

Chapter:	Service Delivery		
Title:	Technology -Based Service and Treatment Delivery		
Policy: <input checked="" type="checkbox"/> Procedure: <input type="checkbox"/>	Review Cycle: Triennial Author: Srvc/Tx Leadership	Adopted Date: 11.2023 Review Date: 11.2023	Related Policies: Service Philosophy Assessment Confidentiality and Privacy Informed Consent for Treatment/Services Professional Licensure Information Security Treatment Planning and Monitoring

Purpose:

This policy is adopted to clarify Hopeful Horizons’ (HHs’) parameters and expectations for the use of technology-based service (TBS) and treatment methods.

Scope:

This policy applies to:

- All HH Staff (add space) Selected HH Staff, as specified: Direct service/treatment
- HH Board Members HH Volunteers
- Other: Direct service/treatment contractors

Policy:

HH permits the use of TBS methods as permitted by law, in accordance with grantor/regulator requirements and consistent with evidence-based and best practices.

- A. **Informed Consent and Client Education:** Upon initiation of TBS, HHs’ staff shall do the following:
 - 1. Obtain informed consent from the client consistent HHs’ policy
 - 2. Inform the client of the potential risks and limitations of receiving services/treatment via TBS
- B. **Privacy and Security:** All TBS delivery shall be conducted in accordance with HHs’ policies and procedures related to client confidentiality and privacy and in a manner that protects the security of client information inclusive of the setting where TBS is being conducted.
- C. **Client Suitability:** For each client/ individual considered for/participating in TBS, HHs’ staff shall:
 - 1. Assesses the appropriateness of TBS delivery based on established criteria and suitability factors:
 - 2. Monitors whether or not the service delivery model is effective
 - 3. Arranges for services to be delivered in-person when necessary
- D. **Personnel:** HHs’ staff shall provide TBS to persons physically located in South Carolina. Staff may provide TBS in another jurisdiction, on a limited basis, when they demonstrate compliance with professional licensing requirements in the state where the client/individual is physically located. Staff/contractors providing TBS from another state shall provide evidence of appropriate licensure in accordance with HH policy in compliance with South Carolina law requiring registration with the state licensing board for provision of TBS.

- E. **Training:** HHs' staff engaged in TBS shall receive training on, or demonstrate competency in:
1. Use of equipment and software as appropriate to their position and the services provided
 2. Privacy and confidentiality issues specific to the TBS delivery model
 3. Recognizing and responding to emergency or crisis situations from a remote location
 4. Engaging and building rapport with clients when communicating electronically
- F. **Technology:** TBS shall only be conducted on HHs' issued technology (e.g., phones, computers) to assure appropriate security measures are in place. HH shall consider the following in selecting tools/methods for TBS delivery:
1. User-friendliness: The platform should be easy for both service/treatment staff and the client to use
 2. Compatibility: The right platform/tool should be compatible with HHs' existing technology infrastructure, including ECR systems, mobile devices, and other hardware and software
 3. Data security and privacy: the solution must have robust security measures in place to protect patient data and comply with relevant regulations including compliance with the Health Insurance Privacy and Portability Act (HIPPA)
 4. Customer support: The platform/tool has reliable technical support, responsive customer service, and customized training
 5. Cost-effectiveness: The platform should be cost-effective for the organization, considering factors such as licensing fees, hardware and software requirements

Use of personal devices for TBS is expressly prohibited.

Communication and Training:

The Board shall receive a copy of the policy at the time of periodic review and will have an opportunity to ask clarifying questions during the approval process. Employees and volunteers shall receive notice of the Board's policy review and approval including notice of any substantive changes. The notice will provide a link to the policy located on the HH website.

Staff using TBS/treatment methodologies shall have additional training on this policy, its related procedures and appropriate practices for using a specific medium.

Definitions:

1. **Confidentiality:** Is defined as the assurance that the access to information regarding a client's HHs' services shall be strictly controlled and that any violation is not only a breach of faith but has the potential to threaten the safety and life of the client and their children. Breach of confidentiality in the context of HHs' services is a potential violation of federal law and may compromise the organization's funding.
2. **Informed Consent:** Means providing all relevant information about the nature and consequences of signing a release of information. This includes advising the client to consider how the information may be used once released from HHs and the possibility of the abuser obtaining the information.
3. **Technology-Based Service/Treatment:** The use of telecommunications, videoconferencing or other technology to provide health, mental health or prevention treatment/services. Research

suggests that technology-based services can be effective in improving access and efficiency of service/treatment delivery.

Other Related Materials:

Credentials Primary Source Verification and Background Checks Procedure

Using Technology-Based Service/Treatment Procedure

References/Legal Authority:

[Program Administration: Technology-Based Service Delivery \(PRG-4\), Council on accreditation, 2023.](#)

[Behavioral Telehealth, SC Code of Laws Section 40.75.800, 2023.](#)

[Specialty Clinic Policy and Procedure Toolkit, Partner Telehealth Resource Center, 2023.](#)

[Telehealth Best Practices: Laws and Ethical Codes for Therapists, Good Therapy, 2023.](#)

[Telehealth Screening to Identify Client/Patient for Whom Telehealth is Appropriate, Telehealth.org, 2021.](#)

[Using Technology-Based Therapeutic Tools in Behavioral Health Services, A Treatment Improvement Protocol, SAMHSA, 2015.](#)

Change Log:

Date of Change	Description of Change	Responsible Party
11.2023	This is a new policy.	N. Miller, Prog. Eval. Consultant in consultation with service/tx leadership