

Checklist for Choosing Technology Modality and/or Platform for Counselling and Psychotherapy

Technology and Innovative Solutions Chapter Project

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COUNSELING ET DE PSYCHOTHÉRAPIE

Checklist for Choosing Technology Modality and/or Platform for Counselling and Psychotherapy

Before selecting any technology for use in your clinical practice take a careful look at **relational capabilities** and **privacy risks** of the modality or platform you are considering using.

Technologies/modalities include, but are not limited to:

- Phone (cell or smartphone)
- Email
- Text messaging
- Real time Chat
- Asynchronous text
- Webcam/videoconferencing
- Virtual reality/Avatars and gaming
- Online Evaluation and Assessment
- Apps
- Wearable technologies
- Social media
- Therapist-assisted online mental health treatment programs (e.g. TAO Connect)
- Office management software including online scheduling options

Relational Capabilities

How does this technology meet clinical needs? What is the purpose for using this particular technology/modality with this particular client?

How will the use of this technology impact the client-counsellor/psychotherapist relationship?

How will you mitigate any negative impact?

Training in the uses of technology in counselling and psychotherapy is available through a number of reputable programs in Canada, the UK and the USA.

Search for evidence base for the technology (e.g. Google Scholar search) and reviews of the technology or modality.

Trial the technology to determine ease of use, how it functions and whether it does what it purports to do.

Privacy Risks

Consider conducting your own Privacy Impact Assessment for each technology you use. Carefully read the privacy policies of the technology platforms or modalities.

- *You can find information on how to conduct a Privacy Impact Assessment (PIA) in the Guidelines for the Uses of Technology in Counselling and Psychotherapy.*
- *You can also find templates for PIAs on provincial and federal privacy websites.*
- *For an excellent example of a privacy policy that addresses these issues check out the CCPA Privacy policy <https://www.ccpa-accp.ca/privacy-policy/>*

Here are some questions to consider:

What personal information will be collected? And for what purpose?

- E.g., client names, contact information, health numbers

Who will see the personal information that is collected? Will personal information be shared?

- Clinician, administrative assistant, tech support, clinical team? What about the technology platform developers? Do they have access to any information that you are collecting?
- Look at the contractual obligations and make sure appropriate ones are in place to protect client information from unauthorized access or use

How will personal information be used?

- E.g., is the information for identification purposes or to determine service offerings

Where is data stored?

- Does the technology have a server in Canada or is the data stored in the Cloud? What are the privacy laws in my province or territory?

You can find federal and provincial privacy law websites listed in the Guidelines reference list.

How is the data transmitted? Is it encrypted?

Does the technology require password protection? Is 2-Factor Authentication available?

Check the Guidelines for definitions of these terms and for suggestions on creating strong passwords.

2-Factor Authentication is more secure than using only one password.

Is your hardware located in a secure premise?

Is the system you are considering located in a secure premise?

Can you turn off any features that collect data?

If records exist with third parties (e.g. cell provider, the cloud provider) – are those records deleted when you delete them on your device (e.g. laptop, cellphone)?

Breaches of privacy and security can and do happen. Create a plan for how to handle these if they occur. Who will you need to contact and when? What are the risks to the individual or group? What are the potential harms if a breach occurs? How can these risks be mitigated?

Roy Huggins of Person Centered Tech also offers a “handy checklist” for technology choices. ¹

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¹ <https://personcenteredtech.com/2017/05/26/practice-checklist-practice-tech-choices/>