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 resources.

2. View public access sections of the Sage website.

3. Contact Sage contributors about their resources in the collection.

4. Contact the Sage administrator 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 resources.

2. View public access and members-only sections of the Sage website.

3. Upload resources to share in the Sage collection.

4. Contact Sage contributors about their resources in the collection.

5. Contact the Sage administrators with questions about Sage and its use.

6. Create and manage a member profile.

Member eligibility

A Sage member 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. See *Registration and member accounts: Organizations* (section 5.1) below for the definition of an organization.

2. Produce information resources related to their work/affiliation that they will add to the Sage collection.

3. Complete the registration process to become a contributor as outlined in the user policy.

4. Agree to respect Sage's values statement, policies and procedures and terms of use.

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 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. For organizations, this includes designating a current contact person to oversee the group's Sage responsibilities.

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.

4. Submit appropriate resources that they would like to share in the Sage collection. Contributors must own the copyright of the resources that they add to Sage and have the authority to manage copyright permission requests from users. See the copyright and liabilities policy for more information.

5. Maintain records for their resources in the Sage collection that accurately describe the resources' content and publication details.

6. Replace resources in obsolete digital formats with a version of the resource in a current digital format if available.

7. Respond to questions and requests from Sage users in a timely manner.

8. Participate in requests for feedback and respond to changes in procedures or standards as they are identified by the Sage administrator.

9. Contribute to the maintenance of Sage as a respectful place for the sharing and exchange of resources and information.

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 administrator, 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 organizations only)

Identifying information and member accounts will be accessible to the Sage administrator for administrative purposes only and will not be shared by the administrator 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 administrator beyond the administration of Sage, unless there was a legal requirement to do so. See *Registration and member accounts: Sage administrator's access to member accounts* (section 5.3) below for additional information regarding Sage administrator's 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.

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.

Members may register as an organization or individual. New registrations will be reviewed by the Sage administrator to ensure that they meet the eligibility guidelines outlined in *Member* (section 2.2) above. Registration may be denied if the eligibility criteria is not met.

5.1 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 member 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. Coordinating the organization's resource contributions to the Sage collection.

There is a limit of one member account per organization. However, within large organizations separate 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 member accounts is a municipal government. A request for a department-specific account should be made directly to the Sage administrator 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.

5.2 Individuals

There is a limit of one member account per individual. By creating their own member 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 individuals should still be those created in relation to their organizational affiliation as given in *Member* (section 2.2) above. However, resources in which content and copyright are the responsibility of an organization should only be submitted through an organization's member account. For example, a doctor at a hospital may wish to upload slides she presented to a community group through her individual member 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 member 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 member accounts have been created and what resources have been added to the Sage collection.

5.3 Sage administrator's access to member accounts

In order to properly address technical problems and follow Sage's values statement and policies and procedures, the Sage administrator will have access to member accounts. The following situations, policies and procedures will guide and limit the Sage administrator's access to member accounts:

1. **New member account registration review** – The review of new registrations is a requirement of creating a member account. The Sage administrator will not alter member account information during the review, but may request user initiated changes if account registration is incomplete or incorrect.

2. **Member account troubleshooting** – If a member requests troubleshooting assistance on a Sage feature accessed through their member account, the Sage administrator 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 administrator may block member accounts following *Procedures for ending participation in Sage: Requested closure* (section 6.2) below as needed.

4. **Requested and immediate account closures** – The Sage administrators will have full access to a member'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 ending participation in Sage: Requested closure* (section 6.2) and *Immediate closure* (section 6.3) below for additional information.

5. **Removal of uploaded material that does not respect Sage's values statement or policies and procedures** – The Sage administrator 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

By closing a member account, an organization or individual is ending active participation in Sage. A closed account will no longer be accessible to the account owner and will no longer be visible to other Sage users through the Sage website. However, the account may remain archived on the Sage server, or may remain visible through the Sage website if the departing member's resources are retained within Sage.

An account may be closed voluntarily by the member, or involuntarily, under certain circumstances by the Sage administrator.

6.1 Voluntary closure

Members can choose to close their account at any time. Among other reasons, accounts may close because an organization closes down, merges or was time-limited.

Members should inform the Sage administrator of their intention to close their account at their earliest convenience. The departing member and the Sage administrator will jointly decide upon an exact account closing date that is manageable by the departing member.

It will be the member's responsibility to implement one or a combination of the following options for managing their Sage resources after discussing their management preferences with the Sage administrator:

1. **Remove resources from Sage.**

   Members can choose to remove all of their uploaded resources from Sage. Removed resources may continue to be archived on the Sage server, but will no longer be accessible to Sage users through the Sage website.

2. **Retain resources in Sage by designating a substitute contributor.**

   Members can choose to retain their existing resources in Sage by transferring the responsibility for their resources to an eligible substitute contributor. An example of a substitute contributor could be the new organization formed by the merger of the original contributor and other organizations, or a member organization assuming responsibility for resources following the end of a working group or committee.

   Substitute contributors should meet the member eligibility requirements given in *Member* (section 2.2) above. Substitute contributors should also be prepared to manage the resources transferred to their care as outlined in Sage's policies and procedures.

3. **Retain resources in Sage without designating a substitute contributor.**

   Members can choose to retain their existing resources in Sage without transferring responsibility for their resources to a substitute contributor.

   Their contributor profile will also remain visible on the Sage website to indicate they still have resources within Sage. Before their account is closed, members should modify their contributor profile to indicate the change in their member status which includes providing clear instructions to users pursuing copyright requests.

6.2 Requested closure

A member may be asked to end their participation in Sage if they do not respect Sage's values statement, policies and procedures or terms of use. Policies and procedures include but are not limited to the collection policy, user policy, archival policy and copyright and liabilities policy.

A requested closure for can result from either:

1. Inability to meet the member eligibility criteria in the user policy as determined during the new registration review.

2. Inappropriate contributor activities, which include activities related to the upload and sharing of resources.

3. Inappropriate user activities, which include activities related to the use and access of other members' uploaded resources and to the use of Sage's interactive information-sharing and resource management features.

A member's conflict with Sage's values statement or policies and procedures may be directly identified by the Sage administrator or indirectly identified by the Sage administrator through the report of another Sage user.

A new member who does not meet the eligibility criteria in the user policy will have their account closed at the discretion of the Sage administrator. Otherwise, the decision to close a member account will be a cumulative process that will provide a member with an opportunity to avoid an account closure by addressing outstanding issues. The following cumulative steps will be followed:

1. The member will be given written notice from the Sage administrator advising them of the values, policies and procedures and/or terms of use that they are in conflict with.

2. Members will have one week from the date of the written notice to respond to and address the outlined concern. If the response resolves the conflict to the satisfaction of the Sage administrator, no further steps will be taken by the administrator.

3. The Sage administrator will give due consideration to the response of members. However, if the response does not resolve the conflict in a timely manner to the satisfaction of the Sage administrator, the member's account will be closed by the administrator.

4. If no response is received after one week, the member's account will be blocked until they forward a response to the Sage administrator. A blocked account will still be visible on the Sage website to other Sage users, but will no longer be accessible to the account owner.

5. If no response is received after 30 days from the date of the written notice, a member's account will be closed by the Sage administrator.

6. If a member has had two different conflict notices on two separate occasions, on the identification of a third potential conflict with Sage's values statement, policies and procedures or terms of use, the member's account will be immediately closed following *Procedures for ending participation in Sage: Immediate closure* (section 6.3) below. There will be no opportunity for the member to present a written response to address a third conflict.

If an account is closed, members will have one week following the closing of their account to request that their resources be removed from Sage. If members do not make this request, the Sage administrator may choose at their discretion to retain some or all of the member's resources in Sage. These retained resources will remain accessible to the public, as will their contributor profile, which will be amended by the Sage administrator to reflect the end of the contributor's active participation in Sage.

A member whose account has been closed by the Sage administrator may reapply for Sage membership after one year. A new membership may be allowed at the discretion of the Sage administrator.

6.3 Immediate closure

As per the terms of use, the Sage administrator reserves the right to close an account without following the *Procedures for ending participation in Sage: Requested closure* (section 6.2) above if the member's conflict with Sage's values statement, policies and procedures or terms of use is severe enough to warrant immediate account closure. A severe conflict may include, but is not limited to:

1. A disregard for Sage's values statement that results in activity within Sage that is highly offensive or disrespectful to other Sage users.

2. A violation of copyright law through illegal use of copyrighted material that is shared through Sage.

After the account is closed, members will have one week following the closure to request that their resources be removed from Sage. If members do not make this request, the Sage administrator may choose at their discretion to retain some or all of the member's resources in Sage. These retained resources will remain accessible to the public, as will their contributor profile, which will be amended by the Sage administrator to reflect the end of the member's active participation in Sage.

A member whose account has been closed by the Sage administrator may reapply for Sage membership after one year. A new membership may be allowed at the discretion of the Sage administrator.