



Making Home the Best Place to Age

Technology Service Policy

Contents

Technology Service Policy..... 2

- 1. Purpose..... 3
- 2. Scope 3
- Prohibited Services** 3
- 3. Technology Support Definition..... 4
- 4. Principles & Values..... 4
- 5. Client Consent..... 5
- 6. Confidentiality & Data Protection 5
- 7. Service Delivery Protocol 5
- 8. Limitations and Escalations..... 6
- 9. Training and Standards for Staff..... 6
- 10. Incident Reporting 6
- 11. Review and Updates..... 6

1. Purpose

The purpose of this Technology Service Policy is to outline the guiding principles, scope, responsibilities, and operating procedures for delivering technology support services to clients of *EverHome Concierge*. This policy ensures safe, respectful, and effective use of technology during service delivery, supports client independence, and protects client privacy in alignment with EverHome's mission to enrich seniors' lives at home. ([Everhome Concierge](#))

2. Scope

This policy applies to:

- All EverHome Concierge personnel, contractors, and representatives ("Staff") involved in technology support services.
- Technology assistance provided to clients both in-home and remotely.
- The use of any client personal devices (e.g., smartphones, tablets, laptops) during assistance.
- All tools, applications, and protocols used in the course of delivering technology support.
- Interactions involving client data and digital accounts when requested as part of support.

EverHome Concierge **does not provide and is strictly prohibited from performing** any regulated, medical, or personal care services, including but not limited to:

Prohibited Services

EverHome Concierge team members **will not**:

- Perform **regulated health care acts** under Ontario law
- Provide **medical care, nursing care, or clinical assessments**
- Assist with **personal care**, including:
 - Bathing, showering, toileting, or incontinence care
 - Dressing or grooming requiring physical assistance
- Perform **lifting, transferring, or mobility assistance**, including:
 - Bed transfers
 - Chair or wheelchair transfers
 - Physical support for standing, walking, or stair use
- Administer, manage, organize, or prompt **medications**, including:
 - Giving medications
 - Setting up pill organizers
 - Medication reminders
 - Handle medical equipment or devices

- Provide emergency medical response beyond calling emergency services

Clients requiring these services must engage licensed healthcare or personal support professionals.

-
-

3. Technology Support Definition

"Technology Support" includes assisting clients with:

- Basic device setup and navigation (smartphones, tablets, laptops).
- Connecting to home Wi-Fi networks.
- Using email, video calling, and messaging applications.
- Instructions for launching apps relevant to wellness, communication, or safety.
- Helping clients understand how to use wearable or assistive technologies when appropriate.

Troubleshooting minor device issues that affect the client's ability to use technology safely and effectively. ([Everhome Concierge](#))

This **does not include medical IT support**, network installations requiring third-party professional services, or access to confidential financial or healthcare systems unless explicitly requested and authorized by the client.

4. Principles & Values

The following principles guide all technology support activities:

- a. Client Dignity and Independence
 - Offer assistance in a manner that encourages client autonomy and confidence.
 - Explain steps clearly and empower clients to learn, rather than simply performing tasks for them.
 - b. Respect and Patience
 - Recognize diverse comfort levels with technology and work at a pace suitable for the client.
 - Treat clients with courtesy, patience, and understanding.
 - c. Privacy and Confidentiality
 - Respect client privacy at all times.
 - Do not access personal accounts (email, financial, healthcare) without the client's express consent.
 - Maintain confidentiality of login credentials and other sensitive information.
 - d. Safety and Security Awareness
-

- Encourage the use of strong passwords and safe online behaviors (e.g., avoiding suspicious links).
 - Advise clients to update devices and applications as recommended to maintain security.
-

5. Client Consent

Before performing technology assistance:

1. **Explain the service** — what will be done, how, and why.
2. **Obtain verbal or written consent** to access or interact with devices or accounts.
3. **Clarify limits** (what support can and cannot be provided).
4. **Document consent** in the client's service record.

Clients may withdraw consent at any time without penalty.

6. Confidentiality & Data Protection

- Personnel must never record, share, or store personal login credentials.
 - Staff should use secure networks and avoid public Wi-Fi when accessing client data.
 - EverHome does not store client credentials centrally; all credentials remain with the client unless securely noted with consent.
 - Any software used in support shall be vetted for security and compliance with privacy best practices.
-

7. Service Delivery Protocol

Before Technology Assistance

- Confirm the client's understanding of the task.
- Ensure device battery power is sufficient.
- Ask about accessibility needs (e.g., screen readers, larger text).

During Support

- Perform steps in clear, repeatable language.
- Encourage the client to watch and participate.
- Pause frequently for questions.

After Support

- Provide a summary of what was done.
 - Offer troubleshooting tips.
 - Supply simple step-by-step written guidance if helpful.
 - Ask for client feedback on the experience.
-

8. Limitations and Escalations

EverHome Concierge personnel **will not**:

- Install or configure networks (e.g., routers) beyond basic connectivity assistance.
- Provide advanced computer repairs.
- Diagnose software or hardware failures that require specialist technicians.

For issues beyond basic troubleshooting, assistance may include **referring a qualified technician** upon client request.

9. Training and Standards for Staff

- All staff providing technology support will receive regular training on:
 - Senior-friendly communication techniques.
 - Basic device and app support approaches.
 - Privacy, confidentiality, and consent protocols.
 - Staff shall maintain professionalism and stay updated on common digital tools used by seniors.
-

10. Incident Reporting

- Any breach of this policy or suspected misuse of client data must be reported to a designated supervisor immediately.
 - Document incidents clearly with description, date/time, and actions taken.
-

11. Review and Updates

This policy shall be reviewed **annually** and updated to reflect evolving technology trends, legal requirements, and service practices.
