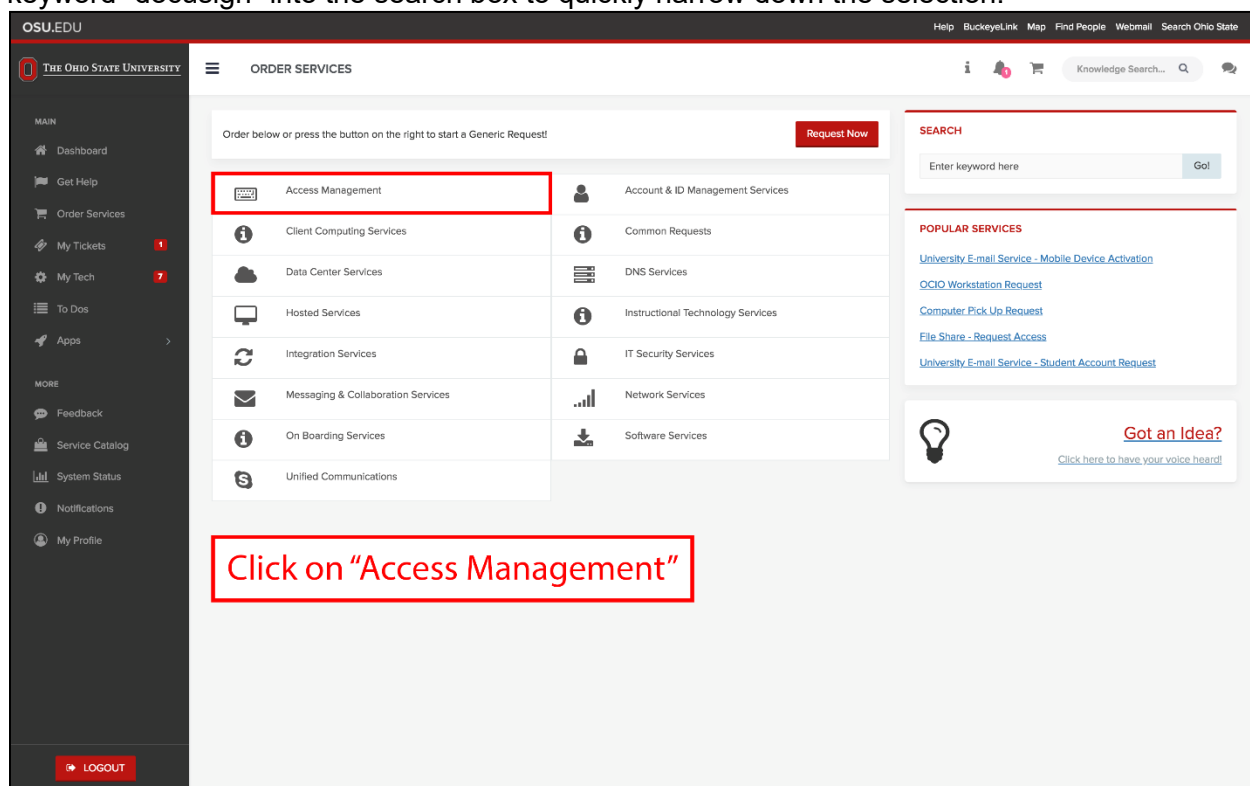
- Navigate to the OCIO Self-Service portal by clicking [here](#) or copying and pasting the following URL:

<https://osuitsm.service-now.com/selfservice/#!/>

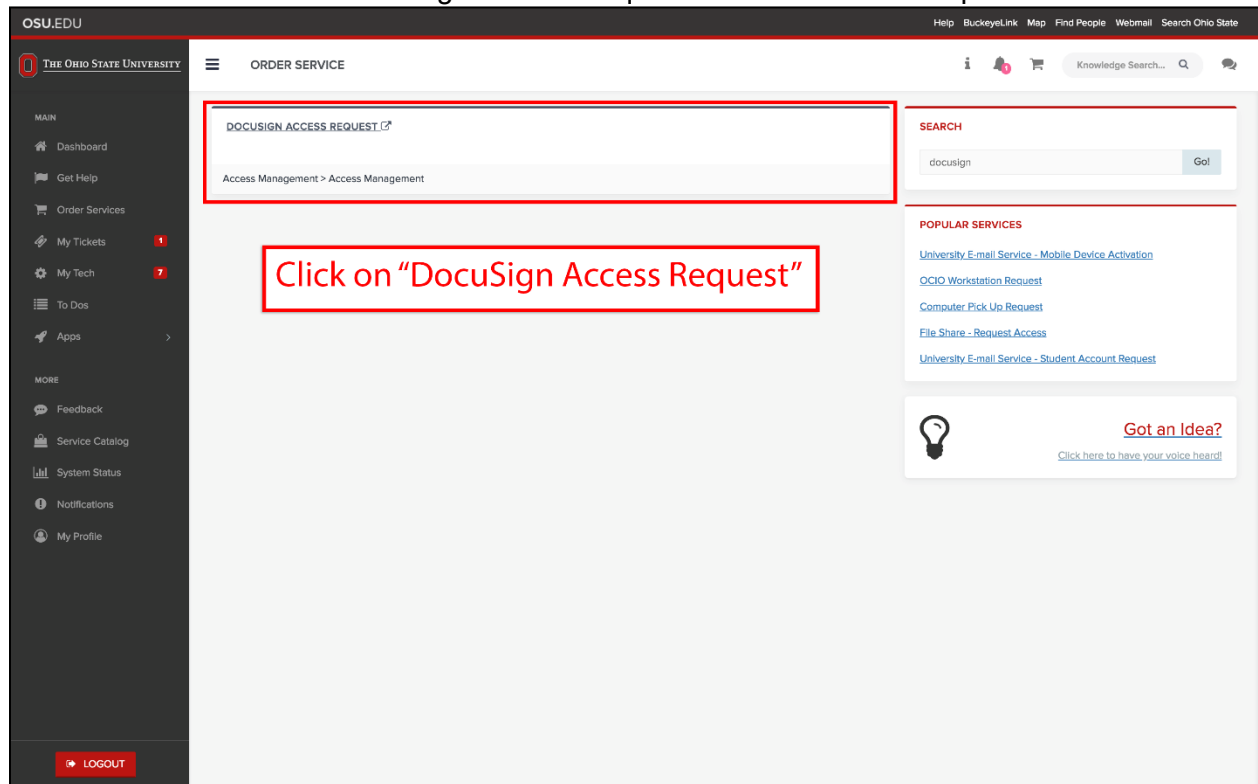
- On the left-hand side of the portal, click on the option “Order Services”



Under "Order Services", click the link for "Access Management". Alternatively, you can input the keyword "docuSign" into the search box to quickly narrow down the selection.



After either clicking on “Access Management” or searching the keyword “docusign”, you will be able to see a link named “DocuSign Access Request”. Click on the link to proceed.



- After clicking on the access request link, you will see a form containing various fields. Verify the information is correct and proceed to the next step.

The screenshot shows the OSU.EDU Order Service interface. The top navigation bar includes links for Help, BuckeyeLink, Map, Find People, Webmail, and Search Ohio State. The left sidebar contains a menu with options like Dashboard, Get Help, Order Services, My Tickets, My Tech, To Dos, Apps, Feedback, Service Catalog, System Status, Notifications, and My Profile. The main content area is titled "Request Catalog > Access Management > DocuSign Access Request". It features a "User Information" section with fields for Ohio State Username (name.#), Full Name, IDM Number, Employee ID, Phone, Org Number, and Request Type. The "Request Type" dropdown is currently set to "-- None --". On the right, there is a "Order this Item" section with a quantity selector (set to 1), an "Order Now" button, an "Add to Cart" button, and a "Shopping Cart" section showing an empty cart. A response time indicator at the bottom right shows a response time of 1926 ms, with a network of 2, server of 559, and browser of 1367.

- Select the request type that best applies to your needs and respond to the question regarding IDP training. If you are requesting a role, you will select the “New or Modify Account/Access” option under Request Type.

Note: Annual completion of the Institutional Data Protection training is required to request or maintain access to this system.

The screenshot shows the 'Request Catalog > Access Management > DocuSign Access Request' page. The form includes fields for User Information (Username, Full Name, IDM Number, Employee ID, Phone, Org Number), Request Type (set to 'New or Modify Account/Access'), and a question about IDP training completion (answered 'No'). At the bottom, there are 'Available' and 'Selected' role selection boxes. Red arrows point to the 'Request Type' dropdown and the 'No' answer, with text boxes stating: 'Select "New or Modify Account/Access"' and 'Answer the question about IDP training'. The 'Order Now' button is visible on the right.

OSU.EDU

Help | BuckeyeLink | Map | Find People | Webmail | Search Ohio State

THE OHIO STATE UNIVERSITY

ORDER SERVICE

Request Catalog > Access Management > DocuSign Access Request

Search catalog

User Information

Ohio State Username (name.#)

workkoetter.5

Full Name

Wyatt Robert Workkoetter

IDM Number

IDM801713661

Employee ID

Org Number

42717

Phone

Request Type

New or Modify Account/Access

Have you completed the IDP training in the past year?

More information

No

Select Role

Sender: This role is for university employees who need to send digital documents to others using existing templates in DocuSign. This role does not include the ability to drag signature tags onto documents.

Author: This role is for university employees who need to create digital documents that can be saved as templates to be used by senders. This role also includes the ability to drag signature tags onto documents.

Please select from the list on the left and push to the right.

Available

Author
Sender

Selected

--None--

Order this Item

quantity

1

Order Now

Add to Cart

Shopping Cart

Empty

LOGOUT

- At the bottom of the form, there are two white boxes named "Available" and "Selected". Click the desired role(s) in the left box to highlight it, then click the right-facing chevron to move the item to the right box. After moving the item, scroll back up and click the red "Order Now" button on the top-right of the page to place your request.

OSU.EDU

Help BuckeyeLink Map Find People Webmail Search Ohio State

THE OHIO STATE UNIVERSITY

ORDER SERVICE

Knowledge Search...

MAIN

- Dashboard
- Get Help
- Order Services
- My Tickets
- My Tech
- To Dos
- Apps

MORE

- Feedback
- Service Catalog
- System Status
- Notifications
- My Profile

LOGOUT

User Information

Ohio State Username (name.#)

wortkoetter.5

IDM Number

IDM801713861

Phone

Request Type

New or Modify Account/Access

Have you completed the IDP training in the past year?

More information

No

Full Name

Wyatt Robert Wortkoetter

Employee ID

Org Number

42717

Order this Item

quantity

1

Order Now

Add to Cart

Shopping Cart

Empty

Select Role

Sender: This role is for university employees who need to send digital documents to others using existing templates in DocuSign. This role does not include the ability to drag signature tags onto documents.

Author: This role is for university employees who need to create digital documents that can be saved as templates to be used by senders. This role also includes the ability to drag signature tags onto documents.

Available

Author

Selected

Sender

1. Click the desired role in the left box

2. Click the right-facing arrow to move the item to the right box

3. Click "Order Now"

At this point you are finished and the order is ready to be processed.

If you have any questions or comments regarding this process, please send an email to esignature@osu.edu for help.

Onboarding Forms

Every trainee must fill out the Due Process Form, the Grievance Policy, and the Trainee Expectations and Responsibilities Form during orientation. These forms can be found in the training drive, Training > Program Info and Forms > Orientation Forms > Forms to Sign.

Supervision Manual Updates

The Supervision Manual is a guide for Counseling and Consultation Service's supervisors. This manual provides an overview of the training program, policies and procedures of the training program, policies and procedures for clinical supervisors and additional considerations for training program staff. Cohort and Training Program evaluations are available, and expectations are reviewed.

Trainee Hours Report

1. Go to reports tab in Titanium.
2. Click Activity Summary by Appointment Code
3. For schedule to include, choose group if doing a cohort and click on the appropriate cohort.
4. For appointment types to include, choose single if doing an individual person and click on the person.
5. For date range, choose this year, then change start date to the first day of orientation.
6. For drop box, choose 'all'.

7. For end date, change to the last day of the report.
8. Press Preview to look at generated reports (you can print from this screen).

How to Calculate Trainee Hours

1. For direct service:
 - a. Add subtotal for individual appointments (attended hours)
 - b. Add subtotal for group appointments (attended hours)
 - c. Subtract supervision-trainee (attended hours)
 - i. If you choose all clinical appointments-Angela, the supervision hours will already be subtracted.
 - d. You are left with total direct clinical hours.
2. For indirect hours:
 - a. Add total attended hours for (individual person)
 - b. Subtract:
 - i. On-site marker
 - ii. Out
 - iii. Lunch
 - iv. (If winter break days get labeled, subtract that)
3. Go to export, and save as excel (for ex: mid-year hours report)
 - a. Subtract previous items from excel report.

Run individual reports to put into Trainee files at the end of year (mid-year if necessary).

Training Manual Updates

The Training Manual is a guide for Counseling and Consultation Service's Trainees. This manual provides an overview of the training program, policies, and procedures of the training program. The Training Manual is updated annually to include any new information and update any changed policies or dates.

Website Updates

The Training Program Assistant primarily edits the training pages.

The main edits that happen regularly are:

- Updating the selection timeline and deadlines for each cohort
- Changing pictures on the pages
- Change the CCS training video
- Making annual changes and edits to each program's information dictated by the Cohort Coordinators and Training Director.

To make edits:

- Content Management > Manage Web Pages – select the name of the web page you are trying to edit. The names of each page are on the CCS training page as the name on the tab to get to each page.
- Write and make changes just as you would in Word.
- To change the pictures that appear on the pages, go to the Content Management > Manage Images. Search or find the picture that is desired (you may need to import a new image to the collection with the Add New Image feature). Once the picture is found, click on the "edit" button and assign the image to the page you need. We usually use

the “Assign to Webpages” feature and click the name of the page for the cohort that applies.

- To make changes to the videos that appear on the pages, navigate to the editing page for the web page and use the insert/edit video button.
- Other website editing features can go to the Clinical Program Assistant or the Outreach Program Assistant.