

Remote Assistance Policy (Windows)

Remote Assistance is a Microsoft tool that enables a technician to “take control” of a client computer – as if the technician were actually at the client’s desk. It is important to state that by using these tools, the technician has access to all data on that computer, again, as if the technician were physically there. This document outlines the policies and procedures for Help Desk technicians regarding Remote Assistance, and serves to protect both the client and the technician.

Overview

The Help Desk cannot use this tool for remote observation or control without the community member first requesting assistance. The purpose of this tool is solely to provide user-initiated assistance on a Windows computer.

Authorization, Confirmation and Documentation

- Before initiating any Remote Assistance session the technician must get verbal authorization from the client. After that, the tech needs the client’s computer name or IP address to initiate the session.
- Once the technician initiates the “Offer to Help” the client must click to accept the offer. At this point, the technician has **view only** access to the client computer.
- In order for the technician to **control** the client computer the technician must request control and the client must grant it.
- All technical activity and written conversation are recorded in a log. The technician will use the chat function to communicate with the client during the entire connection. At the end of the session the technician will copy the log and paste it into the work order to maintain a permanent record of the interaction.

Accountability / Confidentiality

Since the technician will observe the client’s actions on the computer or interact directly with the computer itself, it is imperative that Help Desk staff be mindful of the client’s privacy and the Confidentiality Agreement each of us has signed.

To maintain Technology staff accountability and to protect the technician from accusations of impropriety regarding Simmons data the entire log must be attached to the work order for a request for remote assistance; every completed work order for remote assistance must have the log of the interaction attached.

Before initiating the Remote Assistance session, the user should be reminded that you (the technician) will be observing their desktop and that you may ask to take control of the mouse and keyboard. You must adhere to policy and limit your actions solely to resolving the user’s issue. The user should have the same expectation of privacy as if you were “desk-side,” actually touching the computer.