

TECHNOLOGY PLAN · FY 2026-2027

Cascades of Tucson Technology Plan

A living action document: for each area of the facility's technology, what has been done and what is planned, with an owner, cost, target, and completion date for every action. Prepared with Az Computer Guru. Reviewed and updated at least annually.

PLAN OWNER	PREPARED WITH	PLAN PERIOD	ADOPTED BY / DATE	NEXT ANNUAL REVIEW
Cascades of Tucson — Administrator (Ashley Jensen)	Az Computer Guru	FY 2026-2027	at adoption	adoption + 12 months
STANDARD REFERENCE				
CARF Technology and System Plan, Aging Services Standards Manual (Section 1, "CARF Plans") — manual edition confirmed at adoption				

BASIS OF THIS PLAN

This plan is based on the needs of the people Cascades serves and the people who serve them. **Persons served:** resident safety (Helpany fall/motion sensors with no camera and no microphone), reliable building-wide WiFi for residents and families, and protection of resident health records. **Personnel:** dependable workstations, one sign-on to the clinical record, and secure access that follows staff roles. **Other stakeholders:** families (connectivity and privacy), regulators (HIPAA safeguards), and vendors (managed under Business Associate Agreements).

Technology priorities align with Cascades' strategic goals: resident safety first (safety sensors, proven power-outage recovery), regulatory standing (HIPAA safeguards, CARF conformance, auditable records), and efficient operations (modern workstations, single sign-on, and a sanctioned analytics path for leadership).

THE EIGHT AREAS

01 Hardware

DONE

- Full managed network deployed: UniFi with **77 access points and 12 managed switches**; business firewall with dual internet connections and automatic failover.
- Server storage verified healthy; enterprise SSDs purchased for a planned upgrade.
- Windows Pro upgrades completed on nearly all workstations for domain readiness.

TO DO

ACTION	OWNER	COST	TARGET	COMPLETED
Install the purchased enterprise SSDs (scheduled window)	ACG	purchased	30-60 days	
Replace workstations marked for replacement (list below, 5 + spare)	ACG	~\$700-950 ea	60-90 days	
Scope and quote a server refresh project	ACG + Cascades	formal quote	90 days	
Bring remaining switch ports up to full gigabit speed	ACG	labor	90 days	

WORKSTATIONS MARKED FOR REPLACEMENT

MACHINE	USER / ROLE	PLAN
DESKTOP-TRCIEJA	Lupe Sanchez	Replace (end of life)
ASSISTMAN-PC	Meredith Kuhn	Replace (2015-era processor, cannot run Windows 11)
MDIRECTOR-PC	Shelby Trozzi (MC Director)	Replace (insufficient memory)
MEMRECEPT-PC	Memory Care front desk	Replace (oldest machine in the fleet)
Spare unit	New hire	Deploy spare
CHEF-PC	Culinary	Replace

02 Software

DONE

- Microsoft 365 Business Premium across the organization (45 seats enabled).
- ALIS clinical record connected to company sign-in (**single sign-on live**).
- Domain migration underway: about half of staff PCs on the company domain with department structure and drive mapping built.

TO DO

ACTION	OWNER	COST	TARGET	COMPLETED
Move office staff off the suspended legacy Microsoft 365 license onto supported licenses; full Office only where needed, lighter licenses elsewhere	ACG	new licensing, ~\$375-575/mo	30 days	
Complete staff domain migration + department drives	ACG	labor	60-90 days	
Final Windows Pro upgrade (1 deferred device)	ACG	~\$99	next window	
Retire the per-PC Synology sync client as machines migrate	ACG	labor	with migration	
Plan the move of department files and team collaboration to SharePoint and Teams (Microsoft 365) — role-based access, audit logging, and retention that strengthen HIPAA compliance	ACG + Cascades	included in Microsoft 365 licensing	90 days, then phased	

03 Security (sensitive data / HIPAA)

DONE

- Multi-factor sign-in for all staff; identity-based conditional access live.
- Caregiver accounts restricted to the building network (**credentials unusable off-site**), live since July 1, 2026.
- Auto-lock and auto-sign-out policy on shared care devices.
- Segmented network: voice isolated, per-room isolation, resident devices separated.
- Email authentication (SPF, DKIM, DMARC) enforced.

TO DO

ACTION	OWNER	COST	TARGET	COMPLETED
Create emergency break-glass admin accounts with hardware security keys	ACG	~\$110 keys	30 days	
Enforce the caregiver device allow-list (final enforcement phase)	ACG	labor	30-60 days	
Limit trusted-network sign-in to approved devices (next enforcement phase)	ACG	labor	30-60 days	
Enable file-access audit logging with 90-day / 6-year retention	ACG	~\$50-120/mo	60-90 days	
Formalize a same-day offboarding checklist	Cascades HR + ACG	none	30 days, standing	
Package the dated security risk assessment	ACG	labor	60 days	

04 Confidentiality

DONE

- PHI access limited by role and security group; single sign-on to the clinical record.
- Shared care devices auto-lock; resident and voice traffic isolated on the network.

TO DO

ACTION	OWNER	COST	TARGET	COMPLETED
Complete the Business Associate Agreement inventory (every vendor touching PHI)	Cascades + ACG	none	60 days	
Move ALIS fully to single sign-on (retire the separate native login)	ACG	labor	60 days	
Enable encryption on the resident-data file share	ACG	labor	60-90 days	
Maintain a one-page contract / renewal / BAA tracker	Cascades + ACG	none	90 days, standing	

05

Backup

DONE

- **The server is backed up.** The Synology NAS syncs its data to the server, and the server is backed up online (off-site) with daily incrementals, verified running.
- Firewall and network configuration backed up.

TO DO

ACTION	OWNER	COST	TARGET	COMPLETED
Repurpose the Synology NAS as the onsite backup for the server (with off-site backup continuing)	ACG	labor	60-90 days	
Run and document a test restore	ACG	labor	90 days	
Confirm and document the retention policy	ACG	none	60 days	

06

Assistive technology (persons served)

DONE

- Helpany "Paul" resident-safety sensors: ceiling radar fall and motion detection with **no camera and no microphone**, rolling out floor by floor.
- Building-wide WiFi supporting resident and family connectivity.

TO DO

ACTION	OWNER	COST	TARGET	COMPLETED
Complete the Helpany rollout; move sensors to their own protected network segment	Helpany + ACG	vendor + labor	90 days	
Inventory all resident-facing technology (nurse-call / pendants, assistive listening, resident WiFi for telehealth) into this plan	Cascades + ACG	none	next review	

07

Disaster recovery & continuity

DONE

- Documented, proven power-outage procedure: scripted clean shutdown of core systems and **verified clean recovery** (exercised June 2026).
- UPS battery backup installed on core equipment and all network switches; off-site backup running.

TO DO

ACTION	OWNER	COST	TARGET	COMPLETED
Write the formal disaster-recovery / business-continuity plan with recovery-time targets	ACG	labor	90 days	
Documented restore test (with area 5)	ACG	labor	90 days	
Server redundancy (pairs with the server refresh project)	ACG + Cascades	project quote	FY project	

08

Virus & threat protection

DONE

- Managed endpoint detection & response (EDR) on every managed, enrolled device (35), **including the main server** (verified live July 2026).
- Microsoft Defender and Exchange Online Protection on email; managed monitoring and patching on all devices.
- Legacy agents from the previous IT provider removed from the server.

TO DO

ACTION	OWNER	COST	TARGET	COMPLETED
Remove remaining legacy agents: DESKTOP-TRCIEJA (retires with its replacement); finish console cleanup	ACG	labor	30-60 days	
Standing coverage audit: every device reporting into managed security	ACG	none	quarterly	

SUPPLEMENTARY AREAS

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Communication technology

Done: voice system consolidated onto an isolated voice network (37 devices); WiFi optimized building-wide; email authentication enforced.

To do: dedicated 5 GHz network for phones and Helpany sensors (improves call reliability); replace the Bistro phone; voice quality-of-service; then the supervised move to next-generation WiFi (WPA3 / 6 GHz). Owner: ACG + Vertical + Helpany; 90 days.

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Services purchased / contracted

Managed IT (ACG, prepaid block), Microsoft 365, ALIS (Medtelligent), hosted voice (Vertical), dual-WAN internet (Cox), online backup, firewall & network (Netgate / UniFi), managed security, resident safety sensors (Helpany), plus line-of-business software.

To do: the renewal / BAA tracker (area 4) becomes the single register for all vendors.

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Use of AI

To do: adopt an AI acceptable-use policy for staff (30 days); evaluate Microsoft 365 Copilot under HIPAA guardrails; build the cross-system KPI dashboard (ALIS, QuickBooks, Bill.com, Relias, CRM, TELS, Focus HR) as the sanctioned analytics path: Phase 1 scheduled exports to SharePoint and Power BI, Phase 2 automated data feeds.

Cascades of Tucson's technology plan, prepared with Az Computer Guru. Reviewed at least annually by Cascades leadership; updated as projects complete. Confidential to Cascades of Tucson. Revision: initial draft, July 15, 2026.

PREPAID SUPPORT BALANCE

37.5 hrs

AS OF JUL 10, 2026