

**BPD Technology Committee's  
Technology Assessment Checklist for Social Work Practice (Version 2)  
September 2018**

**History:** The BPD Technology Committee created the first version of the Technology Assessment Checklist for Social Work Practice in 2016, using the web-based mapping tool, *MindMeister* (<https://www.mindmeister.com>), with ten social workers contributing their suggestions this first version. After compiling all the ideas from the mapping tool, the list was reviewed by members of the committee, and was presented at BPD's 2017 Annual Conference during the Technology Committee's Board Sponsored Session in New Orleans. Feedback was provided and the next step was to revise the checklist. Here is a link that original document: <https://tinyurl.com/BPDTechChecklist3-2017>.

In 2018, we used an online collaborative process using *Google Docs* to crowd source the next round of revisions to the Technology Assessment List. Below is a list of the individuals who contributed to that process. A sample of the second version was shared at BPD's 2018 Annual Conference during the Technology Committee's Board-Sponsored Session in Atlanta, GA. Attendees reviewed the document for feedback, and the final version is included in this document.

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**Interpretation:** Historically, social workers have been taught to assess the psychosocial well-being of clients in the context of their environment, including relationships with family members, peers, neighbors, and coworkers. With the increasing use of technology in society, it is important for social workers to also consider clients' relationships and comfort with technology. Such assessments could include client strengths, such as access to particular forms of technology and the ability to use technology for family, work, school, social, recreational, and other purposes. In addition, social workers should consider relevant needs, risks, and challenges, such as clients' reluctance to use technology; difficulty affording technology; limited computer knowledge or fluency with technology; and the risk of cyberbullying, electronic identity theft, and other behaviors regarding the use of technology.

This assessment checklist also addresses Standard 2.05 of the NASW Technology Standards for Social Work Practice: Assessing Clients' Relationships with Technology, which reads "When conducting psychosocial assessments with clients, social workers shall consider clients' views about technology and the ways in which they use technology, including strengths, needs, risks, and challenges." The goal of this assessment is to help social workers and other practitioners focus on practical issues of technology use across client systems and life span issues. There are seven sections of this assessment checklist:

- Section I: Access to Social & Digital Technology
- Section II: Digital literacy and Comfort of client to use technology
- Section III: Developmentally-based Considerations for Individuals
- Section IV: Intergenerational/Cultural issues
- Section V: Special Populations
- Section VI: Families
- Section VII: Social Worker Technology Self-Assessment

This checklist is not meant to be comprehensive, and a social worker can you use any or all of these questions, in whatever order works best, when conducting an assessment on the use of technology. When using the questions on this checklist, please consider the following:

- Assess for strengths and needs as well as risks and challenges.
- Not every client will have or be aware of the available technology so you may want ask if they use a type of technology before asking about details (i.e. ask if they use email before asking for an email address).
- Although much research about technology use points to associations between mental distress and technology use, (a) the studies are typically correlational; (b) the effect of the correlation is often weak; and (c) the correlation typically occurs with very high rates of screen time, 5 or more non-work/school related hours.

## Section I: Access to Social & Digital Technology

### General questions

*Note:* Please adapt these questions for different types hardware and software.

- What hardware/devices do you own?
- What hardware/devices do you have access to? Where? When? How frequently?
- What devices do you wish you had access to (i.e. hearing aids, smartphone, laptop)?
- What are the barriers to owning or accessing hardware/devices (i.e. cost, knowledge of how to use, awareness of what is available/possible)?

### Basic Information to obtain about technology ownership and access:

- Hardware Devices available to client (i.e. smartphone, e-readers, computers, etc.):
- Wearable devices
- Assistive technology (i.e. have you ever been prescribed to use/do you use?)
- Software/apps/frequently visited sites used by client
- Internet connection or access available to clients - DSL, Wi-Fi, in-home, and/or library?
- Email Accounts - how many and how used? Email addresses are often required to set-up an account for Electronic Health Records (EHR).
- Social Media Accounts - how many, which ones and how used?
- Apps - how many, which ones and how used?

### General Use of Technology

- Number of hours spent engaged with technology each day; How much screen time per day; per week?
- What reasons do you use technology (i.e. social, financial, entertainment, educational, etc.)?
- For social reasons, what types of relationships (i.e. online dating or relationships, online friendships, online community or group memberships)?
- How would you describe your screen time and/or use of technology (i.e. productive vs. non-productive; problematic vs. non-problematic; passive such web surfing, watching ads, or watching videos vs. active use such as reading, communicating with others; or creating content)? How do others perceive your use?
- How does tech affect mood? What prompts tech use; how do you feel after?
- Is any online activity monitored? By who? How?
- Is any online activity private? Secret?

### Financial Costs of Technology

- Is computer used for financial purposes (online banking, shopping, medication)?
- What is the monthly expenditure for technology?
- How much awareness do members of your family have regarding the financial impact their technology has on the family budget?
- What is your accessibility and ability to access innovative technology?
- What is your financial burden regarding technology?
- Do you understand their monthly phone/internet plan/bill?
- Are you using online payments for any bills, transactions, or online shopping? If so, what sites and how?
- Do you track your subscriptions? Micro-transactions?

- Are other people in or out of your household connected to these accounts?
- Do you share any subscriptions with anyone (i.e. *Netflix*, *Amazon*, etc.)?
- What percent of their spending is on *Amazon*, online shopping, etc. do you know ways to intervene in problematic tech use? Strategies for cutting back or taking breaks?

#### Resources:

- Pew Research Center. (n.d.). Internet & Technology Home Page. Retrieved from <http://www.pewinternet.org/>
- Techopedia. (n.d.). *Techopedia Home Page*. Retrieved from <https://www.techopedia.com/>

## **Section II: Digital Literacy and Comfort of Client**

*Note:* For this section, you are trying to assess a client's level of knowledge and skills about technology as well as their comfort with technology.

- Overall, how competent or comfortable do you feel using technology?
- Have you ever been uncomfortable with something you posted on someone else's social media site? Have you ever been uncomfortable (angry, sad, afraid) of a post someone send you on a social media site or by private message?
- Has technology created any benefits for you?
- Has technology created any problems for you?
- What do you want to learn or areas of where you need direct technical assistance?
- What is your comfort-level with use of technology with practitioner?
- News and other information - Where do you go for info? So you use trusted sites? How do you assess?
- Online help-seeking behaviors (i.e. medical, behavioral, etc) - Where do you go for info? So you use trusted sites? How do you assess? How do you protect identity when you do?
- Identity Theft/Phishing – what do you do to protect your online identity? Do you use specific hardware or software?
- Netiquette - Is the client familiar with netiquette guidelines? How do the practice civility and etiquette in online environments?
- Tech-Mediated Communications/Interventions - Do you want to use tech-mediated communication/interventions? How do you think you would benefit from tech mediated interventions?

#### Resources:

- Belshaw, D. (2014). The Essential Elements of Digital Literacies. Retrieved from <http://digitalliteraci.es/>
- Jenkins, H., Clinton, K., Purushotma, R., Robison, A. J., & Weigel, M. (2009). *Confronting the Challenges of Participatory Culture: Media Education for the 21st Century*. Chicago, IL: MacArthur Foundation. Retrieved from [https://www.macfound.org/media/article\\_pdfs/JENKINS\\_WHITE\\_PAPER.PDF](https://www.macfound.org/media/article_pdfs/JENKINS_WHITE_PAPER.PDF)

### Section III: Developmentally-based Considerations for Individuals

#### Infants, toddlers, and young children:

- How much screen time does the child per day?
- What technology is shared with the child (i.e. caregiver's phone or tablet?)
- What are parents teaching their kids about the internet?
- Do parents actively participate with their children while they are using technology?
- What content, sites, or apps are parents using with their younger children?

#### Elementary school, Tweens, and Teens:

- Texting: With whom, do you have regular group texts? Who do you text one-on-one with the most?
- Social Media: What types of accounts do you have, use and how frequently used (*Instagram, Snapchat, Facebook Messenger, Kik, YouTube, Vine*)? What types of posts, comments or stories on your accounts? What do you post, like, re-post or share? Who do you follow on these social media accounts? If using anonymous posting sites (i.e. *Yik-yak, Whisper, etc.*) assess for potential bullying, mean-girl/boy behavior or older adult posing as a younger person. What are some of the current social expectations about social media use (leaving friends unread, *Snapchat* replies, response time, etc)?
- Music: How do you listen to music? (i.e. *Pandora, Spotify* or *YouTube, etc*)
- Video: Do you watch *Netflix* or other video platforms such as *YouTube* or *Vine*? If so, when and what do you watch? Do you binge watch? What YouTube personalities do you follow? What movie or TV genres are most viewed? Be aware if child is viewing of high-risk content, including sexually-explicit, self-harm, and other that mismatches family values/practices.
- Create Content: Where do you generate content, and what is it about? (i.e. *YouTube* videos).
- Gaming: Which games? Length of gaming time? Online group video gaming? Any impact of daily functioning? What game streams are you watching? Do they participate in a role play game? Are they using micro-transactions or loot crates?
- Safety & Privacy: Have you discussed inappropriate conversations vs. appropriate conversations with online 'friends?' Have they developed safety provisions if they want to meet online friends or potential dating prospects? Are you currently experiencing any stress or discomfort related to social media use (inability to meet social expectations due to lack of access, not understanding social expectations)?
- Parental Involvement: Do parents speak with you about online issues or controversies, especially if you follow the online personality? Where does the phone/tablet/ computer reside during bedtime? Family time?
- School: What are the school's policy on phone use, access to computers, Wi-Fi, social media, etc? How does this promote or hinder technology use by kids? Does the teen have access to phone or other devices that would allow for chat during school and free Wi-Fi? How is technology used for school work?
- Online Dating: Do you use in online dating apps? How many? Which ones? What is your profile like? Assess online dating practices and app use. Some teenagers also use *Snapchat* and within chat communication of gaming apps to date, they also date within role playing games online using the computer and games on *Xbox* etc.

### Adults (19 -64 years of age):

- Work: How is technology used for work activities? What devices are work only devices? Does your profession require technological adaptation over the years? If so, in what era of informational and communication technology did you leave off?
- Family & Friends: What types of technology do their families or friends use? Are they connected to their families or friends on social media? What types? How often do they use it? If they do not connect with them, why? Lack of tech literacy? How aware are you of internet scams and other risk factors? Assess possible isolation and technological disconnectedness.
- Leisure time: How is technology used for leisure activities or socializing?
- Texting: With whom, do you have regular group texts? Who do you text one-on-one with the most?
- Social Media: What types of accounts do you have, use and how frequently used (*Instagram, Snapchat, Facebook Messenger, Kik, YouTube, Vine*)? What types of posts, comments or stories on your accounts? What do you post, like, re-post or share? Who do you follow on these social media accounts? If using anonymous posting sites (i.e. *Yik-yak, Whisper*, etc.) assess for potential bullying, mean-girl/boy behavior or older adult posing as a younger person. What are some of the current social expectations about social media use (leaving friends unread, *Snapchat* replies, response time, etc)?
- Music: How do you listen to music? (i.e. *Pandora, Spotify* or *YouTube*, etc)
- Video: Do you watch *Netflix* or other video platforms such as *YouTube* or *Vine*? If so, when and what do you watch? Do you binge watch? What YouTube personalities do you follow? What movie or TV genres are most viewed? Be aware if child is viewing of high-risk content, including sexually-explicit, self-harm, and other that mismatches family values/practices.
- Create Content: Where do you generate content, and what is it about? (i.e. *YouTube* videos).
- Gaming: Which games? Length of gaming time? Online group video gaming? Any impact of daily functioning? What game streams are you watching? Do they participate in a role play game? Are they using micro-transactions or loot crates?
- Online Dating: Do you use in online dating apps? How many? Which ones? What is your profile like? Assess online dating practices and app use. (i.e. *Tinder* and other dating apps). About a third of romantic relationships now begin online. It is good to know the strengths and risks of various dating websites, whether your clients are using them, and how to assess their knowledge about strengths and risks.
- Safety & Privacy: Have you discussed inappropriate conversations vs. appropriate conversations with online 'friends?' Have they developed safety provisions if they want to meet online friends or potential dating prospects? Are you currently experiencing any stress or discomfort related to social media use (inability to meet social expectations due to lack of access, not understanding social expectations)?

### Elderly (65 years of age and older):

- Leisure time: How is technology used for leisure activities or socializing? How often do you go online? What type of activities do you engage in online?
- Family & Friends: What types of technology do their families or friends use? Are they connected to their families or friends on social media? What types? How often do they use it? If they do not connect with them, why? Lack of tech literacy? How aware are you of internet scams and other risk factors? Assess possible isolation and technological disconnectedness.

- **Texting:** With whom, do you have regular group texts? Who do you text one-on-one with the most?
- **Social Media:** What types of accounts do you have, use and how frequently used (*Instagram, Snapchat, Facebook Messenger, Kik, YouTube, Vine*)? What types of posts, comments or stories on your accounts? What do you post, like, re-post or share? Who do you follow on these social media accounts? If using anonymous posting sites (i.e. *Yik-yak, Whisper*, etc.) assess for potential bullying, mean-girl/boy behavior or older adult posing as a younger person. What are some of the current social expectations about social media use (leaving friends unread, *Snapchat* replies, response time, etc)?
- **Music:** How do you listen to music? (i.e. *Pandora, Spotify* or *YouTube*, etc)
- **Video:** Do you watch *Netflix* or other video platforms such as *YouTube* or *Vine*? If so, when and what do you watch? Do you binge watch? What YouTube personalities do you follow? What movie or TV genres are most viewed? Be aware if child is viewing of high-risk content, including sexually-explicit, self-harm, and other that mismatches family values/practices.
- **Create Content:** Where do you generate content, and what is it about? (i.e. *YouTube* videos).
- **Gaming:** Which games? Length of gaming time? Online group video gaming? Any impact of daily functioning? What game streams are you watching? Do they participate in a role play game? Are they using micro-transactions or loot crates?
- **Online Dating:** Do you use in online dating apps? How many? Which ones? What is your profile like? Assess online dating practices and app use. (i.e. *Tinder* and other dating apps).
- **Safety & Privacy:** Have you discussed inappropriate conversations vs. appropriate conversations with online friends? Have they developed safety provisions if they want to meet online friends or potential dating prospects? Are you currently experiencing any stress or discomfort related to social media use (inability to meet social expectations due to lack of access, not understanding social expectations)?

#### Resources:

- Albion. (n.d.). *Netiquette Home Page -- A Service of Albion.com*. Retrieved from <http://www.albion.com/netiquette/>
- American Academy of Pediatrics. (n.d.). *Media and Children Communication Toolkit*. Retrieved from <https://www.aap.org/en-us/advocacy-and-policy/aap-health-initiatives/pages/media-and-children.aspx>
- Common Sense Media. (n.d.). *Common Sense Media's Home Page*. Retrieved from <https://www.commonsensemedia.org/>
- University of Southern California School of Gerontology. (n.d.). *Designing Technology for the Aging Population [Infographic]*. Retrieved from: <https://gerontology.usc.edu/resources/infographics/designing-technology-for-the-aging-population/>

### **Section IV: Intergenerational/Cultural issues**

- **Communication Preferences:** For this can we say something like, what is your preferred communication style? What about for your family members? Are there any differences? How do you navigate these? How do you and/or your family communicate regarding sensitive issues in your families (i.e. teens texting parents about topics that they can't discuss face-to-face)? What is the communication style/preference for communicating with technology across generations (i.e. texting conversations at the dinner table instead of face-to-face or

- older adults (maybe) prefer face-to-face while (maybe) teens prefer to text)?
- Grief, death & loss Does the client or family have a plan for social media and other digital accounts at the end-of-life? Who has access to account log-on information to access in case of an emergency? How familiar is the client with archiving or legacy account settings with different types of social media? How comfortable is the client or family with sharing private information via social media?
- Social Media: What cultural or personal beliefs encourage or discourage your interaction with social media?
- General Cultural Issues: Are there any cultural factor that affect how you use technology? How that may impact family dynamics? Has technology increased your access to your culture and heritage? If so, how?

#### Resources:

- Singer, J. B. (Producer). (2017, February 19). #109 - Death and Grief in the Digital Age: Interview with Carla Sofka, Ph.D. [Audio Podcast]. *Social Work Podcast*. Retrieved from <http://www.socialworkpodcast.com/2017/02/digital-death.html>

### **Section V: Special Populations**

- Homeless: What are the options for battery life, Wi-Fi access? How willing are you to use device to communicate with service provider? What web-based programs do you use? Libraries available as resource? Welcoming or hostile? Social worker available? Some social workers program phone numbers and addresses of resources directly into the phones/ direct technical assistance and/or set-up connections to a *Google* account to store phone numbers and addresses in case of phone loss or they lose the paper copy.
- Mental Health: What apps do you use to track your mental health? There are many apps that can be used to supplement mental health care (i.e. self-awareness, mindfulness, self-regulation, etc).
- Foster Youth: Who are you allowed to contact, and how? What are the special safety issues? Do foster parents know how to monitor use?
- Clients with limited capacity/developmental disabilities: These clients may require extra support around psychoeducational, protection of personal information, online shopping, dating/sex-related sites, and gambling/addiction.
- Rural Communities: Many rural areas may have many dead spots for making phone calls but can still send and receive text messages for help.
- Online Education: Does the student have access to hardware, software and devices needed to access learning management systems? Is student aware of school's institutional policies, requirements and resources for online education? Does student have access to Wi-Fi?

#### Resources:

- Johnson, E. (2016). *Tech/SW Assessment*. Retrieved from <https://plus.google.com/100511899319175723425/posts/9nwu8RgkAiD>
- Hitchcock, L. I., Sage, M., & Smyth, N. J. (Eds.). (2018). *Technology in social work education: Educators' perspectives on the NASW Technology Standards for Social Work Education and Supervision*. Buffalo, NY: University of Buffalo School of Social Work, State University of New York.

## Section VI: Families

- General perception of technology on family: Where does tech support, where does it create tension/harm/family conflict? A tech infused ecomap? Need direct technical assistance?
- Equal Access to Tech: Do the parents have the same kind of technology that their children have (e.g. Does dad have a flip phone while the teenager has an iPhone 6?)
- Norms: What are the family rules/norms about technology use? How are rules made?
- Who has passwords to media accounts? Do parents know each media account youth use? Is the computer in public/private place? Do parents/caregivers teach netiquette to children?
- Privacy & Monitoring: What privacy settings are used in media accounts, and who supports the understanding of privacy use? What circumstances lead to restriction of use or monitoring? Do children know how to screen for lock specific apps and secret phone/video apps?
- Online Friendships: Does internet friendship ever move to “in real life” sphere (phone number exchange, in person meeting)? How and who is involved?
- Technology used by other resources that influence the family: School, Work, Health Care Providers, Non-Profit agencies, etc.
- Divorce: What is the family plan for communicating? There are communication sites for mediation and high conflict or abuse situational divorces where parents need to communicate such as *Our Family Wizard* (<https://www.ourfamilywizard.com/pro/courts>).

### Resources:

- Belluomini, E. (2013). *Technology Assessments for Families*. Retrieved from <http://www.socialworker.com/api/content/ce3c1470-3b8c-11e3-ade5-1231394043be/>

## Section VII: Social Worker Technology Self-Assessment

- Knowledge & Skills: How knowledgeable are you about the technology that you use in your professional practice (i.e. could you explain privacy settings in *Facebook* to a client)? How familiar are you with online behaviors such as bullying, trolling, binge watching videos, etc? How would you rate your digital literacy skills (i.e. spotting fake news; awareness of and ability to use software, apps, and devices; netiquette; social networking, etc)?
- Technology Use: What technology do you use and how in your social work practice?
- Privacy & Confidentiality: How you protect client confidentiality related to the use of technology (i.e. use of encryption software, HIPAA compliant electronic records, etc)? How do you protect client privacy related to the use of technology? If you have a website, *Facebook* page/group, blog, how do you inform clients about posting, self-identification, and confidentiality/privacy risk?
- Informed Consent: Do you use informed consent with clients about using technology to communicate, interact, etc? If so, how?
- Social Media Policy: What are your social media professional practices? Do you have a social media policy?
- Professional Learning Network: Do you have a professional learning network? How do you stay current about tech trends (i.e. crisis texting services, telehealth, etc)?
- Organizational Context: How does your agency support technology use (i.e. training, provides adequate tech, etc)? Do you have a risk management plan for your technology in place of employment?
- Financial: What type of financial transactions do you use your phone/computer for? How do you track passwords? Do you use a fingerprint for financial transactions?

Resources:

- National Association of Social Workers (NASW). (2017a). *Code of ethics of the National Association of Social Workers*. Washington, DC: NASW Press. Retrieved from <https://www.socialworkers.org/About/Ethics/Code-of-Ethics/Code-of-Ethics-English>
- National Association of Social Workers (NASW). (2017b). *NASW, ASWB, CSWE, & CSWA standards for technology in social work practice*. Washington, DC: NASW Press. Retrieved from [https://www.socialworkers.org/includes/newIncludes/homepage/PRA-BRO-33617.TechStandards\\_FINAL\\_POSTING.pdf](https://www.socialworkers.org/includes/newIncludes/homepage/PRA-BRO-33617.TechStandards_FINAL_POSTING.pdf)
- National Association of Social Workers & Association of Social Work Boards. (2005). *Technology for social work practice*. Retrieved from <https://www.socialworkers.org/practice/standards/NASWTechnologyStandards.pdf>
- University at Buffalo School of Social Work. (n.d.). *Social worker's guide to social media*. Retrieved from <http://socialwork.buffalo.edu/resources/social-media-guide.html> (Includes an infographic and embedded videos).

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