

Whanau Tahī Messaging Guidelines

A series of workshops were held in Whangarei, Kerikeri and Kaitiāia in late 2018 and early 2019 with the view of gauging interest in using Whānau Tahī messaging and, if there was interest, to develop a set of guidelines on its use. The overall voice from these workshops was that “we know there is work needed and it isn’t a perfect system, but there are lots of potential benefits and so we want to use Whānau Tahī messaging”. On this premise, the following are the guidelines that were developed from these workshops.

- 1) **Before you start:** Before commencing Whānau Tahī messaging with another provider, it is important to discuss this with them first. These guidelines can be the basis for these communications. It is important to ensure that these are understood and agreed to by those you are messaging, before you start messaging with them.
- 2) **This is a patient record:** Make sure messages are written so they can be understood by the patient, the Whānau Tahī record is their record and they can get access to view them. Patients should not find anything new in messages in their Whānau Tahī record, eg: no results or diagnosis they were not previously aware of.
- 3) **Checking for messages:** Before starting to send and receive messages via Whānau Tahī, ensure you have a process in place to check for messages, such as:
 - a. A shared email address or inbox where messages are received and checked regularly.
 - b. Someone assigned to check on messages each day.
 - c. If you do not have a shared email address or inbox, to ensure your messages are checked when you are away, eg. email forwarding.
- 4) **When to use messaging:** Only non-urgent messages to go through Whānau Tahī messaging, eg. nothing requiring action within 72 hours. If patient is unwell, do not use Whānau Tahī as the means to communicate this; make sure to use your current communication processes. You may also want to send a copy of this via Whānau Tahī messaging, but note it as FYI and that the message is a copy,
- 5) **Format of messages:** Always follow the Whānau Tahī Messaging Subject Format document, which outlines what to add to the message subject header to make it easier to read. For example:
 - a. FYI – Add as much detail as needed to communicate the intended message. FYI messages are informational only and do not require a reply.
 - b. Action — Add as much detail as needed to communicate the intended message and the action required. This is only for messages that do not require a reply within 72 hours, if you require a quicker reply, use your current communication channels.
 - c. Please Reply – Please open the message within Whānau Tahī and respond from there. There may be some reason why it is better to respond from within Whānau Tahī, such as the message being a part of an MDT, or a response may require reviewing other messages,
- 6) **Attachments and documents:** If you intend to use Whānau Tahī to share documents in addition to your current method of communication (eg. Discharge Summaries), make sure to send a message (using the FYI, Action or Please Reply format) to those whom you would normally send the document to, so they are aware it is available in Whānau Tahī.