# TECHNOLOGY and SOCIAL WORK PRACTICE 2022

Preamble

In today's practice landscape, social workers have access to many tools to better engage with the people they serve. Social workers and clients use technology to access information, learn, and engage with their communities. The use of technology has the ability to transcend many barriers that people experience while accessing social work services, like mobility and geography, making it an appealing medium for social work practice. Technology has become so common that it may be taken for granted the level of skill and consideration that social workers need to employ to use it in the interest of the client, while mitigating risk.

This document is grounded in the CASW Code of Ethics (2005) and Guidelines for Ethical Practice (2005) as well as the SASW Standards of Practice. While technology and social media present a different forum for building connections and for sharing information, the ethical issues remain the same and ethical principles and standards must equally apply.

The SASW practice committee has developed the following guidance document to assist social workers as they consider how and when they will use technology as they engage in therapeutic practice, conduct research or engage in the pursuit of social justice.
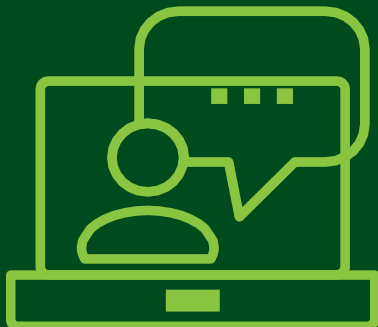
The use of technology has the ability to transcend many barriers that people experience while accessing social work service.

Competence and Proficency

A social worker shall be proficient in the technological skills and tools required for competent and ethical practice and shall seek appropriate training and consultation to stay current with emerging technologies.

Practice Notes:

Technology is constantly changing. It is important for social workers to evaluate the knowledge they currently have and expand that knowledge with continuing education and professional consultation in regards to technology-based practice, research and advocacy.

Some ideas of areas to continue your education or seek consultation are:

- Data storage: How do I keep electronic data secure?
- Internet security: How do I ensure the safe transfer of information?
- Cultural humility: How do I practice cultural humility when using technology?
- Communication with clients in non-traditional modalities (ex. text)

INDIVIDUAL KNOWLEDGE
HOW MUCH YOU HAVE LEARNED ABOUT THE TECHNOLOGY?

COMPETENT TECHNOLOGY USE

CONTINUING EDUCATION
CAN I LEARN MORE ABOUT THE TECHNOLOGY AND HOW TO MITIGATE RISKS?

PROFESSIONAL CONSULTATION
CAN I CONSULT WITH SOMEONE WITH THE TRAINING AND KNOWLEDGE I DON'T HAVE?

Frequently Asked Questions:

1. What are the ethical considerations in providing group chats and forums?

When providers are organizing or endorsing electronic groups, providers must mitigate the risk to participant safety and privacy. When people engage in electronic groups, practitioners and group members must be aware of the risk to privacy that is introduced by participants logging in from different locations. Each of these locations has the potential to introduce exposure to individuals outside the group that may be at a participant's login location and would allow participants access to group members' personal environments.

Although unmonitored forums do exist in the public sphere, provider hosted unmonitored forums should be approached with caution because they introduce risk to participant safety and create significant challenges for practitioners trying to ensure client privacy. Monitored forums reduce the risk to participants but adequate monitoring may be difficult within the confines of most practice environments.

Things to consider:

- Group size
- Group dynamics
- Communication styles
- Availability of crisis support
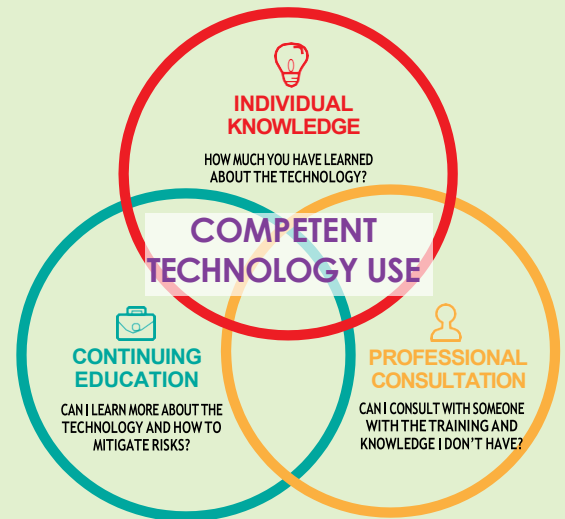
Security and Confidentiallity

Where reasonably possible, a social worker shall keep informed about technology that will increase the quality of program operations and service delivery; invest in and maintain such systems; and establish policies to ensure authorized access, security, and privacy in organization information systems.

Practice Notes:

Technology and what we know about how we use technology changes over time. Ethical use of technology requires that we adopt a continuous review strategy. Even when we invest the time to ensure that we are aligned with current best practices for technology what was current can rapidly become out of date.

Some things to include in your routine review are:

- Updates to policies and procedures when there are security changes with the technology being used in practice.
- Current best practices involved with the technology used to be able to inform client of privacy risks that may be involved when using technology.
- Update and document informed consent based on current best practice.

Frequently Asked Questions:

1. What to do if you are unsure of adequately encrypted conferencing platforms?

   Remember to practice within your competency. If you are not trained in data security, you should seek the advice of a trained professional.

2. Does SASW recommend any platforms that are secure?

   At this time, the SASW has not vetted any software platforms for use by members.

3. Point of sale software and storage of payment information.

   At this time, the SASW has not vetted any software solutions for use by members. It is recommended that you seek professional advice regarding security requirements for financial information.

Dynamics of Electronic Services

A social worker who uses telephonic or other electronic means to provide services shall strive to become and remain knowledgeable about the dynamics of online/electronic relationships, The advantages and drawbacks of non-face-to-face interactions, and the ways in which technology-based social work practice can be safely and securely conducted.

Practice notes:

- A new clinical environment requires different skills. Some skills transfer but are not the same.
- Technology based service providers may have reduced access to non- verbal cues or observations of physical well-being used for clinical assessment.
- Digital environments change how we perform risk assessment and respond to crisis.
- You may have expanded access to assess a person within their environment depending on where the client engages with the social worker (from home, you can see living space in the video). Some drawbacks include reduced confidentiality if others are in the client's home or the social worker's room and can hear the conversation.
- Clients engaging with the social worker within their private environment require the social worker to recognize that professional boundaries do not have the same clarity as in face-to-face services.
- Clients may have financial barriers to accessing technologically based services- lack of availability of reliable internet, computers and/or cameras can all interrupt service.

Suggestions for rules for engagement at the onset of service.

- Where clients should engage in video services
- Dressing appropriately
- Explanation of the workplace boundaries regarding social media and use of technology
- How do I assess who should be seen in person and who should be online?

Frequently Asked Questions

1. What if a client tries to friend me on social media?

   It is important to recognize the difference between professional social media and personal social media as well as the difference between private and public. Friending a client on a personal social media is creating a personal relationship with someone you have a professional relationship with.

2. Are there rules about what I can post on my personal social media?

   Practitioners must remember that in this digital age, clients will seek out information about professional services online. Practitioners must practice social media hygiene as a matter of managing their professional image in order to control what personal information is accessible to clients, Practitioners can use a number of tools available to them such as privacy settings, ensuring public content is appropriate, or potentially using a pseudonym for personal social media activities, etc.

It is important to provide clients with professional information about their providers and the services they provide. This ensures that clients have the ability to find and evaluate the legitimacy of services offered.

3. Can I look up or follow a client on social media?

The question that providers need to ask themselves is what is the therapeutic benefit? Will viewing a client's social media presence create a bias that may impact service and make professional boundary setting difficult?

4. Can I advertise my private practice through social media and have people enter to win something (example free session)?

There are a couple of things to consider. First, what are you requiring of someone to win? It is helpful to consider social media as a busy street in a big city. You have no control over who is viewing the post. Social workers must reflect on ethical guidelines to ensure and maintain the confidentiality of information transmitted by potential winners through the use of technology.

5. How do I assess who should be seen in person and who should be online?

Practitioners must do an assessment of benefit to the client when considering in-person or online work with a client. What are the advantages and disadvantages of each mode of treatment? What is in the client's best interest?

6. Does my insurance cover me for virtual practice?

Your registration with SASW does not provide you with any type of legal coverage. If you have chosen insurance through the CASW professional liability insurance partnership with BSM, they offer a full range of coverage options designed to meet risk needs such as E-Services, Cyber Security Liability and Privacy Liability Breach coverage. (http://www.casw.bmsgroup.com)

If you have chosen an alternate insurer, please consult your insurance policy.

7. How do I ensure privacy doing virtual work from home?

Things to consider:

- Can any part of the client interaction be heard by any individual in your physical environment?
- If you are using the internet, who is responsible for internet security? Has there been a privacy evaluation done to ensure that privacy is maintained through all components of service delivery. If you are unsure, consider consulting a security specialist. Ensure you have enough information to make an informed decision about privacy.
- Storage of electronic records

Resources:

- Checklist for accepting friend requests or interact with a current or former client on a social networking platform (NBASW, Standards Regarding Telehealth services, the use of technology and social work practice, (2020) https://www.nbasw-atsnb.ca/assets/Uploads/Standards-Regarding-Telehealth-Services-EN3.pdf
- Checklist for Using Communication Technologies in Practice, Practice Notes: Professional and Ethical: Communication Technology Practices and Policies for a Digital World (Ontario Association of Social Workers) https://www.ocswssw.org/wp-content/uploads/PN-Communication_Technology_Practices_Policies_for_Digital_World.pdf
- Welcome to the CASW Professional Liability Insurance Program- https://www.casw.bmsgroup.com
- Saskatchewan Social Worker (November 2021). p.18 "Should all social workers have liability insurance?"
- To accept or not to accept? How to respond when clients send "friend request" to their psychotherapists or counselors on social networking sites.- https://www.zurinstitute.com/resources/socialnetworking/

Client Understanding and Benefit

A social worker who uses telephonic or other electronic means to provide services shall reasonably ensure that the client with whom he or she is working is also knowledgeable about, and comfortable with, such technology.

Practice Note:

Practitioners should remember that there is a difference between ongoing therapeutic services and crisis management. The guidance below applies to ongoing therapeutic service provision.

Informed consent and technology:

- Does the client understand how the service will be provided?
- Does the client understand what equipment is going to be used and that this may be at their expense?
- Does the client understand the risks and limits to privacy associated with the technology used in service delivery?
- Does the client understand methods they can use to protect their own privacy?

Evaluation for appropriateness for social work interventions:

- Does the client have the skill ability required to use the technology to engage fully in the therapeutic process?
- Does the use of the technology enhance the intervention or reduce barriers in a way that make it equivalent to, or a better way to provide the intervention?
- Does the client pose a significant risk of harm to self or others?
- Can the social worker provide a standard of care consistent with the CASW Code of Ethics, applicable workplace policies and procedures, relevant criminal laws and regulations for businesses?

Resources required by the client to engage in services:

- If the client does not have access to the technological tools required for the service (computer, etc.), how can they receive appropriate care?

Risk Management:

- Do the social worker and the client have an agreed upon plan or escalation of services if/when needed?
- Is there a contingency plan for emergencies and technical interruptions?
- Does the social worker have an adequate risk management plan that includes protocols for all technologies used by the agency for admin, managerial and social work-related purposes?
- Does the social worker engaging in electronic social work services have a plan to help clients identify local emergency services, supports and resources that may be accessed outside the social worker/client relationship?

Frequently Asked Questions

1. What to do if there is a breach?

   Practitioners should consult the office of the Saskatchewan Information and Privacy Commissioner for guidance https://oipc.sk.ca/ specifically the IPC Guide to HIPA https://oipc.sk.ca/guides/ipc-guide-to-hipa/.

   If you are registered social worker with another provincial association practicing outside of Saskatchewan please consult that provincial body.

Resources:

BMS, Consent to provide Electronic Health Services Template - https://www.sasw.ca/document/5363/Telehealth%20Consent%20Form.pdf

The Information and Privacy Commission of Saskatchewan is responsible for overseeing and enforcing the following provincial access and privacy laws:

- Freedom of Information and Protection of Privacy Act (PDF), Saskatchewan's provincial public sector privacy law
- Local Authority Freedom of Information and Protection of Privacy Act (PDF)
- Health Information Protection Act (PDF), Saskatchewan's privacy law relating to health records
- Privacy Breach Guidelines for Health Trustees (https://oipc.sk.ca)
- Privacy Breach Guidelines for Government Institutions and Local Authorities (https://oipc.sk.ca)
- Office of the Privacy Commission of Canada (https://www.priv.gc.ca)

Practice Jurisdiction

A social worker who uses telephonic or other electronic means to provide services shall abide by all regulations of their professional practice with the understanding that their practice and records may be subject to regulation in both the jurisdiction in which the client receives services and the jurisdiction in which the social worker provides the services. To practice in another jurisdiction, you must be registered in that jurisdiction.

Practice Note:

Each jurisdiction has their own legislation, policy and processes regarding licensing requirements. If you are thinking about electronic practice outside of Saskatchewan, you must contact the social work regulatory body in the province in which you want to practice and determine their requirements.

- Social workers must hold registration in client's physical jurisdiction to provide remote services and are subject to the rules and regulations associated with that registration.
- Any data that is collected and stored is subject to the laws associated with the location of data storage and not the location of data collection unless they are the same.
- In order to continue social work services with a client that moves to another province and wants to continue services for a period of time following relocation or if a client is temporarily relocating, the social worker must be registered in the new client jurisdiction.

Frequently Asked Questions

1. If I am registered in Saskatchewan but I want to provide service to clients in another province, what do I have to do?

   Connect with the Social Work regulatory body for the province you would like to practice in for specific requirements. Social Work regulatory bodies in other provinces and territories have applications specific for social workers already registered in another province.

2. Does my license allow me to do virtual practice outside of Saskatchewan?

   Please consult your policy in relation to the requirement of registration in the jurisdiction you are considering providing services in.

Resources

Provincial Bodies: https://www.casw-acts.ca/en/node/21/policy-and-regulations/regulatory-bodies

Identity and Ability to Respond

A social worker who uses electronic means to provide services shall make reasonable efforts to verify client identity and contact information, and prepare to respond in the case of an emergency

Practice Notes:

When we see clients in person, we get to know the person we are working with. We become familiar with things like what they look like and how they speak which we can use to confirm that the person we are speaking to is who we think they are. Some of these methods continue to hold true when we use video-based technology but are almost completely lost in text-based methods.

What information can I gather to help me verify identity of the client?

- Full name
- Physical address or land location
- Phone number
- Emergency contact.

Frequently Asked Questions

1. Can I work with anonymous clients?

   Unlike in-person services, your ability to respond appropriately to anonymous clients online is significantly reduced. It is recommended that you collect any information that you may need to engage emergency services or law enforcement on the client's behalf in the case of emergency. There is a point where a social worker must shift to crisis management service provision and prioritize the safety of the client and provide the best care you can.

2. Can I provide crisis services to an Anonymous client?

   Safety supersedes the requirement for a practitioner to have identifying information. Practitioners must remember that their ability to engage other emergency services is greatly hampered by the lack of information and there is a need to develop plans for how this will be managed.

Cultural Humility

A social worker shall select and develop online methods, skills, and techniques that are compatible with their clients' culture and environment.

Practice Notes:

When considering cultural humility and technology a social worker must be aware of the interaction of various components including, but not limited to, power imbalances, race, language, disability, gender, socioeconomic status, sexuality, and environmental conditions.

Within the framework of Cultural Humility, a social worker must be self aware and examine their personal beliefs and culture to mitigate and address power imbalances between the social worker and client to come to a place of mutual respect and understanding. The foundation of Cultural Humility is the recognition of wise practises.

Things to Consider:

- Have I read and reviewed the SASW Cultural Standards of Practice?
- Are there language, cultural or other barriers that would make face-to-face communication important?
- Are there accessibility obstacles to providing service via specific technological modes (e.g., text based, telephone, video chat)?
- Does the client require special consideration due to little to no access to telephone, telephone number or stable cell service?
- Does the client require special consideration due to having a secure online access point for web-based remote counselling but no access to telephone services?

Frequently Asked Questions

1. What is Cultural Humility and Technology?

   The use of technology and Cultural Humility in social work practice includes putting the best interests of the client first, recognizing the client is the expert of their personal life journey. The social worker who self reflects and analyzes their own personal biases, ethics and life journey is further equipped, responsive and adaptive to the needs of the client; thereby advancing towards the goal of meeting the client in a space of mutual respect and understanding.

2. What are some Cultural Humility considerations when engaging in remote and/or virtual appointments?

   It is important to remember some communities and people may not have access to the internet, or a stable internet connection for remote access. Additionally, there may be little to some access to online resources but not a private landline or telephone number; or, they might only have access to social media messaging via technological applications. In these cases, special considerations and creative solutions may need to be made under such circumstances.

Resources

E2 Cultural Competence in Standards of Practice for Registered Social Workers in Saskatchewan 2020*

Cultural Humility and Standards of Practice for Social Work 2022

*A change in language from competence to humility has been recommended by the SASW Standards of Practice Committee to better reflect current values in social work practice.

Supervision

When using or providing supervision and consultation by technological means, a social worker shall follow the standards that would be applied to a face-to-face supervisory relationship and shall be competent in the technologies used.

Practice Notes

As with practice, supervision has the ability to be enhanced or hindered by the use of technology. Ask yourself the questions below when considering whether or not to include technological supports in supervision.

- Can the activities performed be adequately monitored remotely?
- Is text or video chat more appropriate and in what circumstances?
- Do all parties feel comfortable with the means of communication?
- Can the medium of communication for supervision be evaluated by all parties to ensure that adequate supervision and consultation opportunities are available?

Frequently Asked Questions

1. Can I provide adequate supervision and support to a student or employee remotely using technology?

   Providing supervision via an appropriate digital platform should be a consideration to increase access to supervision. Supervisors should ask themselves if using technology to provide supervision could benefit student/employee experience and extend support. An appropriate digital medium is current, safe, secure, easily accessible, and ideally of no cost to student or employee.

Definitions Glossary of Terms

APP: An application or software that is downloaded onto mobile devices to perform a specific function. (NASW, 2017)

BOUNDARY CONFUSION: Failure to recognize the psychological distinctiveness of individuals or confusion of interpersonal roles. (NASW, 2017)

CLIENT: Refers to a recipient of professional services, irrespective of whether fees are charged or the salary or compensation received by the social worker, and includes:

i.   an adult or minor age 14 or over who has the requisite understanding to appreciate the nature and consequences of the professional services being provided,

ii. the guardian in respect of a child under the age of 14 or an individual for whom a guardian has been appointed,

iii. the couple, family or other group in cases when professional services are provided to benefit a couple, family or other group rather than an individual,

iv. the corporate entity or organization in cases when professional services are provided to benefit a corporate entity or organization rather than an individual.

CLOUD: A remote platform for storing and accessing software (applications) and data through the Internet rather than through a direct connection to a local server or personal computer. (NASW, 2017)

CONFIDENTIAL INFORMATION: Refers to information obtained by a social worker in the context of a professional relationship or in other circumstances when there was a reasonable expectation by the client that a social worker would not disclose that information.

CRISIS MANAGMENT: A process by which a social worker identifies, assesses, and intervenes with the individual or community in crisis to help restore balance and reduce the long-term effects of the crisis.

DIGITAL FOOTPRINT: Trails or traces of data that may be stored without the original user's knowledge or consent (for example, Internet protocol addresses, cookies browsing history, metadata, and other information that may or may not include identifying data about the user). Also referred to as digital shadow or cyber shadow. (NASW, 2017)

ELECTRONIC COMMUNICATION: Using Web sites, mobile phones, e-mail, texting, online social networking, video, or other electronic methods and technology to send and receive messages, or to post information so that it can be retrieved by others or used at a later time. (NASW, 2017)

ENCRYPTION: The process used to protect the privacy of electronic transmissions of information by converting the information into a code (preventing unauthorized people from gaining access to the information). (NASW, 2017)

FORUMS: An electronic venue where people can meet and discuss various topics with each other.

HOSTING: The business of housing, servicing, and maintaining files including electronic communication, surveys, videos, and application.

INFORMATION TECHNOLOGY (IT): Computer based tools used to work with information, systems and networks.

INFORMED CONSENT: refers to permission given by a client to a social worker, based on reasonable disclosure by the social worker and understanding by the client, of the facts, risks and alternatives, to use identified intervention procedures, which may include assessment, treatment, follow-up, research or community intervention, or to disclose confidential client information.

INTERNET: A network that connects information all over the world using standardized protocols to transmit information.

MALWARE: Malicious software (electronic program) that is designed to destroy data or harm the functioning of computers or other electronic devices. Examples include trojans, viruses, and worms. (NASW, 2017)

ONGOING THERAPEUTIC SERVICES: Services which are rendered on an ongoing basis with the same service provider or organization. In these services therapeutic interactions have a planned trajectory.

ONLINE: Using a computer to communicate to other computers through a network.

PRACTICE JURISTICTION: The location in which the therapeutic exchange takes place. In the case of remote practice, the practice jurisdiction will be the physical location of the client.

DATA PRIVACY: Allows us to determine what information can be viewed, shared or intercepted by outside parties.

PROFESSIONAL RELATIONSHIP: Refers to a relationship with a social worker, when the social worker is assumed to have expertise, knowledge or skills by virtue of the social worker's qualifications as a social worker, whether or not there is an exchange of money or other remuneration.

RISK MANAGEMENT: A process employed by social workers to minimize negative outcomes.

SOCIAL MEDIA: Computer-mediated technologies that allow for the sharing of information, ideas, and other forms of communication through virtual communities and networks. (NASW, 2017) Social media sites include but are not limited to, Facebook, Twitter, Instagram, Google, blogs, YouTube, LinkedIn, etc. (NBASW/ATTSNB Standards Regarding Telehealth services, the use of technology and social work practice), (Nov. 2020)

SECURITY: The protection of hardware, software, and data through physical forms of protection (for example, locks, doors, padded cases, waterproofing) and electronic forms of protection (for example passwords, firewalls, and encryption). (NASW, 2017)

TECHNOLOGY: Any electronic device or program that may be used to communicate, gather, store, analyze, or share information (for example: computers, mobile phones, tablets, smart watches, monitors, Web sites, social networking applications, and computer software). (NASW, 2017)

WORLD WIDE WEB: Any information system where documents are connected to other documents by the use of hyperlinks that allows individuals to move through documents in search of information.

References

Canadian Association of Social Workers (CASW). Code of Ethics (2005)

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