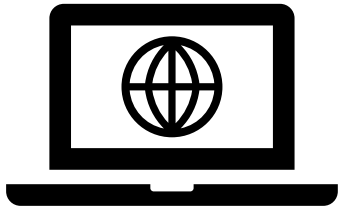
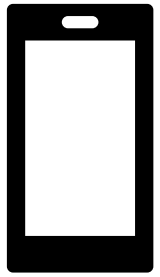
Using Technology Effectively

Presented by:

Family Service Toronto





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FAMILY SERVICE TORONTO
For People. For Change.

United Way Greater Toronto

Agenda

- Using Zoom effectively
- Sharing documents virtually
- Submitting SSAH/ Passport invoices
- Merging calls
- Creating a fillable PDF
- Helpful tips

Using Zoom Effectively

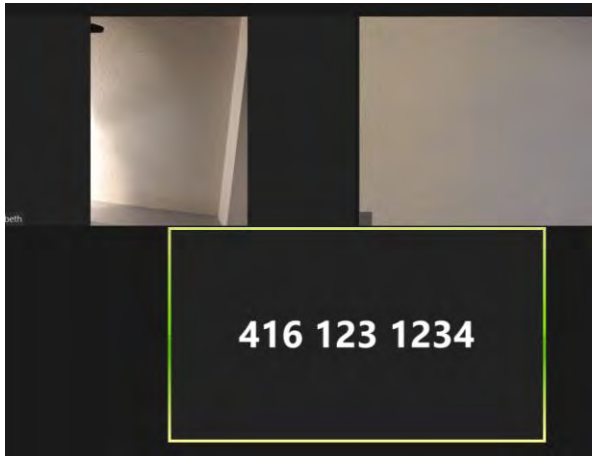
- Confidentiality
- Muting your microphone
- How to turn off your video
- Changing your display name
- Writing in the chat box

Using Zoom Effectively: **Confidentiality**

There are some risks associated with virtual meetings to consider:

- The possibility that the transmission of information could be disrupted or distorted by technical failure
- Service disruption
- The meeting could be interrupted by unauthorized person(s)

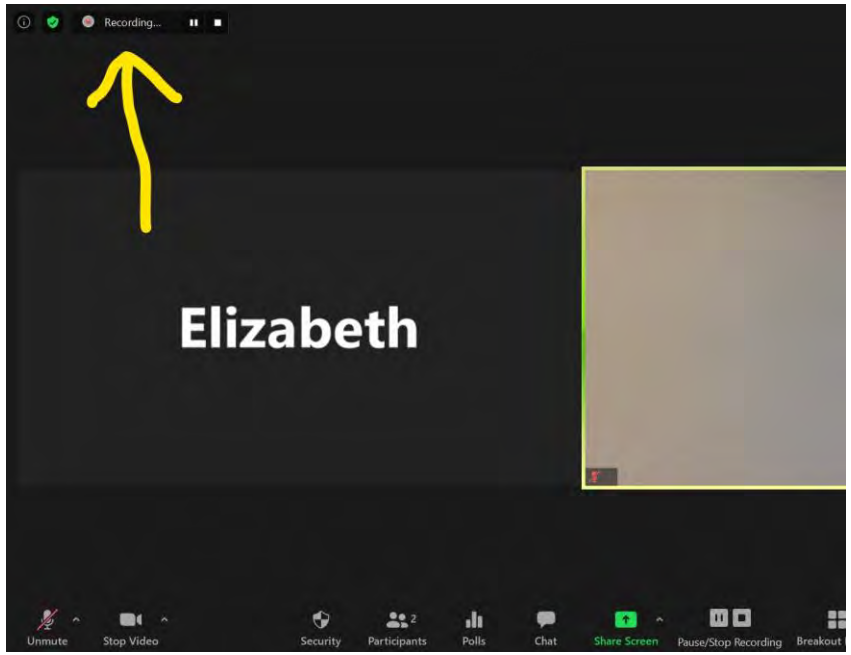
Using Zoom Effectively: **Confidentiality**



Questions to ask about the confidentiality of your virtual meeting:

- If someone is joining a virtual meeting without their video display on (for example, just a phone number is displayed instead of a video or username), ask them to identify themselves
- Ask your host if they have 'locked' the meeting. This means that after all invited participants have arrived, no one else can join your meeting

Using Zoom Effectively: **Confidentiality**

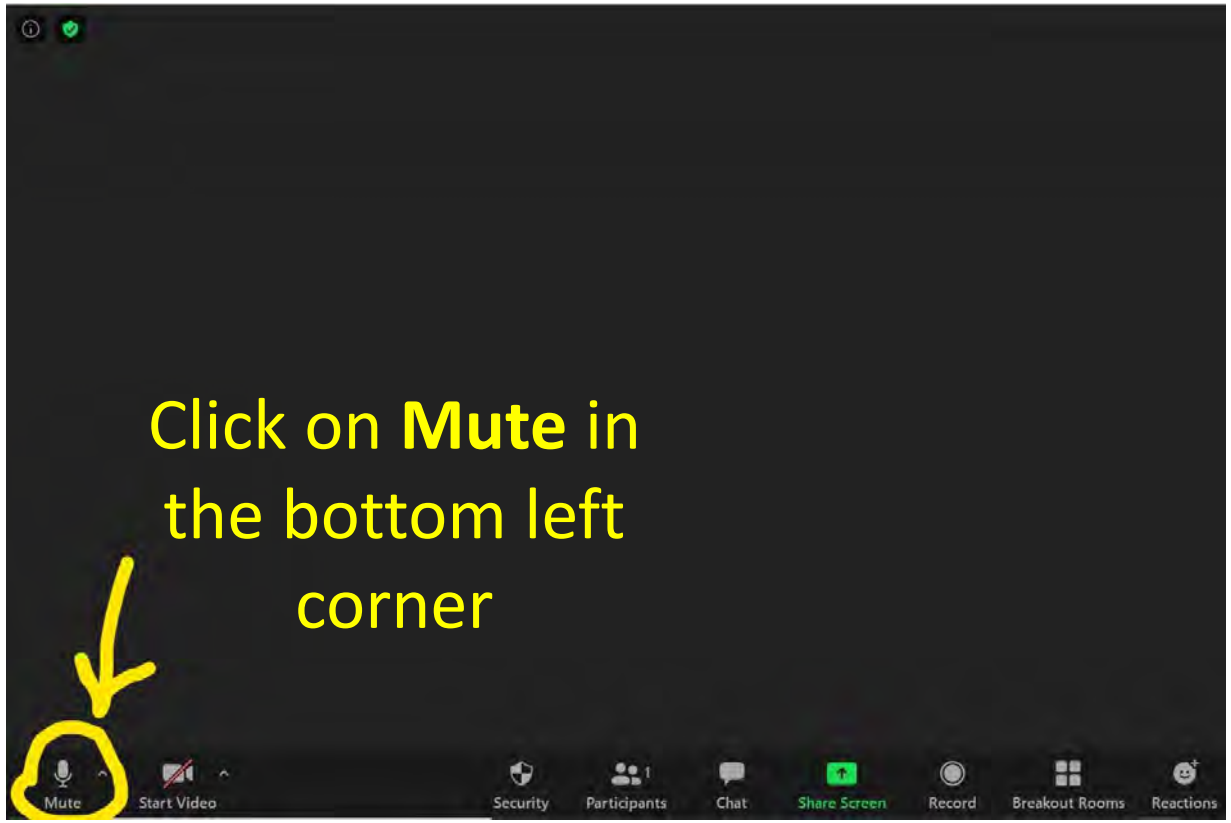


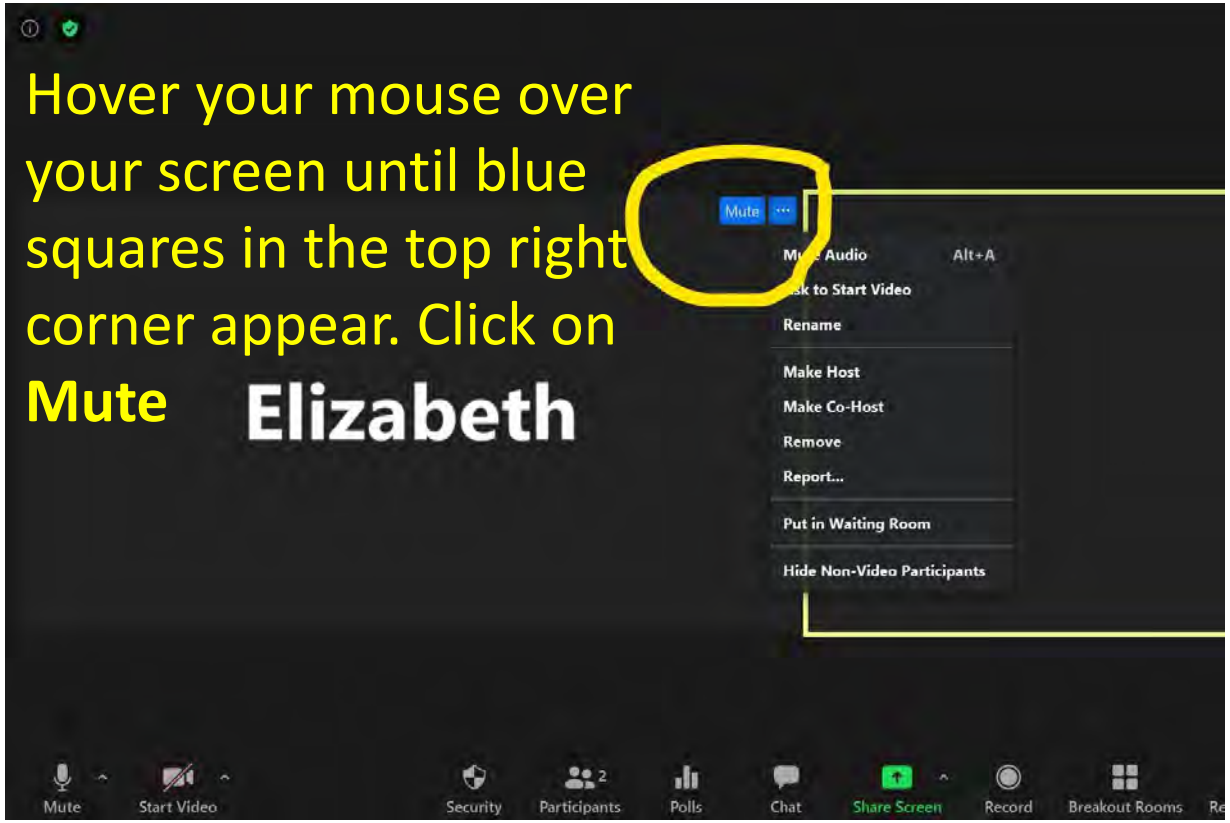
Questions to ask about the confidentiality of your virtual meeting:

- Ask if your meeting is being recorded. The host can block other meeting participants from recording the meeting
- If any of these issues arise, ask to immediately end the meeting and reschedule

Using Zoom Effectively:
Muting Your Microphone

There are **2 ways** to mute your microphone when using a laptop or computer:

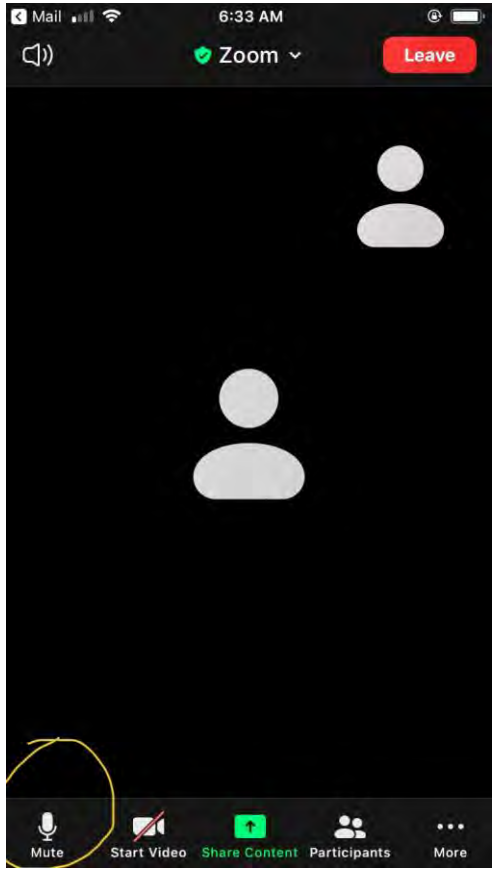




Using Zoom Effectively:
Muting Your Microphone

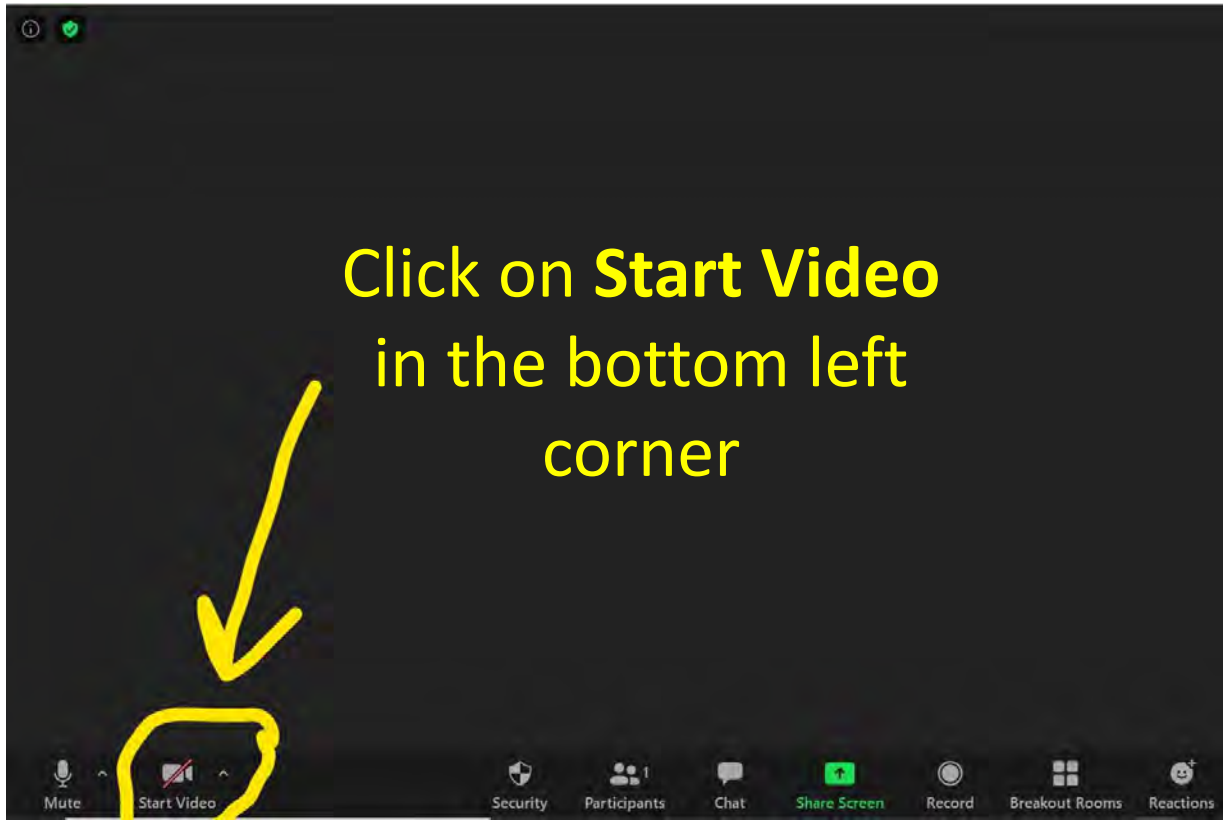
Muting your microphone using the Zoom app on a smartphone:

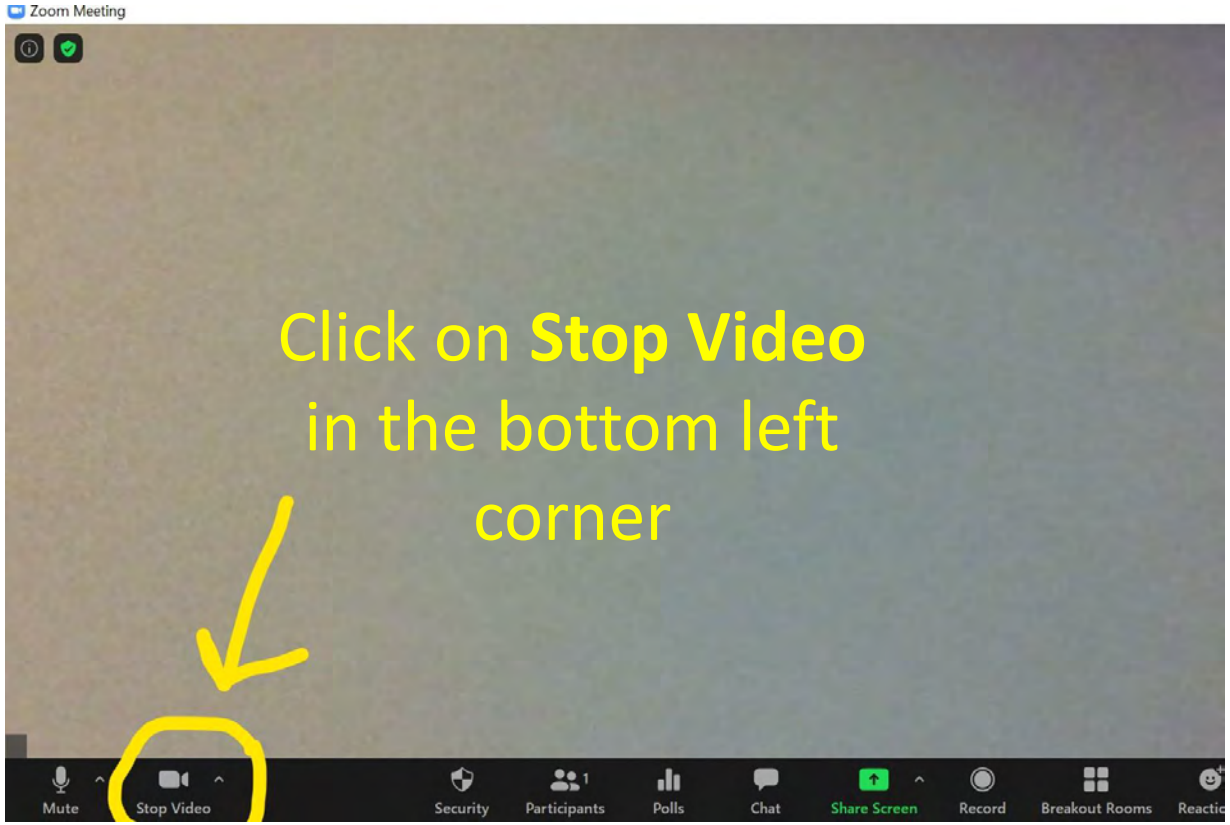
At the bottom of your phone screen in the left corner click on **Mute**



Using Zoom Effectively:
How To Turn Off Your Video

How to turn your video **off** or **on** when using a laptop or computer:

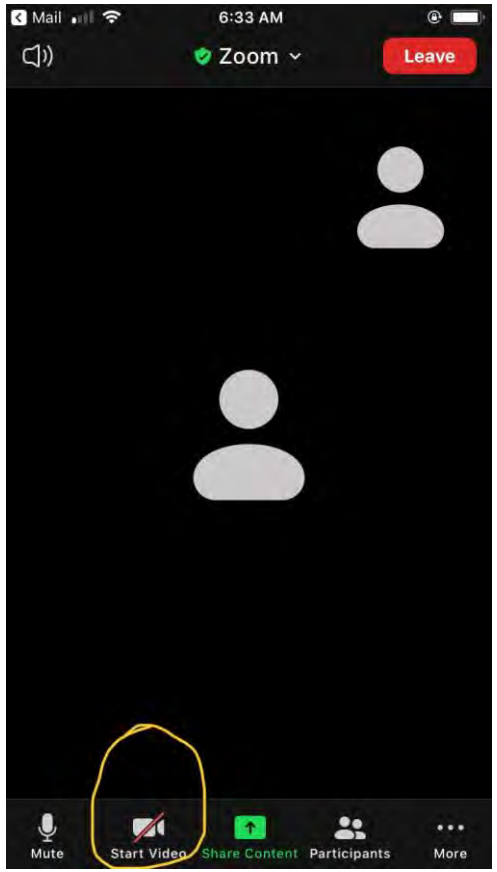




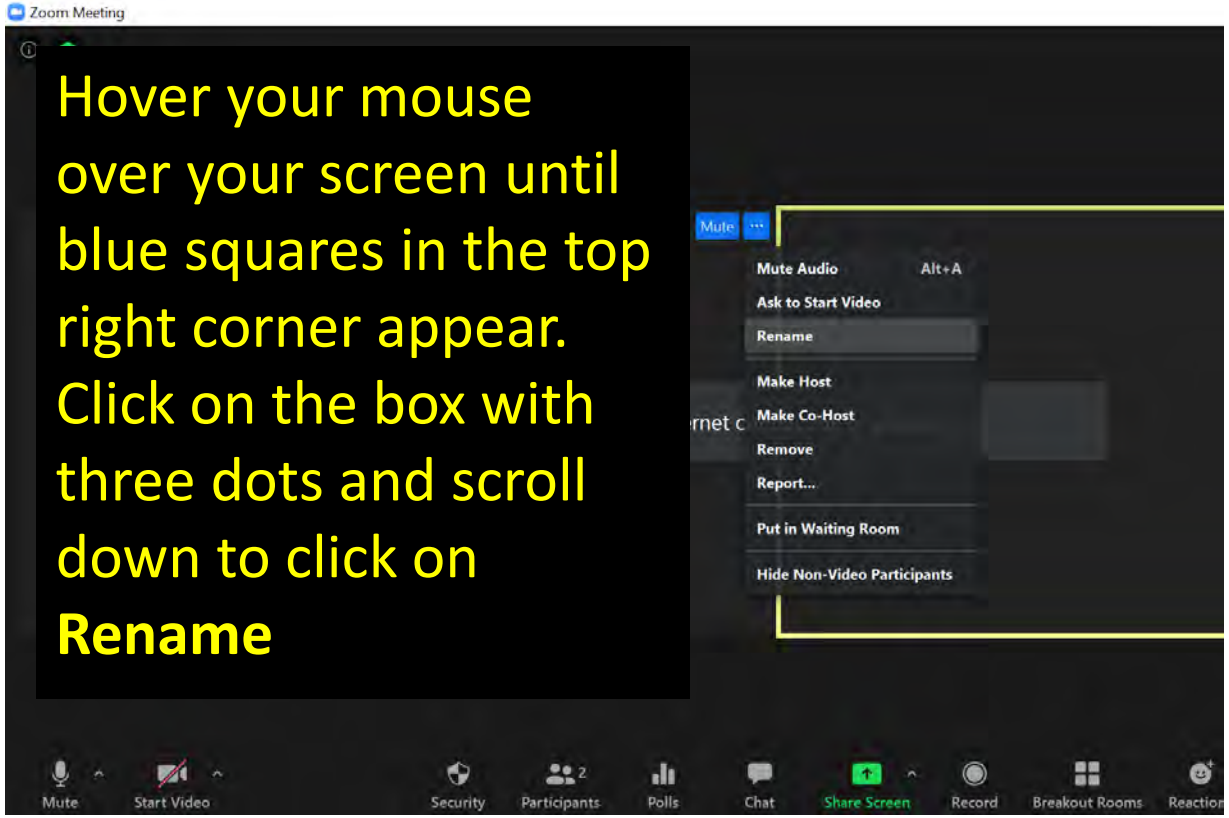
Using Zoom Effectively:
How To Turn Off Your Video

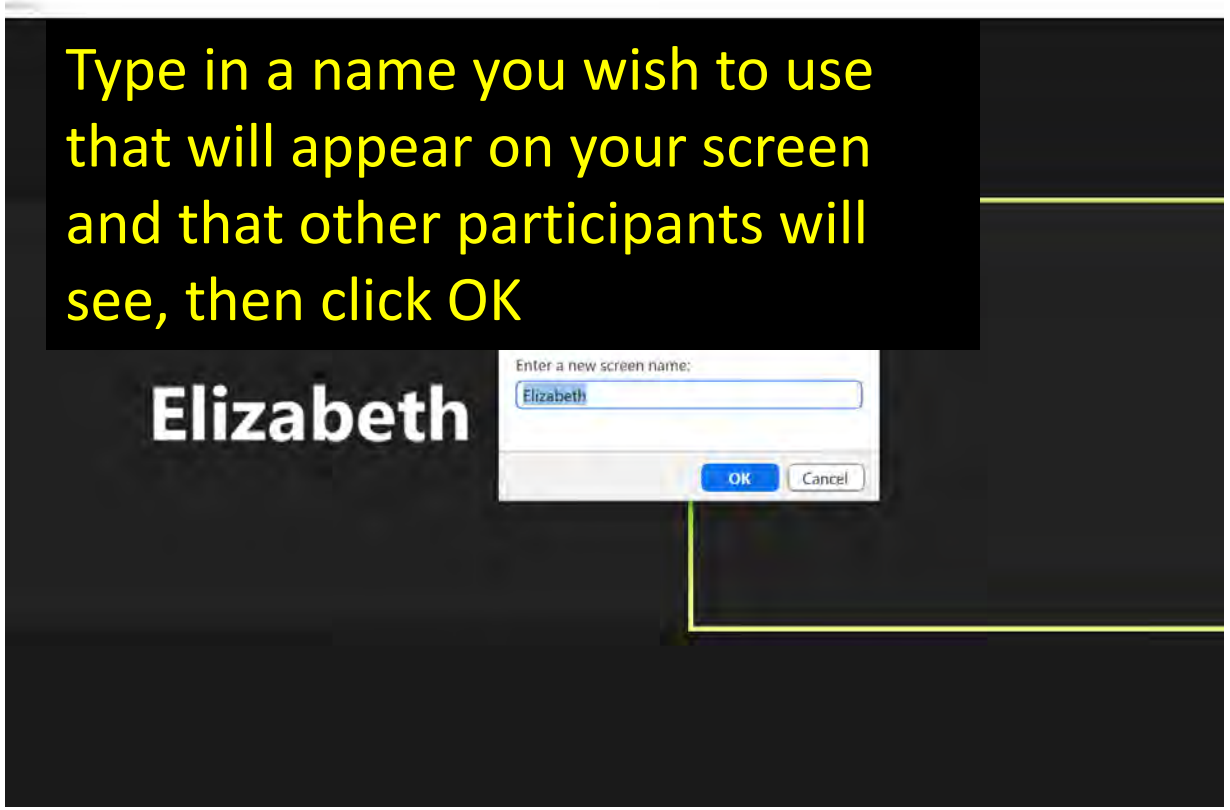
Turning your camera **off** or **on** using the Zoom app on a smartphone:

At the bottom of your phone screen click on **Start or Stop Video**



Using Zoom Effectively:
Changing Your Display Name

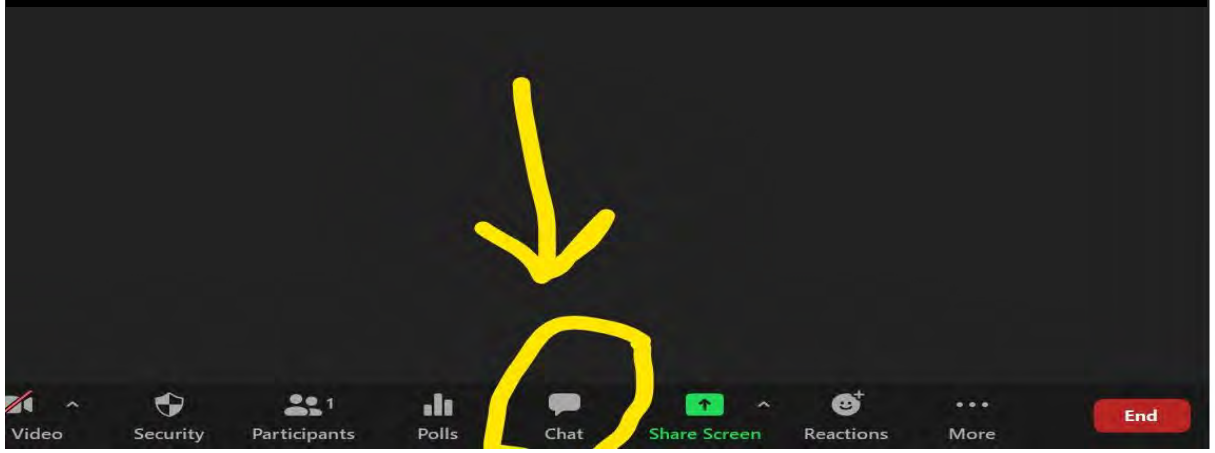




Using Zoom Effectively:
Writing in the Chat Box

- Some hosts use the chat box to send messages to meeting participants. Meeting participants can also share information with other participants (such as contact information, website links, resources etc.)
- Hosts may use the chat box as a "speakers list" as well – if you have a question or comment, type your name in the chat box so the host knows you have something to say

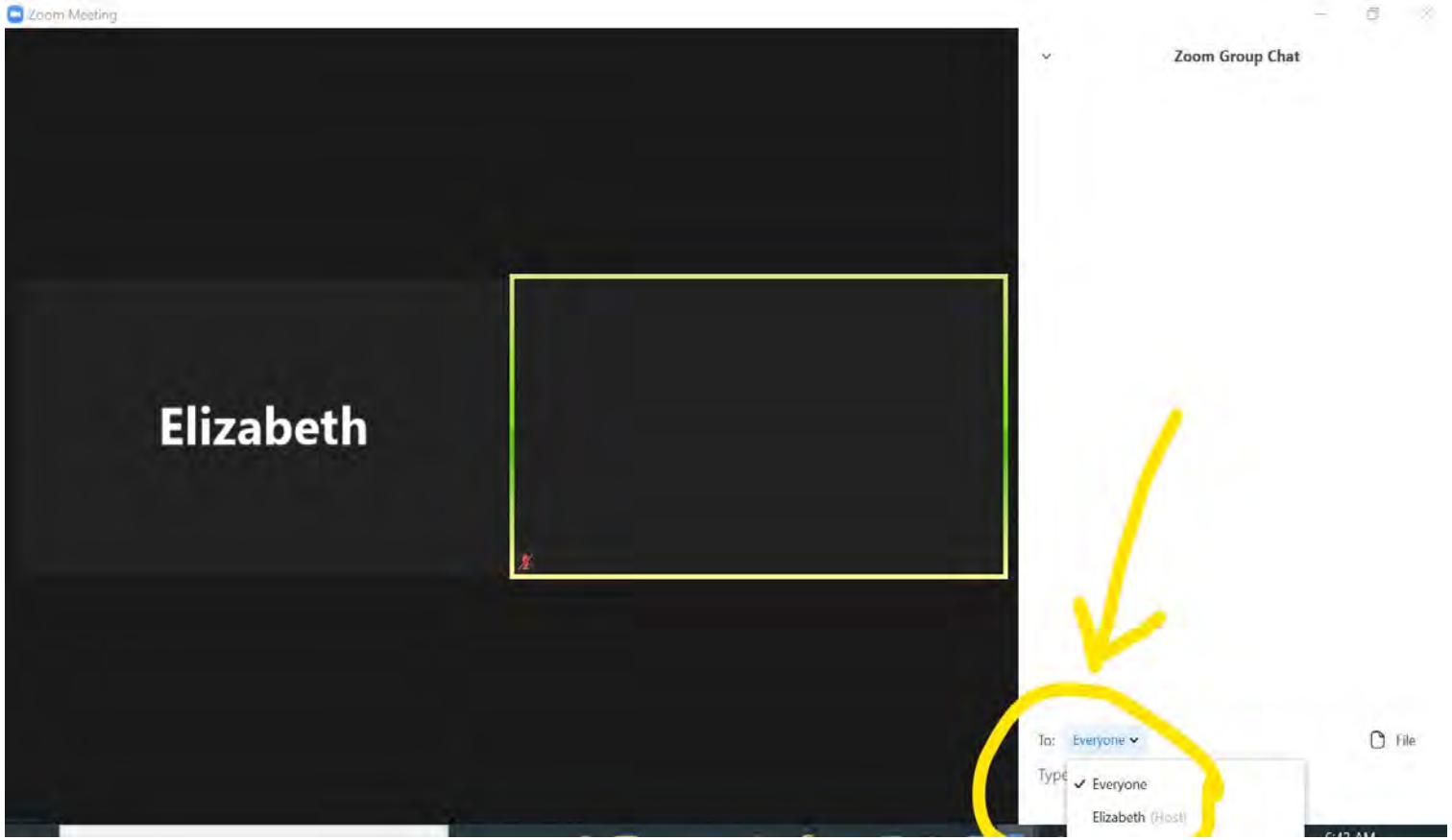
Click on **Chat** at the bottom of your screen. A window will pop open on the right side of your screen, allowing you to see messages from the host or other participants. If the chat window is closed, a red icon will appear on the Chat feature to alert you to a new message.



Using Zoom Effectively:
Writing in the Chat Box

Sending a message:

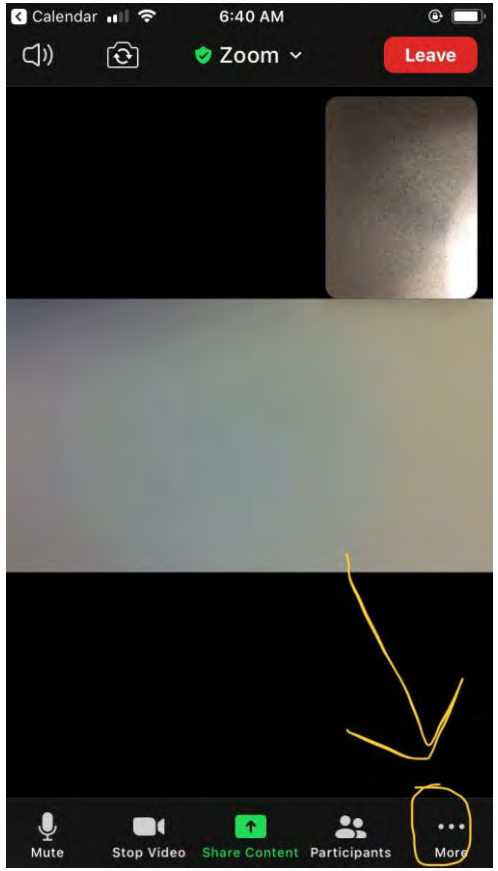
You can choose to either send a message to the host or to all the meeting participants. The word "Host" will appear next to the name of the person running the meeting. If you send a message directly to the host of the meeting, no other meeting participants will see your message. If there is a checkmark beside "Everyone", then everyone in the meeting will see your message.



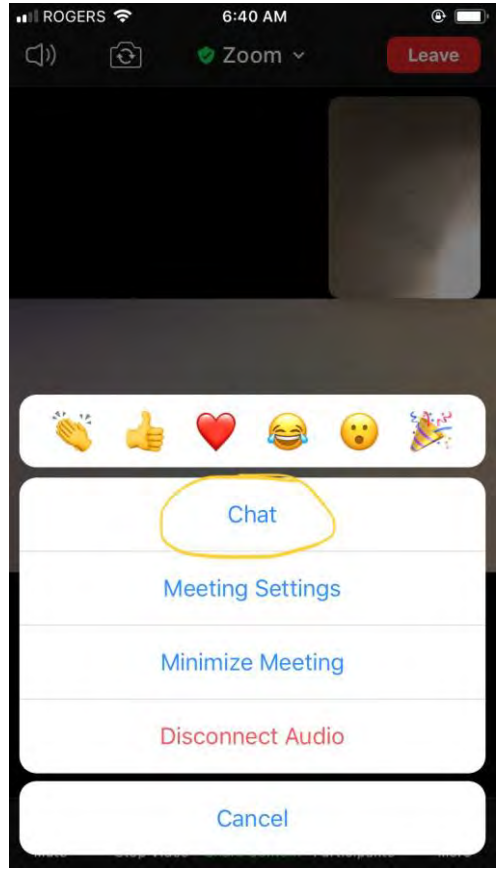
Using Zoom Effectively:
Writing in the Chat Box

Writing in the chat box using the Zoom app on a smartphone:

1.
In the bottom right corner of your phone screen click on **More**



2.
Click **Chat** to send a message or see other messages



Sharing Documents Virtually

- Scanning with your phone
- Attaching files to emails
- Submitting SSAH/ Passport invoices
- MyDirectPlan

Scanning With Your Phone

Downloading the app

1. Open App store/ Google Play store (whatever you use to download apps)

2. Search “Microsoft Office” and press "Install"

Scanning With Your Phone

Capturing the image

3. Open the app by touching it

4. Tap "lens"

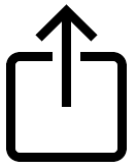
5. Hold your phone over what you want to take a picture of

6. Tap the white circle to capture the image

7. Tap "Done"

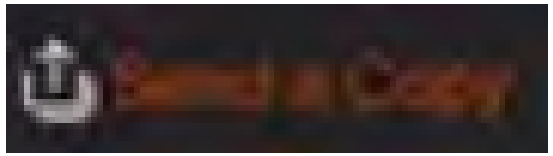
Scanning With Your Phone

Sharing the image

8. Tap “Share” 

9a. Save a copy by tapping "Upload". If you just want to save a copy, stop here!

9b. Send a copy



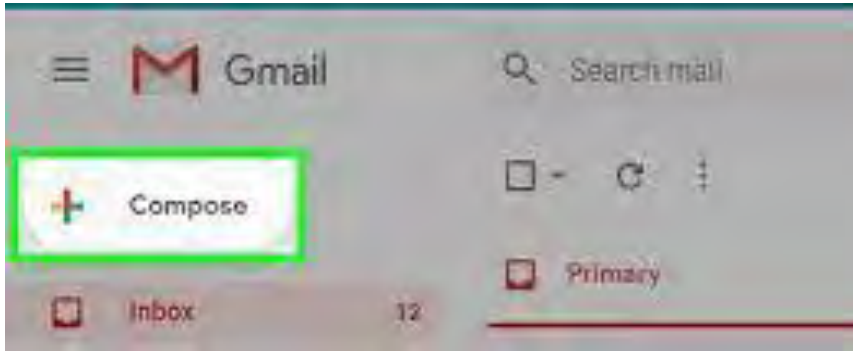
10. Select how you want to share it (text/ email)

11. Continue how you would normally send a text/ email

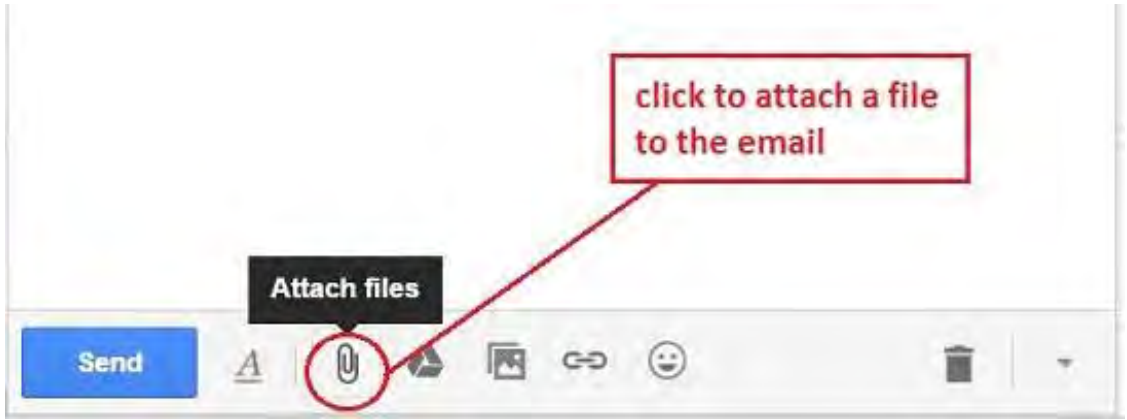
Attaching Files to Emails

1. Open your email (log in if needed)

2. Click to create/ compose a new email



3. Click “Attach a file” or the image of the paper clip.

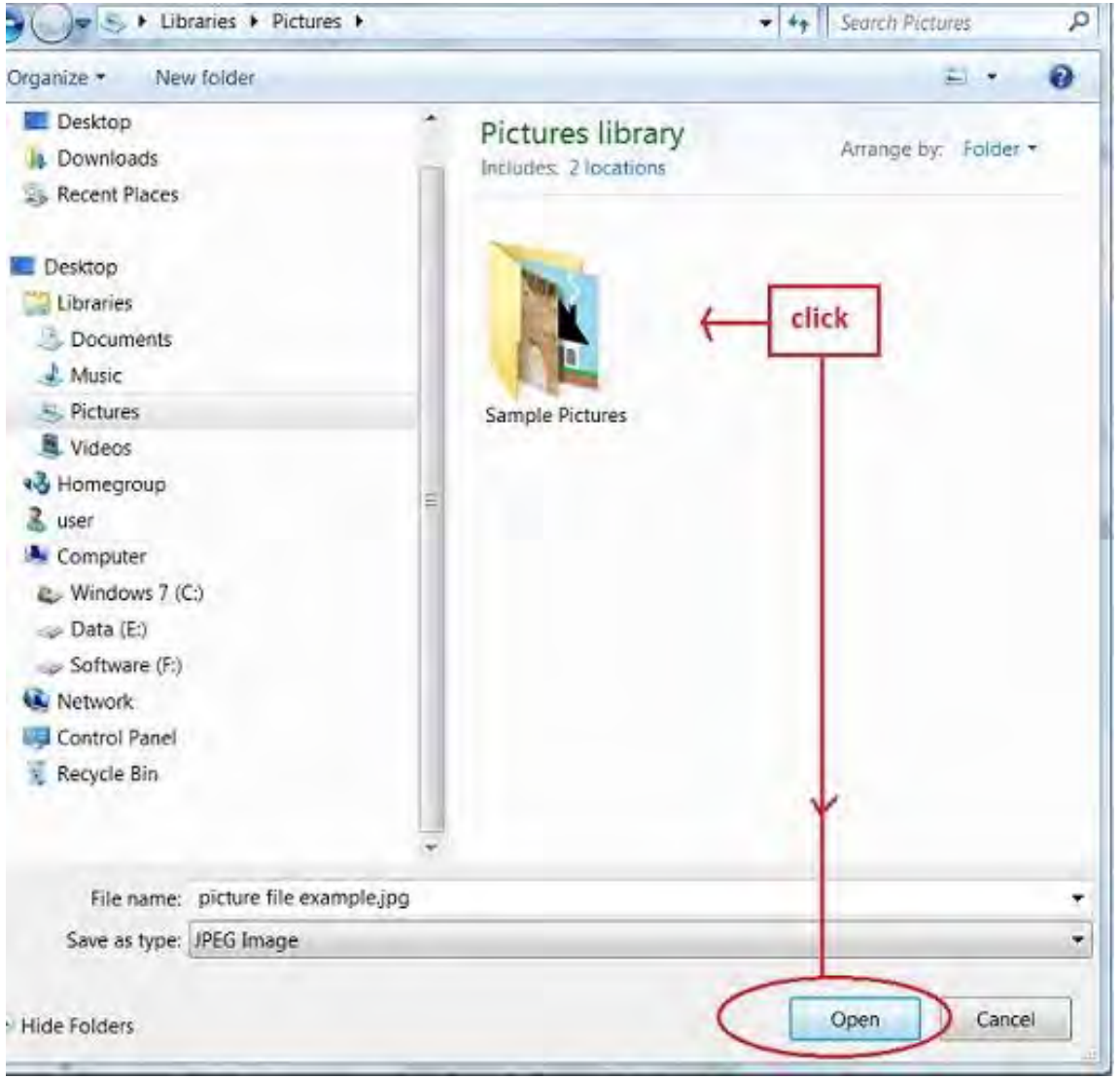


Attaching Files to Emails

4. Search through the window that opens to find your saved file. Click on the file you want to attach.

5. Click “open” to attach the file (it may also say “attach”).

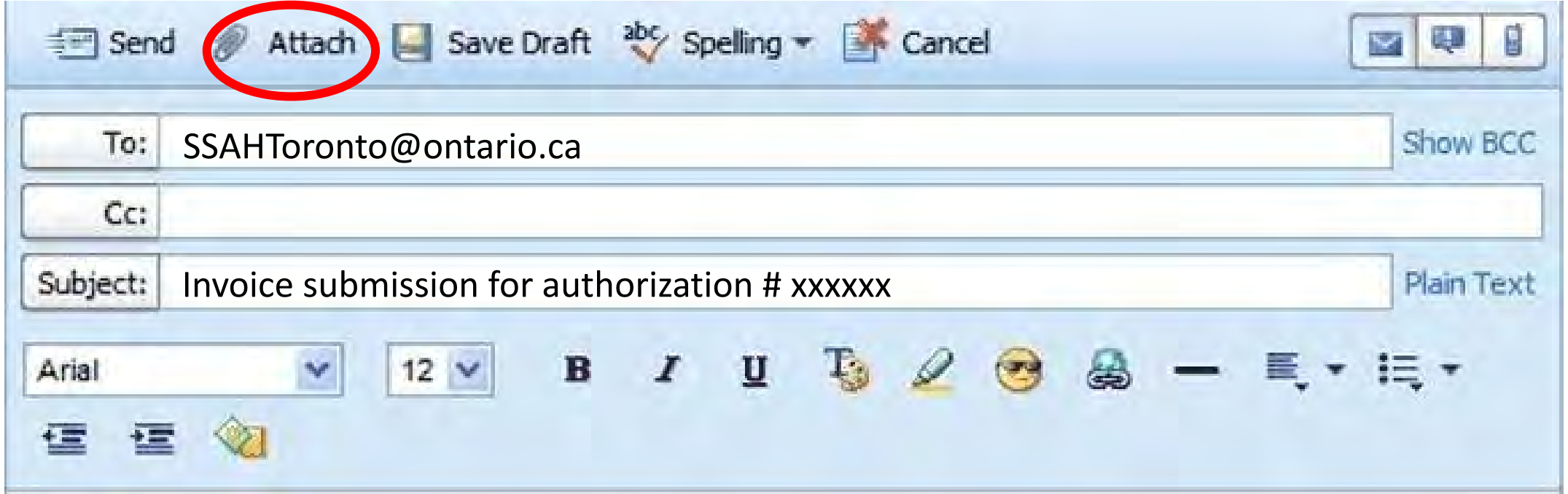
6. Add the contact who you will send the attachment to, and press send!



Submitting SSAH Invoices Via Email

1. Scan or take a picture of the invoice you want to submit
2. Create a new email and attach a photo of the invoice
3. Send the email to **SSAHToronto@ontario.ca**. Remember to include your child's SSAH authorization number.

*Note: If you don't live in Toronto, you will have to check the bottom of your invoice page for the correct email address.



Hi,

Please find attached an invoice for my child [Full Name], authorization # xxxxxx.

Thanks,

[Name]

Submitting Passport Invoices via Email

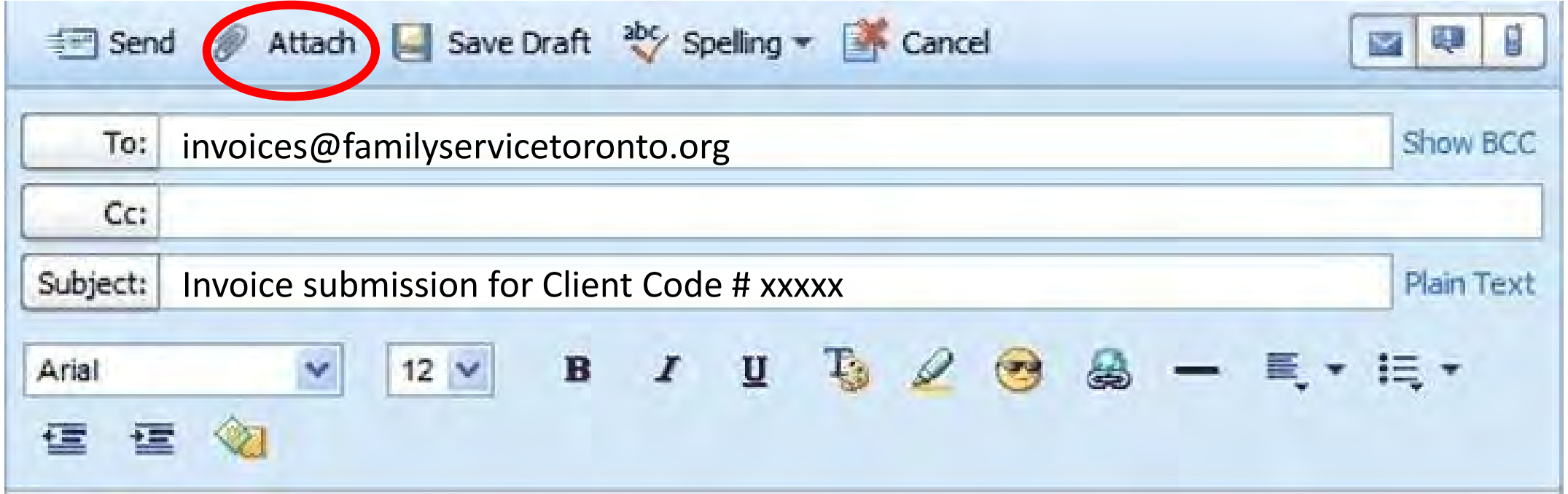
1. Scan or take a picture of the invoice and accompanying Purchase of Service Form (if needed) you want to submit

2. Create a new email and attach photos/ scan of these documents

3. Send the email to **invoices@familyservicetoronto.org**. Remember to include the person's client code.

Tips:

- Your attachments must be smaller than 10MB. You will know if your attachment is too large if when you try to send it, you receive a notification that the attachment is too large to send. If this is the case, you should fax/ mail these documents.
- Ensure you send all documents related to the claim in one email (I.e. receipt/ invoice and completed POS form)



Hi,

Please find attached an invoice and completed Purchase of Service form for [Full Name], Client Code xxxxx.

Thanks,

[Name]

Submitting Passport Invoices Using eCLAIM

Visit the website for a complete step-by-step guide:

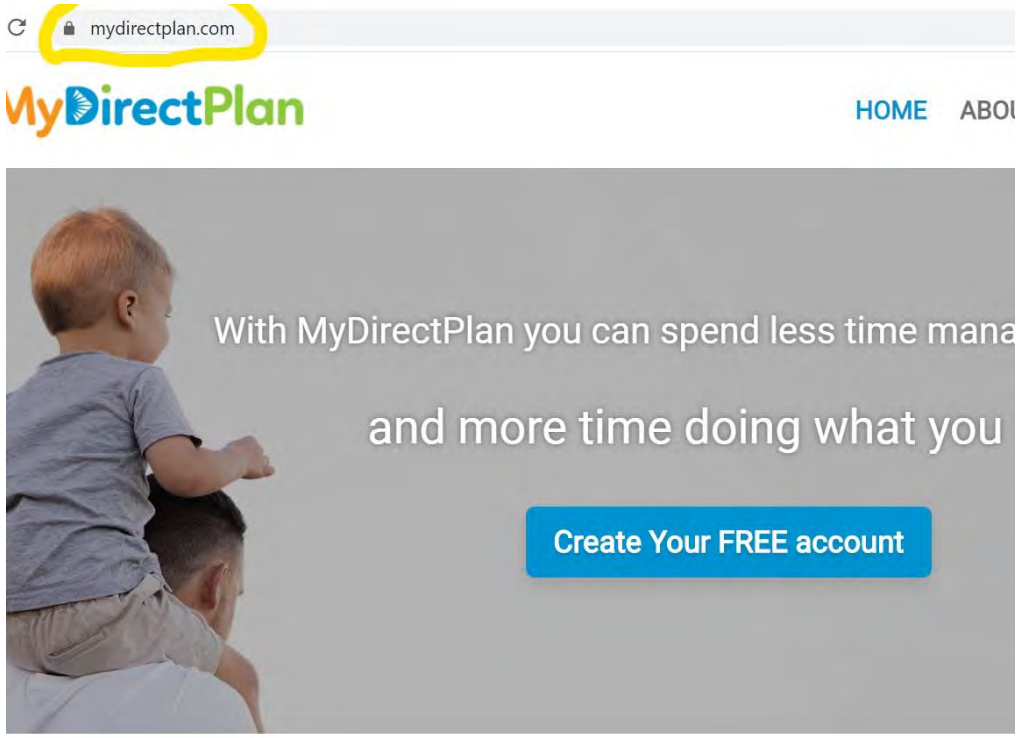
https://dsontario.ca/assets/documents/Downloadable-Inserts/passport/Passport-eClaim-User-Guide.pdf

Or, search "Passport eCLAIM User Guide" in Google and click on the first website listed.

MyDirectPlan

- MyDirectPlan is a free online tool designed to help you manage your Special Services at Home (SSAH), Passport and Residential funding. MyDirectPlan allows you to manage expenses, submit invoices electronically to your funding agency (Ministry of Children, Community and Social Services Regional Office or Passport Agency) and view your funding balance from your free account

*description taken from MyDirectPlan website at mydirectplan.com



MyDirectPlan Key Features

USERS CAN TAKE A PICTURE OF THEIR INVOICE AND SUBMIT ONLINE FOR A FASTER REIMBURSEMENT

REIMBURSEMENT CAN BE AS QUICK AS 48 HOURS

THE WEBSITE PROVIDES REAL TIME UPDATES ABOUT THE STATUS OF YOUR SUBMISSION

MYDIRECTPLAN IS A PAPERLESS, SECURE WAY OF SUBMITTING YOUR INVOICES

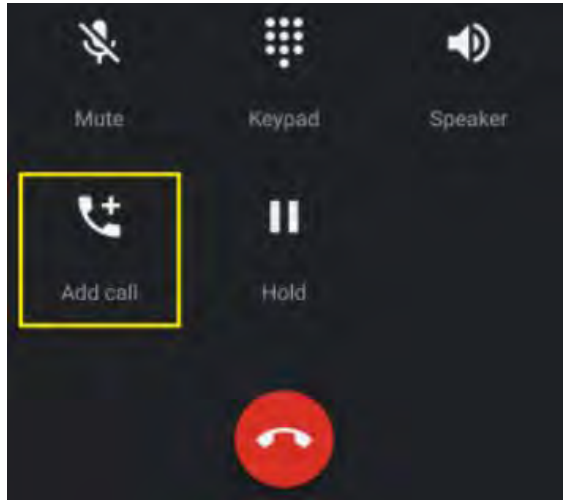
HELPS YOU TO TRACK YOUR FUNDING AND SET A BUDGET

MYDIRECTPLAN IS LOOKING AT DEVELOPING AN APP, BUT FOR NOW, YOU CAN VISIT: HTTPS://WWW.MYDIRECTPLAN.COM/

Merging Phone Calls

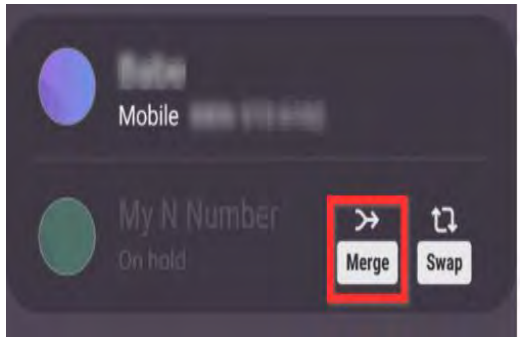
1. Call the first person as usual. Tell them to wait a moment while you call the other person.

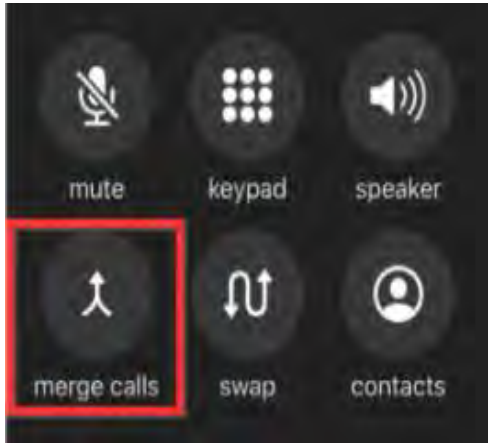
2. Press “Add Call”. Sometimes this is a “+” symbol.



3. Call the second person.

4. Once you have called the second person, press “merge”.





5. You should be able then to speak to both people. End the call as usual when you’re done.

*Note: Not every phone plan has 3-way calling. If you’re unsure or don’t see the option on your phone, call your provider.

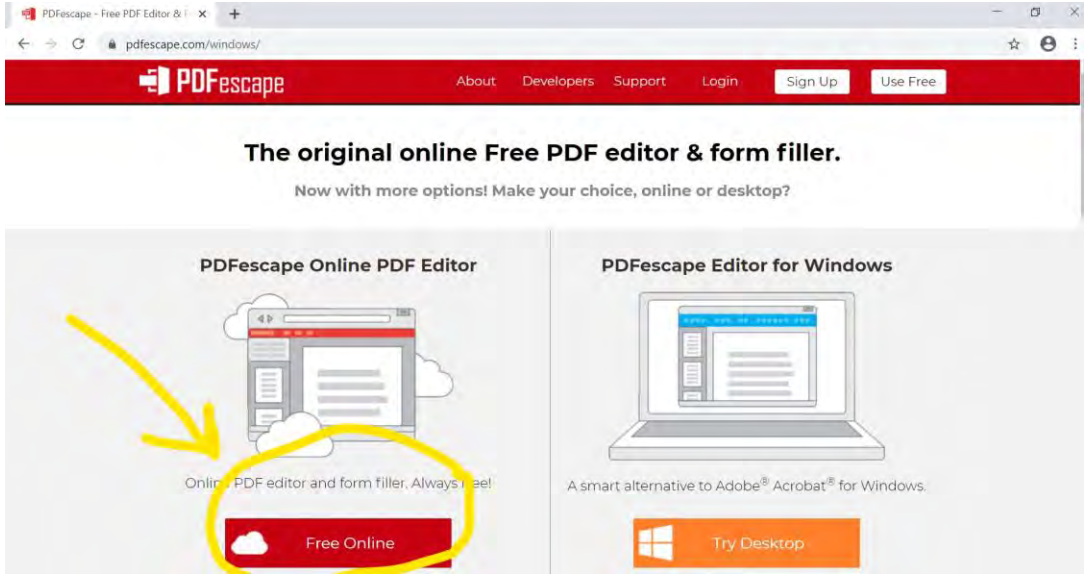
Creating a Fillable PDF

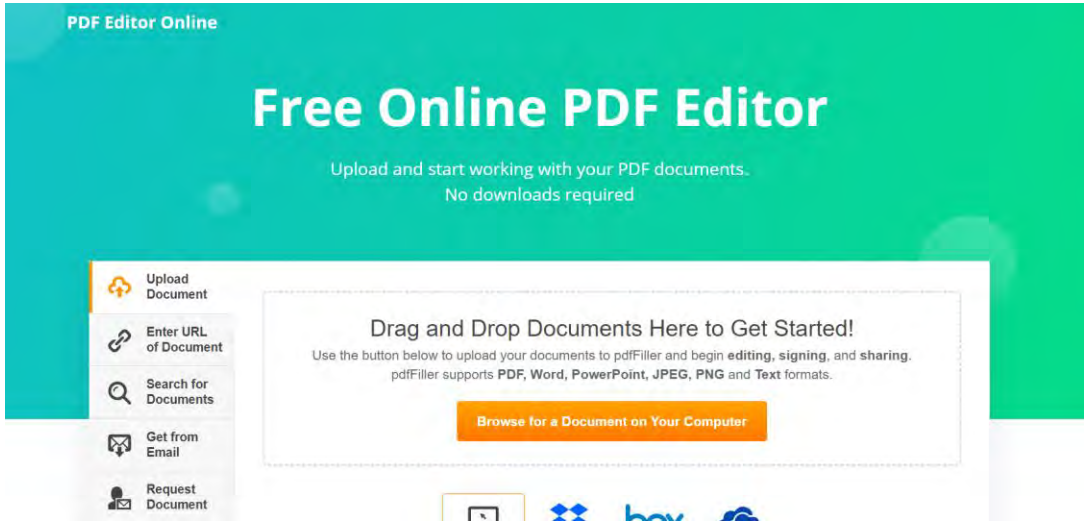
There are various ***free*** websites that allow you to create fillable PDF documents

(shown here are ***PDF escape*** and ***PDF Editor Online***)

What does this mean and what is it for?

- Documents and forms are sometimes sent electronically in PDF format which is usually "unwritable." This means you cannot type into the form or sign it on your phone or computer





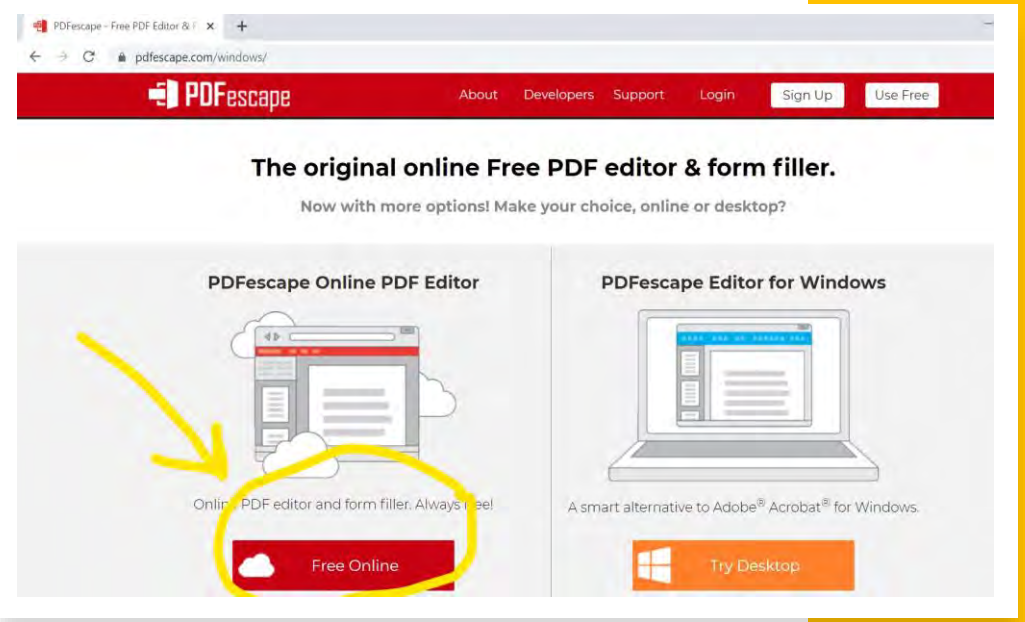
Creating a Fillable PDF

Some examples of PDF forms include; Passport's Purchase of Service forms, registrations for workshops, camps or day programs

- These free websites let you upload your unwritable document and turn it into a form that you can type into
- This allows you to type information into a form, or "sign" a document, and send it back to a service provider without needing a printer and scanner
- However, be aware that there are some risks associated with uploading personal and/or confidential forms to a website!
- We recommend only uploading blank forms, then saving them to your computer to make changes...we will show you how!

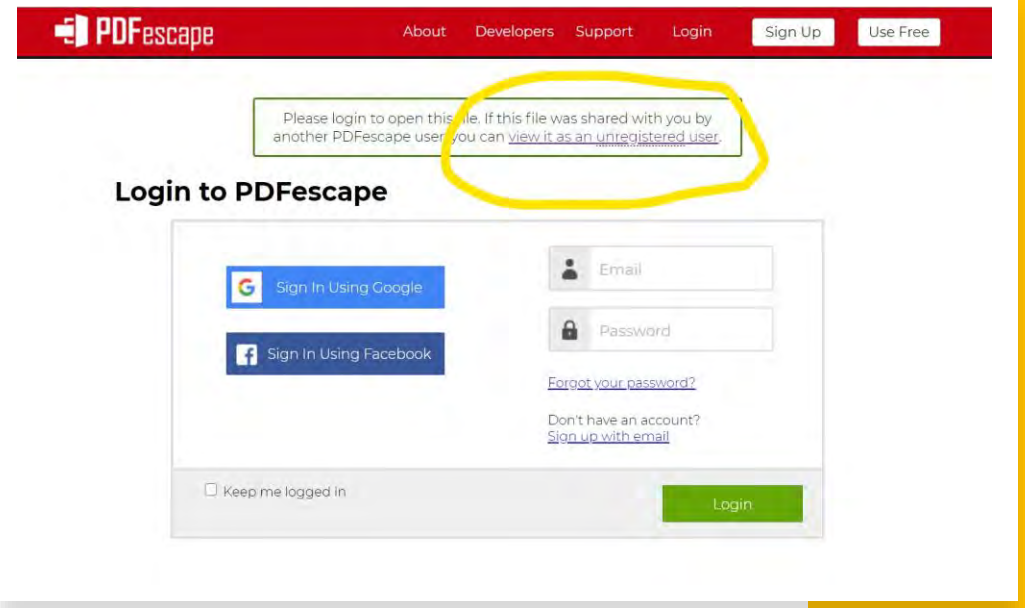
Creating a Fillable PDF

Step 1:



- For our example today, we will be using ***PDF escape***
- ***First make sure you have saved the document you want to edit to your desktop!***

Step 2:

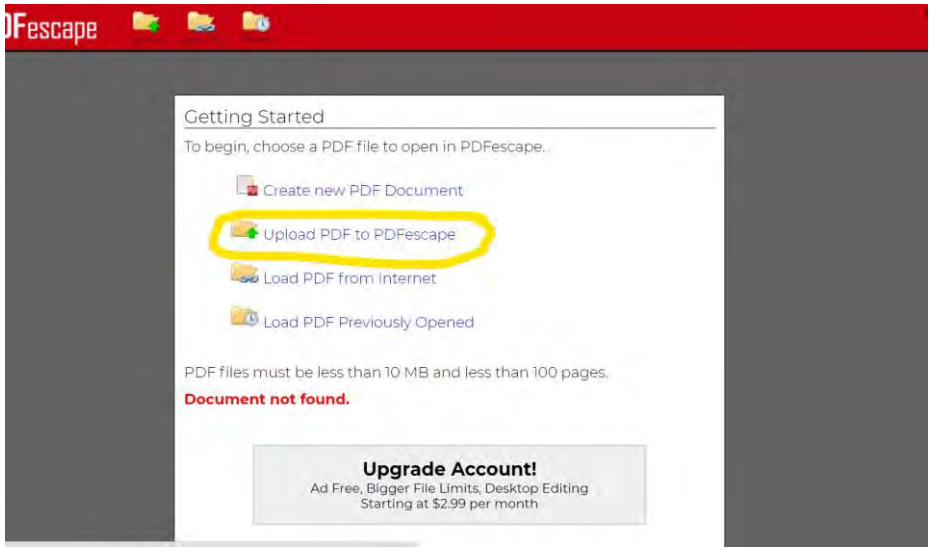


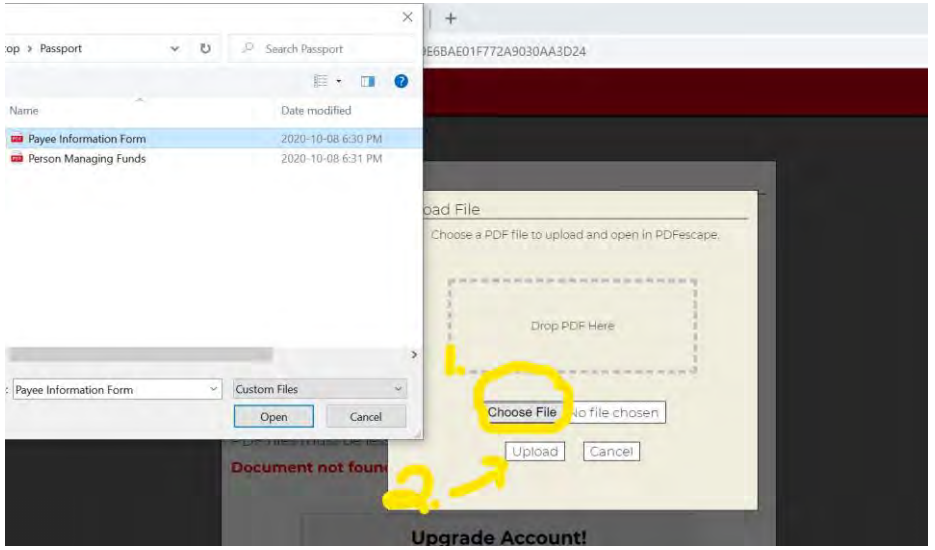
- Step 1: Once you are on the website www.pdfescape.com, click on the **Free Online** box
- Step 2: This will take you to a screen asking for login information. You do **not** need to sign up for an account – click "view as an unregistered user" to access the free site

Creating a Fillable PDF

Upload your document:

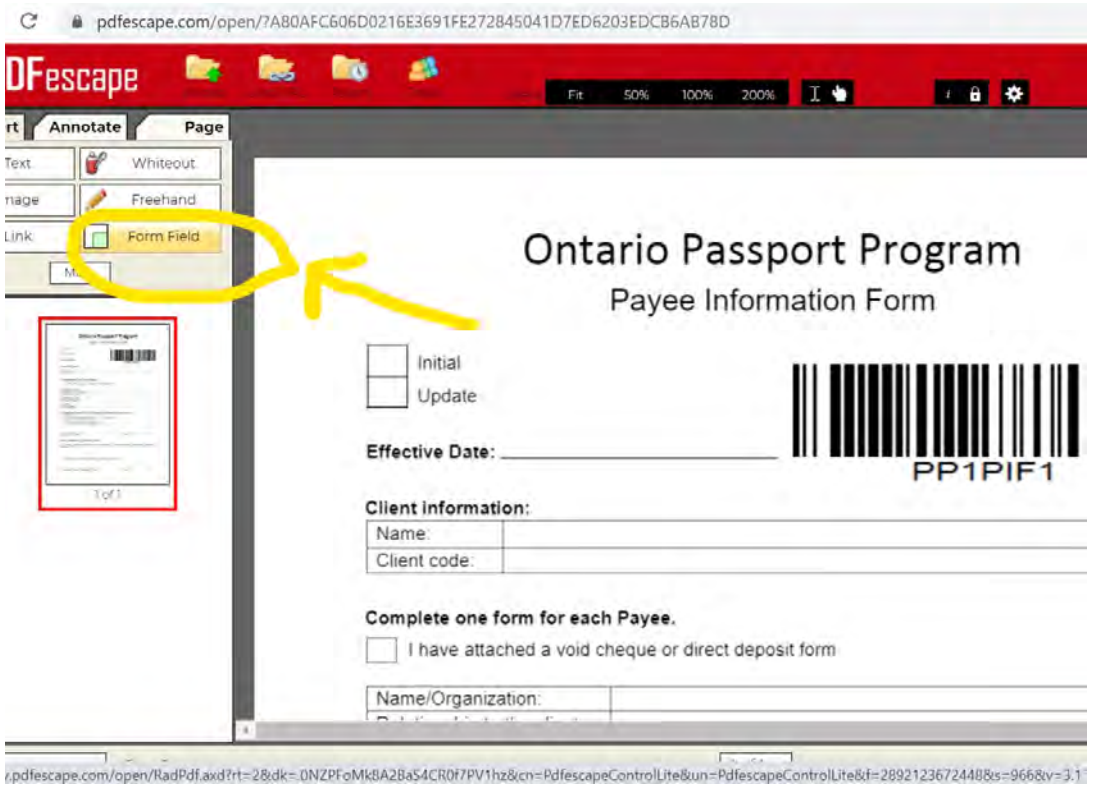
1. Click on **Upload PDF to PDF escape**
2. A window will open where you can click **Choose File**. From there, find the file you have saved to your desktop to be uploaded to the website and click **Open**





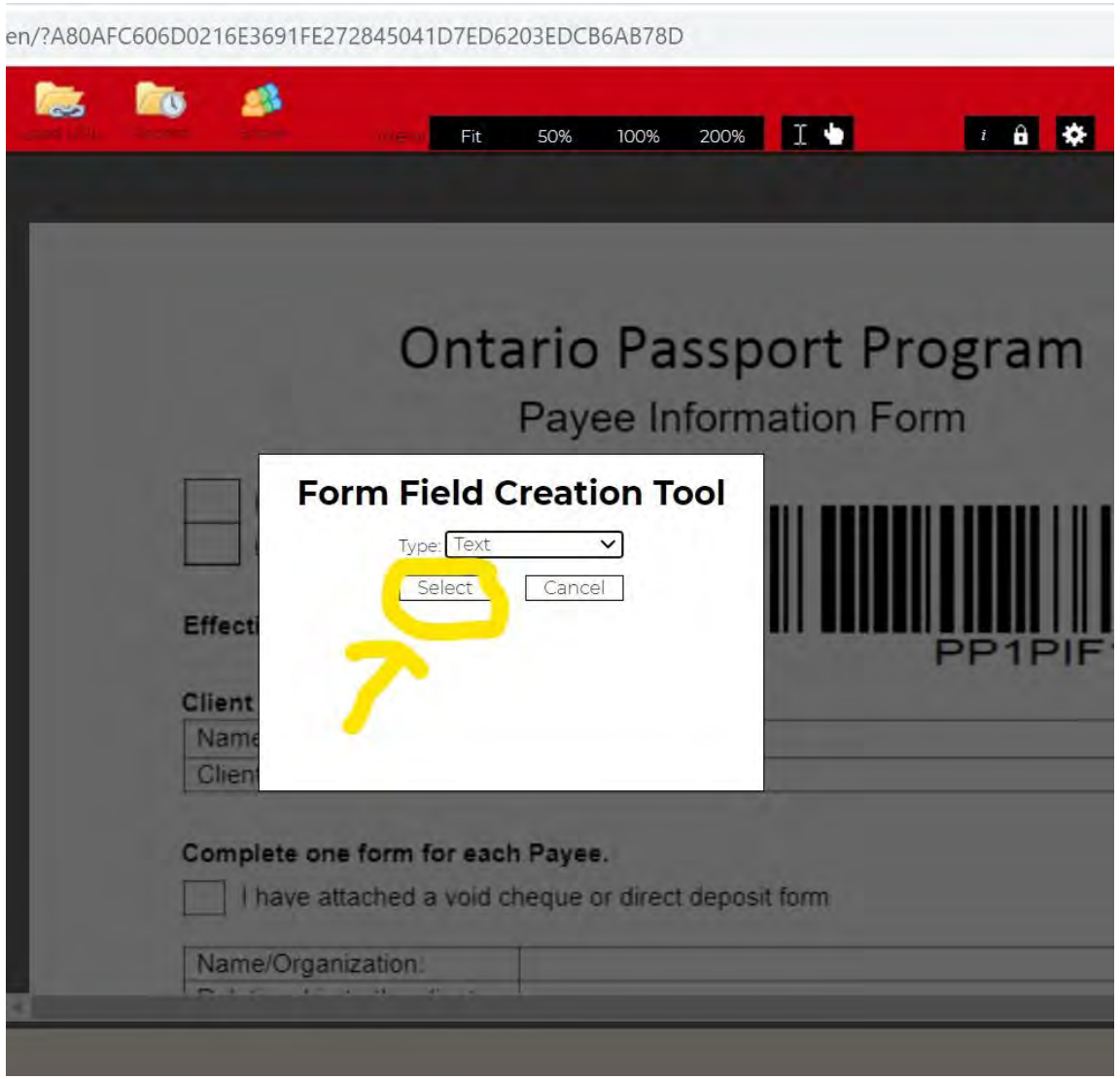
Creating a Fillable PDF

- Now your document has been uploaded to the website
- Next, click **Form Field.** This creates text boxes so you can type into the form



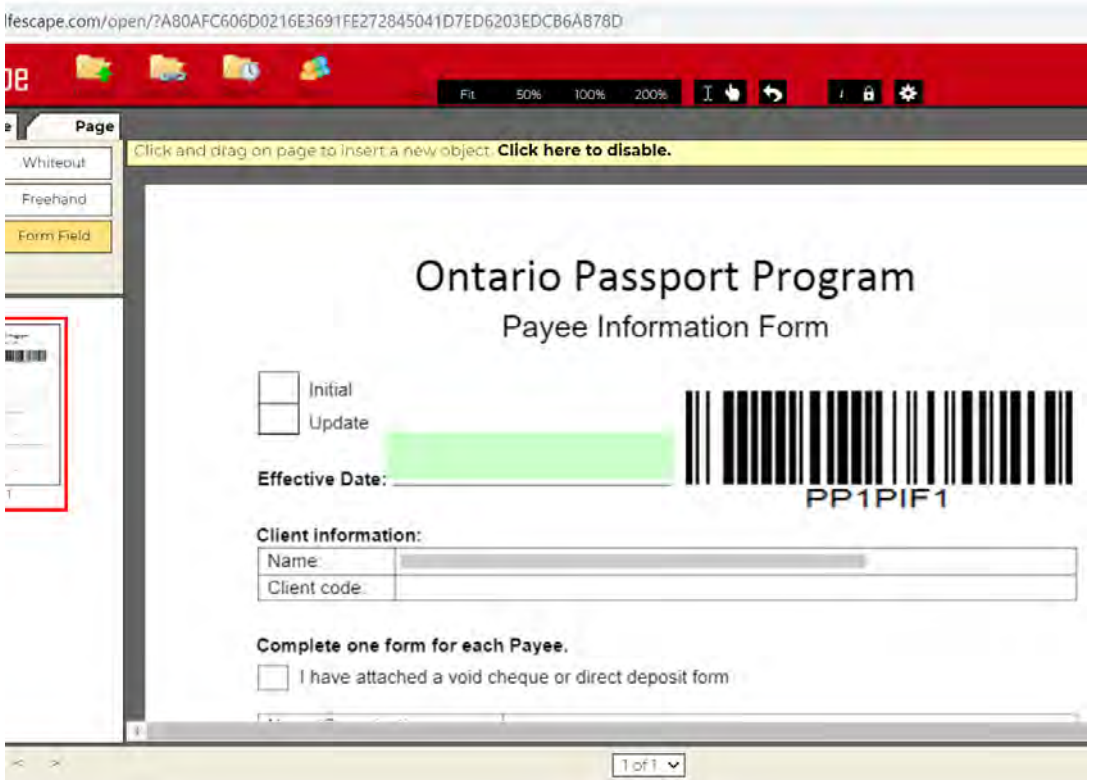
Creating a Fillable PDF

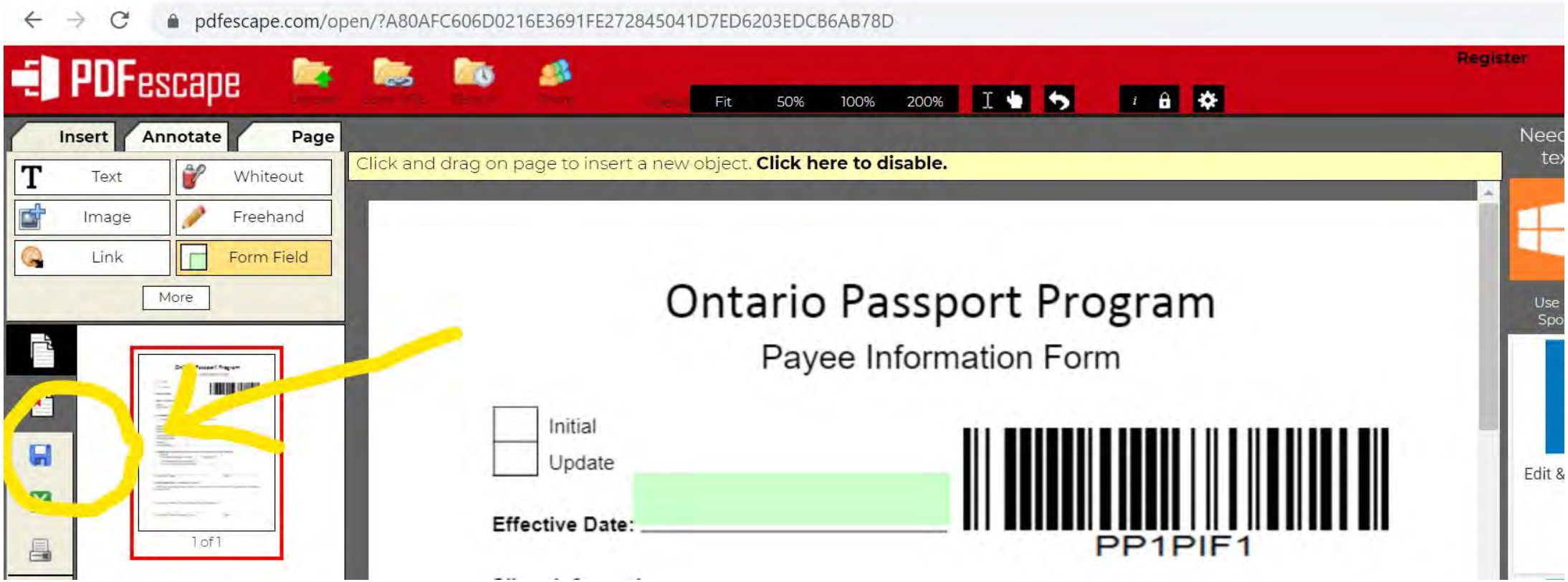
- After clicking **Form Field**, a window will pop up called **Form Field Creation Tool**. Ensure **Text** is selected as your type of field. This will allow you to type into the form
- Click **Select**



Creating a Fillable PDF

- Now you can click on the form to create text boxes. Each 'fillable' box is green – don't worry, when you save the new form to your desktop the box will not be green!
- Create as many boxes as you need throughout your form by simply clicking where you want to type. Once the box is in place, you can adjust the size by moving the arrows



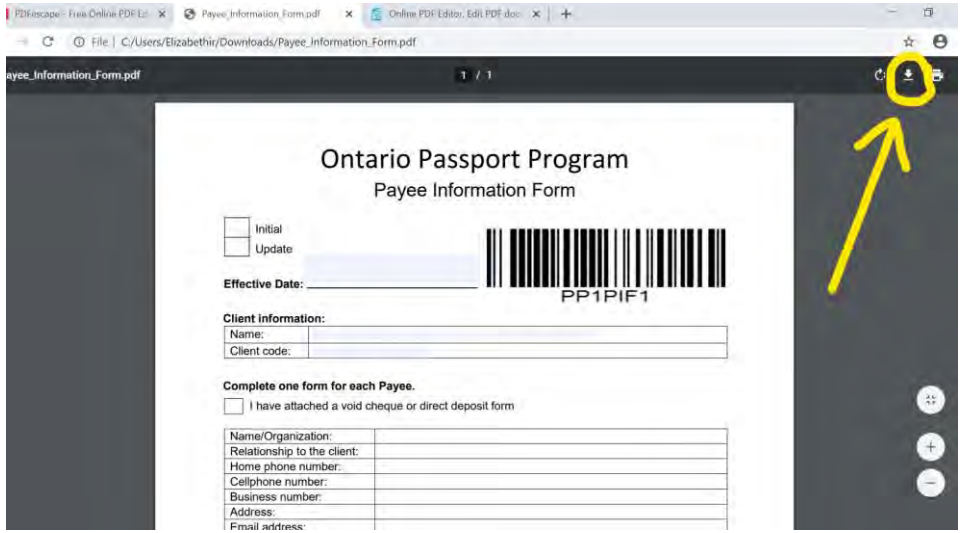


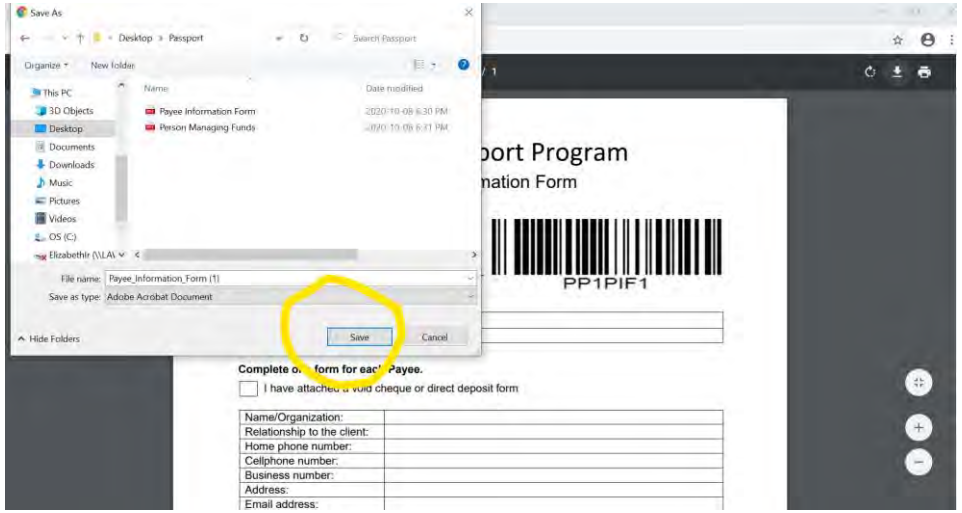
Creating a Fillable PDF

- Once you have created all the boxes you need to complete your form, save your new fillable form to your desktop using the blue icon on the left side of your screen

Creating a Fillable PDF

- After clicking the save icon, your new PDF is available to view
- Download a copy to your desktop by clicking the ⇩ on the top right corner of your screen
- Now you can rename and save your writeable PDF to your desktop
- This form can now be filled out directly on your computer by typing into the shaded boxes





Tip:
Keep a blank copy saved in case you need to use the same form more than once!

Helpful Tips:

- Translating web pages
- Problem-solving when you're stuck
- MyCommunityHub

Translating Web Pages

1. Open Google Chrome.

* If you don't have Google Chrome on your computer, you'll first need to search "Download Google Chrome" in your internet browser and follow the instructions to install it.

2. Google "Install Google Translate extension".

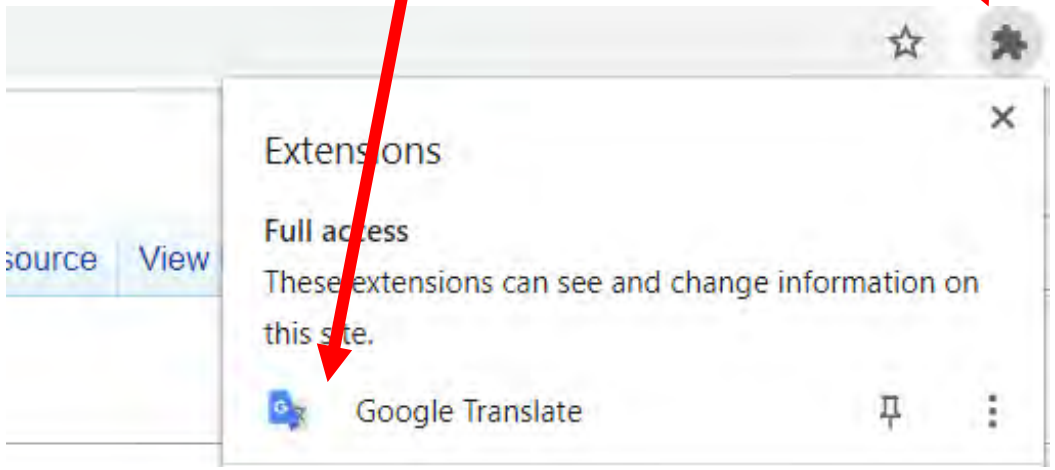
3. Click on the first link listed.

4. Click "Add to Chrome"

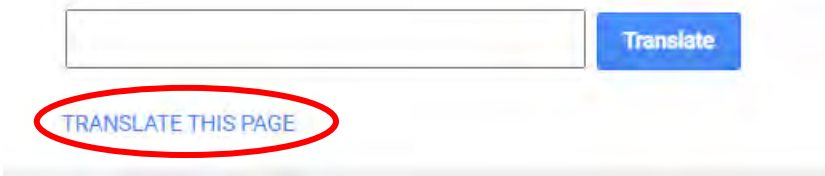
Translating Web Pages

5. In the top right corner of your web page, click the puzzle piece.

6. Click “Google Translate”



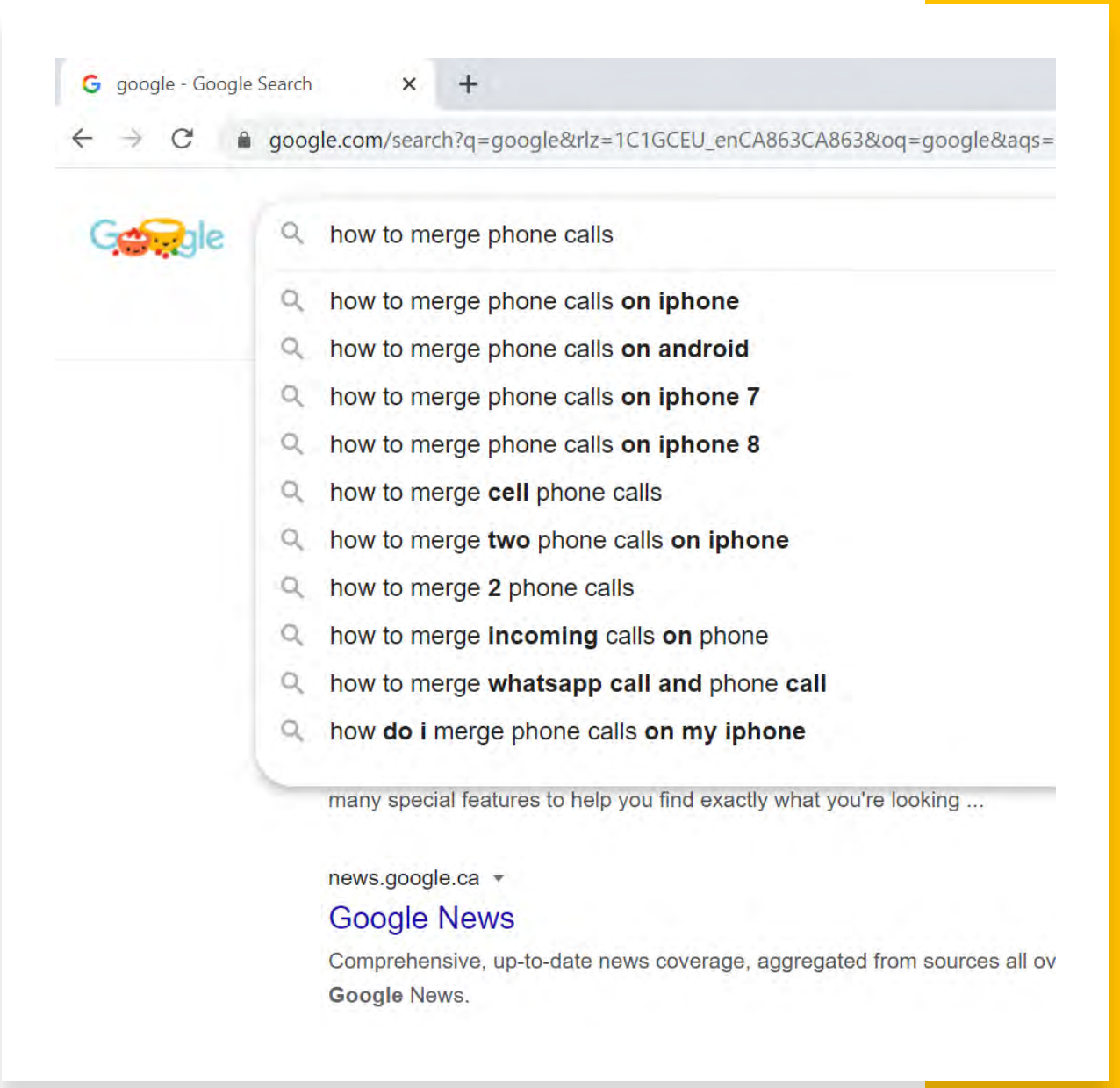
7. Click “Translate this page”



8. Click ▼ and choose your preferred language.

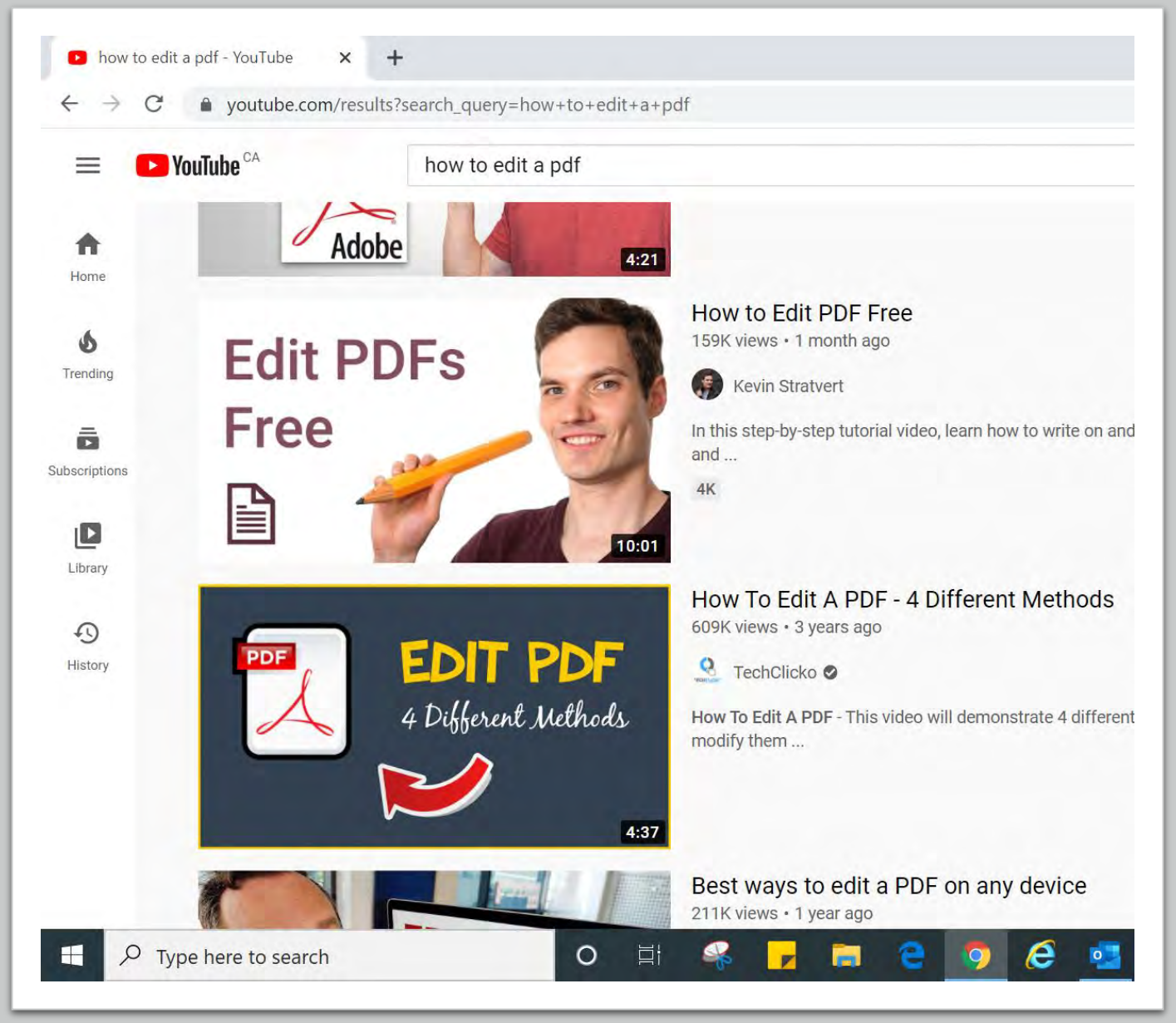
"Google" it!

- Have you tried googling your tech problem? Often Google provides step-by-step instructions if you type "how to..." into the search bar



Use YouTube to solve problems

- Try typing "how to..." into the search bar on https://www.youtube.com/
- There are often several videos that walk you through how to navigate common technological issues such as how to download apps, how to set up an email account, how to change app icons on a phone etc. Some videos go into a lot of detail and some are brief and easy to follow!

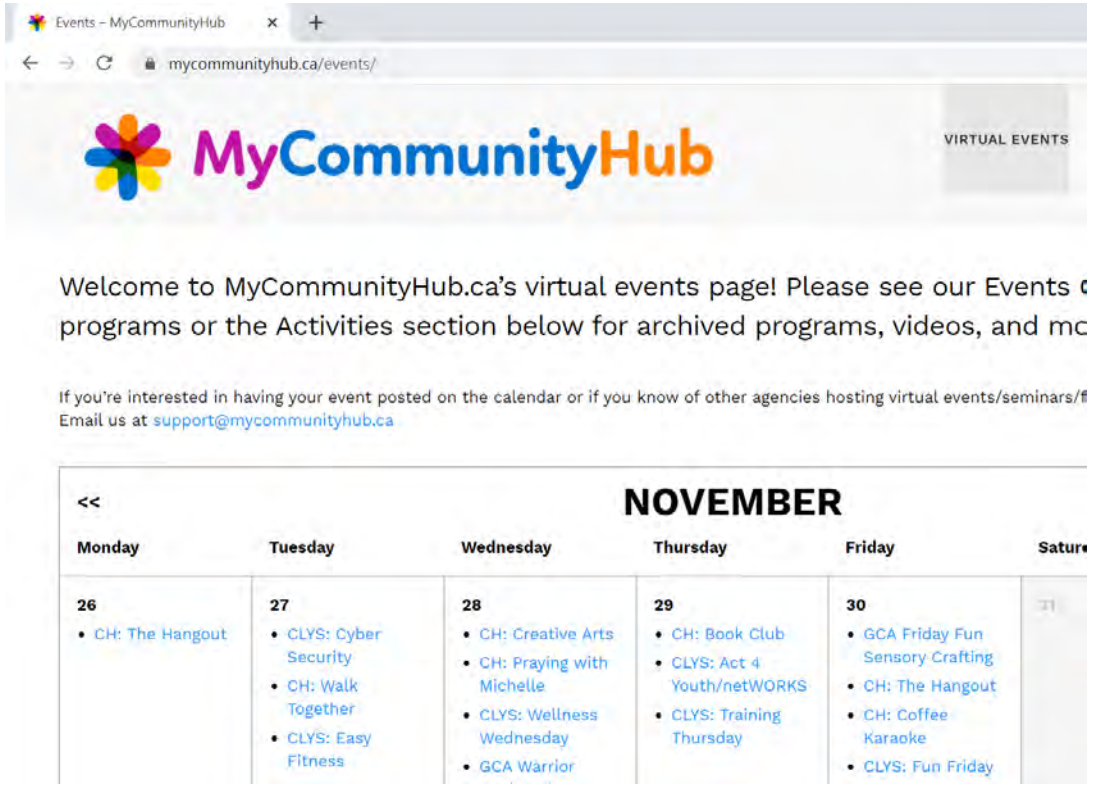


MyCommunityHub

MyCommunityHub is a great community resource for online registration for many programs. You can sign up for a free account at https://mycommunityhub.ca/

The website offers:

- Calendar of online events – free and fee for service
- Snapshot of "what's on today"
- List of virtual attractions
- Educational resources
- Social connections
- See how many spots are left in listed programs



Comments/ Tips from the Zoom Chat

- Notebloc and Scannable are two other apps that you can use for scanning
- PDF Escape and PDF Editor Online are two online platforms to edit PDFs
- On Microsoft Edge (internet browser) if you highlight a section and ‘right click’ “Read Aloud” it’ll read it to you.
- CNIB might have suggestions for text to voice. Their phone number is: 1-800-563-2642.
- If you want to save something as a PDF, you might be able to ‘print’ it and select “Print to PDF”.
- Some Android phones come automatically with the Microsoft office app