

Technical Assistant Guide - Rush Generations Program

Thank you so much for taking the time to provide this service for our programs. While this task may seem small to some, the role of the technical assistant for our group workshops is essential in our group retention and group quality.

You will attend each workshop session and re-name yourself in Zoom as “Your First Name (Technical Assistant).” You do not need to come on camera, but sometimes during session one or session zero it is nice to come on camera and greet participants, so they know who is calling them. Once the session reaches 10 minutes after the start time, you will begin calling the participants who have not yet shown up.

- The roster of participants should be sent to you at least one day before the start of the workshop.
- The program coordinator or facilitators will let you know of any drops or any participant who has let us know ahead of time they will not be there, so you will not have to call those individuals.
- After the second session, the group closes and those who have not yet shown up to the group will no longer be able to join. The program coordinator will send an updated roster at that time.

Things to keep in mind:

- Please speak slowly and clearly.
- Technology can really stress older adults out, so practice empathy. If someone is very flustered, even offer to take a moment to breathe and talk about something else.
- Make sure to avoid verbiage or phrasing that would make someone feel bad about forgetting or missing a session – these participants are as much of a value to us as we are to them.
- You are present to be a tech assistant for the participants, not the facilitators. If a facilitator is struggling with a technical aspect and requests your help, you may provide that help if you feel comfortable; however, please let the Padraic know after the workshop so that he may address this offline.

Here are some workflows and scripting to help you:

- I. The link to join the Zoom meeting will be the same each session; however, you will be cc'd on each reminder email that is sent 30 minutes before the start of each session. All registrants will be BCC'd.
- II. 10 minutes in, check who all is in attendance, and check your emails and Teams messages for last minute notices that may have come through. Begin calling those who have not yet shown up and are unaccounted for.
 - a. Utilize your Doximity Dialer app or Google Voice, as if you use *67, many older adults will not pick up calls from private or blocked numbers
- III. Utilize some of the verbiage below for your calls:

“Hello, could I please speak with [participant first and last name]? This is [your name], calling from the Rush Generations workshop. We started a bit ago and noticed you haven’t joined yet, so we are calling to check-in on you.”

- **Some participants may have simply forgotten about the group** – so your call serves as an additional reminder to them to join! Remind them to look for the invitation email or to enter in the Zoom Meeting ID that was on the cover page of the mailing they received.

We phrase our outreach this way because we never want to be punitive. Stay curious and make sure the participants are ok. We don’t know why they haven’t joined—they could have any number of reasons, and we never fully know what’s going on. So always reach out with kindness.

- **If they are not joining because of a schedule conflict, not feeling well, etc.,** document this so that you can report back to the facilitators. You do not need to motivate them to join, problem solve, etc. Just thank them for their time and let them know they'll let the group leaders know.

“Thank you for your time. We hope to see you at the next session! I will let the group leaders know.”

- **If they have not joined because of a technical issue,** please try your best to work it out with them
 - Remember that older adults may not be as familiar with technology as we assume. Something that may seem like two steps to you, could really be 8 or more steps for them. Slow everything down. (i.e., “go to your apps and open Zoom” could look more like “Do you know where to find the apps on your phone and how to open them? Great, I’ll have you go to that screen and look for the blue icon with the camera on it that says “Zoom,” you’ll need to tap that.”) – if you can break it into multiple steps, do it!
 - All registrants receive a link to join 30 minutes before each workshop session to their email. If they did not receive the email, double check the spelling of the email on the registration sheet, and if that’s correct, ask them to check their spam or junk folders. Rush emails often get sent to junk when larger groups of recipients are BCC’d.
- **If you do not get an answer, it’s ok to leave a voicemail.** Don’t give too much detail, but clear. Here’s a script for voicemails:

“This message is for [participant name], this is [your name], the technical assistant from the Rush Generations program. We started a bit ago and noticed you haven’t joined yet, so we are calling to check-in on you. If you’re having any trouble logging on or if you need any technical assistance, please feel free to give me a call back at XXX-XXX-XXXX. We hope to see you soon! If not, someone from our team will be calling you later to check-in.”
- **If working with a participant takes longer than 15 minutes,** notify the facilitators via the direct chat. You want to make sure all of the folks who haven’t joined yet get a call, so you don’t want to spend too much time on any one participant. If your call takes longer than 15 minutes, it’s evident a longer technical assistance call will be needed. The facilitators will notify the program coordinator and they will receive one.
 - If this is the case, try to find a moment where you “accept that the problem can’t be solved right now”—this might be the case. And then offer them the dial-in information, Meeting ID, and password.
 - Within group fidelity, participants are not allowed to participate with audio-only; however, we make an exception for one session so that the participant can still benefit from the session and then will get a technical assistance call before the next session.

IV. Once you have completed your calls, send a quick direct chat to the facilitators email them and Padraic Stanley (Padraic.Stanley@rush.edu) cc’d letting them know the status of each participant you called. It doesn’t have to be overly detailed. It can just be a list.

V. **Sometimes participants may join the session and have difficulty connecting to audio or video.** You will have co-host permissions. For audio, you may need to call the participant to help them figure it out. If worse comes to worse, you can have them call in, as well as stay on camera. For video, click on the “...” on the participants Zoom square or on the drop down next to their name on the Participants list and select “Ask Participant to Turn on Video”—they will receive a request to their screen. If that doesn’t work, please call them and try this again, but prompting them to press the blue button that says “Turn on Camera.” If that doesn’t work, they may need to give Zoom

Sample email:

Hi Padraic, Gerri, and Laurie,

Call Results from Today’s Workshop:

- 1. Jane Doe – had a doctor appointment***
- 2. Chris P. Bacon – left a voicemail***
- 3. Anita Knapp – forgot, will join soon***
- 4. Ella Vader – not feeling well, will join next week***

permission to access the camera, which can be done through settings. Again, if that takes too long, tell them it's ok and that someone will call them sometime before the next session to help them figure it out.

- VI. Once you're done with that, you can leave the Zoom meeting. There's no need for you to stay on or to announce you're leaving. Just send a quick direct chat to the facilitators with your call results and let them know you'll be leaving. However, if you want to stay on and observe, you are more than welcome to!