

# *S<sup>D</sup> Associates LLC*

**Behavioral Services** Assessment, Consultation, Training and Direct Service

37 Talcott Road, Suite 114, Williston, VT 05495 [www.sdplus.org](http://www.sdplus.org) (802) 662-7831

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## **TECHNOLOGY, SECURITY, AND PLATFORM INFORMATION**

This document will include details about using the various technology venues and platforms. It is important that you use these as written as they are put forth to protect the confidentiality of our clients and staff along with supporting our technology needs. It is an ever-changing technology landscape and every time something is added or changed. We will send out the addition or change using the proper venue and summarize the information here.

### **PLATFORMS USED**

Device or Platform	Date(s) Shared	RULES/EXPECTATIONS/HOW TO's	WHO	WHAT TO AVOID – HOW <u>NOT</u> TO BE USED
<b>CLIQ</b>	4.7.20	<ul style="list-style-type: none"><li>-Used for quick daily information/interaction/communication companywide or with client teams</li><li>-If using with a school team or family see Derek for guidance as to how to setup etc.</li><li>-S<sup>D</sup> prefers use of Cliq groups vs. Google groups. Any new Google group needs to first be authorized by the Operations Director</li><li>-May use cliq video meeting function if meeting is with another S<sup>D</sup> staff member</li></ul>	<ul style="list-style-type: none"><li>-Can be used with S<sup>D</sup> staff or a group can be setup with a family and school team</li><li>-Users do not need Zoho account</li><li>-See Derek if you need a group set up or if you need an external user added</li></ul>	<ul style="list-style-type: none"><li>-Avoid posting documents that people will need to refer to later</li><li>-Avoid lengthy conversations by text</li><li>- Do not post in Announcement Group without permission</li></ul>
<b>EMAIL</b>	4.7.2020	<ul style="list-style-type: none"><li>-Used to send documents for review</li><li>-Password protect or take out PHI</li><li>-Used to give quick information that may need to be referred back to later</li></ul>	<ul style="list-style-type: none"><li>-Use with school teams, S<sup>D</sup> staff and families</li></ul>	<ul style="list-style-type: none"><li>-Avoid using PHI</li><li>-Avoid lengthy conversations or rationale. Clinical discussions should occur in person or remotely</li></ul>
<b>GO TO MEETING (GTM)</b>	4.8.2020	<ul style="list-style-type: none"><li>-Only platform approved for meetings with providers and/or families initiated by S<sup>D</sup> staff.</li><li>-If a school team initiates a meeting using another platform you may attend</li><li><a href="#">-Go To Meeting Tutorials listed on Cloud</a></li><li><a href="#">-GTM site tutorials</a></li></ul>	<ul style="list-style-type: none"><li>- S<sup>D</sup> staff have access to individual accounts to be used for meetings, observation and or parent training</li></ul>	<ul style="list-style-type: none"><li>- Avoid distracting or inappropriate settings when engaged in meetings</li></ul>
<b>CLOUD Landing Page</b>	4.7.2020	<ul style="list-style-type: none"><li>-Important categorical information (<a href="#">see landing page</a>) will be shared by</li></ul>	<ul style="list-style-type: none"><li>-BA's have access to Landing Page</li></ul>	

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		Coordinators and/or Directors. BA's should reference this page for updates/changes		
<b>PHONE-TEXT</b>		<ul style="list-style-type: none"> <li>-Quick time sensitive information (e.g. schedule or location change)</li> <li>-Routinely go through and delete texts with families as PHI often gets embedded</li> <li>-Screenshot any necessary texts and save them to the server if they should be part of the client's file</li> <li>-CLIQ groups are strongly encouraged over text chains as CLIQ is more secure</li> </ul>	<ul style="list-style-type: none"> <li>-Use with S<sup>D</sup> Staff, Providers and families</li> </ul>	<ul style="list-style-type: none"> <li>-Avoid conversations</li> <li>-If conversation begins encourage a meeting time to discuss further</li> <li>- Never use PHI in texts</li> <li>- Do not connect phones to WiFi</li> </ul>
<b>JANE</b>		<ul style="list-style-type: none"> <li>-Access to bill sheets, audits, mileage (transporting clients)</li> </ul>	<ul style="list-style-type: none"> <li>-BA's use to track client hours</li> <li>- BIs to track mileage</li> </ul>	<ul style="list-style-type: none"> <li>- Avoid changing client number after starting a bill sheet. Must be deleted and recreated if you created the sheet in error or need to start over</li> </ul>
<b>CLOUD</b>		<ul style="list-style-type: none"> <li>-Shared files and resources reside here, staff calendars/schedules, program schedules, Triage projects, protocol examples and templates, some current forms and documents</li> <li>- Close all tabs/pages when not actively in use</li> </ul>	<ul style="list-style-type: none"> <li>- S<sup>D</sup> staff have different access to various folders depending on need</li> </ul>	<ul style="list-style-type: none"> <li>-This platform should not hold documents containing PHI</li> </ul>
<b>SERVER</b>		<ul style="list-style-type: none"> <li>-All student and or staff files/information reside here. This is the most secure and confidential location we have</li> <li>-Documents that include PHI should be stored here</li> <li>- Always disconnect from the server when not actively using it (Open VPN/remote access)</li> </ul>	<ul style="list-style-type: none"> <li>-BA, BC, ABC, Directors and Coordinators have access to server files</li> <li>-If another staff should have access please request through your supervisor</li> </ul>	<ul style="list-style-type: none"> <li>- Do not copy or store server documents containing PHI to computer desktops or to personal devices</li> </ul>
<b>GOOGLE GROUP</b>		<ul style="list-style-type: none"> <li>-A google group set up by a family can be used to post information about a students day in a structured manner set up by family and BA.</li> </ul>	<ul style="list-style-type: none"> <li>-Family or school team must set up. Should not be setup by S<sup>D</sup> staff as we prefer use of Cliq groups</li> </ul>	<ul style="list-style-type: none"> <li>-Avoid using this as a discussion platform</li> <li>-Do not use PHI</li> <li>-Only use google groups if initiated by family or school team AND you have discussed rationale</li> </ul>

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				with your supervisor
<b>GOOGLE CLASSROOM</b>		<ul style="list-style-type: none"> <li>- It's best if you can get the school to issue you a gmail account with the school domain to set up your google classroom. And the student must use their school issued gmail account with the school domain.</li> <li>- You can use google classroom without a school-issued domain as the host if: <ul style="list-style-type: none"> <li>--The student has a school issued gmail account that includes the school domain (more secure than personal accounts)</li> <li>--You do not use PHI (even though I'm not sure if this is possible as I think the student's school email addresses typically contain their last name and first letter of their first name)</li> <li>--There is not an opportunity for the student to put PHI on the google classroom</li> <li>--You do not use the video chat feature</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>-Primarily set up by Sp. Educator for client use</li> <li>-May be used for staff assignments on an as needed basis</li> </ul>	<ul style="list-style-type: none"> <li>- Should not be set up by S<sup>D</sup> staff</li> </ul>
<b>APPROVED EDUCATIONAL CURRICULUM AND SUBSCRIPTION</b>		<ul style="list-style-type: none"> <li>- Information can be found on the Cloud <a href="#">here</a></li> </ul>		
<b>LAPTOPS and COMPUTERS</b>		<ul style="list-style-type: none"> <li>- Staff that have signed a <u><a href="#">technology agreement</a></u> and have been assigned a specific device may take devices outside S<sup>D</sup> property when properly secured.</li> <li>- Devices can also be available on a daily basis when appropriately signed out. Must be returned that day.</li> <li>-If an individual is using a personal computer for a remote session this should be pre-approved by their supervisor AND the computer must have Anydesk software set up by the S<sup>D</sup> IT department</li> <li>- <u><a href="#">Manually update Windows</a></u> at least 2x per month</li> </ul>		<ul style="list-style-type: none"> <li>-Do not use personal devices that have not been approved by your supervisor and are not able to be supported by S<sup>D</sup>'s IT department</li> <li>- Devices should not be left unsecured or unattended</li> <li>- Only work-related tasks should be performed on company-owned computers</li> </ul>

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		<ul style="list-style-type: none"><li>- Shut down the computer when done working (avoid just shutting the lid)</li><li>- Log off whenever not working at the computer</li></ul>		<ul style="list-style-type: none"><li>- Do not conduct work near open containers of liquid or eat over your device</li></ul>
<b>WiFi Internet</b>		<ul style="list-style-type: none"><li>- Only company-provided (or school-provided) devices should be connected to company WiFi</li></ul>		<ul style="list-style-type: none"><li>- Do not connect your phone or personal computer to any SD WiFi without prior approval</li></ul>

## **TAKING, USING, AND SHARING VIDEOS**


Any time a video is recorded it becomes a part of that clients file and needs to be treated like any other confidential document. It will need to be stored on the server in the individual client folder and saved for 7 years. Any recordings that include students should be approved in advance by a clinical supervisor and consent forms should be completed.

DEVICE/PLATFORM	DATE(s) SHARED	RULES/EXPECTATIONS/HOW TOs
<b>VIMEO</b>  (For sharing and video storage)	5.11.2020  6.3.2020 6.4.2020	<u><a href="#">Vimeo access how to</a></u>  <u><a href="#">List of videos uploaded on Vimeo</a></u>  <u><a href="#">Where to upload videos</a></u>
<b>GO PRO</b>  (For recording, and sharing observation videos)  <b>*Make sure this is approved and included as part of clients file on the server*</b>	11.9.2020	 <b>GoPro</b> <ol style="list-style-type: none"><li>1. To record a video on the GoPro, select the "video" function in the menu (cycle through options) and then press the top button to both start and stop the recording.</li><li>2. After recording the video you will need to transfer the video from the device to your laptop. To do this, connect the charging/transfer cable (USB) to your PC and transfer the file to your Desktop. Either select the specific folder where you want the files stored or investigate in advance where your default download location is on your PC.</li></ol>

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		<ol style="list-style-type: none"><li>3. Once you have successfully transferred the file (confirm the video will play on your PC), delete the file from the GoPro.</li><li>4. You can then transfer the file to the Cloud under <i>NVT BI access &gt; Vimeo short term storage</i>. Directions are <a href="#">here</a>.</li><li>5. Delete the video from your desktop after the file has successfully been uploaded to the cloud.</li><li>6. Fill out the Vimeo daily log, also in the NVT BI access folder.</li><li>7. Send an email to <a href="mailto:derek.barrows@sdplus.org">derek.barrows@sdplus.org</a> to notify him you need a video uploaded to Vimeo.</li><li>8. A link will be sent out by the end of the following day.</li><li>9. Download the now-optimized file from Vimeo to add to the client's file in the server.</li></ol>
<b>WYZE CAMERA</b>  (For use remote synchronous observation and video recording)  <b>IF RECORDING...</b>  <b>*Make sure this is approved and then include as part of the students file on the server *</b>	 <b>Wyze</b>	<ol style="list-style-type: none"><li>1. You will need to record a video through the Wyze cam application, either on a phone or tablet. Open the app., select the camera you would like to observe and then hit the "record" button. It is the second button in from the left (looks like a dot/target). After you are done recording, the file will be saved to your device. It will be located in the same folder that the device saves other photo/video files.</li><li>2. Next, you must transfer the video from the device to your laptop. To do this, connect the charging/transfer cable (USB) to your PC and transfer the file to your Desktop. Either select the specific folder where you want the files stored or investigate in advance where your default download location is on your PC.</li><li>3. Your phone will prompt you to allow the Wyze app to access your media files. <i>You must allow sharing in order for this to work. **Most apps on your devices require access to personal information and files, but if you are not comfortable with allowing access, other recording methods will have to be explored.</i></li><li>4. Once you have successfully transferred the file (confirm the video will play on your PC), delete the file from the GoPro.</li><li>5. You can then transfer the file to the Cloud under <i>NVT BI access &gt; Vimeo short term storage</i>. Directions are <a href="#">here</a>.</li><li>6. Delete the video from your desktop after the file has successfully been uploaded to the cloud.</li><li>7. Fill out the Vimeo daily log, also in the NVT BI access folder.</li><li>8. Send an email to <a href="mailto:derek.barrows@sdplus.org">derek.barrows@sdplus.org</a> to notify him you need a video</li></ol>

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<b>VIDEO OBSERVATION OF STAFF AND STUDENTS</b>		<ul style="list-style-type: none"><li>- AZ , CZ and some BZ can be done using Wyze cameras and or Go to Meeting live stream</li><li>- For this to be considered billable you need to review feedback with staff before their next session with that client, either by remote meeting or phone call</li><li>- Also for insurance companies please see their specific protocols</li><li>- Please make sure staff and student are aware they are being video recorded and/or observed remotely</li><li>- If a parent or outside provider would like to observe the BA should set this up so that the individual is observing remotely with an S<sup>D</sup> device. The individual must set up a time to come to the office and have a room and device assigned and be given access to the client Wyze cam. It is recommended that the BA sit with the individual observing and/or connect with them at the end of the observation to review what they observed and answer questions.</li></ul>