

Te Whatu Ora Health New Zealand Hauora a Toi Bay of Plenty	HEALTH RECORD - EMAIL & TEXT MESSAGING COMMUNICATION STANDARDS	Policy 2.5.2 Protocol 10
HEALTH RECORD PROTOCOL		

PURPOSE

It is the Te Whatu Ora – Health New Zealand Hauora a Toi Bay of Plenty’s intent that email and cellphone use, including text communication (texting) is conducted and documented in a manner that maintains tāngata whai ora / service user’s rights to privacy and confidentiality while complying with health care delivery standards, including clinical documentation standards.

OBJECTIVE

To facilitate the effective, efficient and safe use of new electronic technologies such as cellphones, text communication (texting) and email by staff as a mechanism for communication with tāngata whai ora / service users.

SCOPE

These guidelines refer to electronic communication between Te Whatu Ora staff and tāngata whai ora / service users / their nominated representative / family / whānau member.

STANDARDS TO BE MET

1. Electronic Communication

- 1.1. The intention to engage with tāngata whai ora / service users using electronic communications of whatever type and on whatever approved devices, should commence with a discussion around what information can safely be transmitted, and agreement as to what information the electronic communication can be used for (e.g. text and photos).
- 1.2. As electronic devices are often shared between family / whānau members staff should check and confirm with the tāngata whai ora / service user that they understand and accept that the communication may be seen by others.

2. Email Communication

- 2.1. Emails to verified tāngata whai ora / service user email addresses recorded in the patient management system will only be sent using a Te Whatu Ora Hauora a Toi Bay of Plenty login on either a Te Whatu Ora Hauora a Toi Bay of Plenty asset or approved device.
- 2.2. If the tāngata whai ora / service user email address is not recorded as verified in the patient management system, but email communication is required, a test email followed by a phone call should be made before any formal communication by email commences
- 2.3. Email communications are legal clinical documents and form part of the tāngata whai ora / service user’s health record which may be requested to be provided / viewed by the tāngata whai ora / service user and / or a third party. Emails sent to tāngata whai ora / service users must include:
 - a) Date
 - b) Tāngata whai ora / service user’s name

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- c) NHI
 - d) Staff member's name / signature and designation
 - e) Content of the communication whether providing medical advice and / or specifying details of appointment etc.
- 2.4. The body of the email must meet clinical documentation standards policy 2.5.2 P2 Health Records Content and Structure
 - 2.5. All email communication complies with the Code of Health and Disability Services Consumers' Rights 1996 and the Health Information Privacy Code 2020.
 - 2.6. Information should only be emailed or sent electronically when the means of transmission is secure and preserves the quality of the information (including images).
 - 2.7. Ensure that there is staff agreement to and tāngata whai ora / service user consent for the use of e-mail. This will be discussed with the tāngata whai ora / service user and documented in the health record. In the absence of consent email will not be used as an avenue for communication.
 - 2.8. When email communication is chosen by the tāngata whai ora / service user as the preferred communication method, any limits on its use will be determined and communicated prior to using the emails. For example the tāngata whai ora / service user will be advised not to use email if urgent advice is required.
 - 2.9. Staff members need to consider issues of privacy, security and the sensitivity of health information whenever they correspond by email with tāngata whai ora / service users / family members.
 - 2.10. Double-checking all "To" fields prior to sending messages.
 - 2.11. Electronic and / or paper copies of e-mailed clinical communications with tāngata whai ora / service users must be retained and held on the tāngata whai ora / service user's health record. Emails relating to investigations of complaints or incidents will be uploaded to the appropriate incident record modules.

3. Text Communication

- 3.1. Text messages to tāngata whai ora / service users will be sent from Te Whatu Ora Hauora a Toi Bay of Plenty approved cellphones or using approved computer-generated text applications.
- 3.2. Text messages to tāngata whai ora / service users will be for administrative matters e.g. appointment scheduling and non-urgent clinical matters e.g. lab results and ongoing welfare checks. Any clinical information is to be kept to a minimum.
- 3.3. Abbreviations commonly used in text messages should not be used unless they are widely known abbreviations.
- 3.4. If a staff member uses text messaging to communicate with a tāngata whai ora / service user, they should establish that text communication is both private and safe with limits on use, availability and timeliness of reply:
 - a) Verify that the tāngata whai ora / service user's cellphone number is correct by placing a phone call to the cell-phone number prior to the first text and confirming the identity of the intended recipient.

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- b) Advise the tāngata whai ora / service user of any limits on its use. For example the person should be advised not to text if urgent advice is required, or contact is required after standard office hours.
- 3.5. If a staff member receives a text communication from a tāngata whai ora / service user that indicates or is explicitly a message of concern, the staff member will at the first practicable opportunity, phone the tāngata whai ora / service user to clarify their situation
- 3.6. Staff members using text communication with tāngata whai ora / service users should make them aware when they are unavailable for periods of time due to leave / sickness and provide an alternative contact in case of emergency.
- 3.7. Staff members must maintain a record of all text communication to and from tāngata whai ora / service users documented as per policy 2.5.2 P2 Health Records Content and Structure.
- 3.8. Text messages should be recorded verbatim in the tāngata whai ora / service user's health record and staff should not delete any text messages either received or sent until they have been documented in the tāngata whai ora / service user's health record. Where the content of any message is of concern or relates to an incident or complaint, the message in its raw state (no changes or corrections made to the text) should be downloaded or emailed to the staff member for adding to the health record to remove any possible ambiguity and to ensure that the initial message has not been changed in any way in the process of transfer from the device to the health record.

REFERENCES

- American Medical Association (AMA) Guidelines for Physician-Consumer Electronic Communications
- Code of Health and Disability Services Consumers' Rights 1996
- Health Information Privacy Code 2020
- Medical Council of New Zealand. Statement on use of the internet and electronic communication. June 2021
- Medicines Regulations 1984

ASSOCIATED DOCUMENTS

- Te Whatu Ora Hauora a Toi Bay of Plenty policy 2.6.2 protocol 1 Email usage
- Te Whatu Ora Hauora a Toi Bay of Plenty policy 2.5.2 protocol 1 Health Records Standards
- Te Whatu Ora Hauora a Toi Bay of Plenty policy 2.5.2 protocol 2 Health Records Content and Structure
- Te Whatu Ora Hauora a Toi Bay of Plenty policy 1.3.1 Consumer and Whānau Feedback and Complaints Management
- Te Whatu Ora Hauora a Toi Bay of Plenty policy 2.1.4 Incident Management

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