

Outline for Developing a Virtual Consultation Manual

When creating a manual, instructors should consider introducing the structure, policies, and steps involved with conducting a virtual consultation in their respective writing center. For our center, we used a digital manual that details the following components that we found most useful for the policies and technology we use in our space:

1. A brief overview of what virtual consultations are, the policies surrounding them, how they are generally run, and why extra training is important in order to move into online work
2. An overview of the technology and tools used for the virtual consultation itself
 - a. Examples
 - i. Tools for collaborating synchronously, such as shareable word documents and a video meeting platform, etc.
 - ii. Scheduling applications (especially if current scheduling system doesn't support scheduling video functionality)
 - iii. Tool for generating digital intake sheets
 - iv. Tool for populating writer intake data and submission records
3. An overview of the different ways to use the technology functionalities that can be used with with or by the writer:
 - a. Examples
 - i. Video/audio/chat functions
 - ii. Screen sharing and closed captioning
 - iii. Sharing documents, comment mode for writers, highlighting text colors, marginal commenting
4. An overview of any relevant learning management systems (LMS) or scheduling management applications that allow for scheduling and/or contacting the writer
5. An overview of ways to make use of the internet
 - a. Use Google to answer difficult questions or look up writing resources, models, or templates
 - b. Access university-wide resources
 - c. Demonstrate online writing center resources such as digital handouts, workshops, scheduling
6. A section regarding accessibility
 - a. Though it is easy to assume that online learning allows for greater accessibility, it is still important to recognize the ways in which we can include accessible practices in our policies and instruction (e.g., Does the writing center ask its consultant to type the notes or should the writer type the notes? Should the consultant ask the writer to read the document aloud, or should they give options for reading/reading to themselves? etc.)

7. A “strategies for transfer” section
 - a. Use split screen when collaborating on the document and look at the writer’s video to pick up on visual/verbal cues
 - b. Share your screen to gesture with a cursor and show the writer how things look on their end since you no longer have the ability to manually point at a paper with a pen
 - c. Have a tab open to writing center handouts or other online resources for quick use

8. A section that covers any relevant reporting or record keeping once the consultation is complete