



My SSP Monitored Referral Overview

What is a Monitored Referral?

When you or your institution are confronted with a challenging student situation that requires **a) timely and more specific clinical support**, and **b) high-level feedback back to designated on-campus personnel** (also referred to as the Primary Referral Contact), a **Monitored Referral** can be initiated.

The Monitored Referral is an important alternative to student-initiated support as it is a more intensive and specialized intervention that aims to help resolve a challenging student situation. A Monitored Referral allows Morneau Shepell My SSP case coordinators, **with informed student consent, to report high-level information regarding the student's situation back to the Primary Referral Contact.**

Many institutions find great value in using this Monitored Referral channel to support their students as it allows for greater insight and feedback on the student's situation.

Monitored Referral example scenarios*:

- Student at risk of going on **academic probation** or leave of absence due to mental health related issue impacting their attendance.
- **Limited availability of on-campus resources** impacting overall case management plan and/or student wellbeing.

**These scenarios are applicable under the assumption that reporting back to campus is required.*

How does a Monitored Referral differ from other channels into the My SSP?

When a campus contact wants to help facilitate a warm transfer into My SSP, but **does not require feedback on the student's situation**, then it is **more appropriate to initiate an Assisted Referral**. With the student's consent, an Assisted Referral involves the campus contact calling My SSP with the student present and helping them navigate the initial intake process. Once connected with support, the campus contact is no longer involved.

Steps to facilitate an Assisted Referral into My SSP:

- Obtain verbal permission from the student to download the free My SSP app onto their phone
- From the app, call My SSP directly to request a My SSP counselor
- Briefly explain the reason for the call and hand the phone to the student
- Leave the room so the student can speak privately with the counselor

Alternatively, the campus contact can call My SSP themselves and, with the student's consent to share their contact information, request that a **Outreach Call** be made to the student to help coordinate support**. In order for My SSP to facilitate an outreach call, verbal confirmation by the campus contact of the following information is needed (as a minimum):

- Student Name
- Student's preferred contact number
- Consent to leave a voicemail (discreet or detailed) in the event they cannot be reached
- Preferred language for ongoing clinical support
- Specific details on the situation/need

****Please note that an outreach call is not considered a safety/wellness check.** If you have concerns about a student's safety, please follow campus protocol around creating a safety plan. Three (3) attempts will be made by My SSP to connect with the student within a 24-hour period, after which a voicemail with further direction will be left (with their consent). The **student's consent to the outreach call is verified upon initial contact. The campus contact will not be notified when contact with the student has been unsuccessful or when services have been declined by the student.**

Who can initiate a Monitored Referral?

The main My SSP program owner at your institution will designate which campus personnel can initiate a Monitored Referral into the program. This group of authorized personnel typically includes representatives from the Counseling office, the Student Health Center, and Student Services office. Where appropriate, Primary Referral Contacts may also include representatives from Behavioral Intervention teams, Case Managers, Career Counselors, and Resident or Housing Coordinators.

Please be advised that it is best practice for all Monitored Referral requests and related consent documentation to funnel through a central campus contact for oversight and coordination purposes.

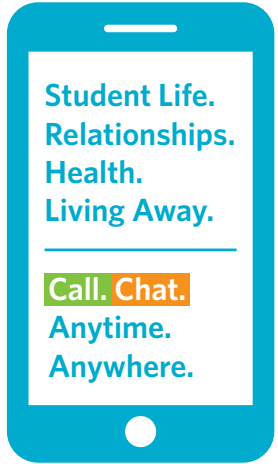
How it works:

- 1) A Primary Referral Contact on campus identifies a student in need of additional support and meets with them to discuss a) the reason for the referral and b) the parameters of the program.
- 2) **Student provides written informed consent via the separate Monitored Referral Form**, which the Primary Referral Contact completes and submits as per the detailed instructions laid out on page one (1) of the form. **The student's personal information contained in this form is to be password protected prior to submission to My SSP.**
- 3) The My SSP Monitored Referral case coordinators review the request and from there, a counselor is assigned to the student.
- 4) Three (3) attempts are made to reach the student within 24-hours of receipt of the completed Monitored Referral Form and the student is advised of the name of the Primary Referral Contact and reason for the referral. **Please note that the Monitored Referral Program is voluntary and the student may choose to discontinue service at any time.** If no contact is made after these attempts, a voicemail with further direction will be left (where possible and with student consent) and the Primary Referral Contact will be notified that attempts to connect with the student were unsuccessful. The student will be instructed to call into the My SSP directly at which point the coordination of their referral will resume.
3. Upon initial contact, the student is offered the opportunity to address any immediate concerns, and the student's availability/preferences for ongoing support are determined. Ongoing clinical sessions are conducted with the student by the assigned clinical Student Support Advisor.
4. The My SSP Monitored Referral case coordinator will provide **monthly, high-level written update reports** back to **the Primary Referral Contact via email**. Additional updates may be provided in line with the frequency of the clinical sessions provided. **These reports will provide details regarding session attendance and scheduling, progress towards treatment recommendations, any risk noted, and any referrals made to outside resources. Personal details about the actual clinical circumstances are never disclosed and the student's name is de-identified**
5. A case is closed when the counselor assesses that goals have been met, delivers the final session and provides final recommendations to the student. A final update is provided to the Primary Referral Contact at case closure.

**For more information or requests for training on this process,
please contact your My SSP Account Manager.**



Student Support Program



Attending college or university is an exciting life experience. It can also be a time of change, adjustment and stress.

89% of students report feeling overwhelmed by all they had to do and 65% feel overwhelming anxiety.*

We're here to help you succeed.

Speak with an advisor/counselor 24/7

CALL **CHAT**

- Immediate support available by phone and chat
- On-going support by appointment available by phone and video

✓ Free

✓ Confidential

*Source: National College Health Assessment (Spring 2016)

Personalized support

The Student Support Program:

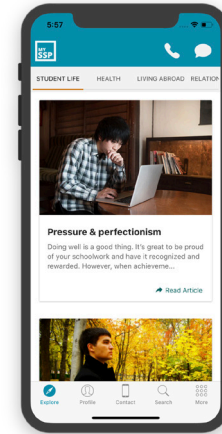
- understands your challenges
- provides immediate support
- refers students to campus resources, when needed
- keeps your information **confidential**
- is available **24/7 + no cost to you**

Support is available via:

- the **My SSP** app and web chat
- over the phone or through video
- self-directed resources including videos and articles in your preferred language

Contacting us is easy

You can choose between scheduling an appointment for a date and time that works best for you or chat immediately 24/7.



Connect to personalized support

Browse an extensive library of articles

Watch videos

Download the free My SSP app today!



Download the free My SSP app today

myssp.app

1.866.743.7732

If calling from outside North America:
001.416.380.6578

Special Features For International Students

Created by clinical and cultural experts, **My SSP** meets the unique needs of international students:



- access to an **advisor/counselor who speaks your preferred language** and understands your culture
- immediate support 24/7 through app, chat and phone
- self-directed support including multilingual articles and videos on the **My SSP** app

Download the free **My SSP** app today!



App and online resources can help you with:

HEALTH

Stress
Sadness
Anxiety
Wellness

RELATIONSHIPS

Family
Friends
Communication
New cultures

Confidential



LIVING AWAY

Loneliness
Confidence
Independence
Time management

STUDENT LIFE


Study habits
School-life balance
Academic stress
Extracurricular activities

Free



My SSP: Student Support Program can help you anytime with:

- ✓ adapting to new challenges
- ✓ being successful at school
- ✓ relationships with friends and family
- ✓ practical issues while studying
- ✓ stress, sadness, loneliness and more

 **Download the free My SSP app today**

 **myssp.app**

 **1.866.743.7732**

**If calling from outside North America:
001.416.380.6578**



Sourcewell

Teletherapy Services – Marketing Plan

RFP 102821

ORIGINAL – October 28, 2021

Colleen Hunter
Director, Student Support Programs
T: 716.406.7866
Colleen.hunter@lifeworks.com

Notice of confidentiality

This document contains confidential information or details of proprietary processes or systems developed by our firm. Therefore, we respectfully request that the contents be held in strict confidence and not shared with any third parties without our written permission. The contents of this document are protected by copyright.

Marketing Plan

- A. Sample copies of communication materials and educational materials provided to members at the start of the partnership.

Below are samples from My SSP's faculty and staff launch and reference guide, in addition to the initial student introduction and launch sample copy.

My SSP Staff & Faculty Launch Email

Purpose: The below My SSP launch notification is intended to be distributed by the key contact at the college/ institution to key personnel, staff and faculty prior to the student launch date.

.....
Email

To: All key personnel, faculty & staff

Subject line: Helping students succeed – announcing the NEW Student Support Program (My SSP)!

Hello,

We are pleased to announce that effective [launch Date – end date], [school name] will be collaborating with Morneau Shepell to extend well-being and mental health support to our [student groups] students to help them succeed in their educational endeavors.

My SSP provides **24/7 remote mental health and wellbeing support to students** via the use of technology. Students are able to access self-directed digital content in addition to connecting with masters level counselors. This program is offered at no cost to the student and aims to support the wellbeing and retention of students studying here at [school name].

How Students Access this Support:

Download the My SSP app: Apple App Store | Google Play | My SSP website

Students can also access the service 24/7 by calling 1-844-451-9700.

Regards,

[Contact email signature]

My SSP: Staff & Faculty Reference Guide



Effective [Launch Date], [Name of College/Institution] will be partnering with LifeWorks to provide the **My Student Support Program (My SSP)** to our students. The program includes **two** components: **direct** support for students and **consultative** support for faculty and staff who work with them.

Support For Students

My SSP provides confidential support to students at *no cost* to them:

- **24/7 remote wellbeing and mental health support from masters level counselors**
- Access to digital content which aims to support the well-being and retention of students
- Access unlimited Fitness Journeys through LIFT, an app-based fitness programs customized to your fitness level and goals that can be performed anywhere, at any time.

How can students access the program?

Students can access articles, videos, tools, resources, and a Student Support Counselor through the app, website, and telephone. They can access **real-time** support and **initiate scheduled** support with a counselor through the My SSP platforms:

- **Download the free My SSP app** from the Apple or Android app store
- **Dial 1.866.743.7732** (for access outside of North America, dial **001.416.380.6578**)

Students may speak with a Student Support Counselor for a myriad of concerns, below are just a few scenarios:

- Stress, frustration, concern, or uncertainty about any aspect of their life
- Difficulty adjusting to local culture/daily life in another country
- Anxiety about upcoming exams or disappointment with academic performance
- Procrastination and building time management skills
- Tensions with family members, friends, or roommates
- Loneliness or homesickness and much more

How can I help spread the work about My SSP as a faculty or staff member at [Name of College/Institution]?

- **Familiarize** yourself with the program by downloading the **My SSP app**
- **Help** students **identify** reasons to connect with a Student Support Counselor
- **Incorporate My SSP** information into conversations with students wherever possible

Consultative Support for Faculty and Staff

My SSP provides direct support to faculty and staff at [Name of College/Institution] who work with students. Please reach out to My SSP if you wish to consult with a counselor on any student issue, such as delivering difficult news or approaching a matter with student in a sensitive way.

How can faculty and staff access this service?

Dial **1.866.743.7732** to consult with a Student Support Counselor

My SSP Students - Introduction Template



The My SSP: Student Support Program

Attending college or university, graduate school or professional school is an exciting life experience. It can also be a time of change, adjustment, and stress. My SSP is here to help, accessible 24/7/365.

Let us help!

All students are encouraged to download the free My SSP app. [school name] has made My SSP services available from Morneau Shepell for [student type or program name] students.

My SSP can help address common concerns such as:

- Adapting to a new culture
- Being successful at school
- Relationships with friends and family
- Stress, worry, sadness, loneliness and much more!

As an [Student], you can now receive support:

- 24 hours a day, 7 days a week via phone or chat
- From a Student Support Counselor that understands your unique challenges
- Multilingual support available
- At no cost to you!

Your information is **confidential** so no one – including your family, friends, or professors – will ever know you used the program unless you choose to tell them.

Access support anytime, anywhere by:

- Download the **free My SSP App**: Search 'My SSP' from either the Apple App Store or Google Play and download today
 - Through the app, you can **call or chat with a Student Support Counselor 24/7** in real-time or **schedule a telephone or video session**
 - Browse our digital library of helpful **articles and videos**.
 - Access unlimited Fitness Journeys through LIFT, an app-based fitness programs customized to your fitness level and goals that can be performed anywhere, at any time.
- Or call direct **1.866.743.7732** (If calling from outside North America, dial 001.416.380.6578)

Watch this short [My SSP App Tutorial Video](#) to learn more and check out the My SSP today!

- B. As a separate attachment, sample copies of communication materials and educational materials currently available regarding services offered

Various communication and education materials that are currently available are attached separately for review, however based on the recent company name change and rebranding, these are all going through a redesign.

C. Describe Marketing resources available to institutions to support the relationship.

We will work closely with partners to educate and train various stakeholders within their institution to become ambassadors of the program, to the point where they have a strong working knowledge of the program, understand how it integrates with campus supports, and feel confident referring students for support. We also encourage faculty, student affairs and Counseling & Wellness Center teams to refer students to My SSP when they need support.

Communication is a very important part of implementation. That means marketing, training, program launch, and outcomes and engagement insight reports. Partner institutions will be provided upfront with several marketing assets and tools and will continue to be provided with marketing content and ideas throughout the year. About 7 to 10 new digital app content items are generated each month, with topics focused on current events and needs, as well as the time of year (e.g., procrastination around exams, loneliness around holidays, relationship changes concerning friends, family, and roommates at the beginning of the year). This allows us to keep generating campaigns for reaching students through social media, text, email, etc. We will also make additional recommendations for things the partner institution can do.

We do invite partner institutions to invest additional time and resources in marketing the program. One partner has recently brought on a new CAPS team member who is solely focused on My SSP promotion and engagement. And below is an example of a few crafty campaigns NYU's marketing team crafted. They also wrapped elevators across the Manhattan campus, and all syllabi are required to have a mental health statement with the number to the Student Health Center and the link to download My SSP.



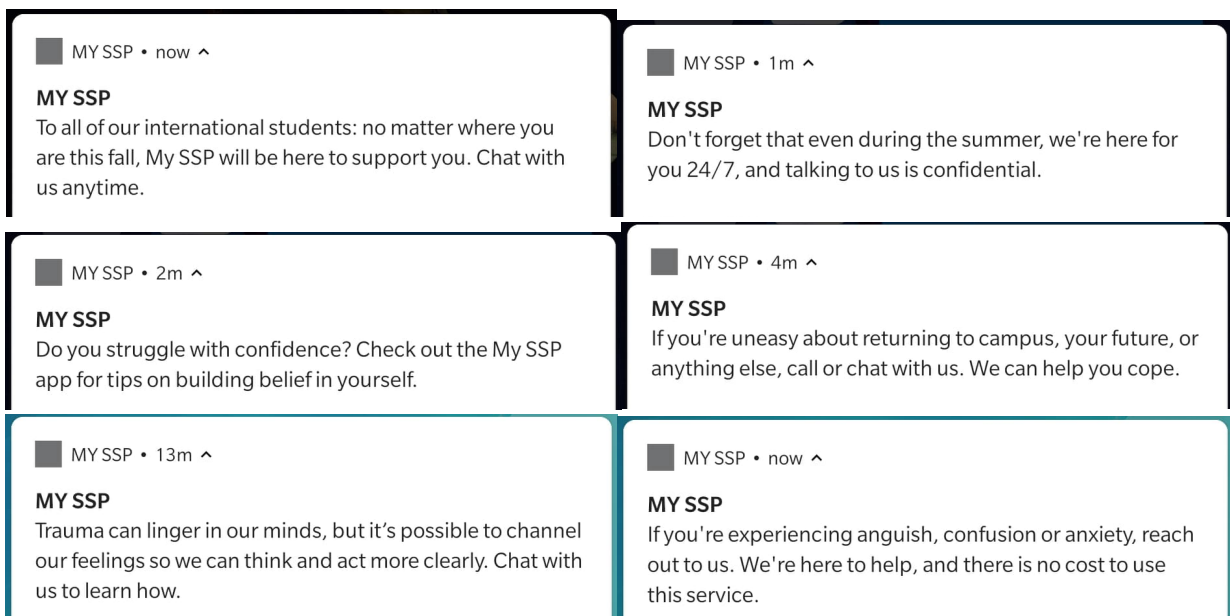
There are also ways to promote through student groups like student government, Active Minds chapters, and we can institute a Student Ambassador Program (SAM) if there's interest. A sample (SAM) job description is available.

LifeWorks had a marketing team dedicated to supporting EAP and My SSP clients. This team develops content assets, funds external video development, and manages app notifications. The My SSP team specifically has a writer who is responsible for drafting monthly communications which are added to the app, and marketing campaigns that support these which your dedicated CSM will provide institutions for them to cascade to students.

D. Marketing and educational materials and resources available to support student navigation of the health care services

Training for faculty/staff and student orientations are one of the most critical parts of marketing and educating students. Prior to training, a dedicated CSM will collect each partner institution’s goals and priorities for My SSP and however you may choose for it to integrate with other services. It’s ideal when a circle of care is created to complement and supplement on-campus services and resources. This information will be woven into the trainings so students, faculty, and staff know exactly how My SSP fits into an institution’s suite of mental health support services. Both of these are offered at the in advance of and just following My SSP launch. Refreshers can be offered throughout the year as requested, and demo and promotional videos are available to cascade to faculty, staff and students, making them a

In addition, brochures, flyers, posters, monthly social media and email campaign copy, we actively use technology to strengthen our service delivery, encourage engagement and utilization, identify trends, and improve data collection. Once students have the app downloaded to their device, they’ll frequently receive push notifications as friendly reminders they have access to My SSP support to encourage utilization. Some examples below:



As shared, My SSP app includes self-directed digital health and wellbeing content, evidence-based health assessments, and virtual fitness sessions. In every corner, the services are directing students to engage with other elements of support options available.

Resources and Referrals to Support Student Navigation of Health Care and Other Services



My SSP aims to create a circle of care through the partnerships with institutions. When students use this student support program, they can be referred back to campus resources and services that are relevant and available to them, as well as community resources as needed. Consider a scenario where a student calls or chats for support concerning the presenting issues of stress and anxiety because of a declining GPA and risk of losing a scholarship. A My SSP clinician would provide support in the moment for the mental health presenting issues and could also refer that student to academic advising, scholarship services, or tutoring support if that were available. Likewise, imagine a student who calls or chats for support in the moment because of mild depression and panic attacks related to the pandemic and having to manage his/her full-time job, a mortgage, and classwork, all while balancing a family of school-aged children. A My SSP clinician would provide support in the moment for the mental health presenting issues and could also refer that student to relevant community resources if the student wanted help, e.g., local childcare options, and/or a local psychiatrist. This circle of care encourages student success, keeping students connected to campus through an institution branded app and referring them back to other campus programs and services as applicable, and contributes to increased student retention.

Referral to on-campus resources

Awareness of all existing supports for students is of utmost importance. Based on an individual student's needs, we may refer students back to campus resources and services. Due to our extensive work with colleges and universities across the US, we have a good understanding of the typical supports available through departments (academic advising, scholarship services, international services, tutoring resources, food pantry, etc.).

We will also have specific details of college/university resources from the comprehensive implementation process and the Campus Resource List document each partner institution will have completed. Should a student identify a concern in one of these areas, we will remind the student that there may be supports available on campus and will guide the student on where to find the information.

There are situations where a participant may be working with a My SSP counselor and during the session(s), it is assessed that the student's presenting issue(s) is long term in nature. If this occurs, the provider may coordinate with the participant, LifeWorks' Community Resources team, and the student's insurance network to secure additional services for mental health, substance abuse treatment, or other community resources. Providers track all referrals to additional services, and this data is then included in our reporting.

Community Resource referrals: supporting students who need additional support

The objective of My SSP will be to provide resolution within a short-term mental health support model; however, some issues requiring longer-term support will be referred out of the program to other resources, such as (but not limited to), mental health and addiction agencies, psychiatric centers, medical services and other community resources/services, depending on the individual situation.

Potential causes for referral to specialized treatment centers are suicidal or homicidal protection, psychiatric interventions, alcohol/drug abuse, academic-related issues, or issues needing face-to-face support.

When a student is referred to an external resource, our clinicians work with them to ensure they understand and accept the referral. Our clinicians and Community Resources support teams are required

to have a thorough knowledge of community resources in their area or anywhere in the world, and be capable of making effective referrals to these resources in the best interests of the student.

Our proprietary case management system allows us to reference the referral resources, and to communicate next steps for the referral with the student. It is important to note that we do not make recommendations or refer into any specific doctors or counselors. We provide a list in the student's area for the student to follow up on.

The table below provides details our referral process:

	Process followed
Before referring a client to a community resource:	<ul style="list-style-type: none"> • Complete a thorough student assessment. • Review student's goals and action/treatment plan. • Discuss any past or present use of any other community resource, and the outcome.
When selecting a community resource, we consider the following:	<ul style="list-style-type: none"> • Identify resources, taking into consideration the specialized needs of the individual, insurance benefits or health plans, and if these are not applicable, their capacity to pay for such services. • Select the least intrusive intervention. • Arrange for student to participate actively in the decision-making process. Whenever possible, give student choices when selecting community resources.
At the time of the referral:	<ul style="list-style-type: none"> • Provide student with email including names and numbers of providers and resources. • Explain to student what to expect from the service.

When a student is referred to an external resource, our clinicians work with them to ensure they understand and accept the referral. Our clinicians and Community Resources support team are required to have a thorough knowledge of community resources in their area and be capable of making effective referrals to these resources in the best interests of the student.

Our proprietary case management system allows us to reference the referral resources, and to communicate next steps for the referral with the student. It is important to note that we do not make recommendations or refer into any specific doctors or counselors. We provide a list in the student's area for the student to follow-up on.

We wish to emphasize that to ensure impartiality and avoid any perceptions of conflict of interest, none of the resources to which we refer are related to LifeWorks financially or by business affiliation, nor are we able to negotiate fees with outside providers. This ensures each student is provided with the resource

that is most appropriate for them and can actively participate in the decision around choosing a longer-term external/community resource, or on-campus service.



Improving lives. Improving business.

LifeWorks is a leading provider of technology-enabled HR services that deliver an integrated approach to employee wellbeing through our cloud-based platform. Our focus is providing world class solutions to our clients to support the mental, physical, social and financial wellbeing of their people. By improving lives, we improve business. Our approach spans services in employee and family assistance, health and wellness, recognition, pension and benefits administration, retirement consulting, actuarial and investment services. LifeWorks employs approximately 6,000 employees who work with some 24,000 client organizations that use our services in 162 countries. LifeWorks is a publicly traded company on the Toronto Stock Exchange (TSX: LWRK).

Website

MySSP.app/demo

Twitter

[@lifeworks](https://twitter.com/lifeworks)

LinkedIn

[LifeWorks](https://www.linkedin.com/company/lifeworks)



My SSP increases student engagement & academic success

My SSP connects students to credentialed, master's-level counselors to help them successfully address mental health challenges. With guidance from our partner The Jed Foundation, My SSP surveys students at the start and end of every intervention to measure the program's impact and ensure effectiveness. With care that feels right, students are healthier, perform better, and stay enrolled at your institution.

EXPAND ACCESS

84% of students who have connected with a My SSP counselor have never reached out for support before to any academic or career advisors, faculty, coaches, or peers.



AUGMENT COUNSELING

59% of students reported having never reached out for other campus mental health support or resources, including the campus counseling center and health & wellness center.



LOWER BARRIERS

More than 75% of students who sought support from a My SSP counselor preferred and used the chat feature to connect for support. And 64% of students reached out after-hours.



INCREASE RETENTION

58% of students with a Pre rating of Extremely Concerned or Very Concerned showed an improved Post rating regarding their ability to persist to course completion or graduation after My SSP support.



BETTER PRODUCTIVITY

61% of students with a Pre rating of Extremely Concerned or Very Concerned showed an improved Post rating regarding their ability to attend classes and complete assignments after connecting with a My SSP counselor.



LEARN MORE ABOUT THE STUDENT SUPPORT PROGRAM:

Visit www.MySSP.app/demo.

Email SSP@LifeWorks.com.