

Remote Supervision

Standard Operating Procedure

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Introduction

Supervision is crucial to the professional growth and development of peer staff, as well as maintenance of quality service delivery. With digital recovery support service delivery and remote work environments, supervision and oversight will be accomplished through a hybrid of established best practices for supervision and effective use of current technology. This document should be used in consultation with the [Digital Remote Working Policy](#). Peer Supervisors are also referred to the [Pennsylvania Certification Board's Core Competencies for Peer Supervisors](#).

Principles of Remote Supervision

- **Communication** - peer staff should maintain a level of communication equal to that of onsite physical proximity, with more communication in certain areas.
- **Accountability** - as always, peer staff are accountable for their work and their time, and proactively participate in oversight and supervision.
- **Service Quality** - participants must consistently receive low-barrier, authentic and quality services delivered with fidelity to ethics, best practices and evidence-base.
- **Self Care** - peer staff should be engaged in ongoing conversations about their own wellness and recovery with attention to vicarious trauma, emotional labor, and compassion/empathy fatigue, as well as strategies to mitigate digital overload.
- **Professional Development** - peer staff should be provided with opportunities for learning and skill development

Operating Workflow

Recoveree Assignment and Intake

Incoming recovery support service requests (referrals) are fielded by the RSS Director. These come through various channels, e.g. web forms, email, telephone, text line, chat, and may come at any point during the day. Cases are assigned using standard matching criteria with given information in the case of asynchronous forms, or from provided information if the incoming request is through a synchronous channel (e.g., text line). The RSS Director facilitates a digital “lukewarm” handoff of recoveree to the appropriate peer staff using the restrictive channel possible. RecoveryLink is used to monitor intake process adherence.

Monitoring and Ad Hoc Supervision

One of the most effective tools in the remote supervisor’s toolbox is cross-referencing. With the use of multiple platforms, peer staff can proactively contribute to their accountability and oversight in a manner consistent with the organizational value of transparency, while the supervisor is able to match data across platforms to give a dynamic view of service delivery.

The following tools can be utilized to monitor service provision, team communication, and time management in the remote work environment. These include examples of deployment:

- **Zoom** Daily team meetings

- **Staff Schedule** Same days on/off
 Same number of hours per day
 Independent scheduling
 Supervision at scheduled times (rescheduling is allowable)
 Flexing is allowable, must be approved

- **Digital All Recovery Meeting Schedule**
 Coverage of assigned meetings
 Logging of meeting topics and attendance

- **Google Calendar** All individual calendars shared with supervisor
 Individual appointments *must be on calendars*
 Unscheduled engagements must be added to calendars
 Team meetings will be on Team calendar

- **Email** Supervisor copied on all external communication unless it is to a recoveree
- **Clockify** Time and project tracking by funding ID
Must be completed *at the end of each day*
Use “projects” to account for activities
- **RecoveryLink** peer-specific service record and data platform
All sessions recorded in appropriate session type
- **Slack** All work-related communication
Use appropriate channels/threads for dissemination of information, team/individual discussions
Record of communication for easy reference
Expectations for timely reply to show attention
- **PandaDoc** Digital document sign platform for informed consent and releases of information
- **All Channels** During the workday, staff on duty must be immediately reachable by phone, text, email or Slack with a *maximum five-minute response time*. Staff should monitor Slack during time off whenever possible and response is optional.

Supervision Workflow Example

Example of single case workflow with remote supervision/monitoring, with key components emphasized. At every step, there is an accountability mechanism.

1. Supervisor receives service request/referral via **Peer Support Text Line**.
2. Information is sent to peer in **Slack** and peer acknowledges receipt of information in **Slack**
3. Peer **emails** recoveree, **copies** supervisor
4. Peer enters recoveree engagement on **Google Calendar**
5. Peer creates intake record, notifies Supervisor in **Slack**
6. Supervisor assigns case to peer in **RecoveryLink**
7. Peer completes intake, schedules next engagement in **RecoveryLink**
8. Peer prepares documents in **PandaDoc** and sends to recoveree
9. Peer reviews documents with recoveree and conducts engagement
10. Peer downloads signed documents from **PandaDoc** and uploads to Participant Profile in **RecoveryLink**
11. Supervisor reviews record in **RecoveryLink**
12. Supervisor meets with Peer over **Zoom** and discusses initial impressions of recoveree as well as reviewing record
13. Record is reviewed in real time by Peer and Supervisor in **RecoveryLink**
14. Supervisor monitors participant progress and peer performance in **RecoveryLink**.

Formal Supervision

Regularly scheduled supervision is essential to the success of peer staff working remotely. Even as digital service delivery is the primary work channel, peer staff supervision will continue to be held weekly on an individual basis, monthly on a group basis, with the addition of a 15-minute all staff checkin daily. In addition to the usual components of supervision, special attention will be given to issues related to digital immersion, including digital wellness strategies, and time management. The supervisor must also be mindful of the peer staff regular work schedule in digital environments. Peer staff must ensure that recoverees are not inadvertently abandoned or neglected as an iatrogenic effect of digital recovery support service delivery. Typical components of supervision with **DRSS components added in red:**

Caseload review

- Recoveree status
- Caseload size
- Workload
- Data trends - attrition, engagement, etc
- **Strategies to overcome digital attrition, barriers to access**

Record review

- Proper use to record types
- Complete data entry
- Content of record consistent with peer methods and principles
- **Proper use of electronic document sign/transfer**

Method/Practice

- Discussion of peer staff's use of Motivational Interviewing and other skills
- Opportunity for brief, ad hoc skills instruction with Supervisor
- **Discussion of digital impact on interactions and MI technique**

Self-care

- Holistic wellness
- Transference/boundaries/role
- **Digital "detox" and compassion fatigue**

Ethics

- Ensuring consistent engagement with recoverees
- Informed consent document integrity maintained
- **Digital implications of privacy and confidentiality regulations**

Supervision Document Templates

Group Supervision Note Template

Supervisees:	Supervisor:																		
Date of Supervision:	Frequency:																		
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2" style="padding: 5px;">Theme of Supervision</td> </tr> <tr> <td style="width: 20%;"></td> <td style="padding: 5px;">Case Presentations</td> </tr> <tr> <td></td> <td style="padding: 5px;">Training</td> </tr> <tr> <td></td> <td style="padding: 5px;">Activity</td> </tr> <tr> <td colspan="2" style="padding: 5px;">Topics of Supervision</td> </tr> <tr> <td></td> <td style="padding: 5px;">Method and Practice</td> </tr> <tr> <td></td> <td style="padding: 5px;">Self-care</td> </tr> <tr> <td></td> <td style="padding: 5px;">Ethics</td> </tr> <tr> <td></td> <td style="padding: 5px;">Teambuilding</td> </tr> </table>		Theme of Supervision			Case Presentations		Training		Activity	Topics of Supervision			Method and Practice		Self-care		Ethics		Teambuilding
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Group Notes:																			
Action Items:																			

Peer Supervision Agreement Template

Supervisor:	Supervisee:
Frequency of Individual:	Frequency of Group:
<p>Rights of Supervisor:</p> <ul style="list-style-type: none"> i. To raise and address any concerns regarding performance ii. To observe the supervisee's direct practice and provide support and direction, if needed 	<p>Rights of Supervisee:</p> <ul style="list-style-type: none"> i. To receive consistent supervision at the agreed-upon time in a private location. ii. To participate in setting the agenda for each session. iii. To receive constructive and honest feedback regarding areas for improvement orally and have an opportunity to correct before it is documented into any formal written performance reviews. iv. To have access to supervisor in the event of an emergency.
<p>Obligations of Supervisor:</p> <ul style="list-style-type: none"> i. To make sure that supervision sessions take place as agreed. ii. To collaboratively assess the supervisee's strengths and areas for continued professional development. iii. To continually ask about training/coaching needs and ensure that the peer specialist is connected to relevant resources and opportunities and that relevant information is shared in the supervision sessions. iv. To use a supervisory form to document the focus of and next steps for each supervision session. v. To ensure that the peer specialist is clear about their role and responsibilities. vi. To ensure that other staff are clear about the role and responsibilities of the peer 	<p>Obligations of Supervisee:</p> <ul style="list-style-type: none"> i. To come to supervision sessions prepared to discuss their work and ready to discuss any challenges that they are experiencing. ii. To consult their supervisor when they are confronted with a situation that is beyond the scope of their practice as a peer specialist. iii. To be open to their supervisor's feedback and be willing to adopt alternate approaches if asked. iv. To share if they are uncomfortable doing something that is being asked of them. v. To track action items that arise in the course of supervision and be prepared to provide a status update during the next supervision session. vi. To inform their supervisor if any aspects of their workload becoming too demanding. vii. Maintain a commitment to ongoing

<p>specialist and when needed provide additional clarity.</p> <p>vii. To review the supervisee's approach with individuals to ensure that it is consistent with a recovery-orientation and provide support, guidance, and redirection if needed.</p> <p>viii. To ensure that each person working with the peer specialist is receiving the correct level of support based on the intensity of their needs.</p> <p>ix. To ensure that the specific agenda items for each session are identified collaboratively.</p> <p>X. To support the peer specialist in identifying their professional development goals.</p> <p>xi. To ensure that the peer specialist has access to all of the resources that they need to be effective in their roles.</p> <p>xii. To provide needed support related to documentation and any other administrative tasks beyond direct service delivery.</p>	<p>professional development through identifying skill gaps and training needs.</p>
<p>Content: To be negotiated between supervisee and supervisor at each session, based on perceived need. *Ethics will be addressed at every supervision session.</p> <ul style="list-style-type: none"> ● Caseload/case conceptualization-review of caseload and discussion of specific recoverees ● Record reviews-check completion and content of RecoveryLink records ● Method/practice-discussions of technique and engagement strategies ● Self-care-ensuring that your recovery is supported and protected ● *Ethics-any examples of ethical principles in your work 	
<p>Signature:</p> <p>Date:</p>	<p>Signature:</p> <p>Date:</p>

Supervision Note Template

Supervisee:	Supervisor:
Date:	Frequency:
<p>Topics of Supervision:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Caseload <input type="checkbox"/> Record review <input type="checkbox"/> Method/practice <input type="checkbox"/> Self-care <input type="checkbox"/> Ethics 	
Notes:	
Action Items:	
Outreach Plan:	
PRSS:	Date:

Annual Professional Development Plan Template

Name	Position	Date
Date of Hire	Supervisor	Date to revisit
<p>What strengths do you bring to your position?</p> 		
<p>Where do you want your career to be in five years?</p> 		
<p>What are your professional goals for the next year? <i>(Please use SMART goals)</i></p> <p>1.</p> <p>2.</p> <p>3.</p>		
<p>How can Unity support you in reaching these goals? <i>(resources, training, direct support)</i></p> <p>1.</p> <p>2.</p> <p>3.</p>		
<p>Unity Recovery is committed to supporting your professional development as well as ensuring that you have adequate opportunities to obtain the required continuing education to retain your professional certification. This plan is not binding, but is a guiding document for the next year of my growth.</p>		
Employee	Supervisor	Date