Avant factsheet
Messaging apps: communicating safely in clinical practice

Quick guide

- Comply with your obligations regarding security, privacy and confidentiality when using messaging apps to send and receive patient information.
- Check if there are any policies about the use of messaging apps at your hospital, health service or practice.
- Consider if any messages are part of the clinical record and if so, ensure you save them to the record.

Using messaging apps

Online communication and messaging platforms are increasingly being used in clinical practice, beyond traditional SMS. There are a few very popular platforms, but this is a rapidly changing area, and some messaging apps are being developed specifically for healthcare settings.

Messaging apps in healthcare are mainly used to communicate with colleagues about patient care or workplace matters. Some examples include:

- Sending messages between different clinicians treating a patient to share updates or seek input into the patient's care.
- Sharing clinical images – e.g. a photo of a patient's wound, or investigations like an ECG.
- Specialists forming a group chat to arrange rostering or on call arrangements.
- Adding students and junior doctors to the team's messaging group when they start a new term or at a new hospital.

Using messaging apps can facilitate doctors asking for help and improve the quality of communication between clinicians. It may also mean responses will be more immediate which can benefit patient care. Group chats may also create a positive and inclusive culture within teams or departments and help break down some historical hierarchies.

There can be uncertainty about when and how to use messaging apps, including how they fit in with other communication about patients and with your professional obligations.

Any time you share information about a patient using a messaging app, consider your duty of confidentiality and privacy and security obligations, and whether the information needs to be included in the patient's medical records.

Privacy and confidentiality

Privacy legislation allows you to share a patient's health information without specific consent where the purpose for sharing is the same as or directly related to the reason that you obtained that information.

This means you can share patient information via a messaging app within the treatment team to provide clinical care without having to obtain specific consent from the patient.

If you want to share any photographs or images, see Avant's factsheet on clinical images for more information.

Messages sent using messaging apps are written records and they should be treated in the same way as any other written record. This means that obligations under privacy and health records legislation apply. Therefore, there may be requirements under legislation regarding:

- Whether information shared using the app needs to be copied into the patient's medical records.
- How long you must keep the messages.

Whether and how long messages must be kept depends on the requirements in your specific state or territory and your organisation. There may be differences between public and private organisations. Ensure that you are aware of the requirements in your workplace.

The person sending a message about a patient should ensure that all clinically relevant information is copied into the patient's medical records to ensure continuity of care and long-term availability of that information. It is important to document who was involved in the messaging conversation and when it took place.

Security

You are required to take steps to ensure the security of information that you exchange using messaging apps. This is complex and includes considerations about the features of the app and the settings of your own device.

Some of these issues will be covered in the app's terms and conditions. You should review them and consider how well the platform will protect the information you send and receive and how it will support you in complying with your legal and professional obligations.

Your organisation may have considered these issues. Ensure you find out whether there is a particular messaging app that is approved by your hospital or practice.

You should also review the settings on your own device.

For more information about security of digital platforms including messaging apps, see the Australian Digital Health Agency's guide: Online conferencing technologies – Connected, secure consultations.

Employment obligations

Most hospitals or public health services will have a policy about whether and how you can use messaging apps. These will often be provided at the start of your employment so you may need to review or ask for a copy of the policy. Ensure you do this, or ask if there is a preferred platform, before using messaging apps to communicate about patients or with your colleagues.

The same principle applies in practices and other healthcare settings as many workplaces have introduced policies about what sorts of information can be communicated using messaging apps. If your workplace does not have a policy but does use messaging apps, it can be unclear what is or is not permitted so we recommend you follow this up with the appropriate person within your organisation.

Have a policy

If you are in a position to create a policy for your healthcare organisation, it should address:

- whether or not messaging apps can be used
- any preferred platforms, and any platforms that are not allowed to be used
- what types of communication the messaging apps can be used for e.g. information about patients, staff arrangements, social interactions?
- what messages should be kept and how this should be done.

Given the speed at which technology changes and regular changes to the settings of different messaging apps, it is good practice to review this policy every year when you review your privacy policy.

Managing your communication

Beyond the policy, put in place some practical steps. We suggest having different groups for different purposes. For example, use separate groups to send a message to your colleague about a patient's condition and the social event the team is organising.

Appoint someone as the administrator and review and update this as needed. Be clear about that person's role, which would include removing people from the group who are no longer part of the team or do not have an ongoing need for the information. This can be addressed in the policy.

If you receive a message in error, for example after you moved to a different team within the hospital, let the administrator of the group know and delete the message, or remove yourself from the group if you can.

Remember to always be professional in how and what you write. Ensure you are always respectful towards colleagues and patients in your messages.

Be aware that, like any record, messages sent via an app could be relevant to and used in a later claim or complaint involving a patient.

Checklist before communicating about a patient via a messaging app

- Is this communication important for the care of the patient?
- Is there a more appropriate way of communicating (e.g. phone call, in-person)?
- Am I only sending patient information to the people who need it?
- Is the message professional and restricted only to the information needed to directly benefit the patient's care?
- Do I need to document in the medical records the exchange had via a messaging app, and any important clinical decisions arising from it?
- If sending a clinical image, do I have consent from the patient to take and send the image? If so, have I documented this consent in the notes?

Further Information

Australian Digital Health Agency Secure messaging

Avant factsheet: Social media for doctors: keeping it professional

Avant factsheet: Clinical images: a snapshot of the issues

Disclosure: Avant is affiliated with and has a shareholding in myBeepr, a communication tool specifically designed for the healthcare setting. Find out more at myBeepr.com

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