



A resource-sharing community for Canadian HIV and hepatitis C service providers

## **User policy**

### **Summary**

The user policy outlines user types and responsibilities, confidentiality and privacy considerations, registration and member account guidelines, and procedures for ending participation in Sage.

### **1.0 Target audience**

The target audience of Sage is frontline service providers working with or for people living with or affected by HIV or hepatitis C.

As a publicly available resource, content on the Sage website designated as public access can also be freely searched and viewed by any general Internet user, although these users fall beyond Sage's target audience.

### **2.0 User types**

User type determines the level of access a user has to the content and features of Sage. There are two broad user types.

#### **2.1 General user**

General users include anyone who uses Sage without a member account.

General users will be able to:

1. Search and browse the Sage collection and view public access resources.
2. View public access sections of the Sage website.
3. Use public access information-sharing features that do not require an account.

4. Contact Sage contributors about their resources in the collection.
5. Contact the Sage administrators with questions about Sage and its use.

## **2.2 Member**

Members will be required to register and create a member account with a user name and password. Registration is free and membership does not expire.

Members will be able to:

1. Search and browse the Sage collection and view public access and members-only resources.
2. View public access and members-only sections of the Sage website.
3. Use public and members-only information-sharing and resource management features.
4. Upload resources to share in the Sage collection (applies to contributors only).
5. Create affiliated member accounts for individuals within a member's organization (applies to contributing organizations only).
6. Contact Sage contributors about their resources in the collection.
7. Contact the Sage administrators with questions about Sage and its use.
8. Create and manage a member profile.

There are two types of members:

### **i. Contributors**

A contributor should:

1. Be a Canadian organization or individual affiliated with a Canadian organization working with or for people living with or affected by HIV or hepatitis C, or in a related field.
2. Produce information resources related to their work/affiliation that they will add to the Sage collection.

For more information on contributor eligibility, see the contributor policy, and *Registration and member accounts: Contributor accounts* (section 5.1) below.

A contributing organization can create affiliated member accounts for individuals within their organization (e.g., staff or committee members). For the administrative responsibilities of contributing organizations related to affiliated member accounts, see *Registration and member accounts: Affiliated member accounts* (section 5.2) below. Contributing individuals cannot create affiliated member accounts.

## ii. Affiliated members

An affiliated member is a person belonging to an organization that has a contributor account. Affiliated member accounts are available at the discretion of a contributing organization to support their staff, committee members, etc., in their work related to people living with or affected by HIV or hepatitis C. Affiliated member accounts will allow individuals to have independent access to the resources and information-sharing features available to members only without needing to access them through their organization's contributor account. However, affiliated members will not be able to use their affiliated member account to upload resources to the Sage collection.

## 3.0 Responsibilities

As a shared, community-driven space, Sage aims to be a respectful place for the sharing and exchange of resources and information. All Sage users are expected to respect Sage's values statement, policies and procedures and terms of use. Sage policies and procedures include but are not limited to the contributor policy, collection policy, user policy, archival policy and copyright and liabilities policy.

In addition, members are expected to:

1. Maintain an accurate and up-to-date member/contributor profile with current contact information.
2. Safeguard their account password to prevent unauthorized use of their account and annually change their password to improve account security.
3. Bring resources that conflict with Sage's values statement or policies and procedures to the attention of the Sage administrators.

Contributors should also see:

1. The contributor policy for responsibilities related to contributing resources to the Sage collection.

2. *Registration and member accounts: Affiliated member accounts* (section 5.2) below for responsibilities related to the administration of affiliated member accounts.

## 4.0 Privacy and confidentiality

### 4.1 General users

General users do not need to identify themselves in order to search and browse the Sage collection or view public access pages on the Sage website. General users will need to provide an email address if they wish to use Sage services such as contacting the Sage administrators, but this information will not be recorded or shared with third parties.

### 4.2 Members

Members do need to identify themselves when creating a member account. Identifying information includes:

- name
- organization
- position title
- email address
- telephone
- address (this applies to contributors only)

Identifying information and member accounts will be accessible to the Sage administrators for administrative purposes only and will not be shared by the administrators with third parties. Identifying information may continue to be archived on the Sage server even after a member account has been closed, but would not be used by the Sage administrators beyond the administration of Sage, unless there was a legal requirement to do so. See *Registration and member accounts: Sage administrators' access to member accounts* (section 5.3) below for additional information regarding Sage administrators' access to member accounts.

Contributor contact information will automatically be shared on the Sage website to allow users to contact a contributor about their resources.

To foster communication and community interaction, an affiliated member's name, organization and position title will be accessible on their member profile. To participate in members only features, members may need to share contact information with other members.

As a public space, information shared through Sage's information-sharing and resource management features should not be considered private or confidential. However, members should also endeavour to maintain Sage as a safe space for open communication among community members. Members are asked to be respectful of another user's contact information and refrain from sharing it with third parties or using it for inappropriate communications unrelated to Sage or their HIV- and hepatitis C-related work.

## **5.0 Registration and member accounts**

Members will be required to create an account with a user name and password in order to access members-only features.

### **5.1 Contributor accounts**

Contributors may register as an organization or individual. New registrations will be reviewed by the Sage administrators to ensure that they meet the eligibility guidelines outlined in the contributor policy. Registration may be denied if the eligibility criteria is not met.

#### **i. Contributing organizations**

For the purposes of Sage, an organization refers to a coordinated group that is working together to achieve a shared mission. Organizations include but are not exclusive to:

- non-profit organizations
- working groups
- committees
- coalitions
- associations
- hospitals, clinics and community health centres
- governments and government agencies
- academic institutions

An organization's contributor account will be associated with the user name and password of a representative from the organization. The representative will be responsible for:

1. Being the primary contact person for the organization.
2. Approving the organization's new affiliated members and managing affiliated member accounts.
3. Coordinating the organization's resource contributions to the Sage collection.

There is a limit of one contributor account per organization. However, within large organizations separate contributor accounts for individual departments may be considered over a single organization-wide account in situations where:

1. The organization is too large to efficiently coordinate central administration of one account across all departments.
2. HIV- or hepatitis C-related work is not organization-wide making an account of interest to only certain departments.
3. The individual department manages its own publishing activities.
4. The individual department has the autonomy, authority and resources to respond efficiently to the publication and copyright questions of Sage users.

An example of an organization that may benefit from department-specific contributor accounts is a municipal government. A request for a department-specific contributor account should be made directly to the Sage administrators for consideration on a case-by-case basis. Departments within an organization are encouraged to communicate with one another to coordinate their Sage activities where applicable.

## **ii. Contributing individuals**

There is a limit of one contributor account per individual. By creating their own contributor account, individuals are not acting on behalf of their affiliated organization within the Sage environment and should only be submitting resources that they have individual responsibility and copyright for.

The resources submitted by contributing individuals should still be those created in relation to their organizational affiliation as given in *Eligibility* (section 1.0) in the contributor policy. However, resources in which content and copyright are the responsibility of an organization should only be submitted through an organization's contributor account. For example, a doctor at a hospital may wish to upload slides she presented to a community group through her individual contributor account. However, she should not, through her account, share hepatitis C brochures that have been produced by her hospital. Brochures published and distributed by the hospital should be submitted to Sage by the hospital through their own contributor account.

Clear responsibility for resources is essential to effective Sage administration and to ensure Sage users that Sage is a reliable place to access resources. Individuals are asked to maintain communication with their affiliated organization to avoid situations where there is a potential lack of coordination between said individuals and their

organization regarding what contributor accounts have been created and what resources have been added to the Sage collection.

## 5.2 Affiliated member accounts

Affiliated members are associated with the contributing organization that created their account. There is no limit to the number of affiliated member accounts a contributing organization can create. However, contributing organizations are asked to respect the target audience of Sage (see *Target audience* (section 1.0) above) and limit their affiliated member accounts to individuals doing work related to people living with or affected by HIV or hepatitis C. The limitation in part assures contributors that the resources they make available to members only are viewed only by their peers engaged in HIV- or hepatitis C-related work.

Contributing organizations are responsible for the following administrative activities related to their affiliated member accounts:

1. **Screening new affiliated members** – New affiliated member accounts are created at the discretion of the contributing organization and will not be reviewed by the Sage administrators.
2. **Ensuring affiliated members adhere to Sage’s values statement, policies and procedures and terms of use** – The Sage administrators will forward any community concerns regarding inappropriate Sage use by an affiliated member to the contributing organization who created their account. It will then be the contributing organization’s responsibility to use the guidance of Sage’s values statement, policies and procedures and terms of use to ensure the affiliated member better understands their responsibilities as a Sage user, and to conduct any follow-up action if needed. Failure to respond in a timely manner to community concerns regarding an affiliated member may result in the closure of the contributing organization’s account following *Procedures for closing contributor accounts: Requested closure* (section 4.2) in the contributor policy.
3. **Determining if an affiliated member account needs to be closed** – Contributing organizations should have affiliated member accounts closed as needed. The primary reason an affiliated member account would be closed is when an individual ends their association with an organization (e.g., a staff member leaves the organization).

## 5.3 Sage administrators’ access to member accounts

In order to properly address technical problems and follow Sage’s values statement and policies and procedures, the Sage administrators will have access to member accounts.

The following situations, policies and procedures will guide and limit the Sage administrators' access to member accounts:

1. **New member account registration review** – The review of new registrations is a requirement of creating a contributor account. The Sage administrators will not alter member account information during the review, but may request user initiated changes if account registration is incomplete or incorrect. The Sage administrators do not review new affiliated member accounts.
2. **Member account troubleshooting** – If a member requests troubleshooting assistance on a Sage feature accessed through their member account, the Sage administrators will need to access the account to determine the source of the problem and its potential solution. Any changes made to the account in order to correct the problem will be communicated to the member.
3. **Blocking accounts of members who do not respect Sage's values statement, policies and procedures or terms of use** – The Sage administrators may block contributor accounts following *Procedures for closing contributor accounts: Requested closure* (section 4.2) in the contributor policy as needed.
4. **Requested and immediate account closures** – The Sage administrators will have full access to a contributor's account during and following a requested or immediate account closure to complete administrative changes to the contributor profile or resource records as needed. See *Procedures for closing contributor accounts: Requested closure* (section 4.2) and *Immediate closure* (section 4.3) in the contributor policy for additional information.
5. **Removal of uploaded material that does not respect Sage's values statement or policies and procedures** – The Sage administrators may remove or block resources following *Procedures for removing resources from Sage: Requested removal* (section 6.2) in the collection policy as needed.
6. **Resource record editing** – A resource record for an uploaded resource may be edited as needed to facilitate the item's discoverability within the Sage collection (e.g., moving a resource to a more representative subject category).

## 6.0 Procedures for ending participation in Sage

### 6.1 Contributors

See *Procedures for closing contributor accounts* (section 4.0) in the contributor policy for procedures on the closing of contributor accounts.

## **6.2 Affiliated members**

Contributing organizations are responsible for ensuring affiliated member accounts are closed as needed. See also *Registration and member accounts: Affiliated member accounts* (section 5.2) above.

If a contributing organization closes their contributor account, all of the affiliated member accounts associated with the organization's account will also be closed at the same time. It is the organization's responsibility to inform affiliated members of their impending account closure.