

DIGITAL BEST PRACTICES COMMITTEE

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AGENDA

- Feedback and Recommendations based on survey (AS)
- Digital Ministry Audits (aka Learner File Reviews) (SM)
- Digital Milestones on Basecamp (AP)
- Sample Digital Learner File System Set Up (AP)
- Digital/Virtual Assessment Options (SM)



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Findings Regarding Delivery of Milestones during COVID

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- A small number of agencies used any milestone available.
- Most agencies used only a few milestone that did not require a lot of information being released.

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- Milestones could be delivered via telephone, email, or Teams meeting.
- Milestones that were completed via Teams were shared on screen. Answers were submitted the following ways based on what was easiest for the learner.
 - Write answers on paper, then take a picture, and email to the instructor.
 - Type the answers into an email and send them to the instructor.
 - Type the answers into the chat feature. The instruction would save/print the chat.
- Whichever method was used, the responses were saved/printed as supporting documentation for the file.

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- Pertinent data from the milestone can be retyped as a fillable document. (PDF, Word doc, MS Form) and sent as an exercise.
 - Anything that identified it as a milestone is removed.
 - The document could be password protected.
 - Time limits can be given.

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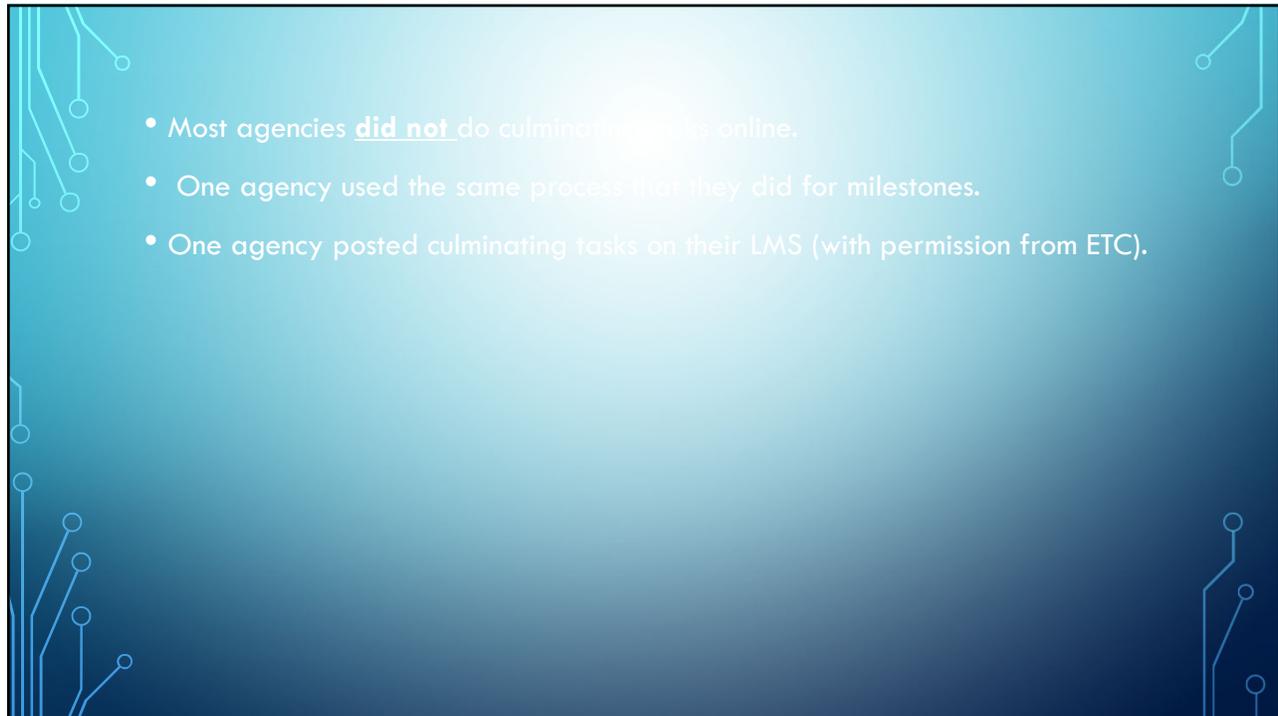
GOOD NEWS

Angela prepared and posted digital Milestones on Basecamp for everyone to access.

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Findings Regarding Culminating Tasks

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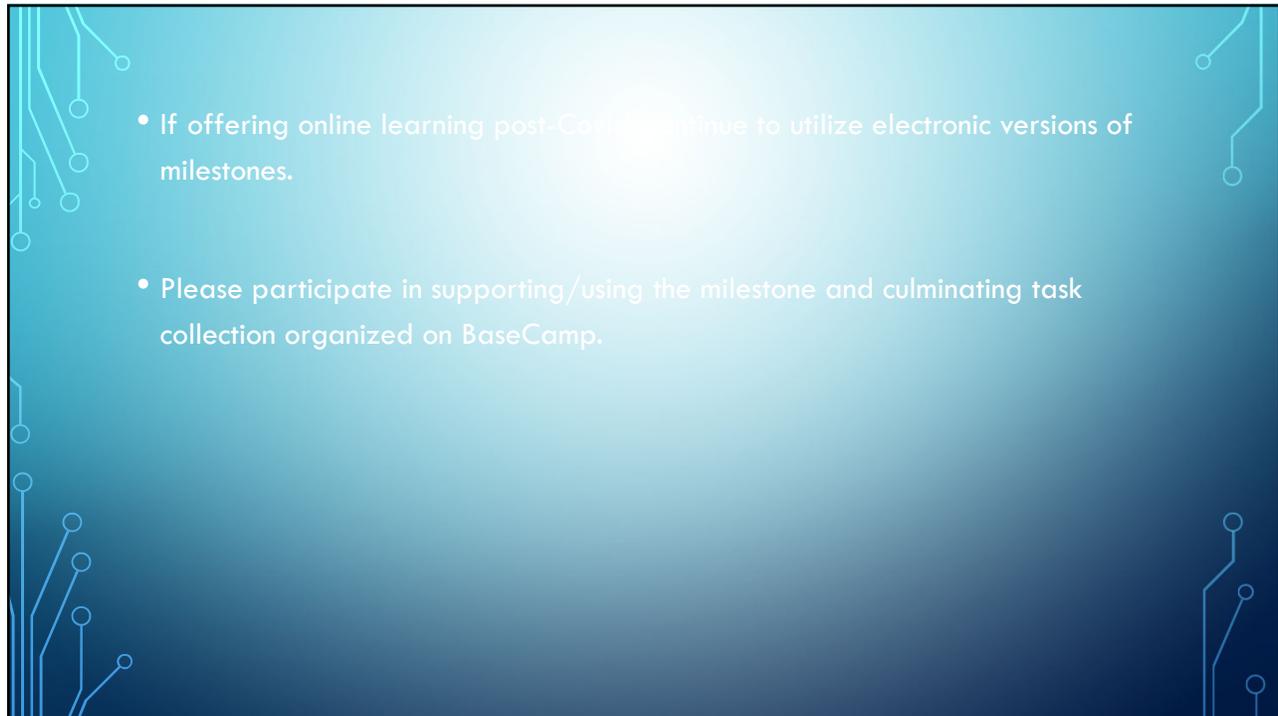
- Most agencies did not do culminating tasks online.
- One agency used the same process that they did for milestones.
- One agency posted culminating tasks on their LMS (with permission from ETC).

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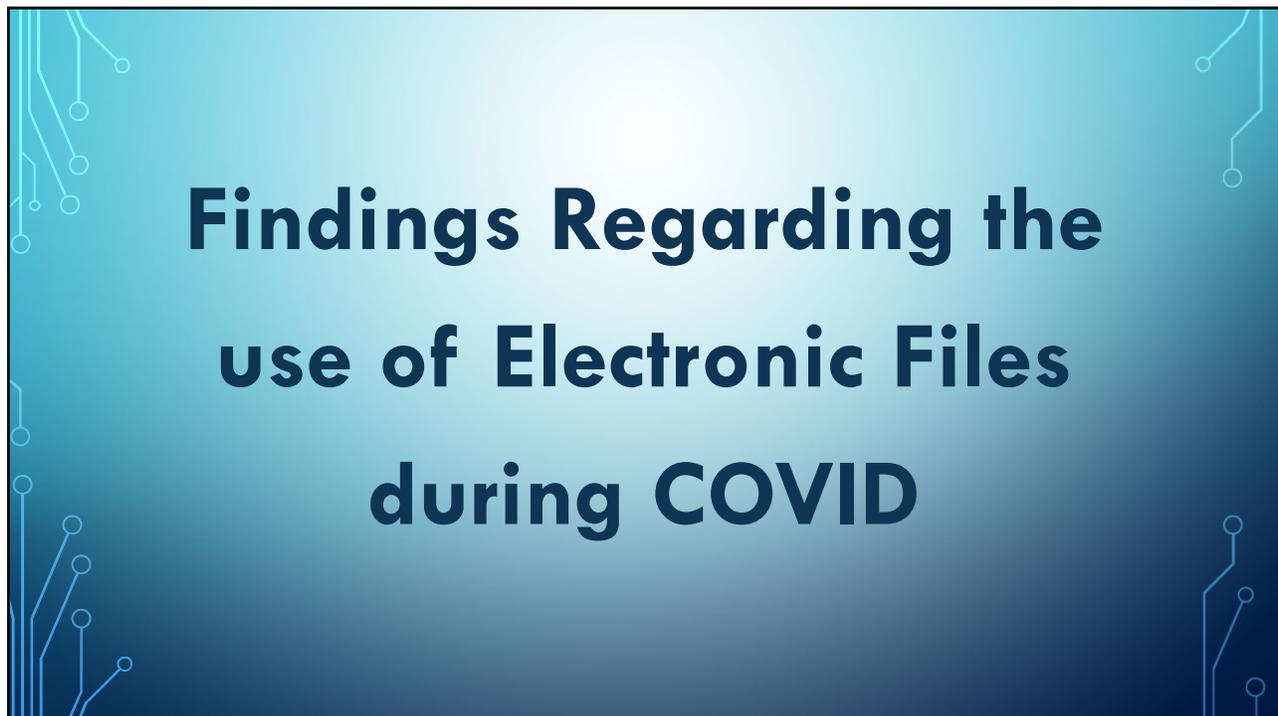
Tips and Best Practices Going Forward

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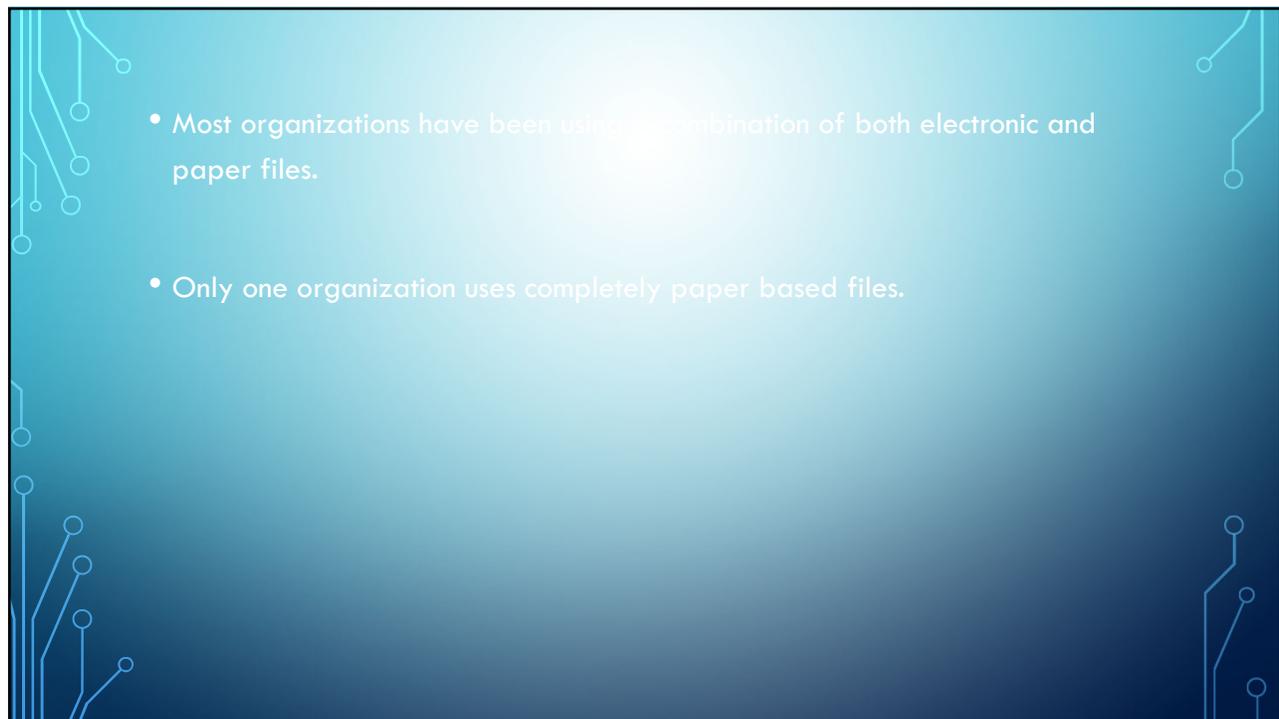
- If offering online learning post-Covid, continue to utilize electronic versions of milestones.
- Please participate in supporting/using the milestone and culminating task collection organized on BaseCamp.

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Findings Regarding the use of Electronic Files during COVID

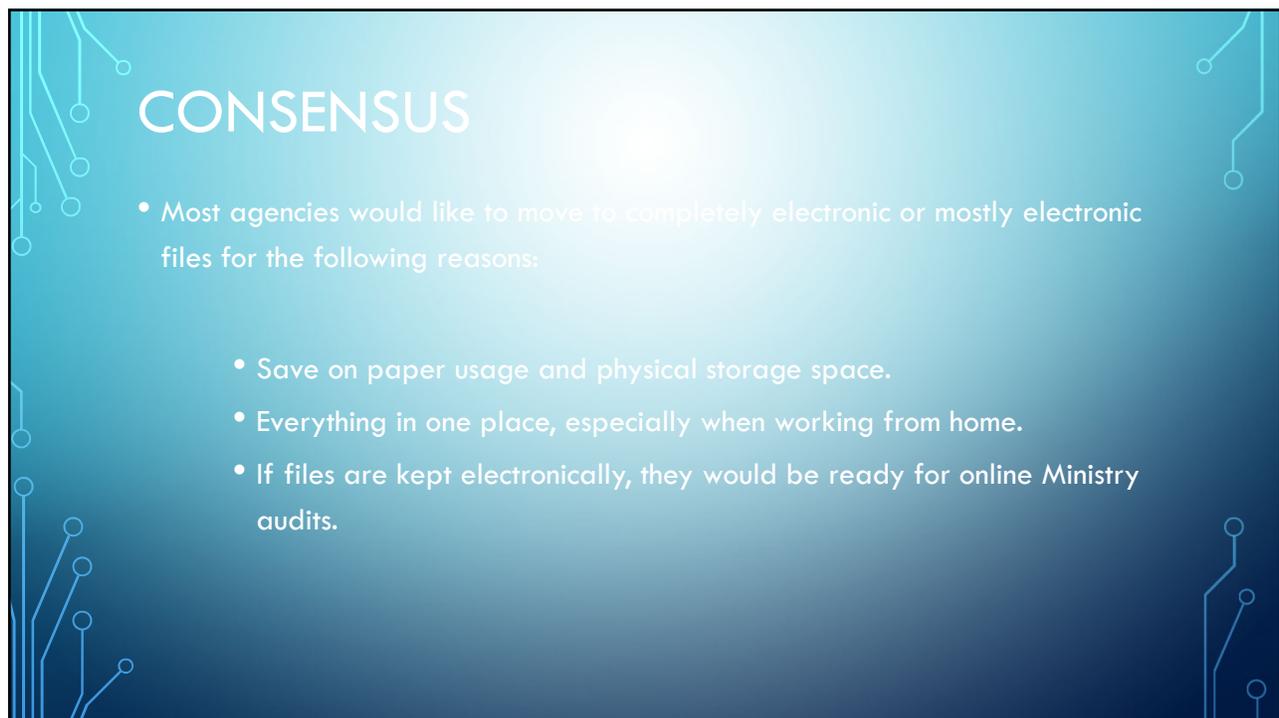
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Slide 13 features a teal-to-blue gradient background with white circuit-like patterns in the corners. The text is centered and presented in a clean, sans-serif font.

- Most organizations have been using a combination of both electronic and paper files.
- Only one organization uses completely paper based files.

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Slide 14 features a teal-to-blue gradient background with white circuit-like patterns in the corners. The word 'CONSENSUS' is prominently displayed at the top left. The text is centered and presented in a clean, sans-serif font.

CONSENSUS

- Most agencies would like to move to completely electronic or mostly electronic files for the following reasons:
 - Save on paper usage and physical storage space.
 - Everything in one place, especially when working from home.
 - If files are kept electronically, they would be ready for online Ministry audits.

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REALITY OF THE SITUATION

- All agencies use some paper based documents. If a full conversion to electronic were achieved, some documents would need to be converted to an electronic version or scanned to make them electronic.

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POTENTIAL ISSUES

- Having access to a scanner and the ability/training to operate it.
- Extra work/time needed to scan.
- Concerns over losing files and the ability to recover lost files.
- Concerns over having a secure file storage system within the agency.
- Creating/managing/organizing electronic files.
- Some learners will not want to complete electronic documents. They will want paper based.

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Tips for Managing Tracking Sheets and Consent Forms

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ELECTRONIC SIGNATURE

- Send an attestation to act as the signature.
- Adobe e-signature allows practitioners to email documents asking learners for their e-signature.
- Documents can be password protected to ensure confidentiality.
- Practitioners will receive an email once the document has been e-signed by the learner.
- Adobe Acrobat Pro DC is \$222.29 annually.

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FREQUENTLY UPDATED FORMS

- Forms that need to be updated potential on a daily basis could be kept in a file or binder while the learner is active.
- Once they are exited from the program the document could be scanned and stored electronically.
- Once stored electronically, the original form could be shredded.

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Tips and Best Practices for Storing and Managing Electronic Files

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SCANNING SUGGESTIONS

- (Free) scanning apps are available for smartphones.
- Example: Genius Scan app uses your camera to scan and then you can easily email the document to yourself or save it directly from your phone into OneDrive, Google Drive, share through AirDrop, etc.
 - This all happens within the app so extra steps like saving the document to your phone, etc. are eliminated.
 - Purchasing the full version gives you additional tools (\$10.99).
- Many photocopiers have a scan and email feature.
- Desktop scanning devices can be purchased. Ex. ScanSnap 300i - approx. \$300

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DIGITAL STORAGE

- Important to Note: Cloud storage services have different default settings for shelf life of documents. You will need to look into whether or not your service can be extended to meet the 7 year document retention requirement.

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CLOUD AND INTERNET SHARING/STORAGE

- Storing and sharing files using MS Teams, OneDrive, and Google Drive are secure.
- Dropbox is also highly secure. However, it is recommended that two-factor verification be set up by users to increase protection at the user end.

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DOCUMENT MANAGEMENT SOFTWARE

- DMS (Document Management Software (eg. MS SharePoint)) are programs that digitally store and organize documents.
- They often have an archival component, so they may be better suited for storing digital documents for longer periods.

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Recovering Deleted Files

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ONE DRIVE

- Deleted files can be recovered or old file versions restored within 30 days of deletion/replacing
- How to: [restore deleted files from the OneDrive recycle bin](#)
- How to: [restore a previous version of a file in OneDrive](#)

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GOOGLE DRIVE

- Deleted files stay in your trash for 30 days (unless you manually empty), after which time they will automatically be permanently deleted.
- How to: [Delete and restore files in Google Drive - Computer - Google Drive Help](#)

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USB FLASH DRIVES

- Because they are small and easy to lose, USBs work better as a means of backing up data, rather than the sole file storage location.
- Make sure there is a secure location to store the USB when not in use.
- USBs are typically less secure than cloud file sharing. However, there are ways to make them more secure:
 - Password protect entire USB: Windows 10 has an app called BitLocker pre-installed to help with this.
 - Encryption - for the tech-savvy only.
 - Purchase an encrypted USB key.

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Tips for Managing Shared Digital Files

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- Develop an organizational structure for the files that will be shared, that all can follow.
- Have a checklist of what should be included in the electronic learner file to help keep everyone on the same page and to train new staff.
- Decide who should be able to access which files (e.g. should all instructors access every learner file, or just the manager and direct instructor?)
- Review who has access to shared files regularly to ensure only current staff have access to learner files.

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