

MARÍLIA DUQUE

Learning from WhatsApp Best Practices for Health

COMMUNICATION PROTOCOLS FOR
HOSPITALS AND MEDICAL CLINICS



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Duque, Marília

Learning from WhatsApp Best Practices for Health: Communication
Protocols for Hospitals and Medical Clinics. Marília Duque. London:
ASSA, 2020. 151 pages

ISBN: 978-1-8380069-0-7 (eBook)

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INTRODUCTION

The material you are holding is not just a practical guide that will impact the communication in your hospital or clinic in a positive way. It is also the product of one of the best Postgraduate Communication Programmes in Brazil, coming from one of the best educational and research institutions in the area. I am talking about ESPM, an institution whose mission is to produce high quality, innovative research. But what do we mean by innovation? Innovation, for us, is the potential to transform reality through academic research and that is what makes this production unique.

This work is the result of nearly two years of ethnography and more than six years of research by the author at ESPM and in the *Research Group on Ethics, Communication and Consumption* - GPECC of PPGCOM/ESPM, certified by the CNPq – Brazilian National Council for Scientific and Technological Development. In addition, the researcher is currently collaborating with the global project *Anthropology of Smartphones and Smart Ageing*, based at University College London, in a convergence of themes that responds to a demand for applied knowledge around the world.

This is what you will find in this guide: fast and effective forms of communication applied to the health ecosystem, delivered on a platform with high potential to impact outcomes. This is the great differentiator of Marília Duque's work and research. Marília has observed the ways in which Whatsapp is already used for health in São Paulo, and has learned from them and their users. Valuing these often informal practices, the author translates these into step-by-step protocols, contributing to our mission as social scientists to understand reality, to question it and to transform it.

Luiz Peres-Neto

ESPM Media Lab Coordinator

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FOREWORD

by Daniel Miller

It is a pleasure to be able to express my admiration for this important work developed by Marília Duque. Her mapping of the uses of WhatsApp for health can genuinely contribute to the improvement and expansion of health services in Brazil and around the world. Duque is part of the research team on the *Anthropology of Smartphones and Smart Ageing* project, funded by the European Research Council and registered under the name ERC–2016–Adg–SmartPhoneSmartAging–740472. (<https://www.ucl.ac.uk/anthropology/assa/>). For 16 months, she and ten other researchers observed how smartphones were used to manage health and ageing in order to help to develop mHealth initiatives. But what is mHealth? What we call mobile Health, or mHealth, is essentially the effort that health and technology professionals put into developing apps that can impact health, benefiting patients and optimising healthcare features using mobile devices. It is amazing how big this market is and how many companies are investing in this kind of innovation as they try to build apps intended to solve health issues.

Our evidence, however, shows that most people do not use these types of apps. In addition to step counter or period tracker apps, we have only seen the modest use of apps related to very specific diseases or conditions. These apps look promising in the prototyping and testing phase but are not widely adopted. People use these apps once or twice and then stop using them. Based on this observation, we believe that there is a much more effective alternative to this kind of intervention by mHealth discarding the development of bespoke apps. Our proposal is to explore the basic features of smartphones and the most popular apps, with an emphasis on what people already use every day in medical care and health practices. This alternative is neglected as there is no profit to be made from these implementations and most likely no one will be considered a hero or heroine because the users themselves are the authors of this kind of innovation.

Google, for example, is not a health platform, but it is broadly established as the primary means of obtaining health information. This does not mean that the consequences caused by its use cannot be criticised. Our observations show how using Google for medical research can highlight inequalities. Among less educated users, the volume of information given by Google can result in misinformation or even anxiety, as people find it difficult to interpret which search result is reliable or relevant. To overcome this inequality is a challenge, but it does not invalidate the potential of the platform when applied to health. Another example of the implementation of health interventions using mobile devices is the case observed in Uganda. In Uganda, mobile money is one of the primary uses of mobile phones for health purposes. It allows people to transfer money to relatives, even at a distance, often to support emergency health needs such as hospital fees. Therefore in this regard, enabling this remote transfer is itself a mobile health tool.

I recently published a book called “The Comfort of People”. The work is based on the study I conducted at a hospice in England. Working with hospice patients under palliative care, I found that there were two really important things for them at this stage of their lives. One was communication with the people they loved. The other was communication with the institution itself. I observed that many people would like to have a choice about the kind of communication they use at this stage of life, and this included platforms like Facebook.

At that time, WhatsApp was becoming popular and I could already notice families and friends creating their WhatsApp groups to support their loved ones. That is why I am not surprised by Duque’s findings that the same practices can be seen in Brazil. Generally,

sons/daughters would create a group to monitor parent care, keep others informed about their current health condition, and distribute responsibilities according to their needs. No one instructed them to use WhatsApp for this purpose. They invented their own solution to stay close and active. In the past, health services invested a lot of money to develop patient communication apps and systems. Our research team's suggestion is to find ways to observe successful informal practices and share them with others so that they can be used and updated, as this is a process that changes with every technological change. This includes patients and families, but also carers and health professionals.

This is the context in which Duque's work lies. As an ethnographer, she spent 16 months observing how people use WhatsApp in their daily practices and in formal and informal health practices. This includes nurses mediating between doctors and patients, doctors consulting other medical staff, and care networks among family and patients. Learning from these practices is essential to scaling them and impacting the largest number of people. Therein lies the unique usefulness of her work. Duque is not the author of most of the protocols presented in this manual. They already happen in practice. Her greatest work was to systematise them, and to propose improvements based on users' skills and possible uses of the platform for health. Her contribution comes from the observation that innovation, when applicable to health, is most effective when it comes from below.

This manual provides step-by-step instructions on how to apply these protocols and how to expand them, using WhatsApp's full potential as a platform for healthcare interventions. Duque's project work is fabulous because it is not about speculation or future possibilities. The protocols gathered here are inspired by real-life practices that are already positively impacting health in Brazil and especially in São Paulo, where she has observed these uses. In addition to mapping them, the author also makes important contributions, such as protocols for the ethical handling and management of patient data via WhatsApp.

Instead of developing a new app and trying to convince people to adopt it, Duque starts from an existing app that is used by 99% of Brazilian smartphone users. Duque demonstrates simply and affordably how WhatsApp can be turned into a platform for inclusive, efficient and ready to use medical practices.

Daniel Miller is Professor of Anthropology at University College London. He is the author/ editor of 39 books including *A Theory of Shopping*; *Stuff*; *How the World Changed Social Media*; *Social Media in an English Village*; *Visualising Facebook* (co-authored with J. Sinanan); *The Comfort of People*; *Digital Anthropology* (co-authored with H. Horst); *The Internet: an Ethnographic Approach* (co-authored with D. Slater) and *The Comfort of Things*. He is the coordinator of the Anthropology of Smartphones and Smart Ageing (ASSA) project, which is funded by the European Research Council.

AUTHOR'S NOTE

This handbook is the result of my 16 month ethnography in São Paulo. The research is part of my PhD at ESPM São Paulo's Post-Graduate Programme in Communication and Consumption Practices, as well as being integral to the global *Anthropology of Smartphones and Smart Ageing project*, based at University College London. During this time, I participated in activities related to elderly people in a middle-class neighbourhood of São Paulo and conducted in-depth interviews with issues addressing three main aspects: smartphones, health and ageing. I also worked as a teacher on a course teaching the use of Whatsapp (three semesters) and as an assistant on a course teaching the use of smartphones (one semester), both aimed at people over 60 years old. I did not observe significant health app usage among the participants, which I consider to be the segment most in need of care, a natural result of the ageing process. What I did find, however, was a very high uptake of WhatsApp, which is the app with which this population is most familiar. Whatsapp is the most used app among this segment, used to communicate with family and friends, resulting in a network of solidarity and support.

At the same time, I observed how WhatsApp has been used by doctors, nurses, clinics and health insurance companies to improve communication with patients and to optimise resources spent on healthcare. In one of the clinics I observed, I accompanied the nurses, observing their platform-mediated care. WhatsApp is used for medical appointments, treatment guidelines, and as an interface for dialogue with general practitioners who also use the app to consult medical staff or experts involved in each patient's case. In the clinic I did research in, patients would leave their appointments with the WhatsApp number of the nurse responsible for monitoring their care. Elderly people who have a supplementary health insurance specialised in care for the elderly also leaves the appointment with a WhatsApp number, but in this case the contact gives access to the medical team in the therapy area for which he or she needs care. Carlos, 63, is covered by this supplementary health insurance and was also one of my interviewees. For example, he told me that he did not need to schedule a new appointment when, after having just left an appointment, he realised that he had forgotten to mention a pain in his fingers. He simply sent a WhatsApp message to the rheumatology team and they arranged to send him a new request for a medical test. Carlos was therefore able to bring all of his test results together at his next appointment, which saved him time and saved the health insurance company money.

In a survey conducted by Associação Paulista de Medicina (APM) in 2018, 85% of the doctors surveyed declared themselves in favour of using instant messaging services such as WhatsApp in their daily practices. I had the opportunity to interview some of these doctors. One shared with me his personal use of WhatsApp to communicate with his mother's carer, who updates him during the day about his mother's medical condition, her meals, and her activities. The photos, videos and messages allow him to make a daily assessment of his mother's condition, adjusting her diet or medication as needed. Another doctor I spoke to worked as a general practitioner in a basic healthcare unit for elderly people. He decided to share his personal WhatsApp number with his patients, as he believes that having a communication channel with a doctor has positive impacts on this population, mainly because it makes patients feel safe. He points out that many cases could be solved directly through the platform, avoiding elderly people actually going to the healthcare unit.

WhatsApp is also used to educate and support patients, families and carers. The research observed groups around three therapy areas: Alzheimer's, diabetes and menopause. In this example, specialists are invited to join the group, replying, via WhatsApp, to community questions and concerns. The questions and answers are then consolidated into an eBook that is shared with the group in PDF format. In addition to being an educational channel, WhatsApp becomes a space for empathy, where patients and families share their daily

anxieties and challenges.

Lastly, WhatsApp is also used by sons and daughters to monitor the care of elderly parents. In these groups, the daily needs and demands of their parents are shared on WhatsApp, to then be divided among the relatives. Some groups also include carers, who update members on the patient's daily medical condition. WhatsApp-mediated remote care also benefits elderly parents living alone, enabling a supervisory and caring routine. Bete, for example, is 66 years old and lives alone in São Paulo. Her only daughter lives in Spain. They have created a procedure that allows Bete to live safely. Every day, she has until 10 am to send a message to her daughter, confirming that she spent the night well and that she is fine. If her daughter does not get the message, her daughter contacts her social network in São Paulo to check on her mother.

Based on the observation of these formal and informal health practices, my proposal is that WhatsApp should be the app with the greatest potential to positively impact health outcomes in Brazil, particularly benefiting from high uptake among the elderly population. The app is already the most used means of communication among Brazilians, being present in the daily life of 99% of smartphone users. Implementing WhatsApp for health practices removes the need to overcome barriers to learning and adopting new health apps, but it also recognises the value of people's use of it. In this regard, my contribution was to map out the best procedures for health practices using WhatsApp that I observed. These procedures were systematised into protocols for routine patient communication, triage, remote care and education. Based on these, I also propose new procedures that aim to complement them by exploring all available WhatsApp features.

It is crucial to emphasise this point. The protocols gathered here are essentially processes for facilitating communication between people and it is surprising to see how quality in communication implies higher quality in health practices and patients adherence to treatments. On the other hand, this means that my contributions and suggestions could and should be best evaluated and adapted by trained health professionals in accordance with their needs and their current local legislation. It implies that the implementation of these protocols is their sole responsibility. As it includes experiences that are updated daily in practice, this manual is also a collaborative and constantly expanding work. In this regard, the comments and contributions of future users are welcome, as well as any ideas for improving the proposal regarding how WhatsApp can be used for health practices in hospitals and medical clinics (for feedback, please contact me by e-mail at mariliaduque@gmail.com). Finally, it is important to note that WhatsApp is a registered trademark, and that the protocols provided herein are records of third party uses of the platform.

Marília Duque is a Brazilian researcher who is part of the global study Anthropology of Smartphones and Smart Ageing (ASSA), based at University College London. She is a PhD candidate on the Postgraduate Programme in Communication and Consumption Practices at ESPM São Paulo and a CAPES scholarship holder. She also holds a Master's Degree from the same institution (PPGCOM-ESPM), with a dissertation on networked reputation on Facebook. She is the co-author of the book *Éticas em Rede: Políticas de Privacidade e Moralidades Públicas*. She has a degree from ECA-USP in Marketing and Advertising.

WHY WHATSAPP?

WhatsApp is one of the most used messaging apps in Brazil and one of the most used in the world. WhatsApp has 1.5 billion monthly active users and about 60 billion messages are sent daily through the platform. In 2017, Brazil already numbered 120 million users on the platform^[1]. In 2018, the app was already one of the most popular in the country, being on the homescreen of 65% of Brazilian smartphones. Also, in a study asking participants to choose just one app to install on their smartphones, 48% of interviewees chose WhatsApp^[2]. WhatsApp's use for health practices has as its main advantage the fact that it is a tool with which patients, family members, carers and medical staff are already familiar as ordinary users in their daily communications with friends, contacts and interest groups. On one hand, 85% of doctors declared themselves in favour of using instant messaging services such as WhatsApp in their daily practices^[3]. On the other, WhatsApp is installed in 99% of smartphones in Brazil^[4]. This use of WhatsApp therefore bypasses frequently encountered barriers to the adoption of health apps (including barriers around learning, adherence, and engagement).

Among the older population, more sensitive to medical care needs, our 16-month fieldwork in São Paulo shows that WhatsApp is also the app most used by this age group, including being a gateway to elderly people adopting the use of smartphones more broadly. Moreover, in Brazil use and adoption of smartphones among lower social classes is growing. Results of PNAD Contínua 2016 ^[5], released by Brazilian Institute of Geography and Statistics (IBGE), show that 69.3% of Brazilian households use the Internet; 97.2% of these households used their mobile phones for this purpose, and in 38.6% of households the mobile phone was the only means of accessing the Internet. Mobile broadband access was 85.1% in the north of the country, 65.1% in the northeast, 75.6% in the south, 80.6% in the southeast and 82.9% in the mid-west. 94.2% of users access the Internet to send or receive texts, voice messages or photos by apps other than e-mail. If we consider that mobile providers in Brazil offer data plans that include unlimited WhatsApp usage (except voice and video calls - VoIP), this means that WhatsApp has also the potential to mediate comprehensive, inclusive and high-impact health initiatives.

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THE UNIQUE BENEFITS OF WHATSAPP

- Most used messaging app in Brazil
- No need to install a new app
- Users are already familiar with the tool
- High uptake among population aged 60+
- High penetration among different social classes
- Visual and audio features allow for the inclusion of users with low literacy rates
- Availability of mobile plans with unlimited WhatsApp usage

HOW TO USE THIS GUIDE

WhatsApp can be used as a support tool for healthcare communication, with protocols enabling the interface to be used among and between patients, healthcare professionals, carers and family members. This handbook explores how the app's basic features can be used by the healthcare ecosystem, aiding remote care and making it more efficient in terms of money and time in addition to improving the quality of life of patients.

Here you will find step-by-step instructions for implementing WhatsApp usage in hospitals and medical clinics. The protocols are divided into modules, including routine patient communication and triage, remote healthcare, proactive health management, and education processes. Modules can be implemented independently. Each module brings together all of the WhatsApp features mapped around its purpose. Many features are repeated in more than one module. Our intention with this was to consolidate all of the necessary information in each module and facilitate the consultation of the protocols as a practical guide. This version is designed specifically for the Android operating system, using a Motorola and a Samsung device, but features can also be used on iPhones, with due consideration of the differences between operating system interfaces.

The *Learning from WhatsApp - Best Practices for Health* handbook is the result of interviews with health insurance companies, clinics, doctors, and health professionals from the public and private system as well as the observation of practical uses of WhatsApp in the health ecosystem. In addition, the perspective of users in their midlife period and their daily routines was taken into account in order to consider their skills and familiarity with the app. User ethnography was conducted between January 2018 and June 2019, involving observation, in-depth interviews with informants, and direct participation, which took form of teaching WhatsApp and smartphone uses in courses addressing people over 60 years old in São Paulo. In addition to face-to-face participant observation, WhatsApp chats and groups were also observed.

As it is a pilot project, the material makes use suggestions that can, and should be, improved by its users. The implementation of the protocols should be evaluated by competent professionals, who are fully responsible for its progress and results. Feedback and contributions are welcome and will be incorporated into updated versions and impact evaluation of the use of WhatsApp for health outcomes. In this regard, suggestions can be sent to the author of the book by e-mail at mariliaduque@gmail.com.



PLEASE NOTE:

The names of doctors, nurses, and patients used throughout the visual examples in this handbook, such as “Dr. James Smith”, “Ms. Julie Roberts” or “Dr. Paul Knox” are completely fictional and do not represent any doctors, nurses, or patients in real life. The visuals in the handbook do contain, however, examples of screenshots from the perspective of the patient in which the author has chosen to visualise as herself (‘Marilia Duke’). In addition, the examples of medications or medical treatments that have been given, such as “taking Adcort”, for example, are completely fictional and not based on any specific patient’s treatment or prescription. These have been chosen at random, and at times, fictitious medication names have been used (such as ‘Easylexxy’).

SUMMARY

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- Instructions on how to set up a hospital or medical clinic WhatsApp account
- Instructions on how to set up a hospital or medical clinic on WhatsApp web
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PROTOCOLS FOR STRATEGIC HEALTH MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

In this section, we present protocols aimed at hospitals and medical clinics that want to play a proactive role in their patients' care by using WhatsApp for patient information, awareness and education.

- Sending information and instructions to the patient
- Managing the scheduling of medical care and preventive routines
- Updates on the patient's state of health
- WhatsApp as an educational channel
- WhatsApp for support groups

FIRST STEPS

As a potential WhatsApp user, you might think this module's content is irrelevant. You probably know how to download and how to set up a WhatsApp account. However, there are some valuable tips to improve its usage in daily basis in hospitals and clinics. It is important for example to establish and communicate when the service will be available for patients. The status feature on WhatsApp, can be used for that. The way the patient's contact will be added in the hospital or clinic account can also be improved, including the number of medical record in one of the fields in the contact screen. This can facilitate the work of tracking and updating medical information. Moreover, and more importantly, you will be guided to start defining what services your hospital or clinic can provide through WhatsApp and who will be responsible for what.

These are the procedures required to implement WhatsApp use in hospitals and medical clinics you will find in this module:

1. Preparing staff
2. Setting up WhatsApp and WhatsApp Web accounts
3. Adding patients on the hospital or medical clinic WhatsApp account
4. Creating WhatsApp chat rules
5. Safety Reminders



FIRST STEPS

1. Preparing staff

Even before setting up WhatsApp for interacting with patients, hospital or clinic staff must decide how information will flow internally and assign roles to each member of staff, taking into consideration care and responsibilities as well as hierarchies and decision-making. We recommend using a flow chart like the one below, which may be appropriate based on the needs of each hospital or clinic.

1.1. Professional in charge of WhatsApp admin and direct patient interaction

This professional will be responsible for coordinating information received by and sent to the patient. Our suggestion is that this should be a nursing professional with the following skills:

- the ability to write well, be communicative and empathetic;
- the ability to understand clearly what the patient's need is by classifying the nature of this need: pain, illness, incident, concern about a treatment or medication, adverse event reporting for drugs, etc;
- to conduct the initial triage assessing the emergency of the patient's need: can it be solved directly by the nursing professional? Is the doctor's involvement necessary in order to reply to the patient? Is it an emergency that requires the patient to immediately go to the hospital or medical clinic?;
- the ability to text message the doctor or medical staff responsible for the patient's care, in order to ask for guidance;
- the ability to update patient medical records with reported events via WhatsApp.

1.2. Doctor in charge

This professional is usually a doctor or general practitioner who will receive any information or requests from the professional in charge of WhatsApp admin, who (if necessary) will pass these on after talking to the patient. His/her duties are:

- to receive information and/or requests from the professional in charge of WhatsApp admin and guide him/her on the procedure(s) to be followed;
- to have access to the patient's medical record;
- to reply with a recommended procedure, which should be presented clearly and objectively;
- to notify or consult specialist doctors or medical staff under his/her coordination whenever necessary.

1.3. Healthcare team

The hospital or clinic can create a WhatsApp group to bring together its interdisciplinary medical staff, or it can group medical staff according to their shifts or specialty. The professional in charge of WhatsApp admin can directly text message the medical staff if there is no doctor in charge of coordinating the patient's care, or if he/she receives direct guidance from the doctor in charge to do so. Group members can be tagged in messages if the professional in charge wants to draw their attention, or if something needs to be prioritised (this can be done by typing the @ symbol - WhatsApp will then open a menu consisting of a list of the names of the

FIRST STEPS

contacts in the group, enabling the user to tag them).

The duties of each medical staff member are as follows:

- to read the shared messages in the group;
- to reply promptly to any requests or demands pertaining to their area of care;
- to reply with a recommended procedure to be followed, which should be described clearly and objectively;
- to interact directly with the professional in charge of WhatsApp admin, as and when determined by the doctor in charge that this should be done.

1.4. Specialist doctor

The specialist doctor may be text messaged by the doctor in charge for the purpose of consultation regarding the specialties relevant to the case. The doctor in charge may also recommend that the patient be referred to the specialist, and establish direct communication between the specialist and the professional in charge of WhatsApp admin. The duties of the specialist doctor are as follows:

- to receive any information, requests or demands from the doctor in charge;
- to have access to the patient's medical record;
- to reply with a recommended procedure to be followed, which should be described clearly and objectively;
- to interact directly with the professional in charge of WhatsApp admin, as and when determined by the doctor in charge that this should be done.

A member of staff in an operational-administrative position (not a nursing professional) may also assume the coordination of information received by and sent to the patient. In this case, another level is added to the procedure.

- I. Professional in charge of WhatsApp admin and direct patient interaction (first port of call)
- II. Nursing professional (mediator)
- III. Doctor in charge or Healthcare team
- V. Specialist doctor

FIRST STEPS

Case study: the Amparo Medical Clinic

Amparo Medical Clinic's main differentiator is the provision of a WhatsApp account which acts as a communication channel for its patients and allows their care to be monitored by a general practitioner. When the operation began, every patient who left the clinic was placed in a WhatsApp group consisting of a nurse, a nursing coordinator, and a general practitioner. The purpose of the WhatsApp group was for the medical team to receive concerns and clarify them, as well as acting as a first point of contact for medical attention, which often made going to the clinic unnecessary, thereby saving the patient time and money. After a few months of operating the model, it was observed that the group consisting of medical staff overloaded the doctors. And, in practice, the nurses were the ones providing daily care to patients, solving most of their requests, as well

as being more accessible in terms of providing easy-to-understand explanations to patients through remote care. Nurses were also responsible for clarifying medical diagnoses and treatments after patients left doctors' appointments. They were the natural choice when the clinic decided to expand its support to WhatsApp. Nowadays, new patients are only given the WhatsApp contact details of the nurse who is responsible for coordinating the care strategy put together by and with the medical staff. Doctors are kept up to date about new events on WhatsApp through the clinic's medical record system and are text messaged if necessary.

2. 2. Setting up WhatsApp

2.1. Requirements for WhatsApp use

- Android Device (Any operating system will work, but the protocols presented here used Android operating system)
- Internet Connection (Data plan or Wi-Fi)
- Dedicated Whatsapp account
- Desktop or laptop for integration with WhatsApp Web (Windows 8 or newer)

We recommend that the hospital or clinic purchase a smartphone and an exclusive mobile number dedicated for WhatsApp care only. The app will be downloaded and installed on this smartphone and a specific account shall be created for the purposes of interacting with patients. In this version of the manual, the step-by-step demonstration of features is illustrated using Android devices (a Motorola and a Samsung one). iPhones can also be used, bearing in mind that the minor differences in operating system interfaces will have to be considered.

In order to facilitate the interactions with patients and other medical staff, as well as message coordination, we recommend allocating a dedicated desktop or laptop computer exclusively to this use. The reason for this is to enable the use of WhatsApp for Web, which allows users to view and use the platform right in their computer screen, with the added comfort of being able to type on a keyboard. Moreover, it facilitates the access to the hospital or clinic system and network.

To save data and avoid using up the allowance offered by the phone data plan, we recommend that the smartphone should be set up to use the hospital or clinic's wi-fi connection whenever available.

FIRST STEPS

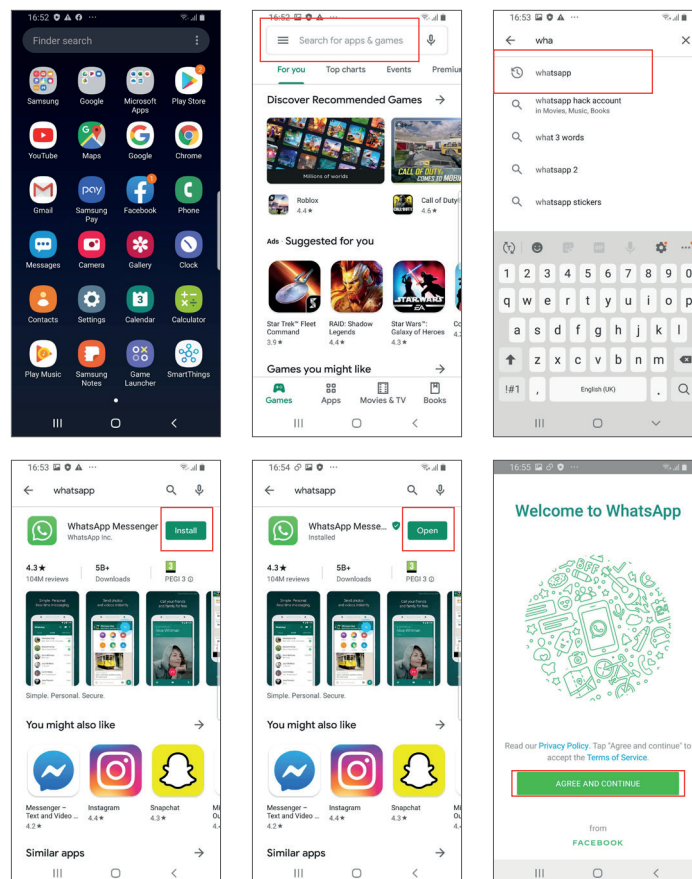
2.2. Step-by-step: Setting up WhatsApp on a smartphone

2.2.1. Downloading WhatsApp on smartphones

Note: You are probably a regular WhatsApp user and have already downloaded and installed the app on your private smartphone.

INSTRUCTIONS TO DOWNLOAD WHATSAPP

- Open Google Play (Google's app store)
- Search for WhatsApp by typing WhatsApp into the search bar.
- Look for the WhatsApp Messenger option in the list of results.
- Tap the WhatsApp Messenger option in the list of results.
- Tap the INSTALL button.
- On the next screen, tap ACCEPT to accept the permissions, if requested by the app.
- After downloading is complete, tap OPEN.
- You have the option to read the Privacy Policy and Terms of Service.
- Tap AGREE AND CONTINUE to start using WhatsApp.



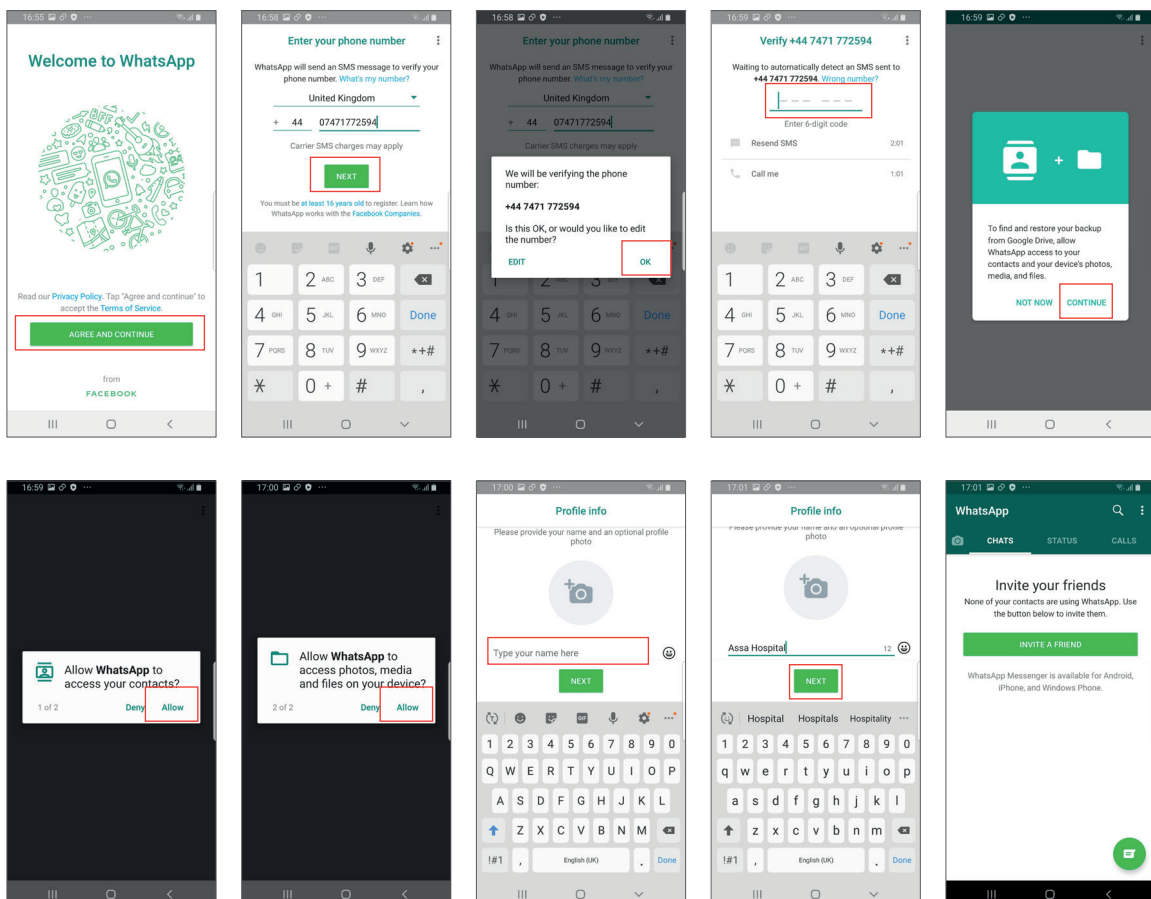
FIRST STEPS

2.2.2. Hospital or clinic WhatsApp account setup

Follow the instructions below for setting up your WhatsApp account according to the information requested on each screen.

INSTRUCTIONS FOR HOSPITAL OR CLINIC ACCOUNT SETUP

- On the WELCOME TO WHATSAPP home screen, tap AGREE AND CONTINUE.
- Enter your phone number including your COUNTRY CODE and tap NEXT.
- Check that your phone number is correct and tap OK.
- WhatsApp will send you a 6-digit verification code via SMS. If you prefer, you can request to receive an automated voice call that will tell you your code.
- Enter your 6-digit verification code.
- Tap CONTINUE to allow WhatsApp to access your contacts and your device's photos, media, and files.
- Tap ALLOW to allow WhatsApp to access your contacts.
- Tap ALLOW to allow WhatsApp to access your device's photos, media, and files.
- You will be directed to the PROFILE screen. Type the NAME OF THE HOSPITAL OR CLINIC and tap NEXT.
- Wait while WhatsApp sets up your account.
- You will be directed to WhatsApp's main screen (CHATS).

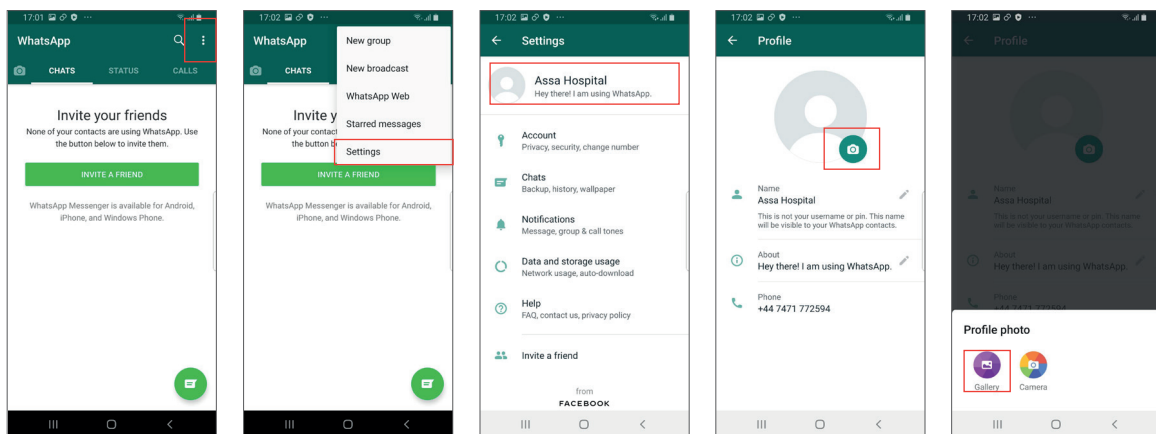


FIRST STEPS

Now let's customise the hospital or clinic's WhatsApp account, so it can be easily viewed and recognised by patients.

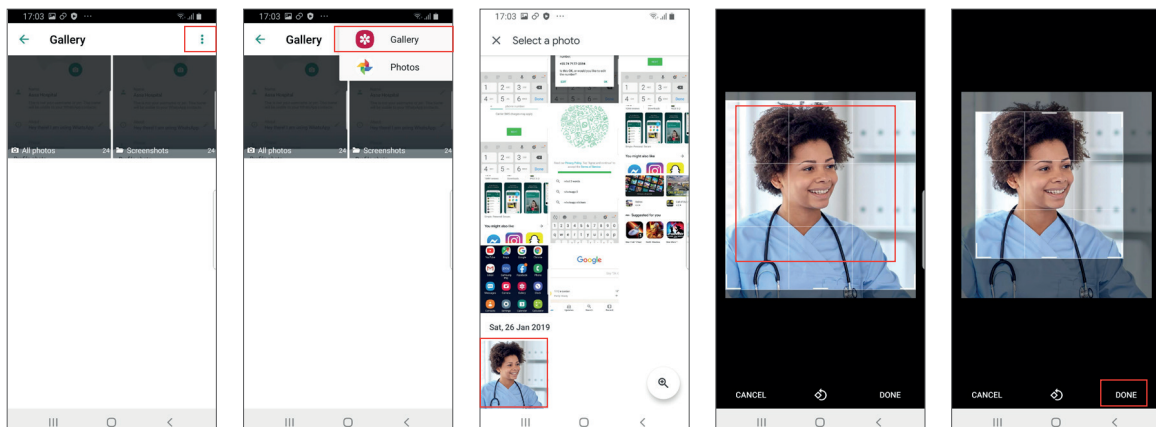
INSTRUCTIONS FOR HOSPITAL OR CLINIC ACCOUNT CUSTOMISATION

- Tap the MORE OPTIONS icon on the top-right corner of the screen (Chats).
- Tap SETTINGS.
- Tap on the first line of the screen where a profile icon appears next to the name assigned to the installed WhatsApp account.
- Tap the CAMERA icon in the circle reserved for your profile photo. Here you will have the option of taking a photo or choosing a photo from your gallery.



We recommend that you choose a photo that allows patients to identify you easily. One suggestion is to use a photo that is characteristic of medical professionals or to opt for the hospital or clinic logo.

- Select the photo you want to use.
- You can adjust the photo for better framing and better patient viewing. Tap DONE to save.



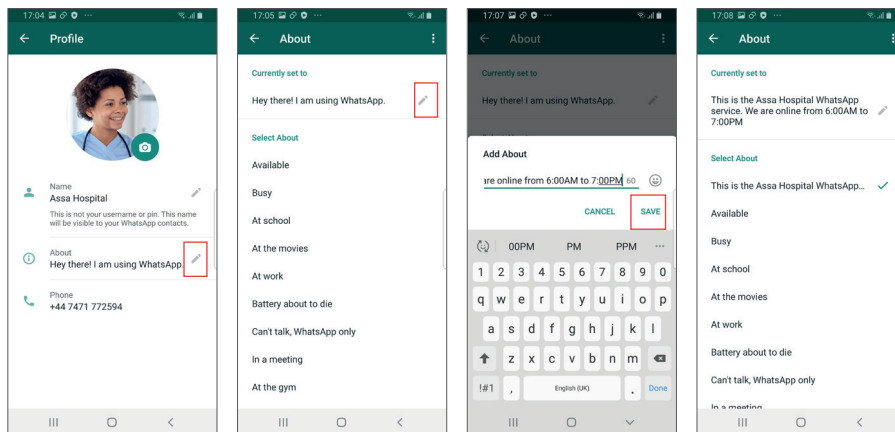
FIRST STEPS

- Back to the profile screen, see the ABOUT item.
- Tap the first line, where the WhatsApp default message “Hey there, I am using WhatsApp” appears. You will be directed to the ABOUT screen, where you can customize a message for your patients.
- Tap on the PENCIL icon to edit your ABOUT section.

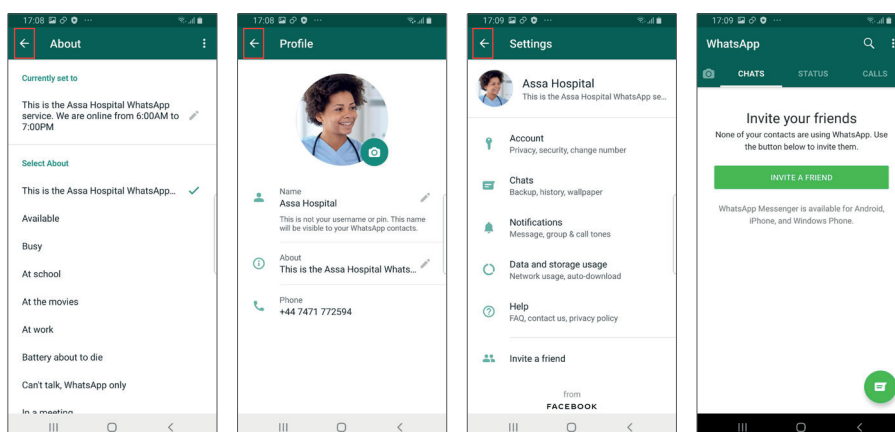
Here we recommend that you provide basic information about the WhatsApp service provided by your hospital or clinic.

You have 139 characters to write your ABOUT message. Be sure to tap SAVE to save your customised ABOUT message. Our suggestion for the content included in “About” is the following (customise it according to your need):

This is the (Name of the Hospital or Clinic)’s Whatsapp service. We are online from (define time) to (define time).



- Tap BACK using the arrow on the top-left corner to exit the ABOUT screen.
 - On the PROFILE screen, you will now see your profile with your PHOTO, NAME, ABOUT message, and PHONE NUMBER.
 - Tap BACK using the arrow in the top-left corner to exit the PROFILE screen.
 - Tap BACK using the ARROW in the top-left corner to exit the SETTINGS screen and return to the WhatsApp main screen (‘Chats’).
- (!) Done: The hospital or clinic account is now set up.



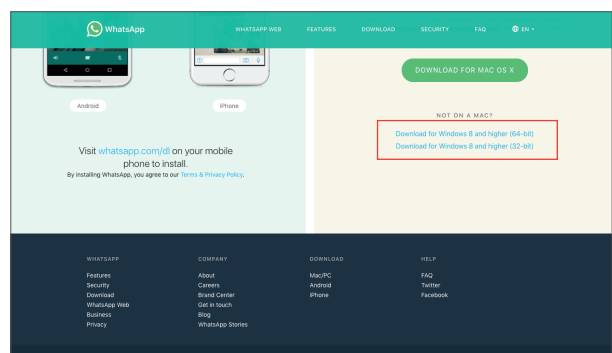
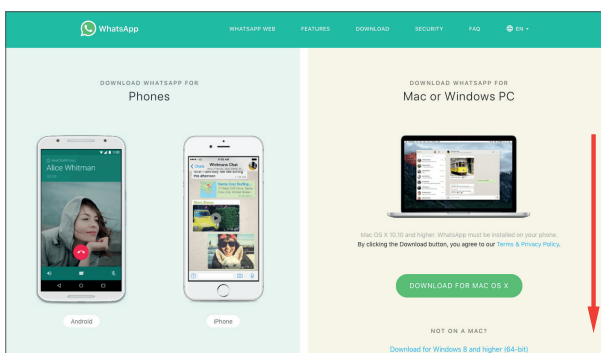
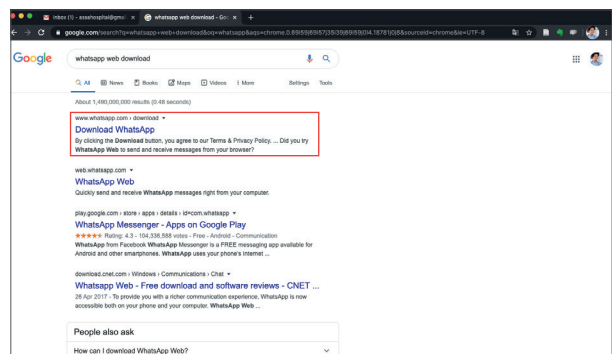
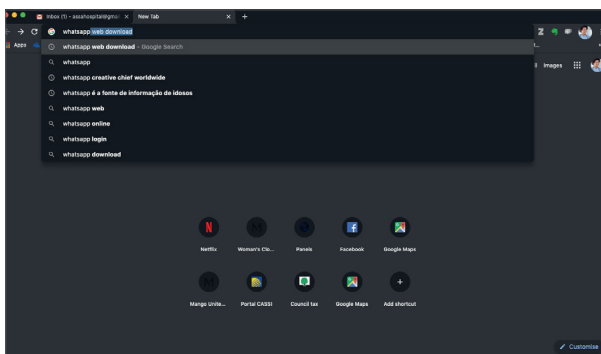
FIRST STEPS

2.3. Step-by-step instructions for setting up WhatsApp Web

WhatsApp Web is the version of WhatsApp for desktops and laptops. The app does not work as well on tablets. The great advantage of working with WhatsApp Web is the comfort of viewing chats on a large screen, and being able to use the keyboard to reply to messages. You can also attach photos and documents which may be available on the hospital or clinic network. Using a desktop or laptop connected to the clinic network is also recommended in order to update patients' records with interactions and procedures managed on WhatsApp.

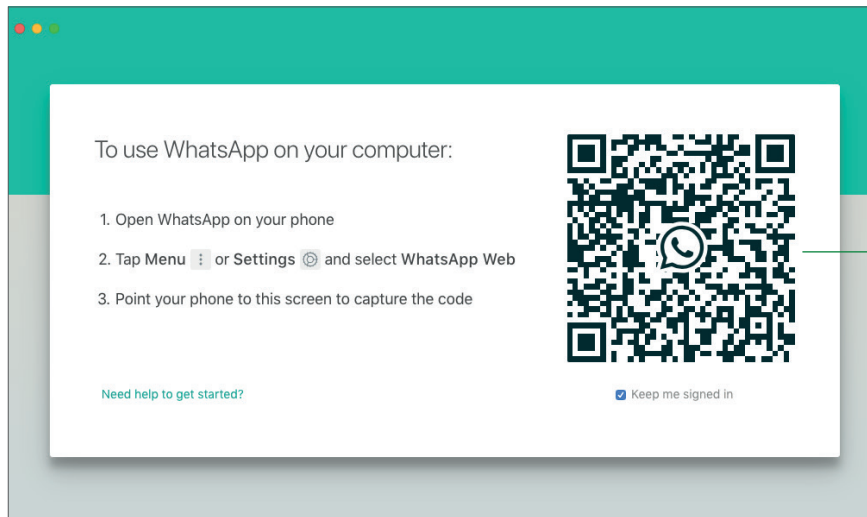
INSTRUCTIONS FOR WHATSAPP WEB SETUP

- Open the browser you usually use to search for information on the internet (Google, Chrome, Firefox, etc.).
- Type "WhatsApp Web Download" into search and you will see the link https://www.whatsapp.com/download/?l=pt_en. Click on the link.
- Select "Download for Windows 8 or newer" option (or select the option for Mac if that is your case).
- Install the program on your computer.

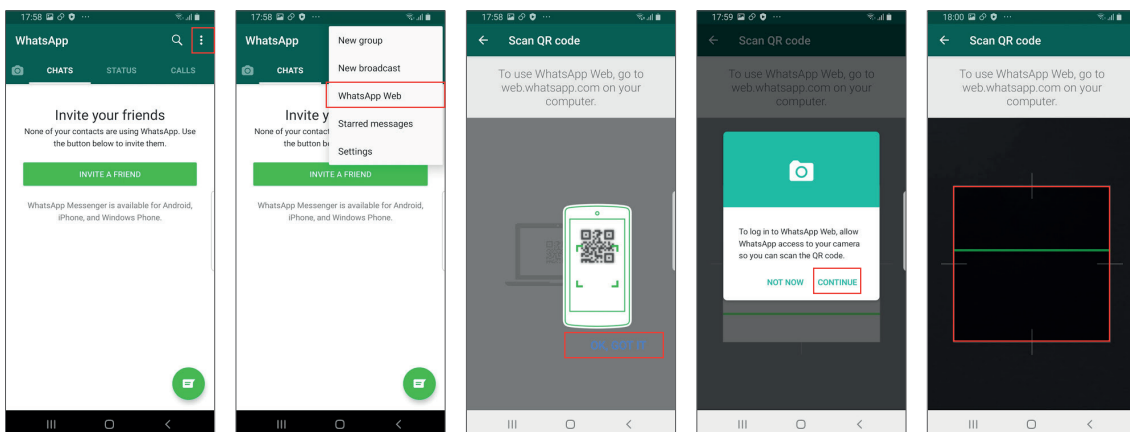


FIRST STEPS

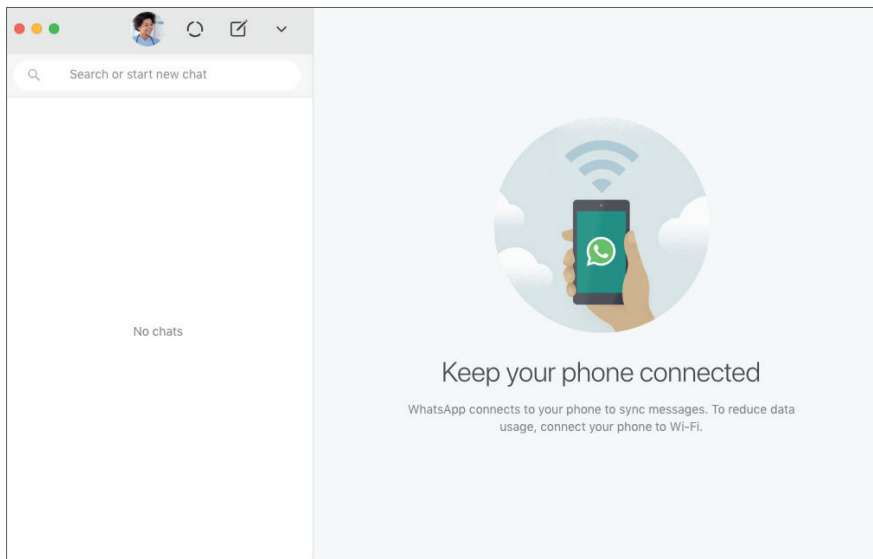
- Open WhatsApp Web on your computer. You will see a QR Code.



- Open WhatsApp on the smartphone where your account is set up.
 - Tap the MORE OPTIONS icon in the top-right corner of the WhatsApp main screen (Chats screen).
 - Tap WHATSAPP WEB.
 - WhatsApp will show a short tutorial on the screen indicating how to read the QR Code.
 - Tap OK, I GOT IT to proceed.
 - Tap CONTINUE to allow WhatsApp to access your camera and scan the QR Code.
 - Point your smartphone to the QR Code available on your computer screen to capture it.
- (!) Done. After capturing it, your WhatsApp will automatically be loaded on your computer screen.



FIRST STEPS



Recommendation

For implementation in hospitals or clinics, we recommend that the WhatsApp service is provided exclusively through WhatsApp Web. WhatsApp Web can be installed on different computers, but the smartphone must be turned on and close to the computer that is actually in use. We therefore recommend that your smartphone should be connected to the hospital or clinic Wi-Fi network when possible.

FIRST STEPS

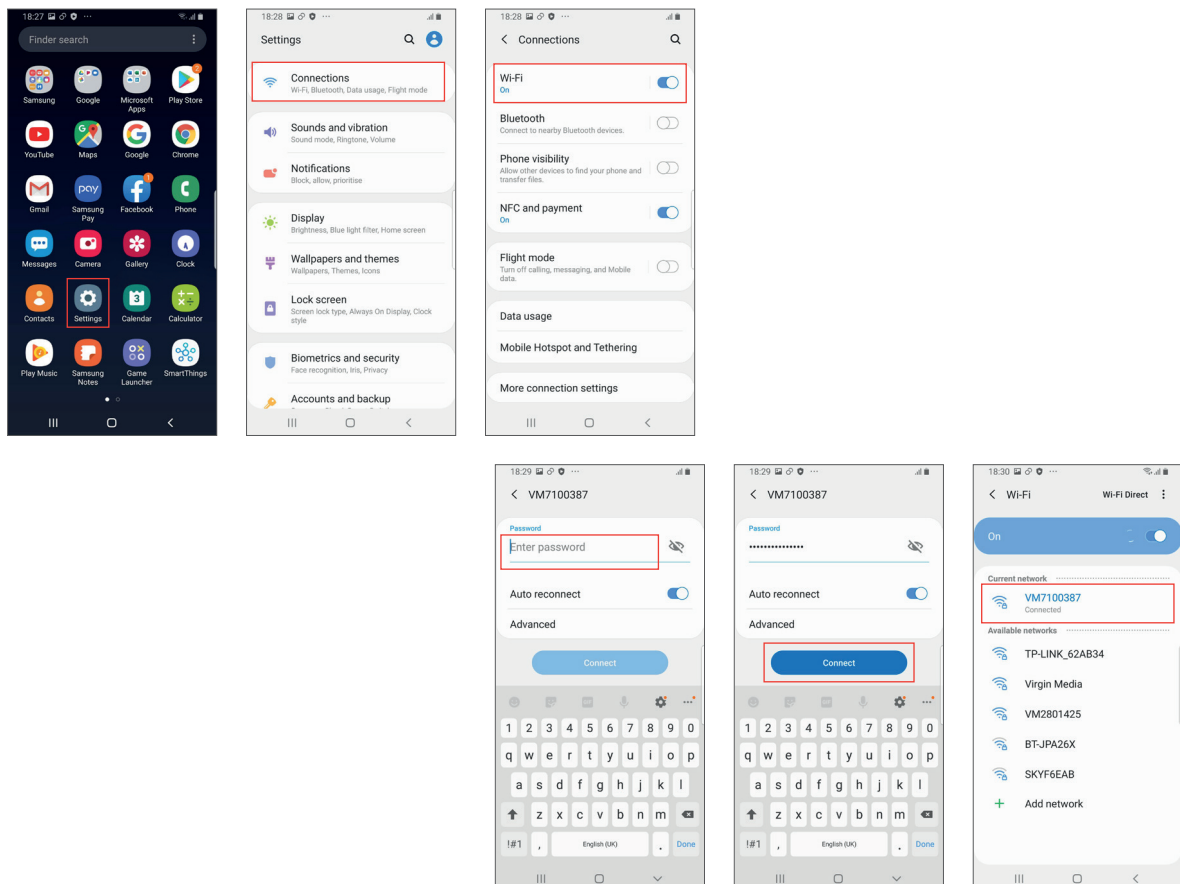
2.4. Step-by-step: Setting up Wi-Fi on the Hospital or Clinic Smartphone

If your hospital or clinic has Wi-Fi, you have most likely already set up your personal smartphone for accessing the internet through this network. Just repeat the same procedure for the hospital or clinic smartphone.

INSTRUCTIONS FOR WI-FI SETUP

- Tap the SETTINGS icon on the smartphone.
- Select the NETWORK AND INTERNET or the Wi-Fi option, depending on the device.
- Select the Wi-Fi option.
- Search for, and tap on the name of the hospital or clinic Wi-Fi network from the available options.
- Enter the Wi-Fi network password of the hospital or clinic.
- Tap the “CONNECT” option to connect to the hospital or clinic’s Wi-Fi network.

(!) Done: your smartphone is connected and ready to start your chats via WhatsApp or WhatsApp Web.



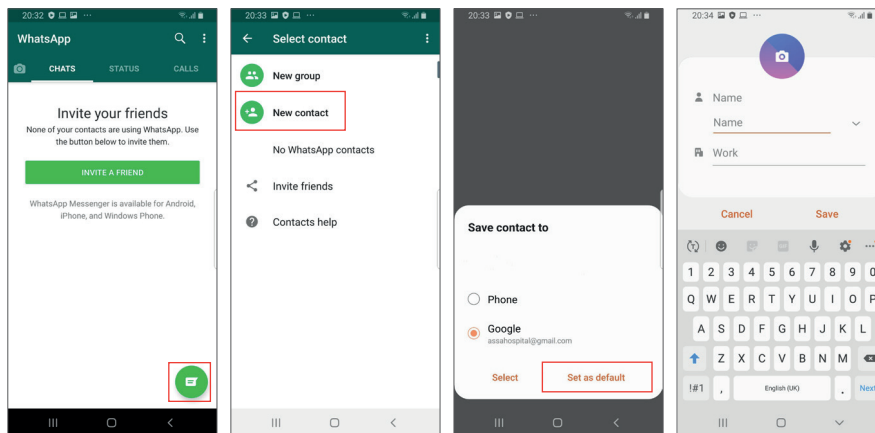
FIRST STEPS

3. Adding Patients to the hospital or clinic WhatsApp

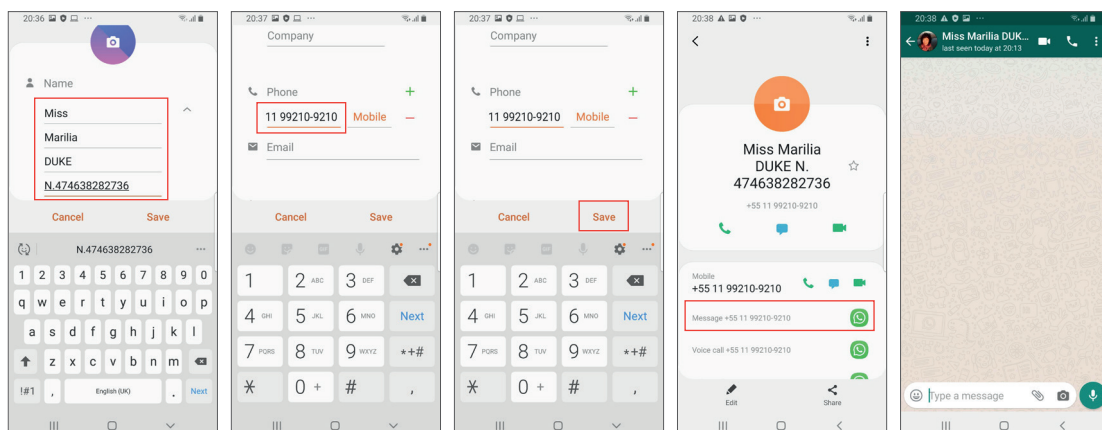
The procedure for adding patients to the hospital or clinic WhatsApp is simple.

INSTRUCTIONS FOR ADDING PATIENTS TO THE HOSPITAL OR CLINIC WHATSAPP

- Tap the NOTES icon at the bottom right corner of the WhatsApp main screen (Chats screen).
- Select the NEW CONTACT option and you will be directed to the NEW CONTACT screen.
- Select where you want to save the contact to. Our suggestion is that your smartphone should have a dedicated Google account (Example: assahospital@gmail.com). With this Google account, contacts are saved in the cloud and can be recovered if your device is lost, stolen, or replaced. Tap GOOGLE and then tap SET AS DEFAULT.



- Fill in the patient contact information. Our suggestion is that you use the NAME field to type in the patient's full name and the LAST NAME field to identify the patient's medical record number at the hospital or clinic, if any.
- Tap SAVE on the right corner of the top bar to complete the process.
- If the patient is a WhatsApp user, you will see a WhatsApp icon below the contact information box. Tapping the icon will take you directly to the chat with the patient on WhatsApp.



FIRST STEPS

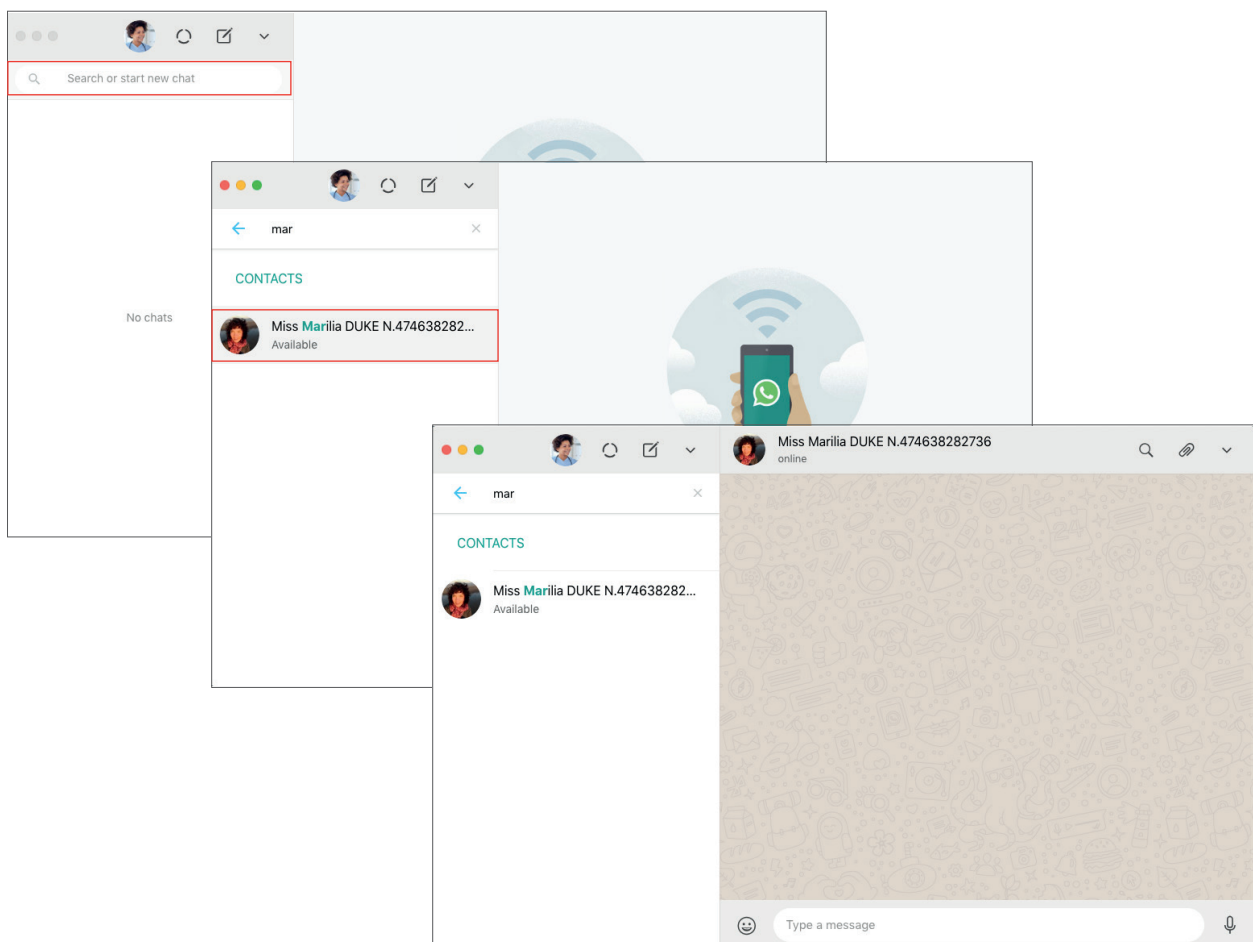
4. Creating rules for chatting with patients via WhatsApp

In order to have effective patient interactions via WhatsApp, it is essential to establish service use rules, and that means clear communication that clarifies the following:

- What the purpose of the service provided by WhatsApp is – in other words, what the patient can and cannot expect;
- What the business hours of the service are, and what the deadline for hospital or clinic replies is;
- What content is allowed by the service – this is to prevent the channel from being used for other purposes or being filled with personal messages (such as “good morning”, “good afternoon” or “good evening”) that may interfere with the identification of messages that are really important for the provision of remote care.

INSTRUCTIONS FOR STARTING A NEW CHAT WITH PATIENT VIA WHATSAPP WEB

- On the main screen, in the left column, use the search field or select the START NEW CHAT option.
- Type in the name of the patient.
- WhatsApp will display a contact list.
- Select the patient with whom you want to start a new chat.



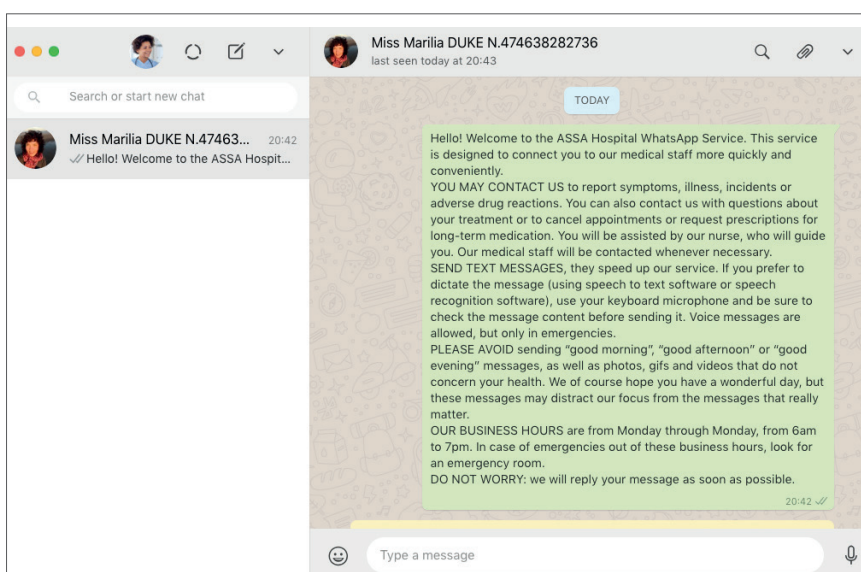
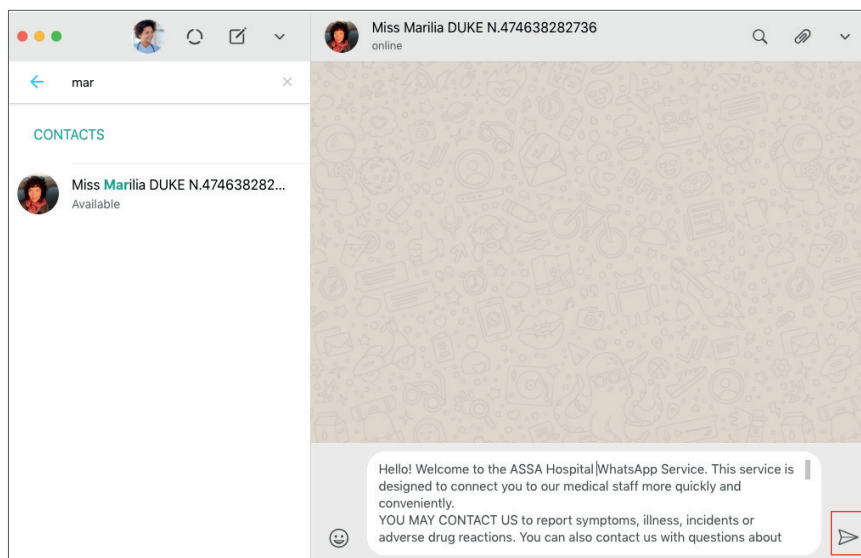
FIRST STEPS

We advise that every time a patient is added to the hospital or clinic's WhatsApp contacts, he or she receives a welcome message detailing the rules and information for service use.

We recommend you save all template messages in a text editor so that you can copy the text and paste it into the WhatsApp message field whenever you need it. This will enable you to attend to patients faster, but will also help you create a standard for the service provided.

INSTRUCTIONS FOR SENDING A WELCOME MESSAGE

- Copy the text of the message.
- Paste the message into the TYPE A MESSAGE field.
- Tap the ARROW to send.



FIRST STEPS

[See below for a template for welcome messages (copy, paste and edit as needed)]

Hello! Welcome to the WhatsApp Service of [name of the hospital or clinic]. This service is designed to connect you to our medical staff more quickly and conveniently.

YOU MAY CONTACT US to report symptoms, illness, incidents or adverse drug reactions. You can also contact us with questions about your treatment or to cancel appointments or request prescriptions for long-term medication. You will be assisted by our nurse, who will guide you. Our medical staff will be contacted whenever necessary.

SEND TEXT MESSAGES, they speed up our service. If you prefer to dictate the message (using speech to text software or speech recognition software), use your keyboard microphone and be sure to check the message content before sending it. Voice messages are allowed, but only in emergencies.

PLEASE AVOID sending “good morning”, “good afternoon” or “good evening” messages, as well as photos, gifs and videos that do not concern your health. We of course hope you have a wonderful day, but these messages may distract our focus from the messages that really matter.

OUR BUSINESS HOURS are from Monday through Monday, from 7am to 7pm. In case of emergencies out of these business hours, look for an emergency room.

DO NOT WORRY: we will reply your message as soon as possible.

Our 16 months of observation of WhatsApp groups shows that it is necessary to remind the patient about the rules of service use quite frequently, especially the rules regarding the restrictions on sending photos, gifs and videos that do not concern their health. We recommend that the reinforcing message about the rules of service use be sent as and when needed to maintain the focus on health-related interactions.

[See below for a template for reinforcement messages that remind the patient of the rules of service use (copy, paste and edit as needed)]

Hello! We would like to remind you that this channel was created EXCLUSIVELY to address your health issues. Thank you for the messages, but please DO NOT SEND photos, gifs, and videos that do not concern your health. These slow our service down. We are counting on you.

FIRST STEPS

5. Safety Reminders

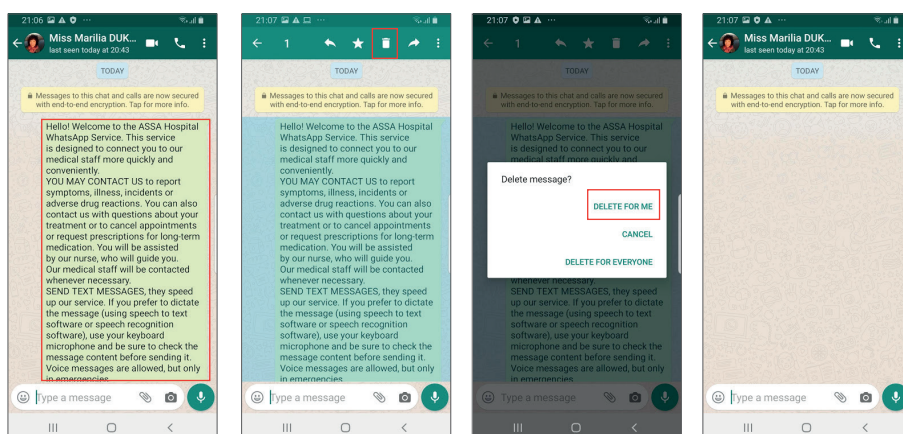
WhatsApp is a secure communication system that uses end-to-end encryption for messages. This means that even WhatsApp itself cannot read them. The risk of improper access then lies with the loss and theft of devices. Therefore, our recommendation is that whenever possible, the smartphone on which the hospital or clinic WhatsApp account is installed on should remain within their facilities.

If the smartphone has to accompany the admin person out of the facilities and an event of robbery, theft, or loss of the device occurs, we recommend registering a police report. In Brazil, it would be necessary to provide the police with the phone's IMEI number (Dial *#06* to find out the IMEI number of the device). You should also inform the mobile provider to cancel the SIM card.

There is also the risk of the medical staff losing their device or having it stolen, which compromises the confidentiality of patient data. If the use of WhatsApp in the hospital or clinic follows the flowchart proposed in the Manual, with the centralisation of information done by the coordinator who is tasked with interacting with the patient, the doctor may delete messages and photos from his/her device after their provision of care to the patient has finished. Messages and photos will only be recorded on the hospital or clinic device.

INSTRUCTIONS FOR THE DELETING PATIENT DATA FROM DEVICES BY DOCTORS

- On WhatsApp chat screen, select the message you want to delete (tap and hold the message until it is selected).
- A menu will be activated at the top of the screen. Tap the TRASH icon.
- Select the DELETE FOR ME option.



A final point about medical ethics: in the case of consultation between colleagues, if one of the parties has no contact with the patient, the patient's privacy must be preserved. In this case, if photos and tests are shared between them, the patient's name must be kept confidential. This standard can vary from one hospital or clinic to another. Hospitals and clinics are responsible for checking and complying with local medical practices and regulations. These procedures will be addressed in different chapters of this manual.

PROTOCOLS FOR BASIC COMMUNICATION ROUTINES BETWEEN THE HOSPITAL OR CLINIC AND PATIENTS USING WHATSAPP

WhatsApp can be used for its most basic purpose, which is to establish peer communication. The hospital or clinic can enable the channel for the purpose of managing patients' concerns and simple administrative issues such as: scheduling an appointment or a return appointment, appointment reminders, reminders about medical tests and check-ups, alerts that notify the patient that their prescription renew request has been successful and they can pick the prescription up (for those on long-term medication), or that their medical test results are ready and can be picked up. In these cases, we recommend that the professional in charge of WhatsApp admin and direct patient interaction works with preformatted text messages that can be copied and pasted according to the content of patient chats.

This is one of the main advantages of WhatsApp Business, a version of WhatsApp designed for businesses. On WhatsApp Business, users can save template messages in the app itself by building a bank of replies that speeds up interactions. This manual prioritises the free version of WhatsApp for users. We therefore recommend that template messages used by the hospital or clinic be saved using text processing software such as Word, so that they can be copied and pasted directly into the WhatsApp message field.

The following are standard operating procedures, which means that in these cases, the professional in charge of WhatsApp admin and direct patient interaction may be a professional with only administrative training, who is familiar with WhatsApp and the hospital or clinic system.



PROTOCOLS FOR BASIC COMMUNICATION ROUTINES BETWEEN THE HOSPITAL OR CLINIC AND PATIENTS USING WHATSAPP

1. Scheduling appointments

The patient uses WhatsApp to make an appointment. The messages are plain text, exchanged between the professional in charge of WhatsApp admin and the patient and should be adapted to the hospital or clinic protocols for the appointment scheduling procedure. The chat starts with the patient making his or her request, which in this case is to schedule an appointment, and ends with the sending of messages that formalise the appointment with useful information such as the therapy area or specialty required, the doctor's name, the date and time of the appointment and the address. It is important that the professional in charge of WhatsApp admin then enters the appointment into the system used by the hospital or clinic.

[See below for a template for a reply to the scheduling of an appointment]

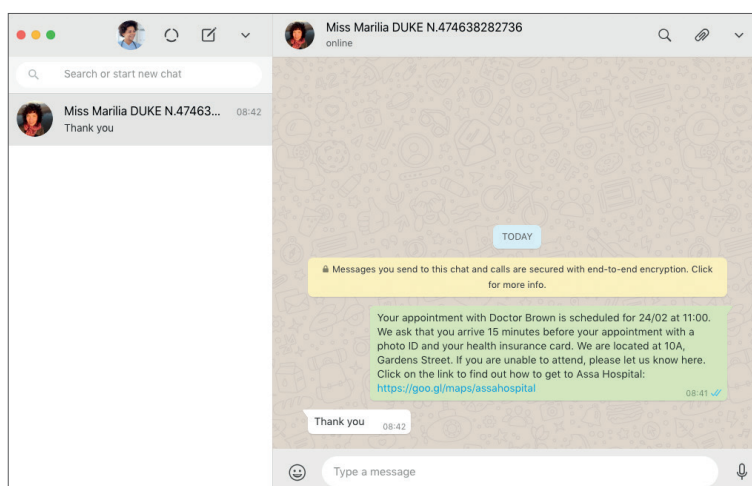
Your appointment with Doctor [NAME OF DOCTOR] is scheduled for [00/00] at [00:00]. We ask that you arrive 15 minutes before your appointment with a photo ID, your health insurance card and the results of the tests ordered by your doctor, if you have done any. We are located at [ADDRESS OF THE HOSPITAL OR CLINIC]. If you are unable to attend, please let us know here.

An optional element that could be added might be a link to Google Maps with the hospital or clinic's location. This facilitates the patient's access to the hospital or clinic.

[See below for a template for a reply to the scheduling of an appointment with address link included]

Your appointment with Doctor [NAME OF DOCTOR] is scheduled for [00/00] at [00:00]. We ask that you arrive 15 minutes before your appointment with a photo ID and your health insurance card. We are located at [ADDRESS OF THE HOSPITAL OR CLINIC]. If you are unable to attend, please let us know here.

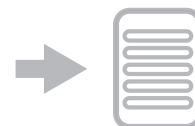
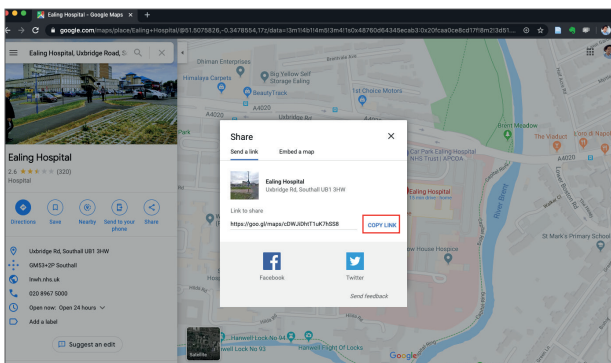
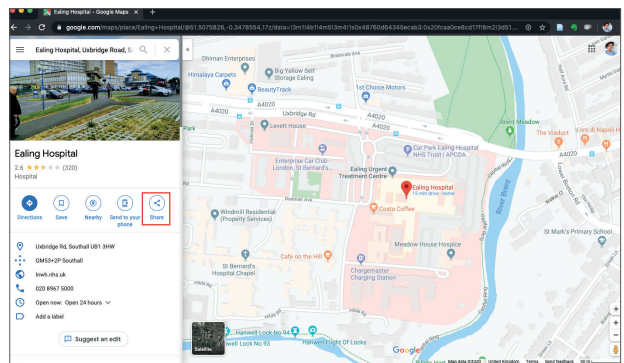
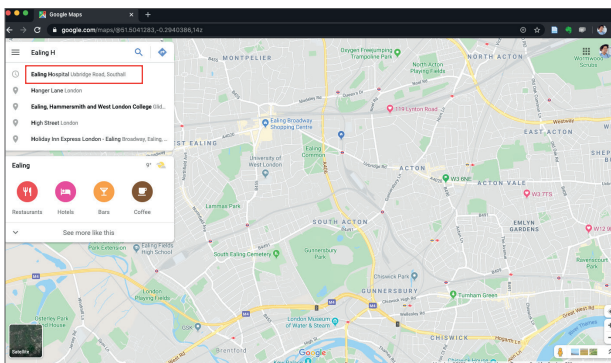
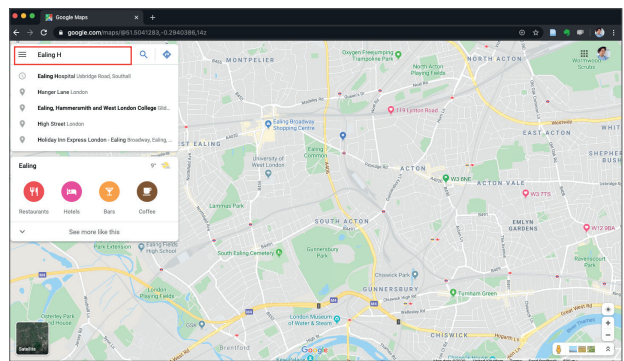
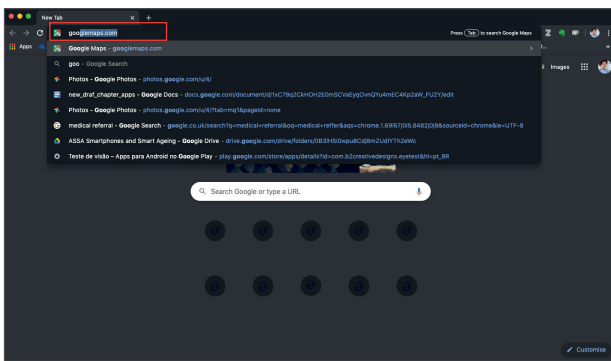
Click on the link to find out how to get to NAME OF THE HOSPITAL OR CLINIC: <https://goo.gl/maps/youraddress>



PROTOCOLS FOR BASIC COMMUNICATION ROUTINES BETWEEN THE HOSPITAL OR CLINIC AND PATIENTS USING WHATSAPP

INSTRUCTIONS FOR COPYING THE LINK TO YOUR ADDRESS ON GOOGLE MAPS

- Access Google maps by typing www.googlemaps.com into your browser.
- In the SEARCH HERE field, type the address of the hospital or clinic. Tap SEARCH.
- Confirm that the address shown on Google maps is correct.
- Tap the SHARE button.
- Tap the COPY LINK button.
- Paste the link into your template reply.



PROTOCOLS FOR BASIC COMMUNICATION ROUTINES BETWEEN THE HOSPITAL OR CLINIC AND PATIENTS USING WHATSAPP

2. Scheduling return appointments

Scheduling return appointments is very similar to the scheduling an appointment protocol. Most likely the professional in charge of WhatsApp admin will request identification from the patient in order to find him or her in the hospital or clinic system. With the patient's medical record open, the professional in charge of WhatsApp admin will already know which doctors the patient has consulted with.

Dialogue simulation:

- Good Morning
- Good Morning, may I help you?
- I need to schedule a return appointment
- Can I have your social security number?
- 808008081-80
- Would the return appointment be with Doctor NAME OF THE DOCTOR?"
- Yes, it would
- Do you already have all the test results ordered by the doctor?
- Yes, I do
- When would you like to schedule the appointment?
- On the 20th
- On the 20th I have availability in the afternoon at 2:00 pm. Can I schedule the appointment then?
- Yes, you can

[See below for a template for replying to the scheduling of a return appointment]

Your return appointment with Doctor [NAME OF DOCTOR] is scheduled for [00/00] at [00:00]. We ask that you arrive 15 minutes early with a photo ID, your health insurance card and the test results ordered by your doctor, if you have done any. We are located at [ADDRESS OF THE HOSPITAL OR CLINIC]. If you are unable to attend, please let us know here.

An optional element that could be added might be a link to Google Maps with the hospital or clinic's address. This facilitates the patient's access to the hospital or clinic.

PROTOCOLS FOR BASIC COMMUNICATION ROUTINES BETWEEN THE HOSPITAL OR CLINIC AND PATIENTS USING WHATSAPP

INSTRUCTIONS FOR COPYING THE LINK TO YOUR ADDRESS ON GOOGLE MAPS

- Access Google maps by typing www.googlemaps.com into your browser.
- In the SEARCH HERE field, type the address of the hospital or clinic. Tap search.
- Confirm that the address shown on Google maps is correct.
- Tap the SHARE button.
- Tap the COPY LINK button.
- Paste the link into your template reply.

[See below for template messages replying to the scheduling of a return appointment with a Google maps address link]

Your return appointment with Doctor [NAME OF DOCTOR] is scheduled for [00/00] at [00:00]. We ask that you arrive 15 minutes early with a photo ID and your health insurance card. We are located at ADDRESS OF HOSPITAL OR CLINIC. If you are unable to attend, please let us know here.

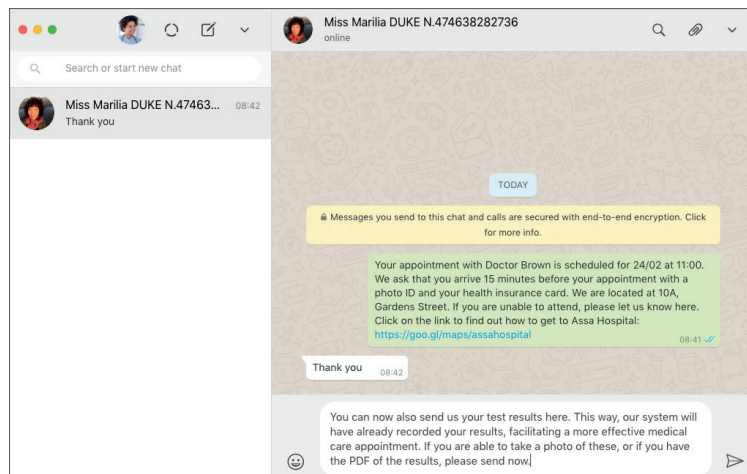
Click on the link to find out how to get to NAME OF THE HOSPITAL OR CLINIC: <https://goo.gl/maps/youraddress>

3. Sending results for tests the patient has done before the appointment

The hospital or clinic may also request that the patient sends any medical test results through WhatsApp itself for the purpose of updating their medical record on the system used in the hospital or clinic. In this case, the patient may be asked to take a photo of the medical reports or send the test results in PDF format if possible.

[reply template for requesting that a patient send their test results to the hospital or clinic via Whatsapp]

You can now also send us your test results here. This way, our system will have already recorded your results, facilitating a more effective medical care appointment. If you are able to take a photo of these, or if you have the PDF of the results, please send now.

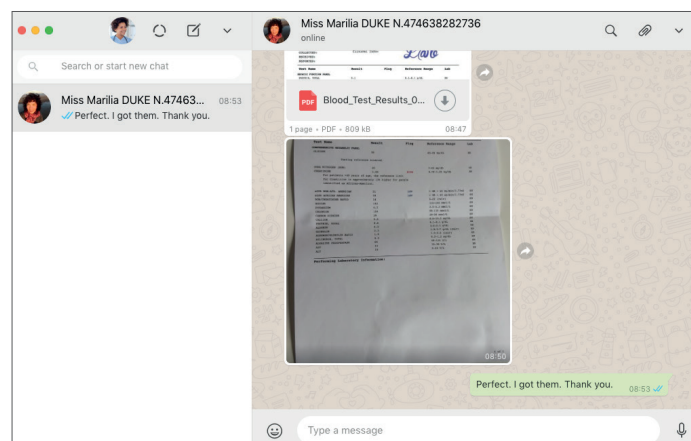
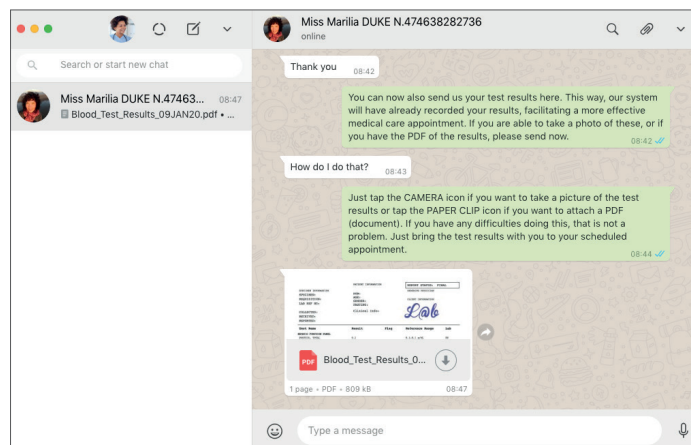
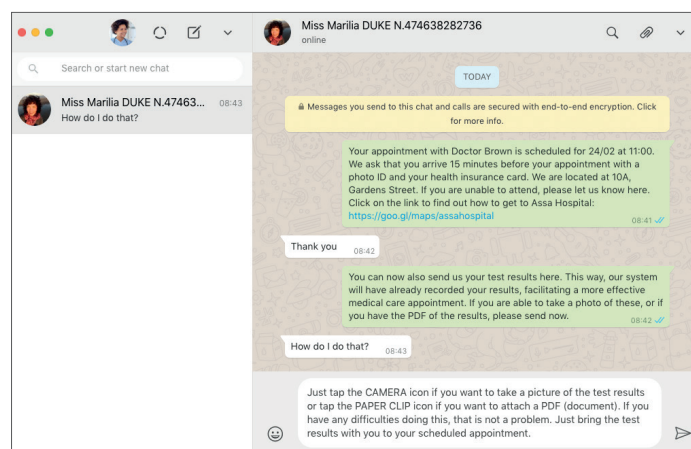


PROTOCOLS FOR BASIC COMMUNICATION ROUTINES BETWEEN THE HOSPITAL OR CLINIC AND PATIENTS USING WHATSAPP

The patient may have questions about how to attach his/her test results, whether they are sending a photo or a PDF. The professional in charge can send instructions to help the patient successfully send these to the hospital or clinic.

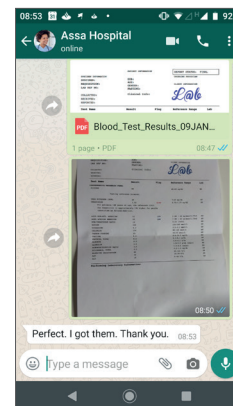
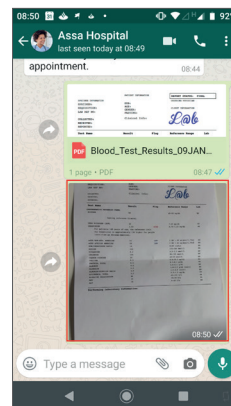
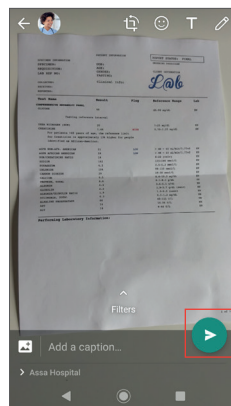
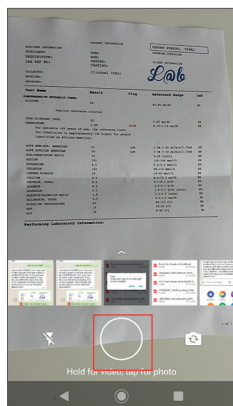
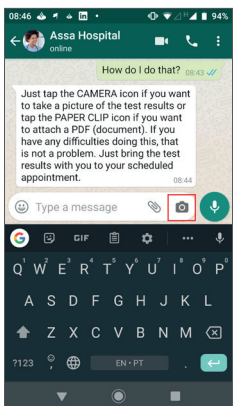
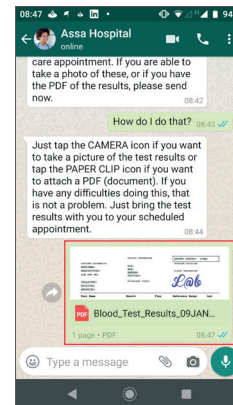
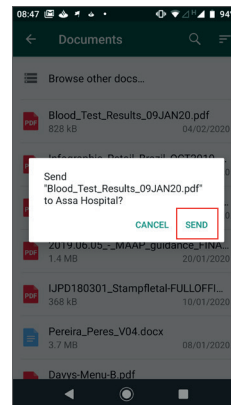
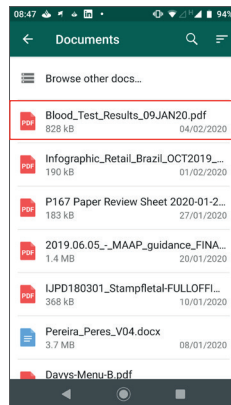
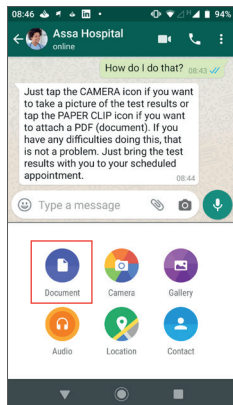
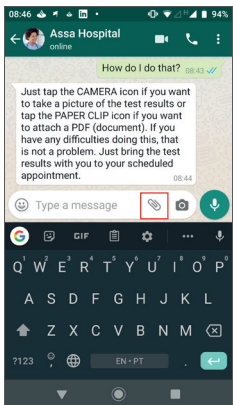
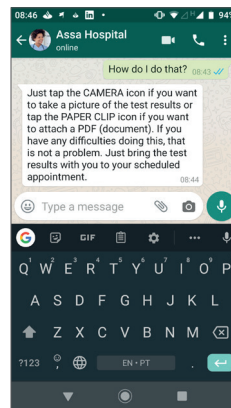
[See below for template message for replying to the patient to help them send their test results to the hospital or clinic]

Just tap the CAMERA icon if you want to take a picture of the test results or tap the PAPER CLIP icon if you want to attach a PDF (document). If you have any difficulties doing this, that is not a problem. Just bring the test results with you to your scheduled appointment.



PROTOCOLS FOR BASIC COMMUNICATION ROUTINES BETWEEN THE HOSPITAL OR CLINIC AND PATIENTS USING WHATSAPP

Understanding how the process of sending photos and PDFs via WhatsApp works:

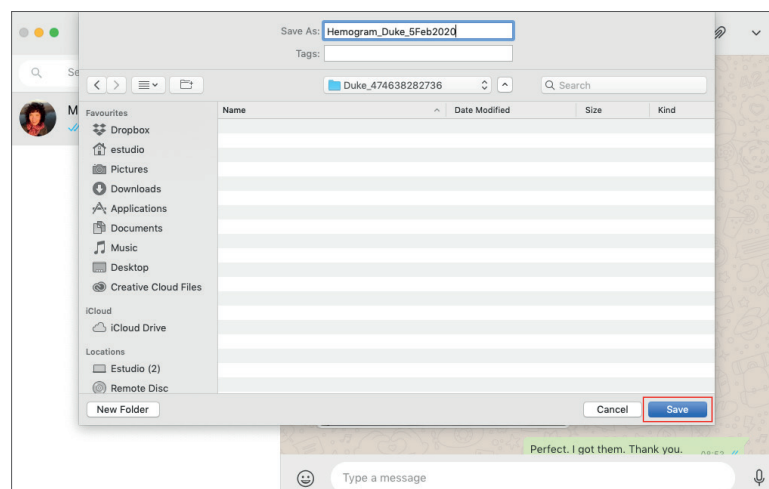
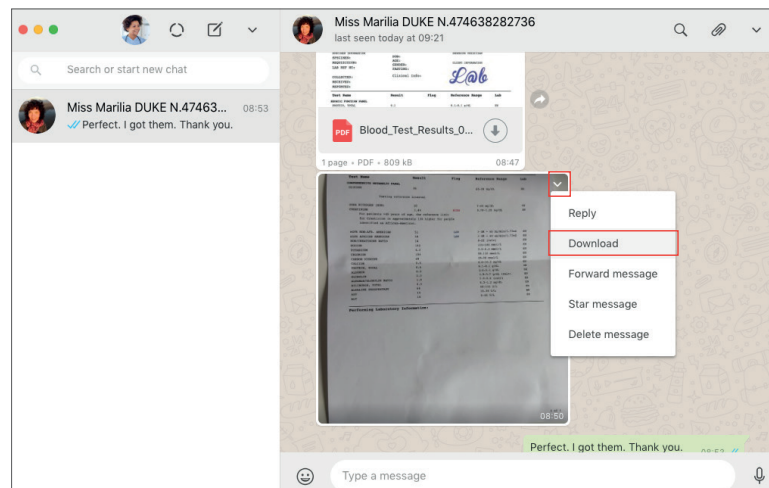


PROTOCOLS FOR BASIC COMMUNICATION ROUTINES BETWEEN THE HOSPITAL OR CLINIC AND PATIENTS USING WHATSAPP

If the patient sends a photo or PDF file of the test results, these should then be added to his/her medical records, depending on the system used by the hospital or clinic.

TO SAVE A PHOTO SENT BY A PATIENT VIA WHATSAPP WEB

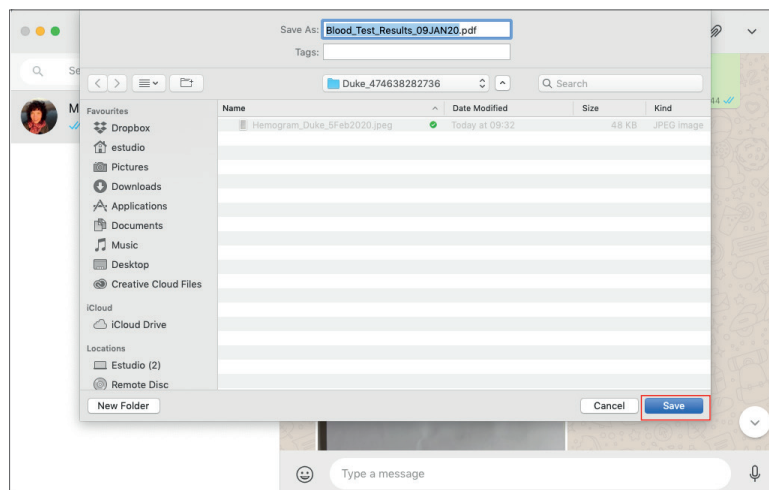
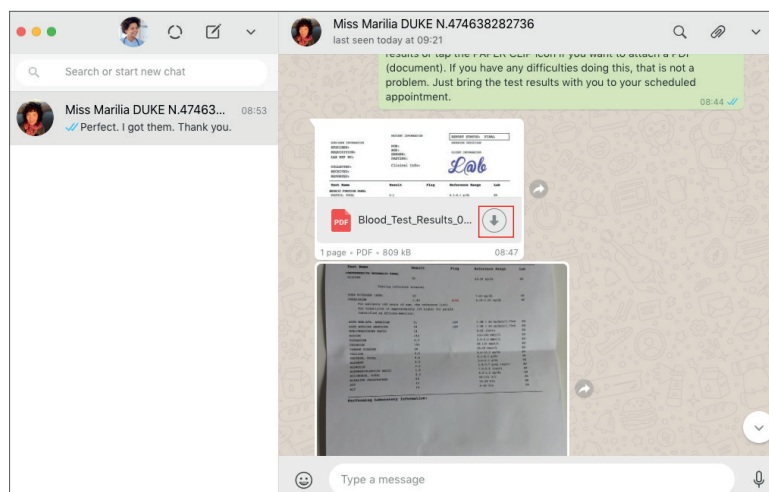
- Hover over the top-right corner of the photo. You will see an ARROW.
- Tap the ARROW.
- Select DOWNLOAD.
- Choose the directory on your computer where you want to save the photo.
- You can also rename the photo by specifying the name of the test result it refers to.



PROTOCOLS FOR BASIC COMMUNICATION ROUTINES BETWEEN THE HOSPITAL OR CLINIC AND PATIENTS USING WHATSAPP

TO SAVE A PDF SENT BY A PATIENT VIA WHATSAPP WEB

- WhatsApp already provides a preview of the file with the PDF icon.
- Tap the ARROW to download the file.
- Choose the directory on your computer where you want to save the PDF.
- You can also rename the PDF by specifying the test result it refers to.



It is important that the professional in charge of WhatsApp admin enters the scheduled return appointment on the patient management system used by the hospital or clinic.

PROTOCOLS FOR BASIC COMMUNICATION ROUTINES BETWEEN THE HOSPITAL OR CLINIC AND PATIENTS USING WHATSAPP

4. Confirming appointments

The number of patients who do not attend their scheduled appointment(s) is significant, generating a significant financial loss and making it impossible to offer the appointments to other patients. Hospitals and clinics already use SMS and e-mail for this purpose. We recommend using WhatsApp for appointment reminders and to confirm appointment attendance, because the chances of the notification being seen by patients is higher, especially if we consider that by 2018, for example, WhatsApp was already the most popular app used by Brazilians, and was present on the main screen of 65% of Brazilian smartphones. We recommend sending a template message with a simple reply option for patients.

[See below for a template that can be used to ask patients to confirm their upcoming appointment]

Hello! You have a scheduled appointment with us tomorrow.

Please confirm you are able to attend the appointment by replying 'Y'.

If you are UNABLE to attend the appointment, please reply with 'N'.

We are waiting for your confirmation. Thank you.

The hospital or clinic may also choose to customise their message by adding more information on the patient's appointment.

[See below for a template message that works as a customisable appointment confirmation]

Hello, you have a scheduled appointment tomorrow with Doctor [NAME OF DOCTOR] at 00:00.

Please confirm you are able to attend the appointment by replying 'Y'.

If you are UNABLE to attend the appointment, please reply with 'N'.

We are waiting for your confirmation. Thank you.

Click on the link to find out how to get to NAME OF THE HOSPITAL OR CLINIC: <https://goo.gl/maps/youraddress>

It is important that the professional in charge of WhatsApp admin updates the appointment on the patient management system used by the hospital or clinic taking into account the reply sent by the patient.

5. Medical test results

If the hospital or clinic provides medical tests, patients may be notified via WhatsApp when the results are ready for them to pick up (In Brazil the test results are given to patients, not directly to the doctors or GPs). As pointed out in the previous item, in 2018, for example, WhatsApp was already identified as the most popular app in Brazil, being present on the main screen of 65% of Brazilian smartphones. This means the patient is more likely to see the notification on WhatsApp than in other apps such as SMS or e-mail. We recommend that you send a template message to patients, alerting them that they can pick up their test results.

[template reply for alerting patients that they can pick up their tests results]

Hello, your test results are ready and can be picked up starting tomorrow. Tests can be picked up from 00:00 to 00:00.

You can pick up your tests at [DESCRIBE FLOOR, BOX, etc.] . Thank you.

Click on the link to find out how to get to NAME OF THE HOSPITAL OR CLINIC: <https://goo.gl/maps/seuendereco>

PROTOCOLS FOR BASIC COMMUNICATION ROUTINES BETWEEN THE HOSPITAL OR CLINIC AND PATIENTS USING WHATSAPP

6. Check up and medical test reminders

If the hospital or clinic has a schedule with the dates of their patients' upcoming routine check-ups or tests, they can notify them by sending a template message via WhatsApp, improving their relationship with the patient and demonstrating commitment to their care. This feature does not require medical training and can be performed by a professional with administrative training who is familiar with WhatsApp and the hospital or clinic system.

[template for reminding the patient they have an upcoming check-up]

Hello! We hope you are well.

We would like to remind you that your annual check-up is now due.

Having an annual check-up is important for preventative care.

If you would like to schedule your check-up, please reply YES and we will contact you to schedule it here via WhatsApp. Thank you

[template for reminding the patient they are due to have a medical test]

Hello! We hope you are well.

We would like to remind you that your [NAME OF MEDICAL TEST] is now due.

In your case, it is very important to this test done as frequently as recommended by your doctor. Do not let more time pass between appointments than your doctor recommends.

If you would like to schedule your [NAME OF THE TEST], reply with YES, and we will contact you to schedule it here via WhatsApp. Thank you.

It is important that the professional in charge of WhatsApp admin then proceeds to schedule the check up or medical test on the patient management system if the patient replies YES to the message. In this case, he or she will have to engage with the protocol for scheduling appointments.

7. Long-term Medication

Patients taking long-term medication may request a new prescription for continued treatment via WhatsApp. This practice was reported by a supplementary health insurance provider in São Paulo. The professional in charge of administering this channel shall validate the request with the doctor in charge of the patient's care, who will evaluate whether to make the prescription available for collection or whether the patient needs to be reassessed via a new appointment. The validation of the request with the doctor in charge can also be done via WhatsApp, in a private chat between the professional and the doctor in charge. This procedure must be in accordance with the protocols adopted by the hospital and clinic and must also be in accordance with the laws regulating this practice.

PROTOCOLS FOR BASIC COMMUNICATION ROUTINES BETWEEN THE HOSPITAL OR CLINIC AND PATIENTS USING WHATSAPP

The flowchart works as follows:

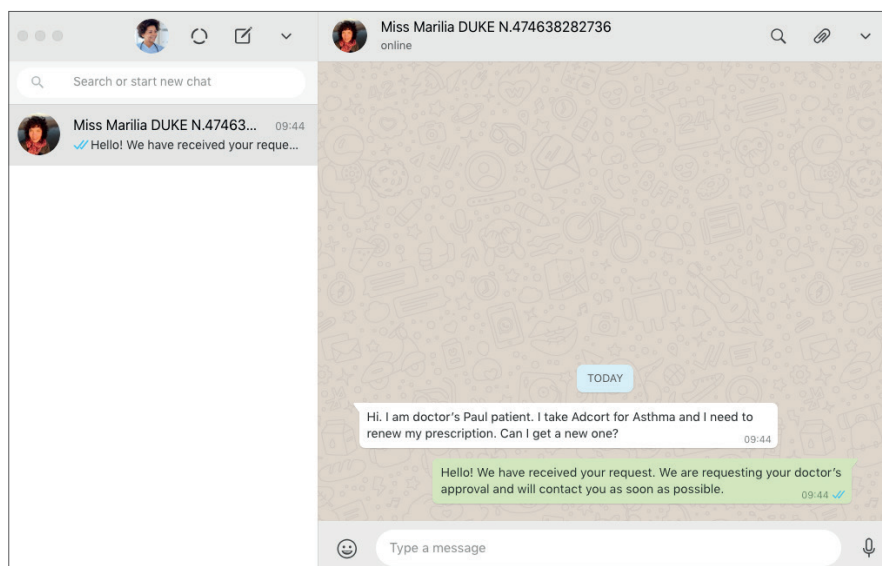
- Patient requests a new prescription.
- Professional replies that he/she will validate the request with the doctor in charge.
- Professional gathers patient data from hospital or clinic medical records and sends a private message to the doctor in charge for assessment.
- The doctor in charge of the patient's care receives the message and evaluates the request.
- If the doctor in charge AGREES with the prescription being renewed, he/she authorises the professional to inform the patient and makes the prescription available for collection.
- If the doctor in charge DISAGREES with the prescription renewal and finds it necessary to reassess the patient, the professional informs the patient and follows the protocol for scheduling an appointment.

As this interaction with the doctor in charge of the patient may take some time, we recommend sending a template reply to the patient.

[template reply for request of receipt for long-term medication prescription renewal]

Hello! We have received your request. We are requesting your doctor's approval and will contact you as soon as possible.

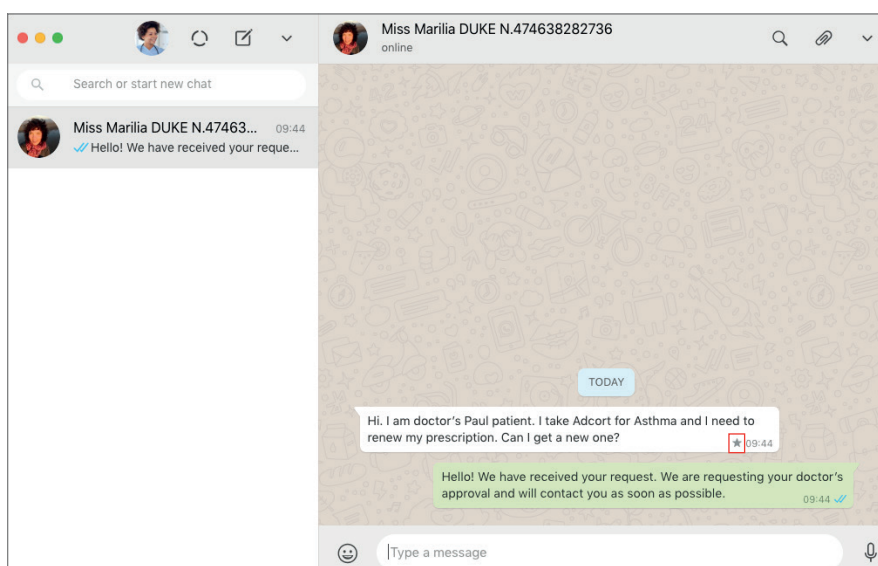
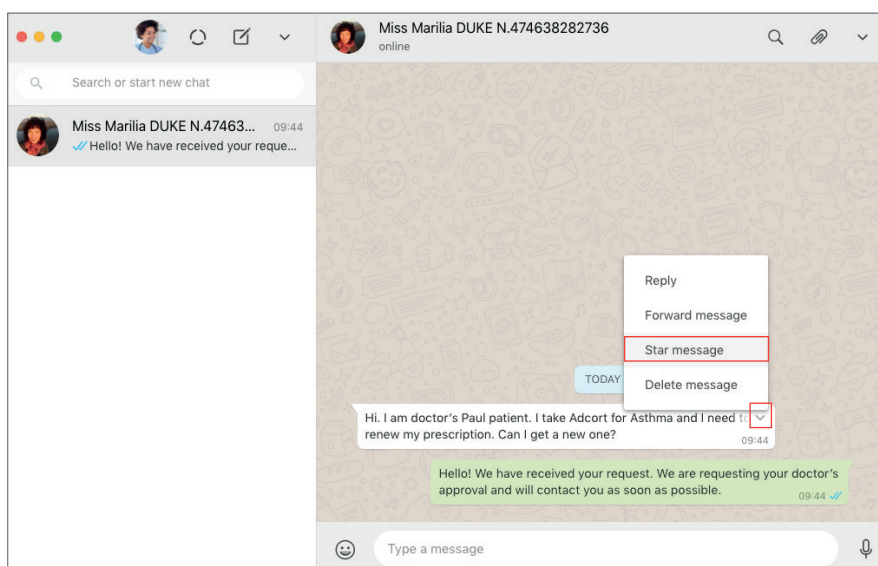
In this situation, the reply to the patient is pending, since it is awaiting a resolution from the doctor in charge, and may require a future return appointment with the patient. We will use WhatsApp's "STAR MESSAGE" feature to keep track of 'pending' issues on a daily basis.



PROTOCOLS FOR BASIC COMMUNICATION ROUTINES BETWEEN THE HOSPITAL OR CLINIC AND PATIENTS USING WHATSAPP

INSTRUCTIONS FOR STARRING MESSAGES AS 'PRIORITY' OR 'PENDING'

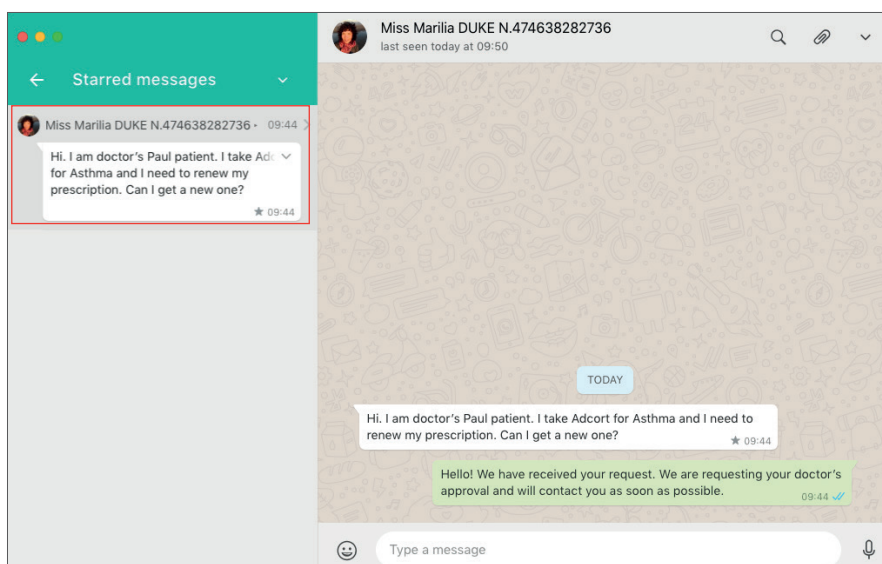
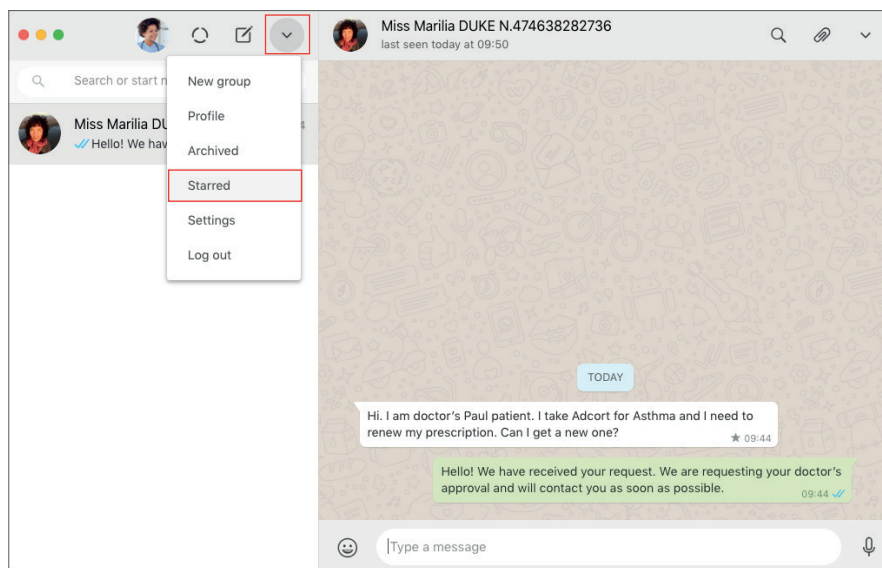
- Hover over the top-right corner of the message sent by the patient requesting the renewal of his or her prescription. You will see an ARROW.
- Tap the ARROW and select the "STAR MESSAGE" option.
- This message will be saved in a directory named "STARRED".



PROTOCOLS FOR BASIC COMMUNICATION ROUTINES BETWEEN THE HOSPITAL OR CLINIC AND PATIENTS USING WHATSAPP

INSTRUCTIONS FOR VIEWING THE STARRED MESSAGES DIRECTORY

- You can access the directory containing all the starred messages in the top bar in the left column of your Whatsapp Web.
- Tap the ARROW and select "STARRED".
- You will then be able to access all pending or priority messages by being shown all STARRED messages.



PROTOCOLS FOR BASIC COMMUNICATION ROUTINES BETWEEN THE HOSPITAL OR CLINIC AND PATIENTS USING WHATSAPP

Whether the doctor agrees to renew the patient's prescription or not, in both cases the professional in charge of WhatsApp admin should go back to the chat to inform the patient regarding the doctor's decision. He/she may use the following template messages.

[template for replying to instruct the patient to collect the prescription of their long-term medication, following its approval]

Hello, your doctor has concluded that there is no need for a reassessment and will continue your treatment with the same medication.

Your prescription will be available for collection from tomorrow at the [FLOOR OR BOX OR SPECIFIC LOCATION TO PICK-UP INSIDE THE FACILITIES OF THE HOSPITAL OR CLINIC]. Thank you.

Click on the link to find out how to get to NAME OF THE HOSPITAL OR CLINIC: <https://goo.gl/maps/youraddress>

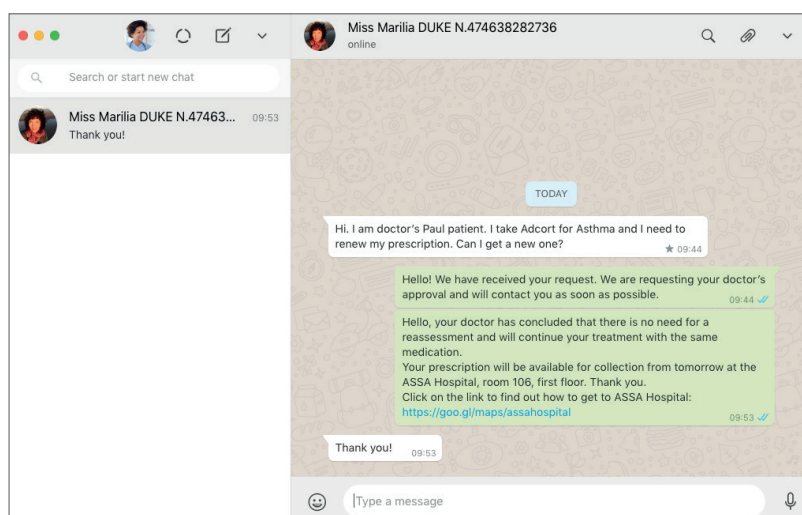
[template for replying to patients if the doctor has concluded they need to be reassessed prior renewing their prescription]

Hello, your doctor has requested you schedule an appointment to see whether you should continue with the same medication or whether you need to make any changes or adjustments to your dosage.

We can schedule an appointment right now via WhatsApp.

Would you like to schedule your appointment now?

If the patient chooses to schedule an appointment, the appointment scheduling protocol should be enabled, and the appointment information should be updated in the hospital or clinic's patient management system.

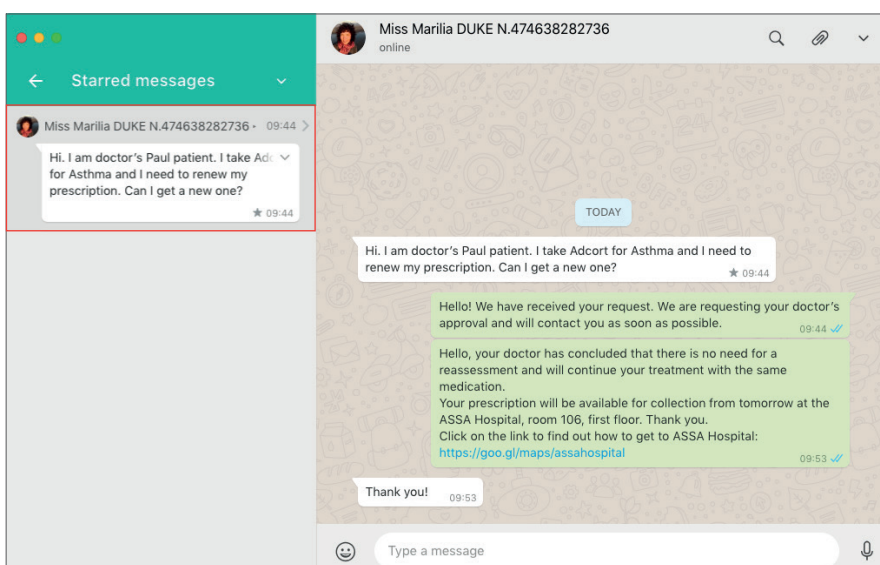
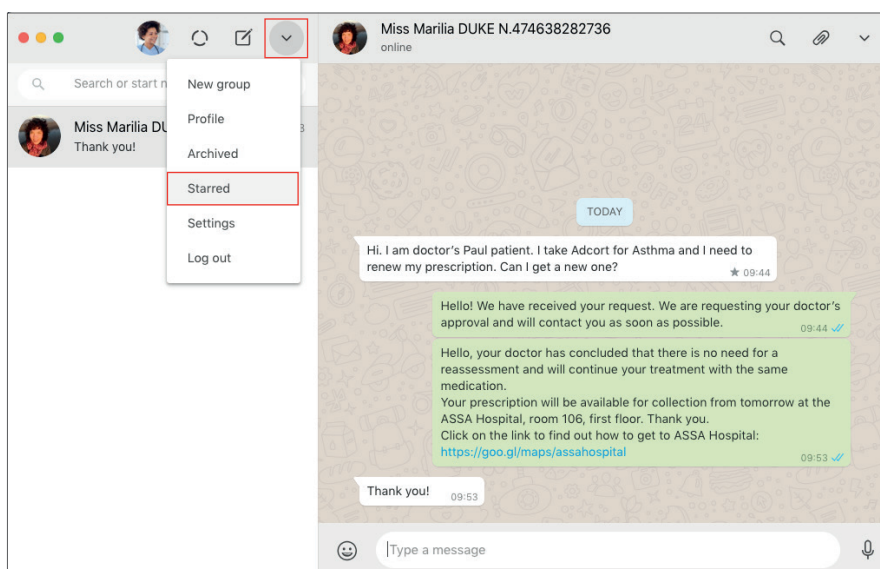


PROTOCOLS FOR BASIC COMMUNICATION ROUTINES BETWEEN THE HOSPITAL OR CLINIC AND PATIENTS USING WHATSAPP

Make sure you unstar the message as soon as the patient receives feedback and the procedure that follows feedback is finished (the scheduling of an appointment for reassessment or making the prescription available for collection). By doing this, you will remove the message from your daily 'pending' queue.

INSTRUCTIONS FOR UNSTARRING A MESSAGE:

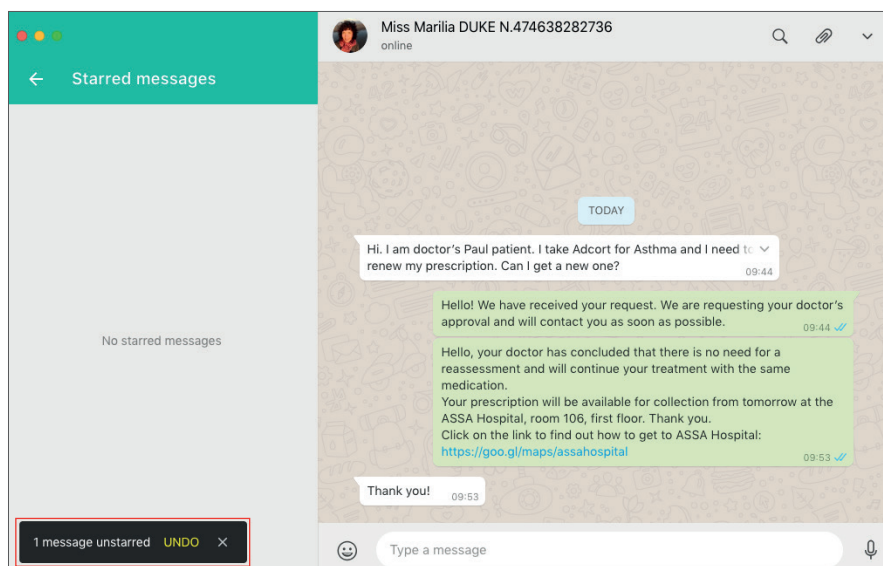
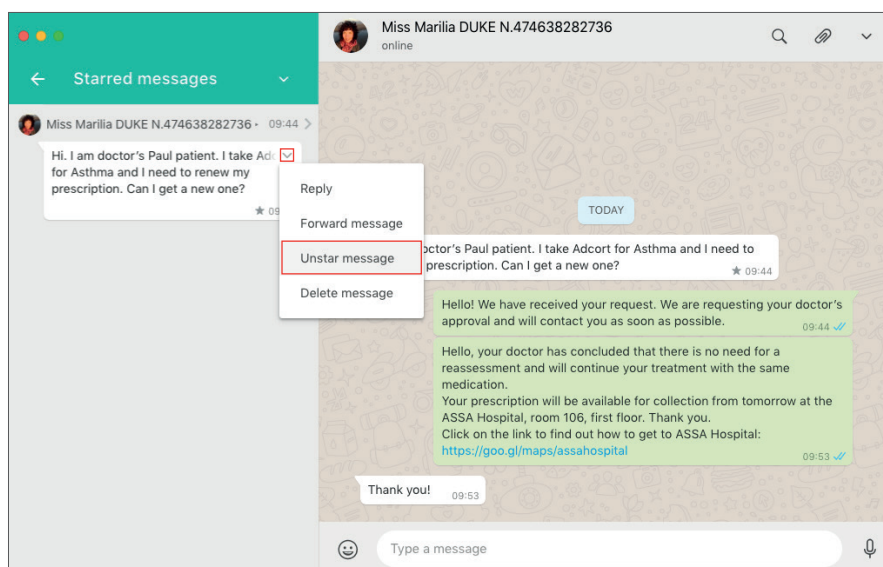
- Access all starred messages by selecting the top bar in the left column on your WhatsApp Web.
- Tap the ARROW and select "STARRED".
- You will access all starred messages (these are your 'pending' messages),
- Find the pending message that has already been solved.



PROTOCOLS FOR BASIC COMMUNICATION ROUTINES BETWEEN THE HOSPITAL OR CLINIC AND PATIENTS USING WHATSAPP

- Hover over the top-right corner of this message. You will see an ARROW.
- Tap the ARROW and select the "UNSTAR MESSAGE" option.

(!) Done: the message has been removed from your 'pending' list (the folder for starred messages).



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

In this chapter, we present a set of protocols to hospitals or clinics that would like to use WhatsApp to provide care at distance. The protocols can be implemented independently according to the hospital or clinic's objectives.

1. Triage

We provide useful protocols for triage, conducted by nursing professionals via WhatsApp through a direct-to-patient interface, aiming to empower the hospital or clinic professionals to listen to the patient's request or problem and decide on what remote care protocol to follow.

2. Remote Care: Level I, Level II and Level III

In this section, we provide protocols that can be followed to organise patient care procedures via WhatsApp at different levels of care coordination, whether care is given directly by the nursing professional (who can issue clarifications, guidelines and information) or with the engagement of the doctor in charge of a particular patient or healthcare team. The level III protocol is also designed to help provide guidance to patients if they need to schedule a medical appointment or go to the emergency room in cases of emergencies.

LEVEL I: cases that can be solved by the nursing professional himself/herself.

LEVEL II: cases that require the engagement of the doctor in charge of the patient's care or healthcare team.

LEVEL III: cases that require the patient to be referred to the doctor's office, the outpatient clinic or the emergency room.



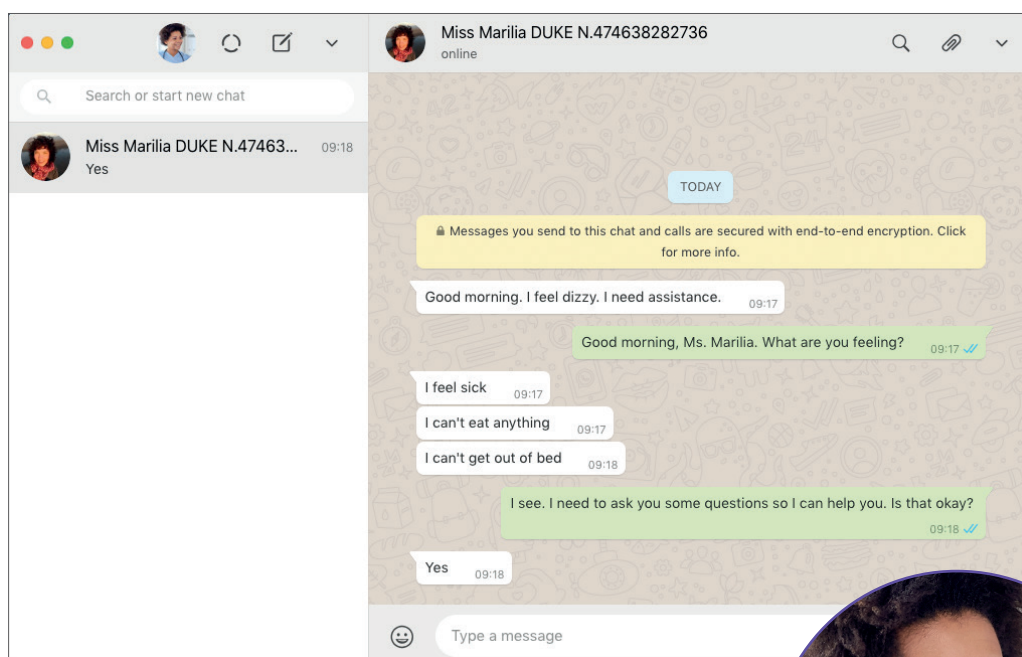
PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

TRIAGE

First port of call: Triage

Triage aims to receive the patient's request or demand, understand his/her need and classify it for referral based on its degree of emergency and complexity. We therefore recommend that the professional in charge of WhatsApp admin should be a nursing professional. The main advantage of having a nursing professional using the interface with patients via WhatsApp is that some of requests or issues can be solved directly by him/her without the need to involve the doctor in charge of the patient's care, or other medical staff. It is up to the hospital or clinic to define the cases in which the nursing professional has the autonomy to provide the patient with medical attention.

The hospital or clinic should develop a triage questionnaire protocol via WhatsApp which the nursing professional should follow. This way, he or she can collect all the information necessary to classify the case through text messages.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

TRIAGE

Five WhatsApp features that can be used to conduct hospital or clinic triage

We have identified five features that can help enhance the quality of conducting triage via WhatsApp.

- **THE ABILITY TO REFERENCE A PATIENT'S SPECIFIC MESSAGE**

Enables the nursing professional to go back to information previously provided by the patient in the chat, making direct reference to it. This enables the nursing professional to organise the chat flow and collect more data about a specific piece of information.

- **THE ABILITY TO THE PATIENT TO SEND A PHOTO OF THEIR BODY**

Allows the patient to send photos of the affected area, for example.

- **THE ABILITY TO THE PATIENT TO SEND A PHOTO OR PDF SHOWING PREVIOUS TEST RESULTS**

Allows the patient to send photos or PDFs showing results from previous medical tests or examinations.

- **ARCHIVING PATIENT PHOTOS AND FILES SENT BY WHATSAPP**

Allows photos and documents that were sent during the triage process to be saved onto the network of the hospital or clinic, and included in the patient's medical record.

- **CREATING A DIRECTORY FOR PENDING AND/OR PRIORITY MESSAGES**

Using WhatsApp's STAR MESSAGE feature, the nursing professional can signal which cases will be referred for further evaluation by a doctor or medical staff. The feature automatically creates a 'pending' list for easy viewing and consultation. Once the pending issue is solved, it is possible to UNSTAR the message, constantly updating the list of patients awaiting a reply.

PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

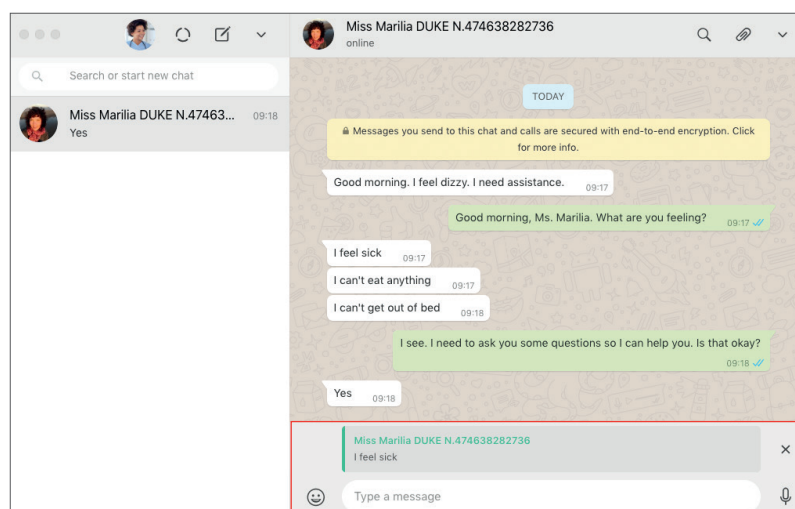
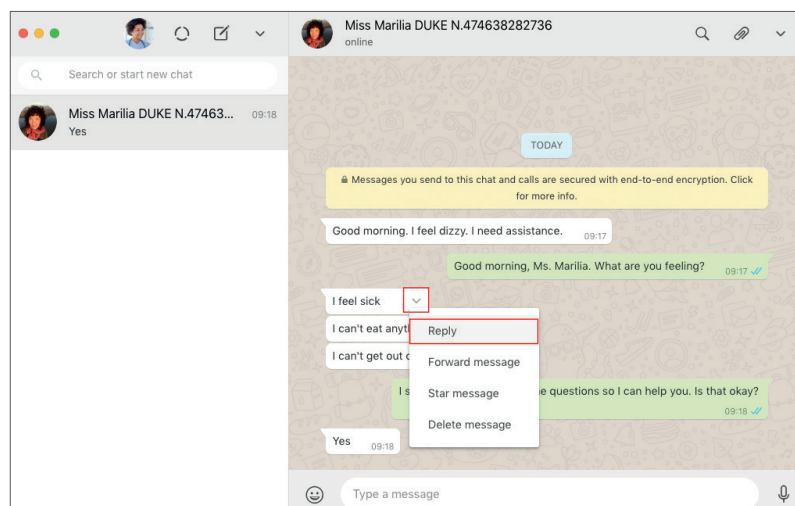
TRIAGE

1. Referring to a specific message previously sent by the patient

The nursing professional may feel the need to go back to a piece of information previously provided by the patient in the chat. To refer to a previous message, the nursing professional can use the following WhatsApp Web feature:

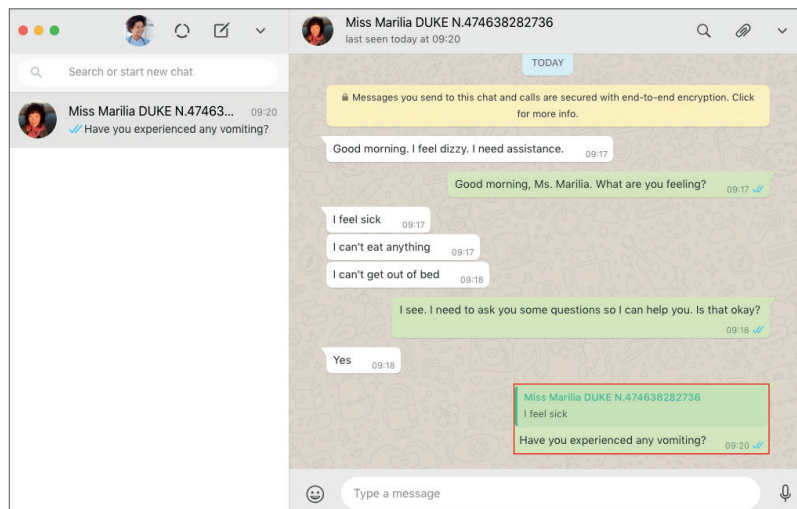
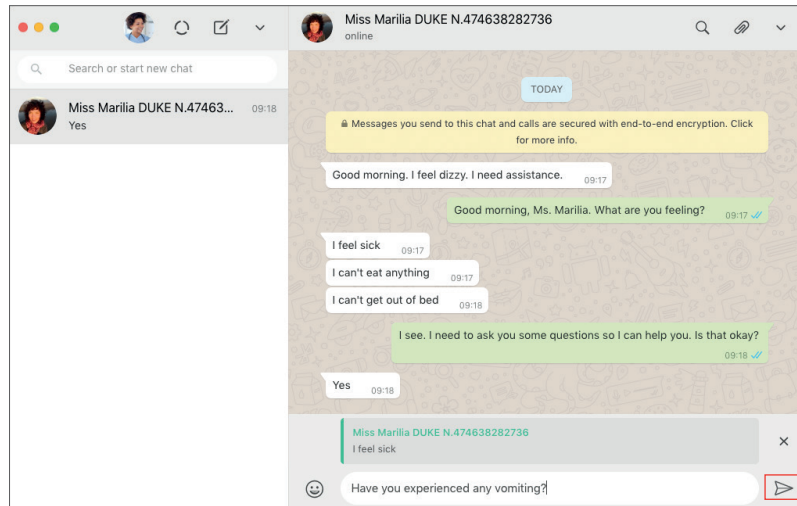
INSTRUCTIONS FOR REFERRING TO A SPECIFIC REPLY PREVIOUSLY SENT BY THE PATIENT

- Identify the specific patient message you want to refer to.
- Hover over the top-right corner of the message. You will see an ARROW.
- Tap the ARROW and select REPLY.
- The message you selected will be highlighted and “pasted” into your reply.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

TRIAGE

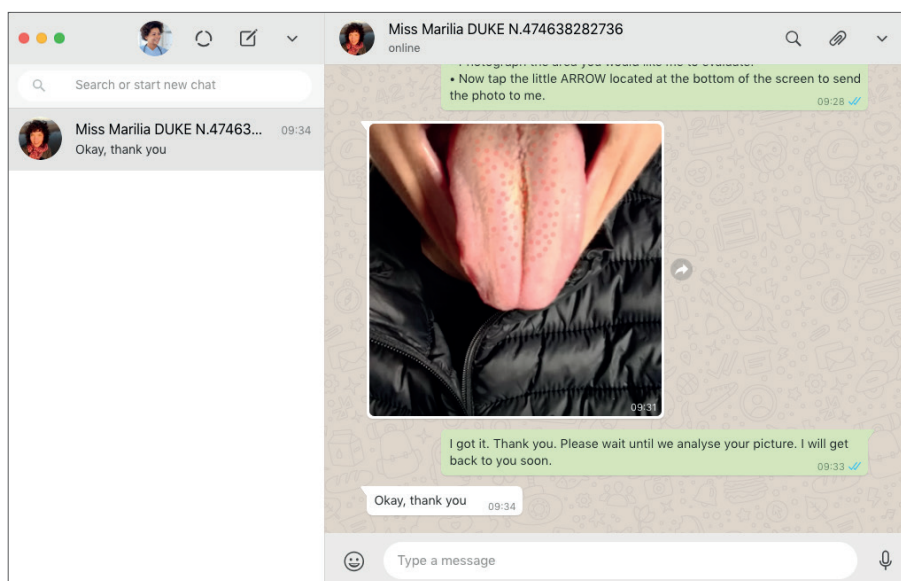


PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

TRIAGE

2. Patient sends photo for triage

WhatsApp also allows the patient to send photos to help the nursing professional in providing them with the appropriate medical care. In this case, the nursing professional may request a photo. The nursing professional can then analyse the photo, which may given them more confidence in making a decision.



If the patient does not know how to take a photo, the nurse can send them instructions.

[template reply for instructions on how to send photos via WhatsApp]

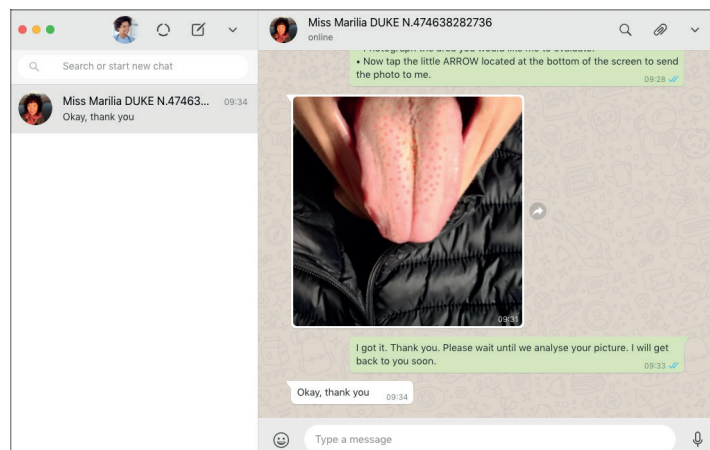
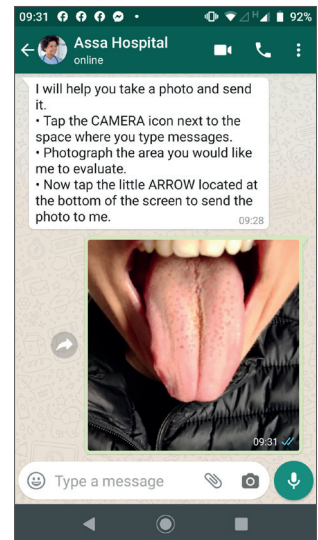
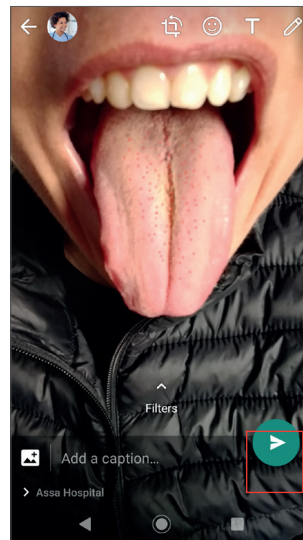
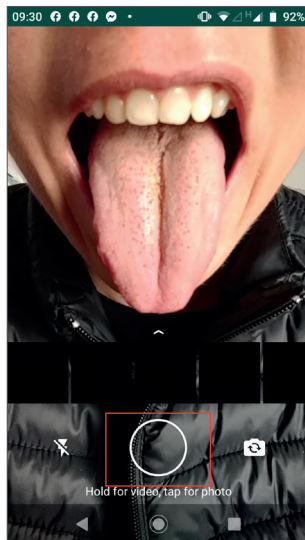
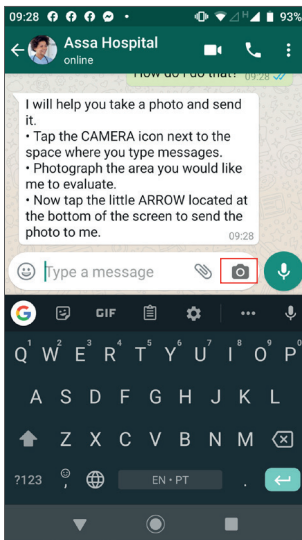
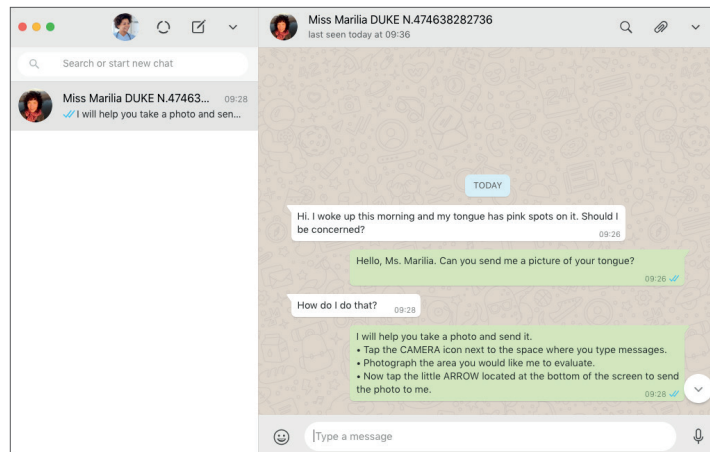
I will help you take a photo and send it.

- Tap the CAMERA icon next to the space where you type messages.
- Photograph the area you would like me to evaluate.
- Now tap the little ARROW located at the bottom of the screen to send the photo to me.

PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

TRIAGE

Understanding how the process of sending photos via WhatsApp works:

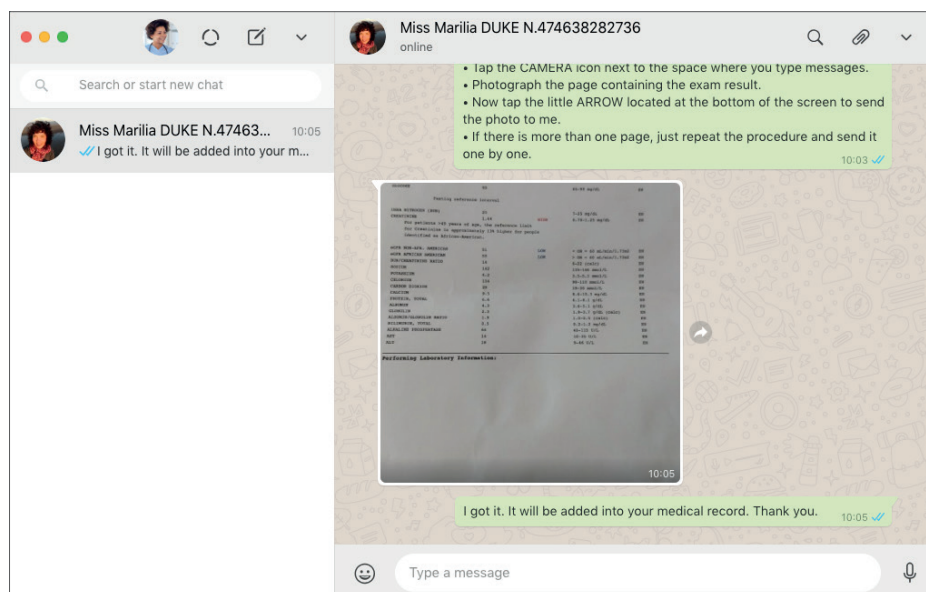


PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

TRIAGE

3. Sending previous test results as photographs

WhatsApp also allows the patient to send previous test results to help the nursing professional in providing medical attention. In this case, the nursing professional may ask the patient to take a photo of the results. If needed, the patient should be instructed to take a photo of the required test result.



If the patient does not know how to take the photo, the nurse can send instructions.

[template for replying with instructions on how to send previous test results as a photo via WhatsApp]

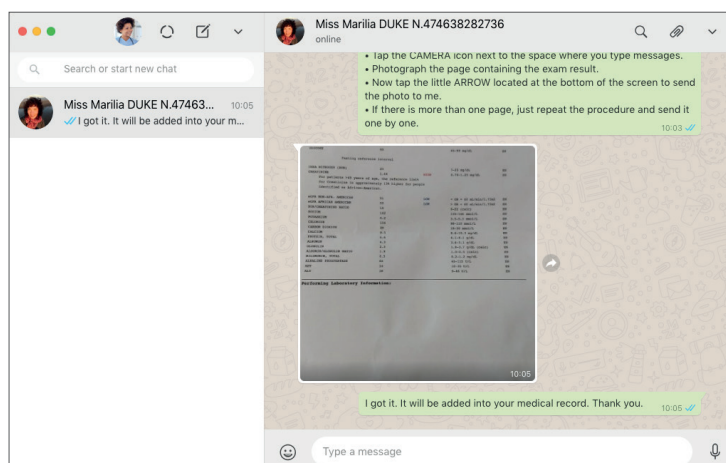
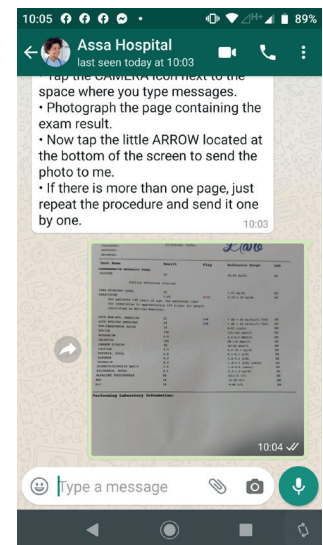
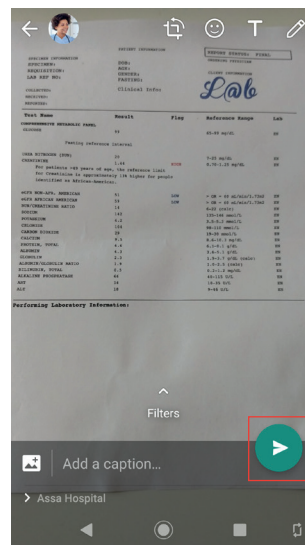
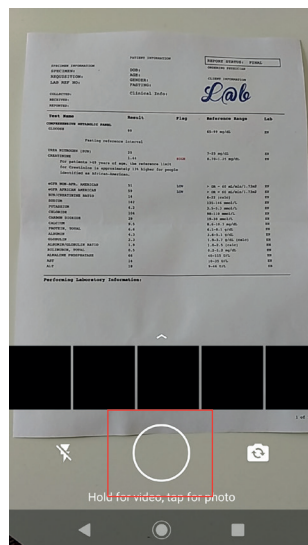
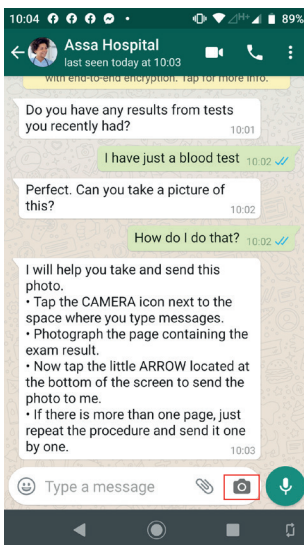
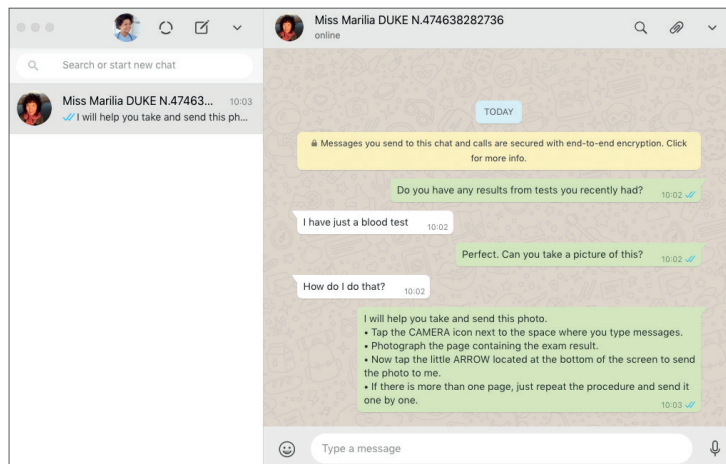
I will help you take and send this photo.

- Tap Paper Clip next to the space where you type messages.
- Now select CAMERA.
- Photograph the page containing the exam result.
- Now tap the little ARROW located at the bottom of the screen to send the photo to me.
- If there is more than one page, just repeat the procedure and send it one by one.

PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

TRIAGE

Understanding how the process of sending test result photos via WhatsApp works:



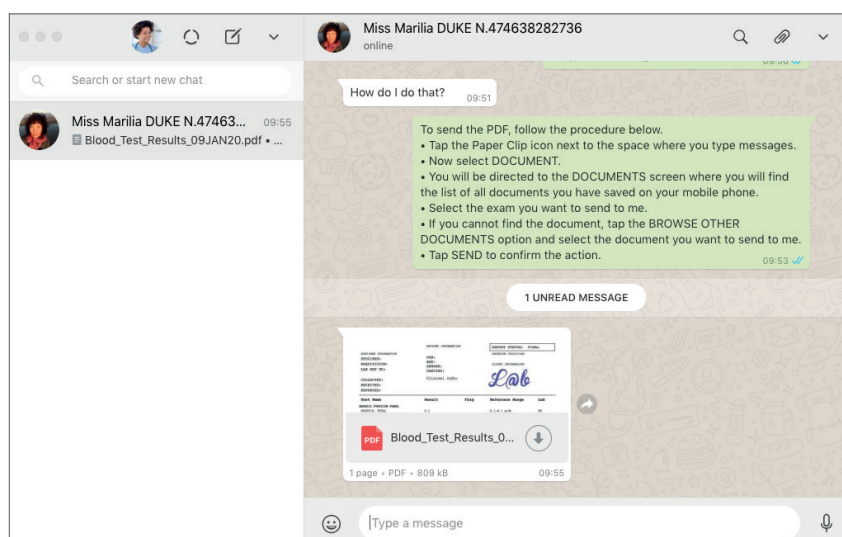
PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

TRIAGE

4. Patients opts to send the results of previous tests as a PDF file

The patient can inform the nursing professional that he or she has the results of a medical test in PDF format. In this case, the nursing professional may request the PDF via WhatsApp.

If the patient needs instructions, the nursing professional can send these via WhatsApp. Sending PDFs requires more advanced skills, because he or she will have to find the location the document was saved in, whether in the cloud or on the device itself.



[template for replying with instructions on how to send previous test results as a PDF via WhatsApp]

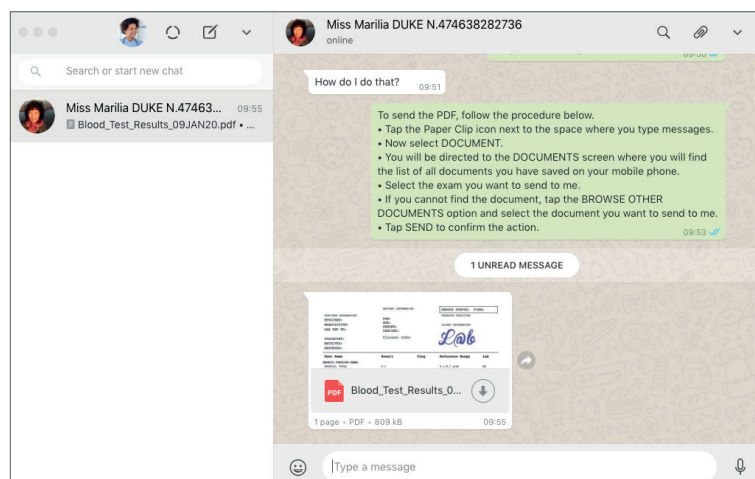
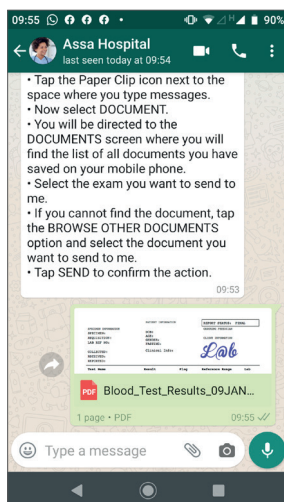
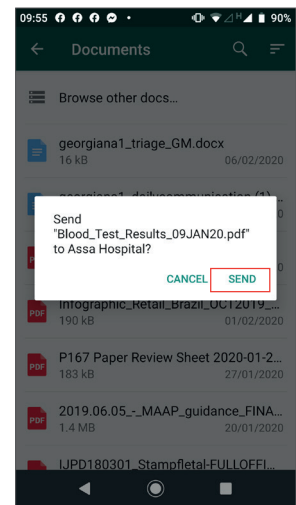
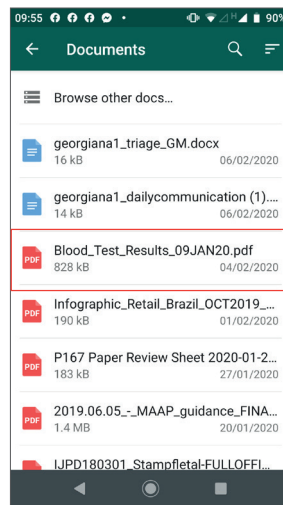
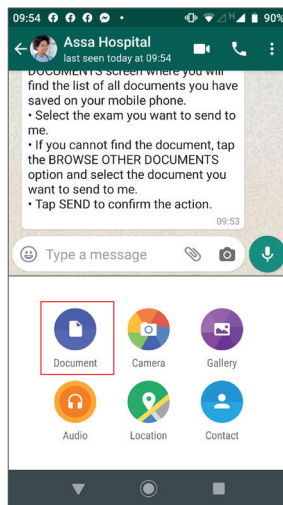
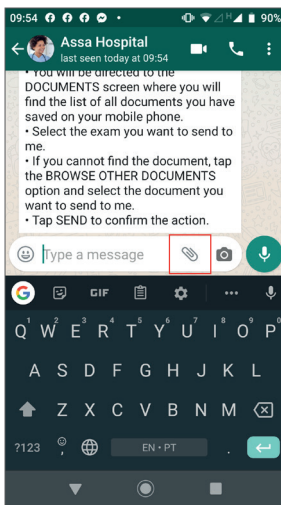
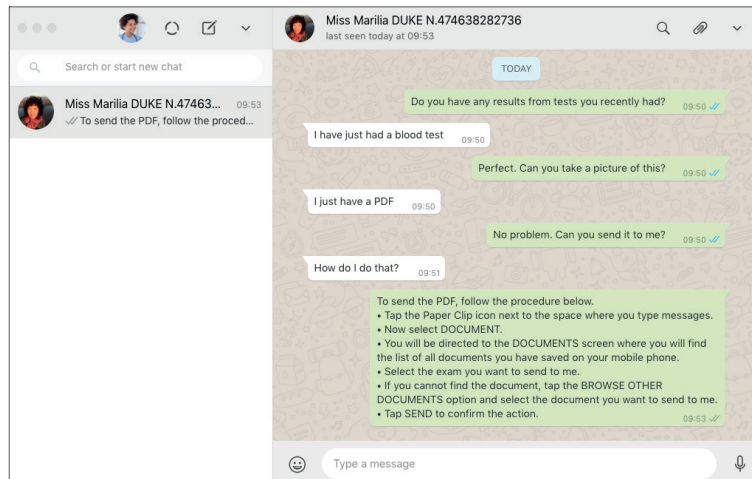
To send the PDF, follow the procedure below.

- Tap the Paper Clip icon next to the space where you type messages.
- Now select DOCUMENT.
- You will be directed to the DOCUMENTS screen where you will find the list of all documents you have saved on your mobile phone.
- Select the test result you want to send to me.
- If you cannot find the document, tap the BROWSE OTHER DOCUMENTS option and select the document you want to send to me.
- Tap SEND to confirm the action.

PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

TRIAGE

Understanding how the process of sending test results in PDF format via WhatsApp works:



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

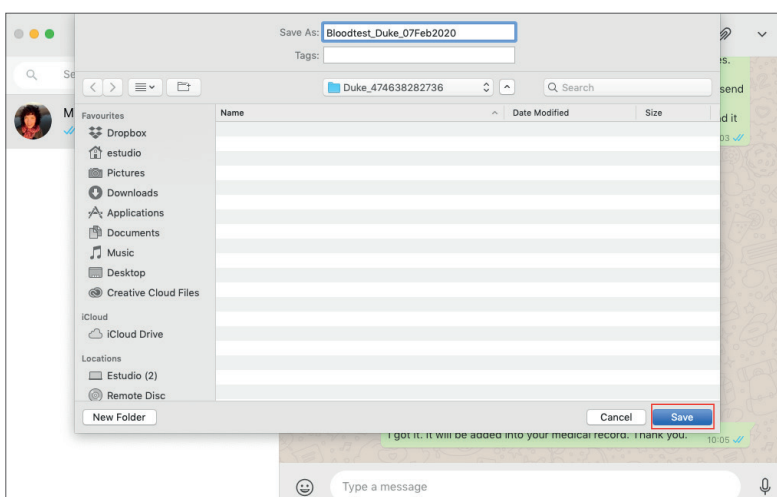
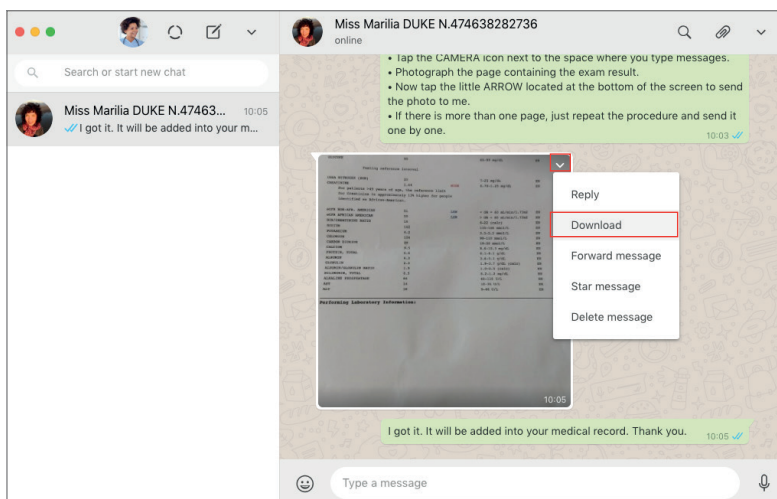
TRIAGEM

5. Saving photos and PDFs sent by the patient

If the patient sends a photo or PDF with the results of previous test results, it can be included in his/her medical records, depending on the patient management the system used by the hospital or clinic.

INSTRUCTIONS FOR SAVING A PHOTO SENT BY THE PATIENT VIA WHATSAPP WEB

- Hover over the top-right corner of the photo. You will see an ARROW.
- Tap the ARROW.
- Select DOWNLOAD.
- Choose the directory you want to save your image to on your computer.
- You can also rename the image by specifying the name of the test it refers to.
- Tap SAVE to complete.

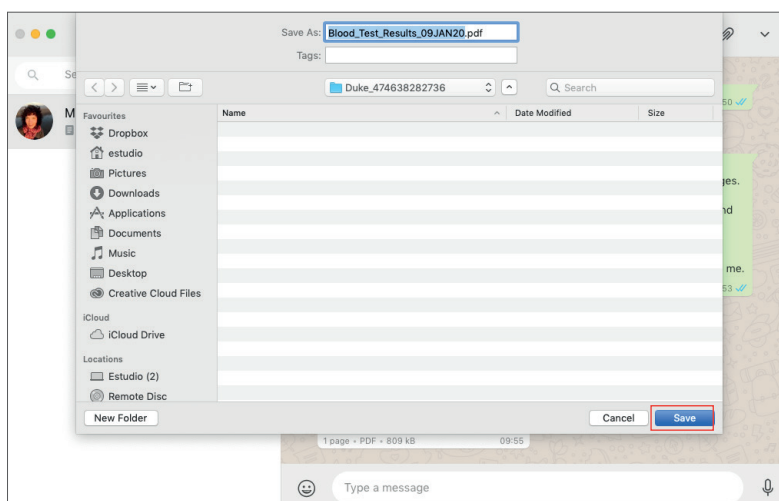
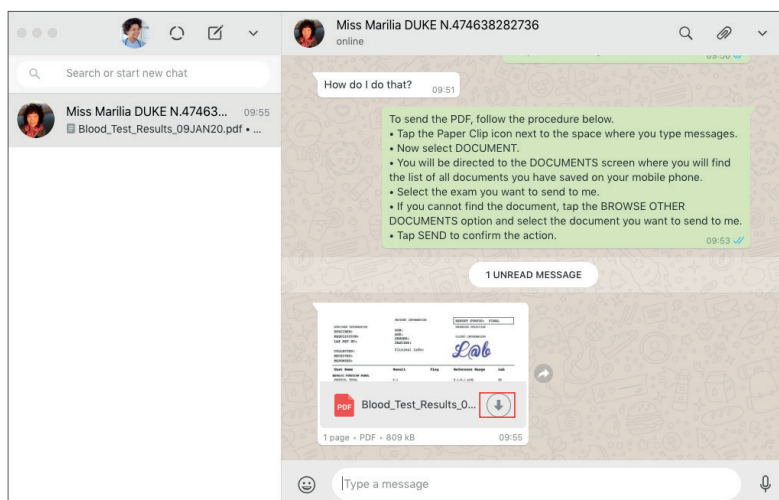


PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

TRIAGE

INSTRUCTIONS FOR SAVING A PDF SENT BY THE PATIENT VIA WHATSAPP WEB

- WhatsApp already provides a preview of the file with the PDF icon.
- Tap the ARROW to download the file.
- Choose the directory on your computer where you want to save the PDF.
- You can also rename the PDF by specifying the test results it refers to.
- Tap SAVE to complete.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

TRIAGE

6. Completing the triage

After following the triage questionnaire defined as the protocol to be used by the hospital or clinic for sorting cases and determining priority, the nursing professional should be able to classify the case as Level I, Level II or Level III. The classification will follow criteria predetermined by the medical staff.

The hospital or clinic should define how medical care will proceed, taking into account the organisational hierarchy in the hospital or clinic.

Our suggestion is that cases should be referred as follows:

LEVEL I: can be solved by the nursing professional himself/herself.

LEVEL II: requires the involvement of the doctor in charge of the patient's care or healthcare team.

LEVEL III: referral of the patient to the doctor's office, the outpatients clinic or the emergency room.

6.1. Starring messages to denote their 'pending' status after triage

In LEVEL II cases, which require involving the doctor in charge of a patient or healthcare team and consulting with them on patient guidance, we recommend that the nursing professional classify the patient's last message as pending, using the WhatsApp STAR MESSAGE tool. Using this feature, the nursing professional will be able to see, in a single list, all cases in which the reply to the patient is pending.

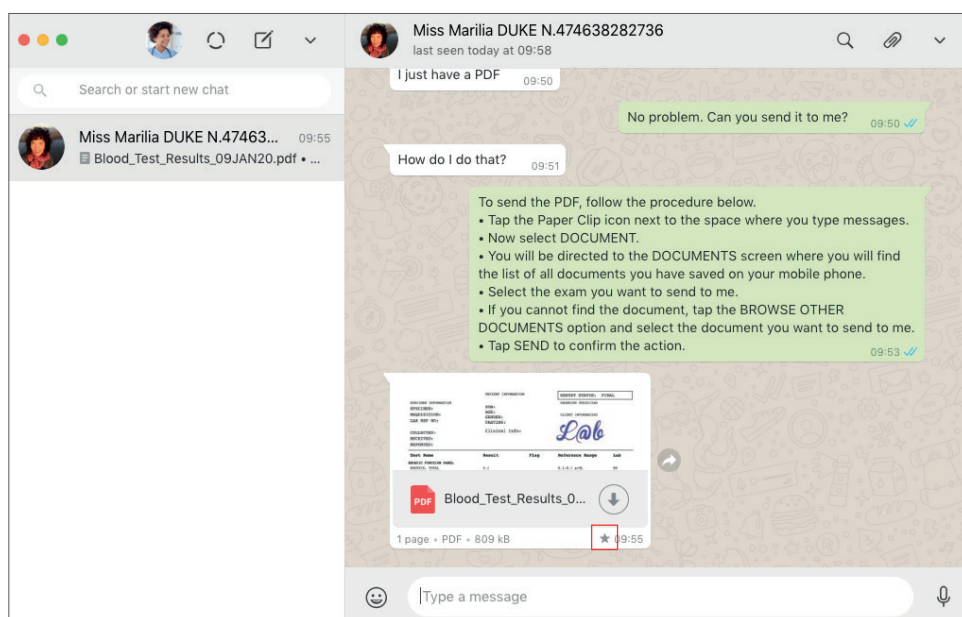
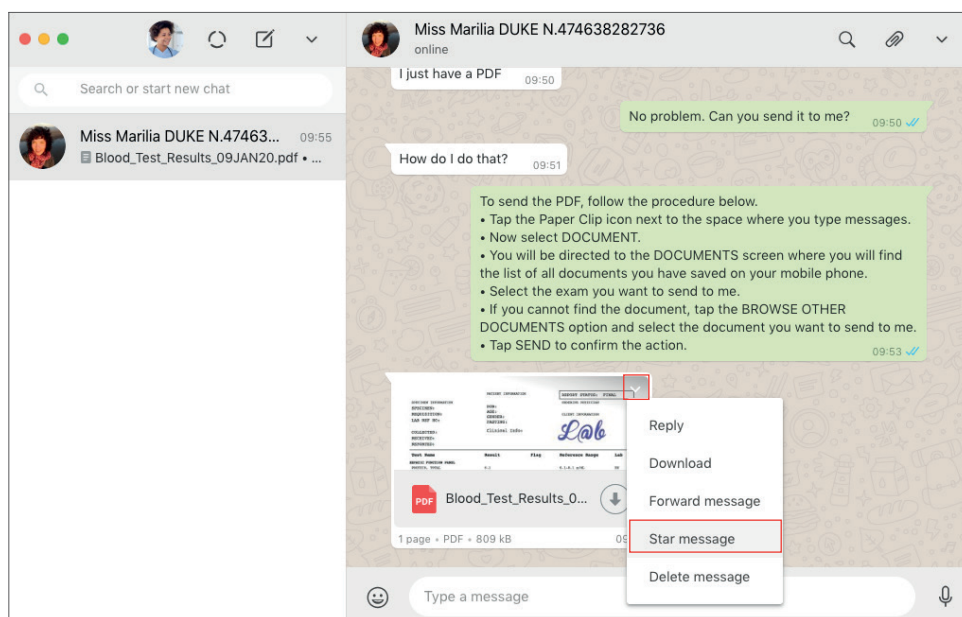
It is important for the nursing professional to update this list, by unstarring messages in cases where patient care has been completed. Doing this means the message is removed from his/her daily pending list.

PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

TRIAGE

INSTRUCTIONS FOR STARRING MESSAGES AS 'PENDING'

- Hover over the top-right corner of the patient message you want to star. You will see an ARROW.
- Tap the ARROW and select the "STAR MESSAGE" option.
- This message will be saved in a directory called "STARRED".

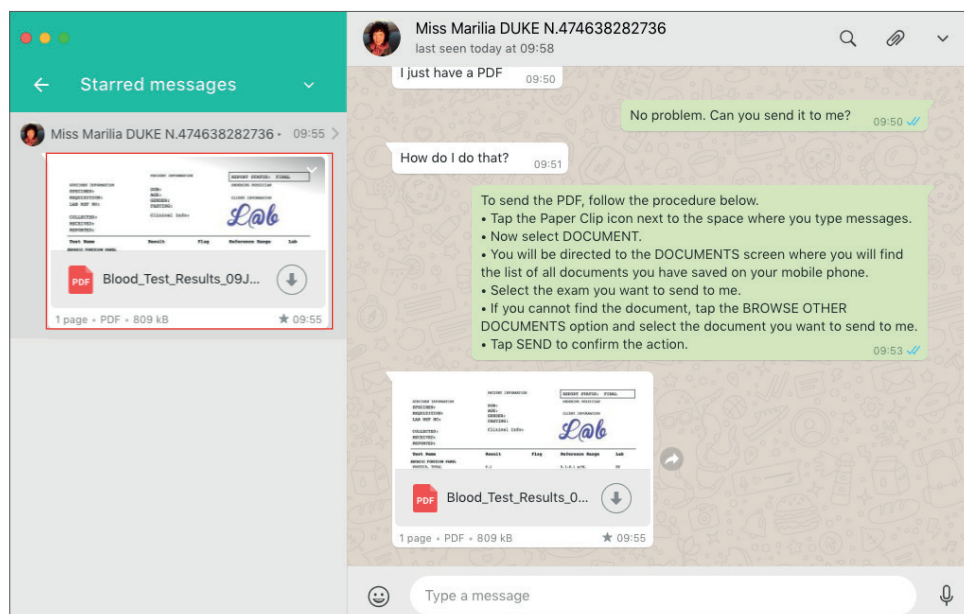
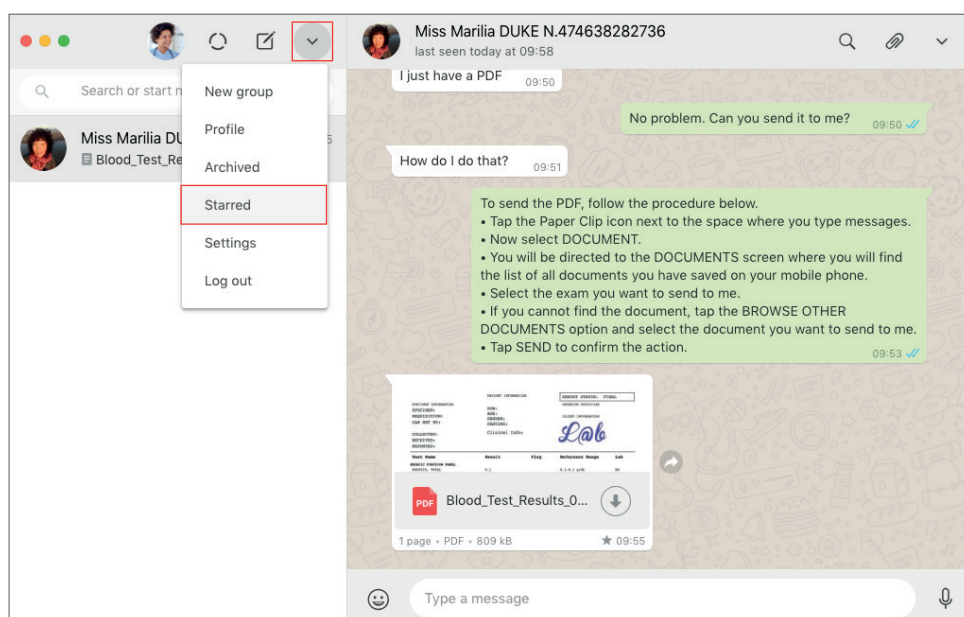


PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

TRIAGE

INSTRUCTIONS FOR VIEWING THE DIRECTORY CONTAINING ALL OF THE PENDING (STARRED) MESSAGES

- You can access the directory that contains all of the starred messages on the top bar of the left column on WhatsApp Web.
- Tap the arrow and select "STARRED".
- You will be able to access all starred messages as pending issues.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

TRIAGE

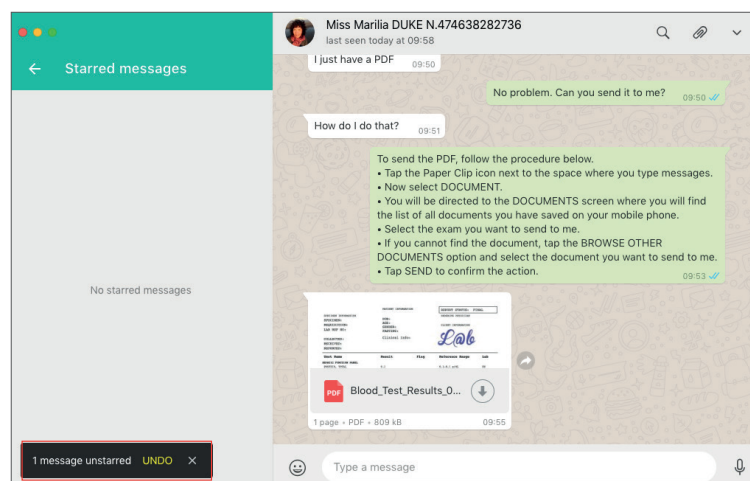
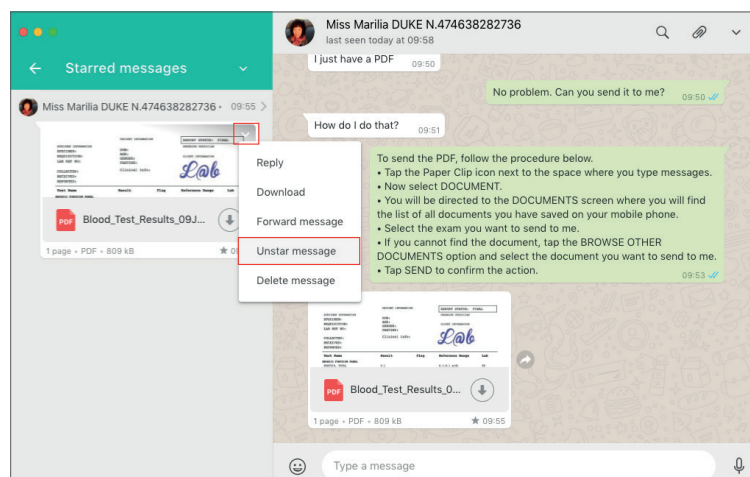
6.2. Unstarring messages that are classed as pending issues

If the professional identifies that a chat was mistakenly starred as pending or if the pending issue has been solved, he or she may delete it from the pending list.

INSTRUCTIONS FOR UNSTARRING A MESSAGE AND THEREBY REMOVING IT FROM THE PENDING LIST

- Access all starred messages on the top bar of the left column on WhatsApp Web.
- Tap the arrow and select "STARRED".
- You will be able to access all starred (pending) messages.
- Find the pending message that has already been solved.
- Hover over the top-right corner of this message. You will see an ARROW.
- Tap the ARROW and select the "UNSTAR MESSAGE" option.

(!) Done: The message has been removed from your pending list (starred messages).



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL I MEDICAL CARE - WITH NURSING PROFESSIONAL IN CHARGE

Remote Medical Care via Whatsapp - Level I

Through triage, the nursing professional should be able to identify cases in which the patient's discomfort can be solved or mitigated with basic guidelines on how to proceed. The following cases, classed as LEVEL I, can be solved by the nursing professional himself/herself via WhatsApp, providing greater agility to the medical care system, and greater comfort for the patient:

- Difficulty reading the medical prescription prescribed by the hospital or clinic.
- Questions on how to take the medication prescribed by the hospital or clinic.
- Question on how to adhere to the treatment prescribed by the hospital or clinic.
- Help following guidance or procedures defined by the hospital and clinic.

The patient's medical record must be accessed during medical care and the procedure must be recorded upon the completion of medical care. Level I medical care is provided primarily through the exchange of messages between the nursing professional and the patient. The nursing professional may ask the patient to send photos or images or PDFs of previous test results following the same procedures as in the triage phase.

Another case where sending a photo can solve the patient's problem is when they have an illegible prescription. Although Resolution No. 278.15 of the Regional Council of Medicine of São Paulo (CREMESP) has established that it is the doctor's obligation to write a legible document and printed prescriptions are becoming more frequent, there are still cases in which the patient cannot acquire the medication due to prescription illegibility. In Tocantins, for example, the G1 news portal reported that local pharmacists had created a WhatsApp group to solicit help from colleagues in understanding illegible prescriptions.

In clarifying the prescription's contents, the nursing professional has the advantage of being able to access the patient's medical record as well as being able to contact the doctor who wrote the prescription in the first place.

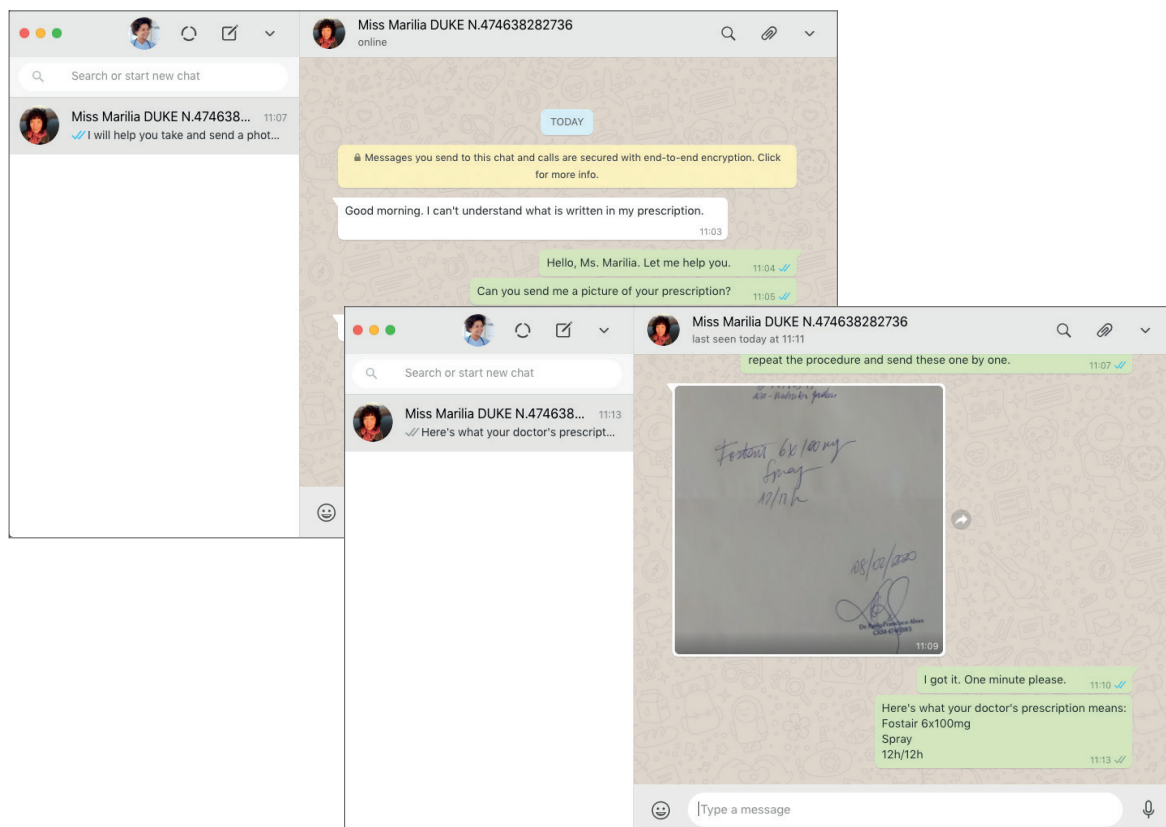


PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL I MEDICAL CARE - WITH NURSING PROFESSIONAL IN CHARGE

1. Patient sends a photo of his or her prescription for clarification

If having difficulties reading the medical prescription the patient is asking about, the nursing professional may ask the patient to send a photo of the prescription.



If the patient does not know how to take a photo of the prescription, the nurse can send instructions.

[template for sending instructions on how to send a photo of the prescription via WhatsApp]

I will help you take and send a photo of your prescription.

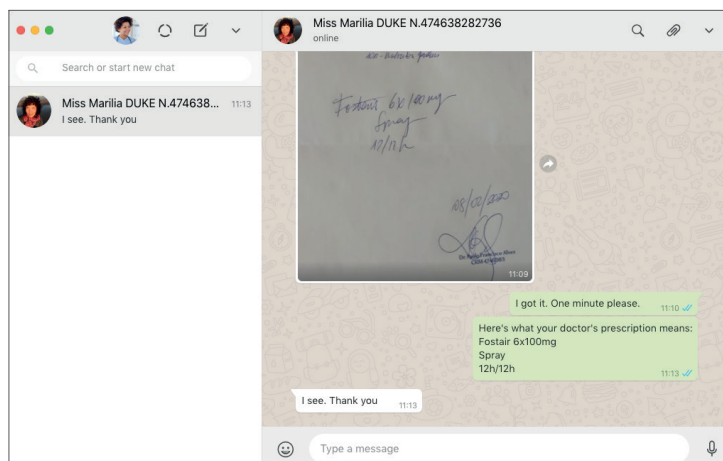
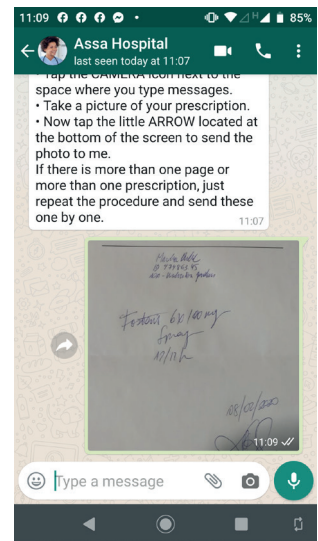
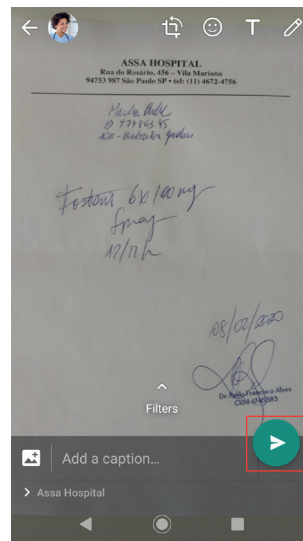
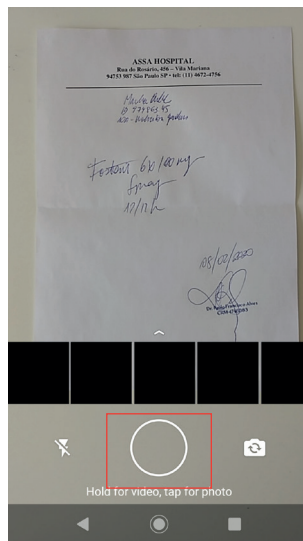
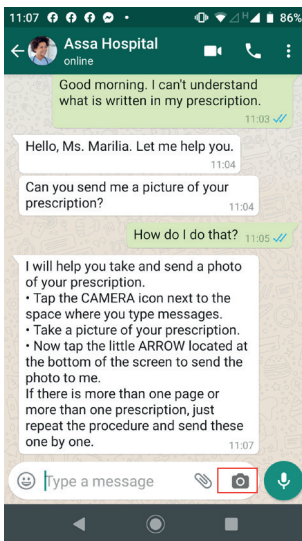
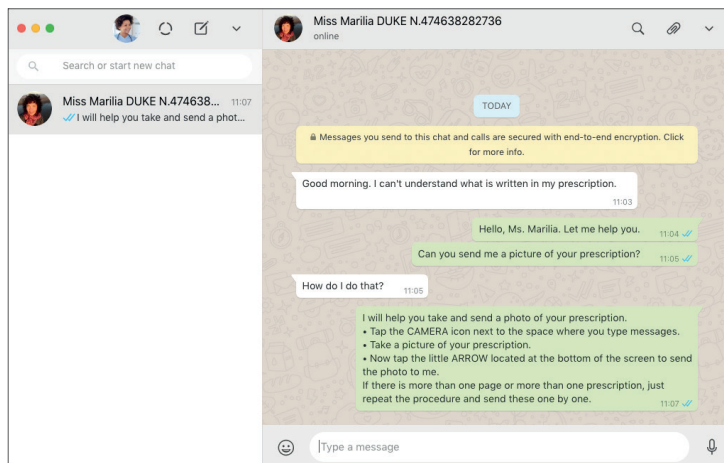
- Tap the CAMERA icon next to the space where you type messages.
- Take a picture of your prescription.
- Now tap the little ARROW located at the bottom of the screen to send the photo to me.

If there is more than one page or more than one prescription, just repeat the procedure and send these one by one.

PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL I MEDICAL CARE - WITH NURSING PROFESSIONAL IN CHARGE

Understanding how the process of sending photos of medical prescriptions via WhatsApp works:



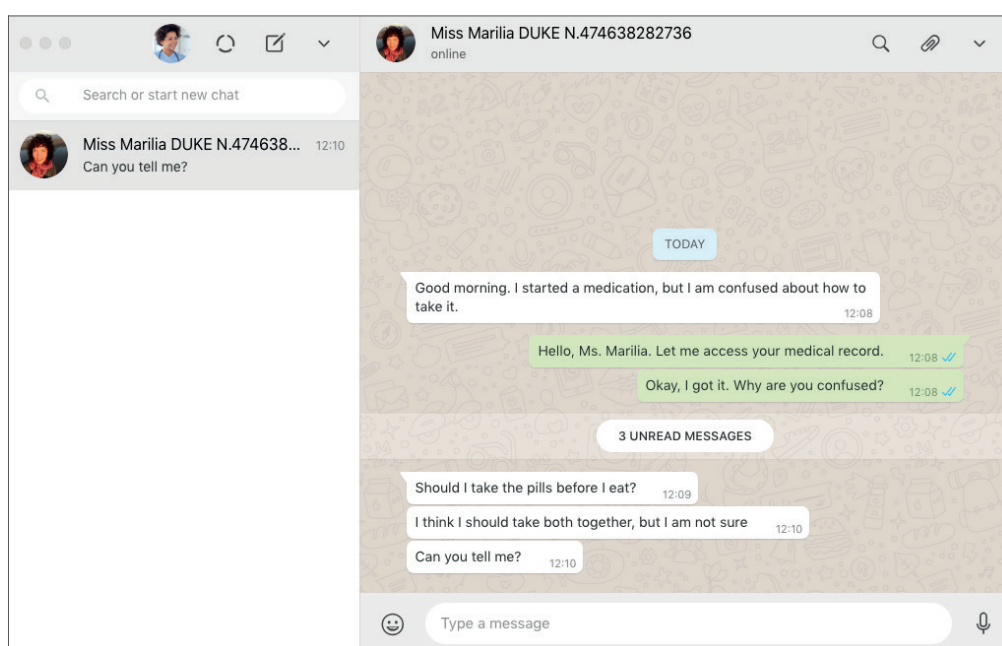
PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL I MEDICAL CARE - WITH NURSING PROFESSIONAL IN CHARGE

2. Clarifications after appointment

The nursing professional can assist the patient after his or her appointment, clarifying questions about how to take the necessary medications or how to follow the guidelines prescribed by the doctor. This service is primarily a listening exercise that aims to understand the patient's needs or requests. After appointment, clarifications can be made through text messages sent via WhatsApp.

It is important that during the chat, the nursing professional accesses the patient's medical record in order to follow the instructions and procedures recorded by the doctor in charge of his/her care.



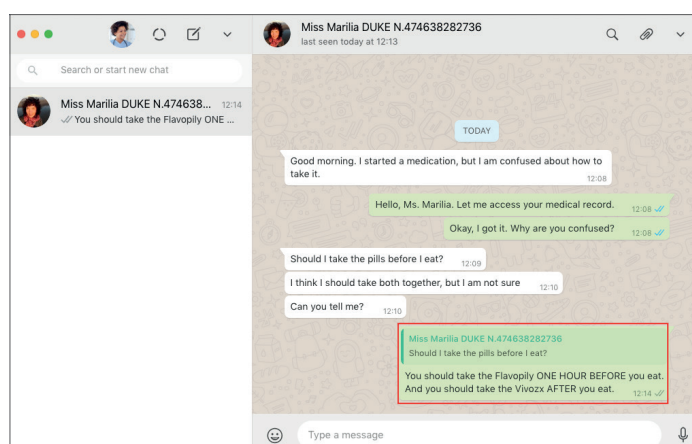
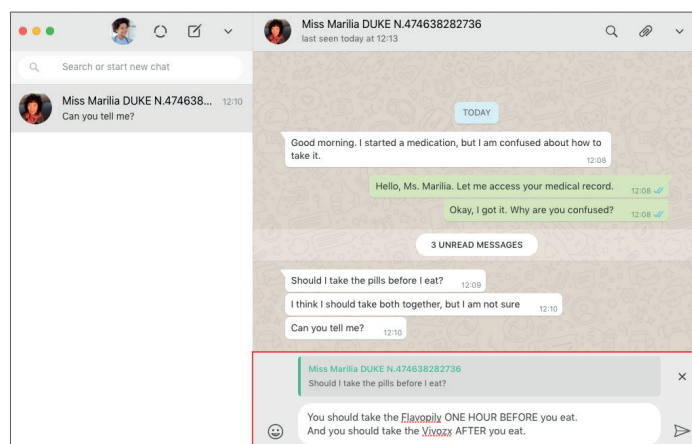
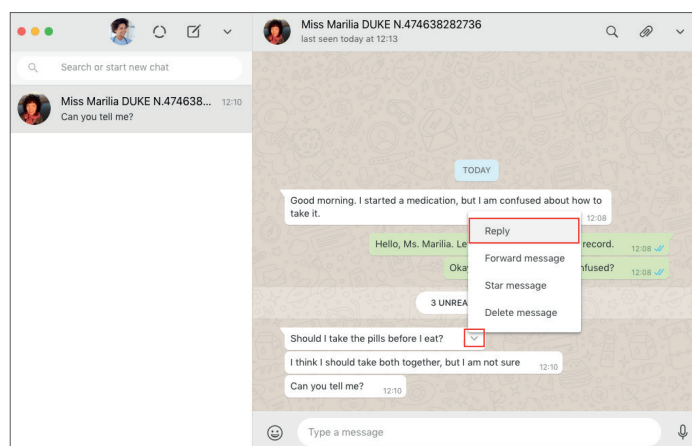
During the chat, the nursing professional may feel the need to signal which specific message or question sent by the patient to he or she is referring to in their reply. In such cases, he/she can enable the REPLY feature, which makes the reference to a specific message visible, facilitating the organisation of the chat, as well as the patient's understanding.

PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL I MEDICAL CARE - WITH NURSING PROFESSIONAL IN CHARGE

MAKING REFERENCE TO A SPECIFIC MESSAGE FROM PATIENT

- Identify the message of the patient you want to refer to.
- Hover over the top-right corner of the message. You will see an ARROW.
- Tap the ARROW and select REPLY.
- The specific message you selected will be highlighted and pasted next to your comment.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

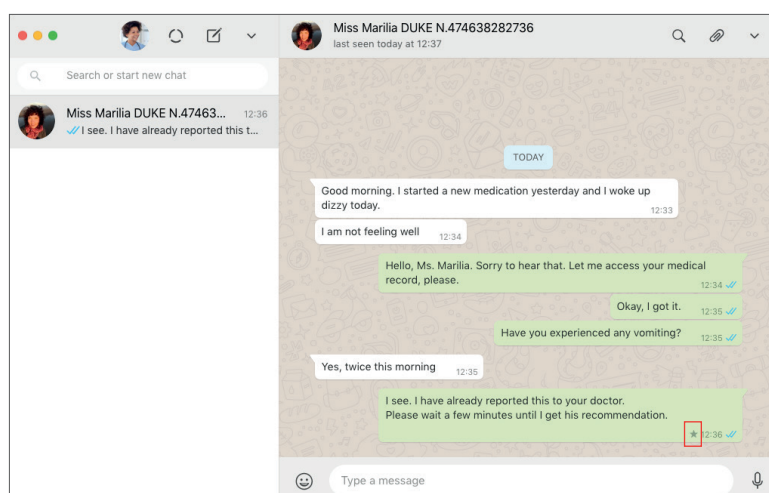
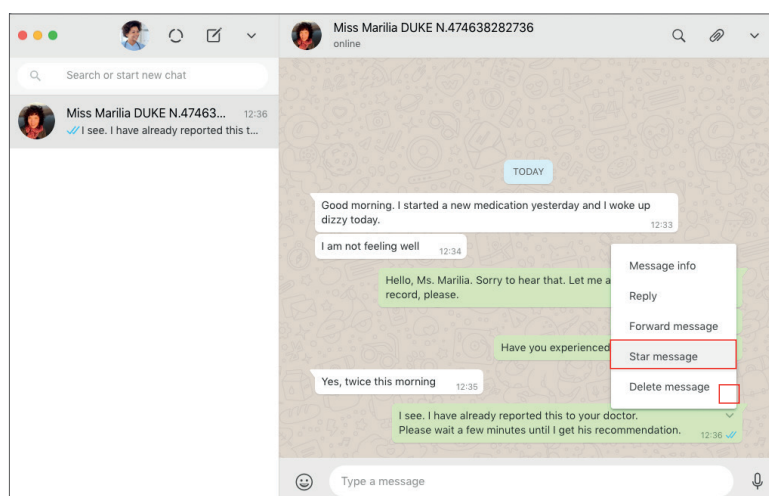
LEVEL I MEDICAL CARE - WITH NURSING PROFESSIONAL IN CHARGE

3. Starring Level I pending medical care or identifying Level II medical care

The nursing professional may star messages pertaining to Level I care which are pending, or messages related to a case that needs to be reclassified as Level II, meaning it requires the involvement of the doctor or medical staff member in charge of the patient in question. Using the WhatsApp Web STAR MESSAGE feature, he/she can group all of the messages with 'pending' or referral status into a single list, which can be updated according to how the process of care progresses (or when the process has been completed).

INSTRUCTIONS FOR STARRING MESSAGES TO DENOTE THEIR STATUS AS PENDING (FOR LEVEL I) OR TO SHOW THEY MAY NEED TO BE CLASSIFIED AS LEVEL II

- Hover over the top-right corner of the patient message you want to star. You will see an ARROW.
- Tap the ARROW and select the "STAR MESSAGE" option.
- This message will be saved in a directory called "STARRED".



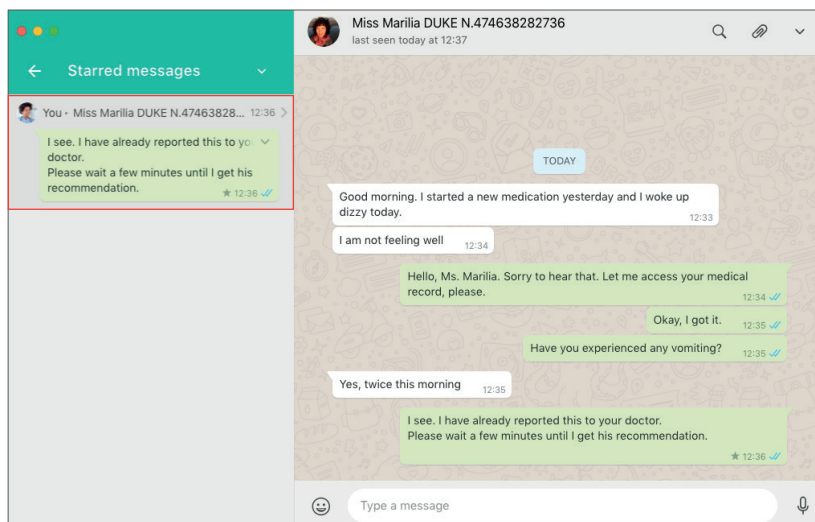
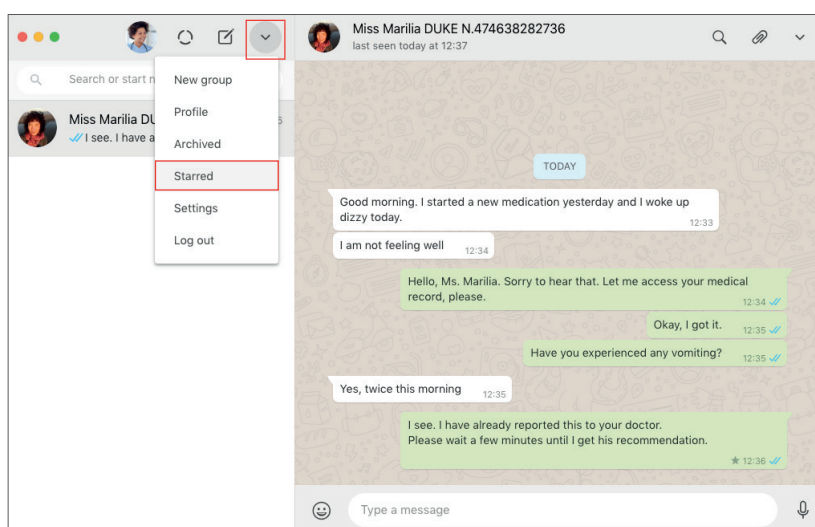
PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL I MEDICAL CARE - WITH NURSING PROFESSIONAL IN CHARGE

INSTRUCTIONS FOR VIEWING THE DIRECTORY OF STARRED MESSAGES

(MESSAGES WHICH ARE EITHER PENDING OR RELATE TO A CASE THAT MAY NEED TO BE RECLASSIFIED AS LEVEL II)

- You can access the directory of all the starred messages at the top bar of the left column on your WhatsApp Web.
- Tap the arrow and select "STARRED".
- You will now be able to access all starred messages as pending.



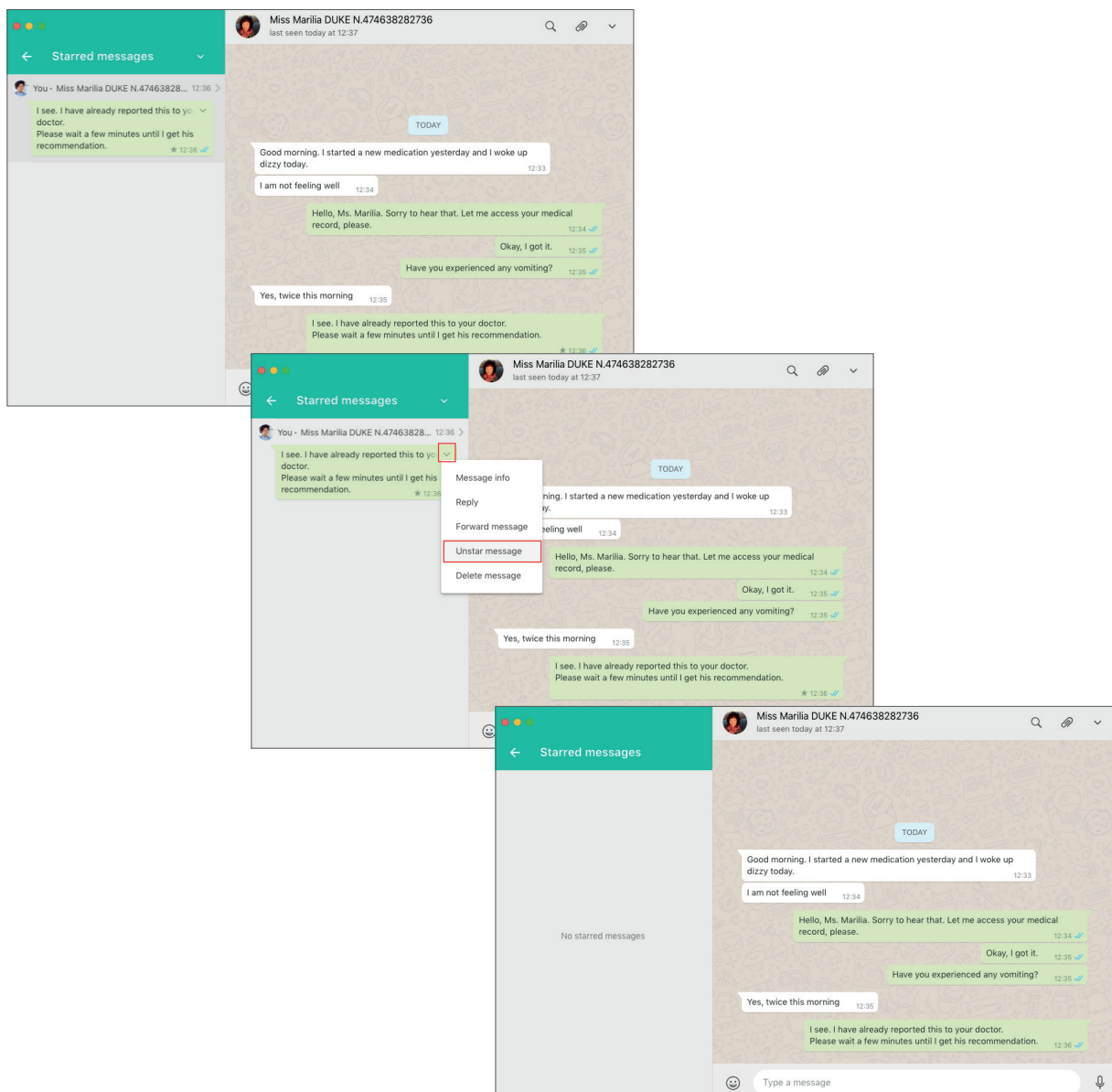
It is important for the nursing professional to update this list by unstarred messages for cases where patient care has been completed. Doing this means the message is removed from his/her daily pending messages.

PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL I MEDICAL CARE - WITH NURSING PROFESSIONAL IN CHARGE

INSTRUCTIONS FOR UNSTARRING PENDING MESSAGES

- Access all starred messages at the top bar of the left column on your WhatsApp Web.
 - Tap the arrow and select "STARRED".
 - You will now be able to access all starred messages as pending.
 - Find the pending message that has already been solved.
 - Hover over the top-right corner of this message. You will see an ARROW.
 - Tap the ARROW and select the "UNSTAR MESSAGE" option.
- (!) Done: the message has now been removed from your pending list (starred messages).



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL I MEDICAL CARE - WITH NURSING PROFESSIONAL IN CHARGE

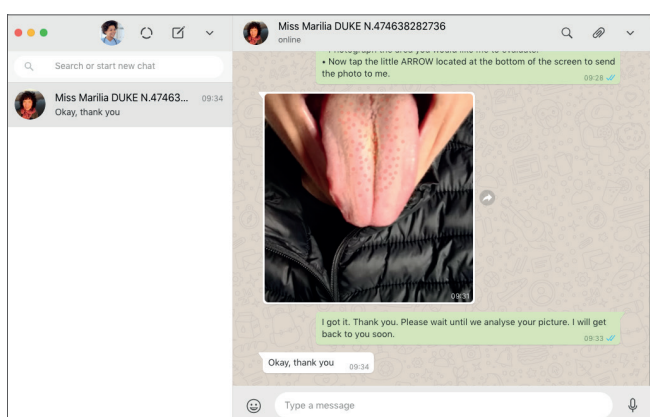
4. Additional protocols for remote care Level I in cases of possible Level II referrals

During Level I remote medical care, the nursing professional may request patient's photos or test results. When the provision of care has been completed, this data should be saved on the patient's medical record. By identifying that a case should be reclassified as Level II, meaning it requires the involvement of the doctor in charge of the patient or medical staff, the nursing professional may request additional information from the patient. The aim of the nursing professional is to gather, organise and provide as much information as possible about the case when referring it to the doctor in charge or medical staff. Procedures for sharing photos and test results received from the patient to the chat with the doctor or medical staff will be specified in the medical care protocols for Level II.

The procedures for receiving photos and test results and saving them on the patient's medical record are the same as those adopted in the triage phase. They will be repeated here only to consolidate the protocols that should be followed in each module of medical care, making the consultation of this resource easier.

4.1. Photo sent by the patient

WhatsApp also allows the patient to send photos to help the nursing professional in providing medical care. In this case, the nursing professional may request a photo. The nursing professional can then analyse the photo and make a decision with more confidence. If the patient does not know how to take a photo, the nurse can send them instructions.



[template reply with instructions for taking photos via WhatsApp]

I will help you take a photo and send it to me.

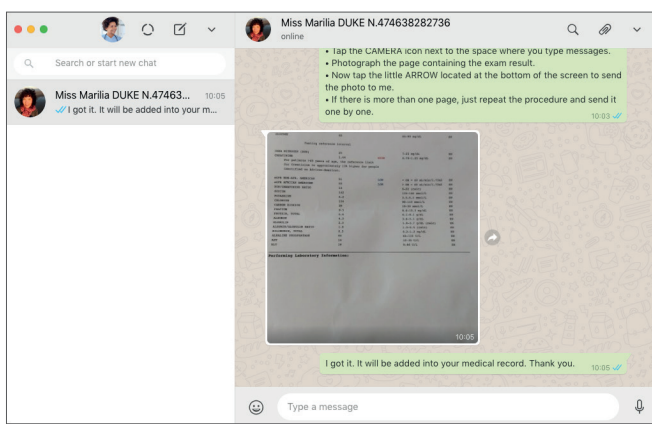
- Tap the CAMERA icon next to the space where you type messages.
- Photograph the area you would like me to evaluate.
- Now tap the little arrow located at the bottom of the screen to send the photo to me.

PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL I MEDICAL CARE - WITH NURSING PROFESSIONAL IN CHARGE

4.2. Sending patient previous test results as a photo

WhatsApp also allows the patient to send the results of previous medical tests to help the nursing professional in providing the appropriate medical care. In this case, the nursing professional may ask the patient to take a photo of the test results or send them as a PDF if this is available. The patient should be instructed to take a photo of the required test result. If the patient does not know how to take the photo, the nurse can send instructions.



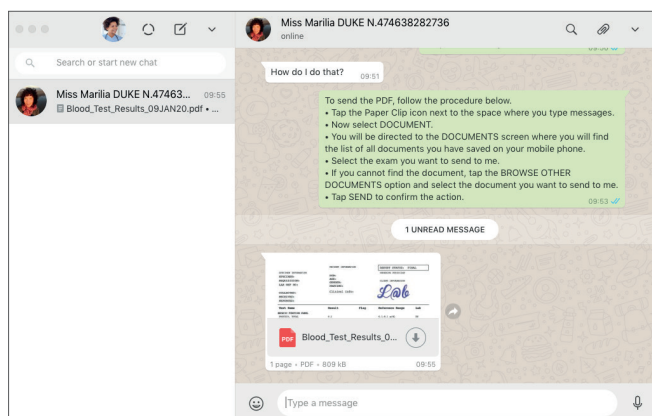
[template reply for sending instructions for how to send the results of previous tests as a photo via WhatsApp]

I will help you take a photo and send it to me.

- Tap the CAMERA icon next to the space where you type messages.
- Photograph the test result page.
- Now tap the little arrow located at the bottom of the screen to send the photo to me.
- If there is more than one page, just repeat the procedure and send them one by one.

4.3. Sending previous test results as a PDF

The patient may inform the nursing professional that he or she has their test results in PDF format. In this case, the nursing professional may request the PDF via WhatsApp. The nursing professional can also send instructions via WhatsApp if the patient needs this. Sending PDFs requires more advanced skills on the part of the user because he/she will have to find where he/she saved the document, whether this is in the cloud or on the device itself.



[template for replying with instructions on how to send previous test results in PDF format via WhatsApp]

To send the PDF, follow the procedure below.

- Tap the Paper Clip icon next to the space where you type messages.
- Now select the DOCUMENT option.
- You will be directed to the DOCUMENTS screen where you will find the list of all documents you have saved in your mobile phone.
- Select the test result you want to send to me.
- If you cannot find the document, tap BROWSE OTHER DOCUMENTS and select the document you want to send to me.
- Tap SEND to confirm the action.

PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

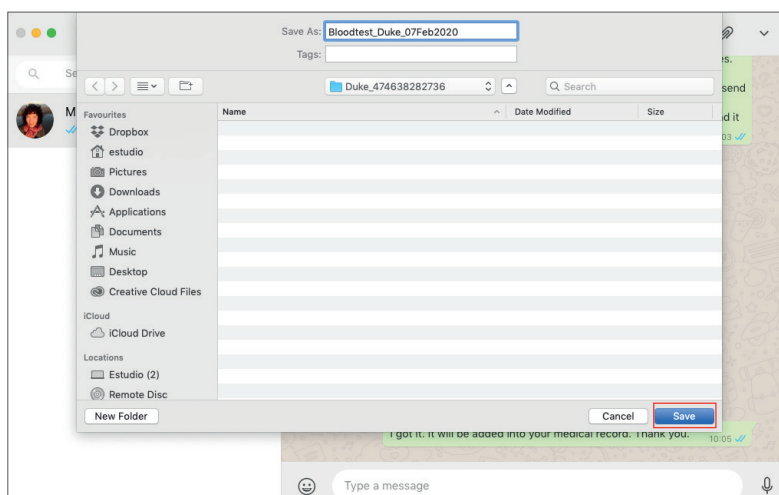
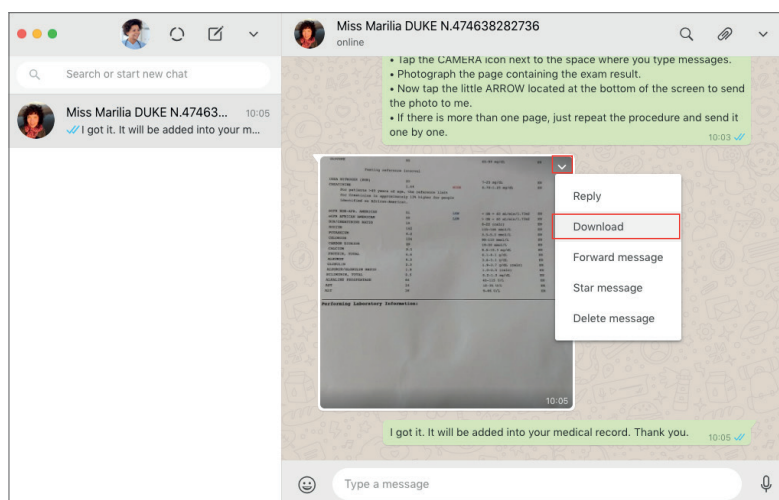
LEVEL I MEDICAL CARE - WITH NURSING PROFESSIONAL IN CHARGE

4.4. Saving photos and PDFs sent by the patient

If the patient sent a photo or PDF with the results of their previous test results, these can be inserted into his/her medical records, depending on the patient management system used by the hospital or clinic.

INSTRUCTIONS FOR SAVING A PHOTO SENT BY THE PATIENT VIA WHATSAPP WEB:

- Hover over the top-right corner of the photo. You will see an ARROW.
- Tap the ARROW.
- Select DOWNLOAD.
- Choose the directory on your computer that you want to save the photo to.
- You can also rename the photo by specifying the name of the test result it refers to.
- Tap SAVE to complete the procedure.

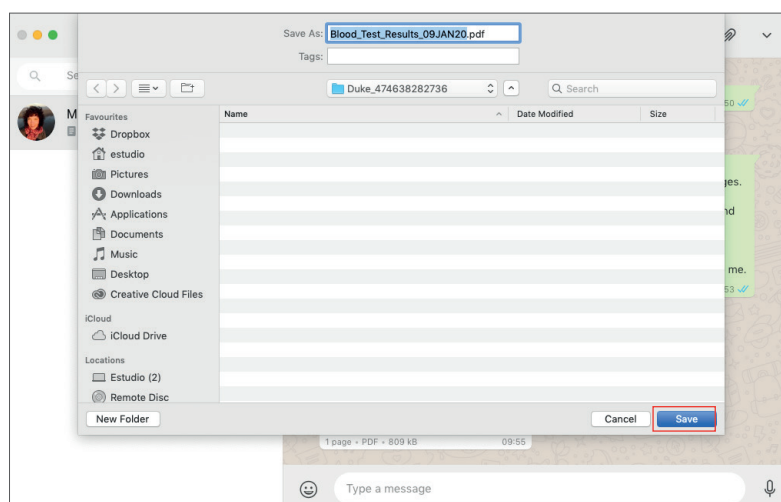
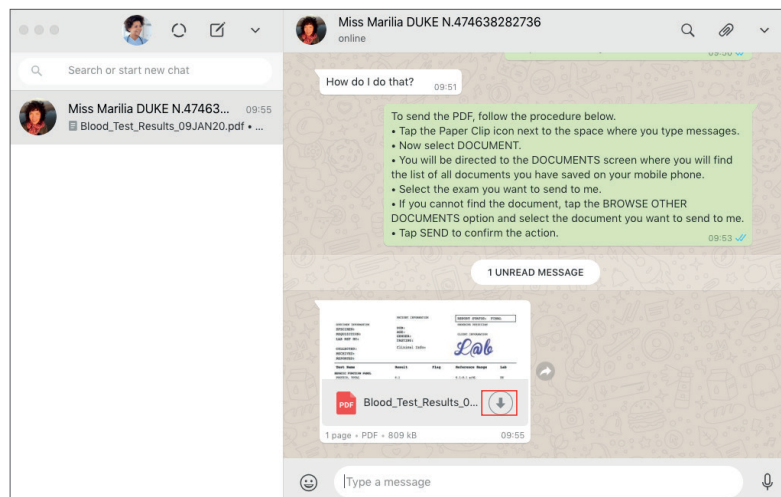


PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL I MEDICAL CARE - WITH NURSING PROFESSIONAL IN CHARGE

INSTRUCTIONS FOR SAVING A PDF SENT BY THE PATIENT VIA WHATSAPP WEB

- WhatsApp already provides a preview of the file with the PDF icon.
- Tap the ARROW to download the file.
- Choose the directory on your computer that you want to save the PDF to.
- You can also rename the PDF by specifying the test result it refers to.
- Tap SAVE to complete the procedure.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - WITH THE DOCTOR IN CHARGE

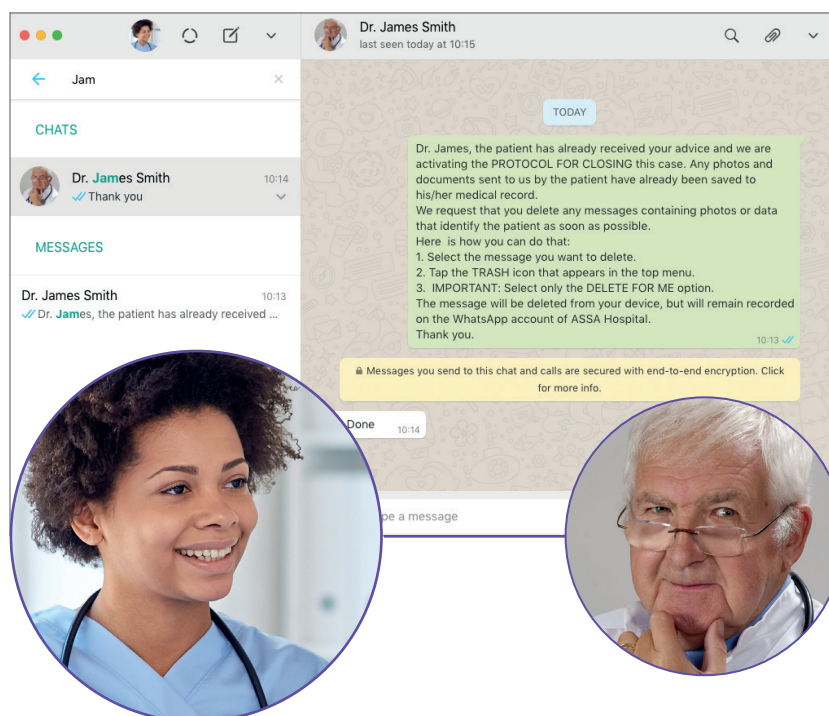
Level II Medical Care via WhatsApp with the involvement of the doctor in charge of the patient's care

Cases where Level II medical care has to be provided are those that require the involvement of the doctor in charge of the patient or medical staff. The hospital or clinic should have defined the organisational chart for the patient's care in advance. **The following protocols relate to Level II medical care, with interactions only between the nursing professional and the doctor in charge.**

1. WhatsApp chat with the doctor in charge

If Level II medical care cases are directed to the doctor in charge of the patient in question, the nursing professional must ensure that the doctor's contact details are saved on the hospital or clinic's WhatsApp account. The nursing professional can then directly forward all patient messages to the doctor in charge, but we do not recommend this practice.

Our recommendation is that the nursing professional consolidates the details or requests given to them by the patient, and then sends a single message to the doctor in charge of their care.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

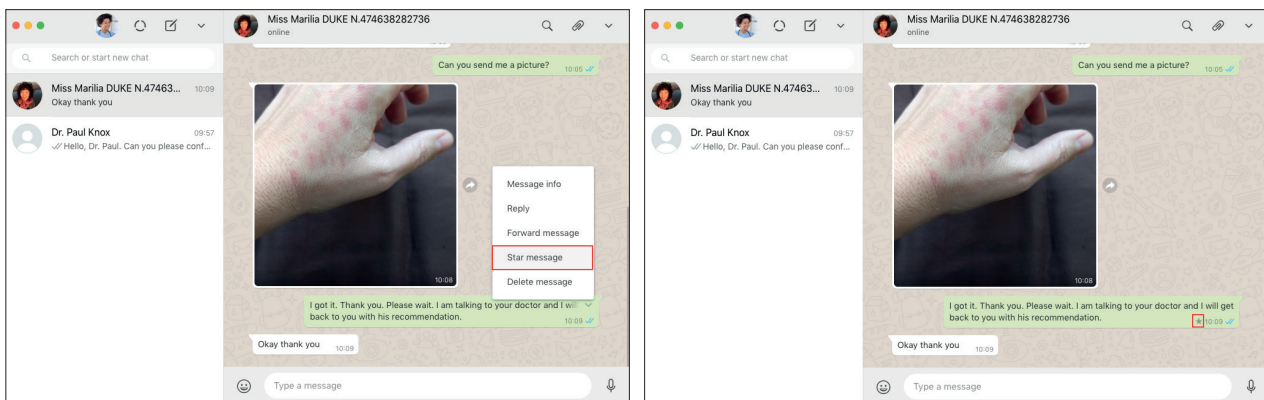
LEVEL II MEDICAL CARE - WITH THE DOCTOR IN CHARGE

2. Before you start

The nursing professional may star messages when a case is reclassified as Level II, meaning it requires the involvement of the doctor. Using the WhatsApp Web STAR MESSAGE feature, he/she can group all of the messages with 'pending' status into a single list. It might be useful considering nursing professional may manage the conversation with several patients, doctors or healthcare teams simultaneously. Make sure you starred the last message with a patient before starting the chat with the the doctor.

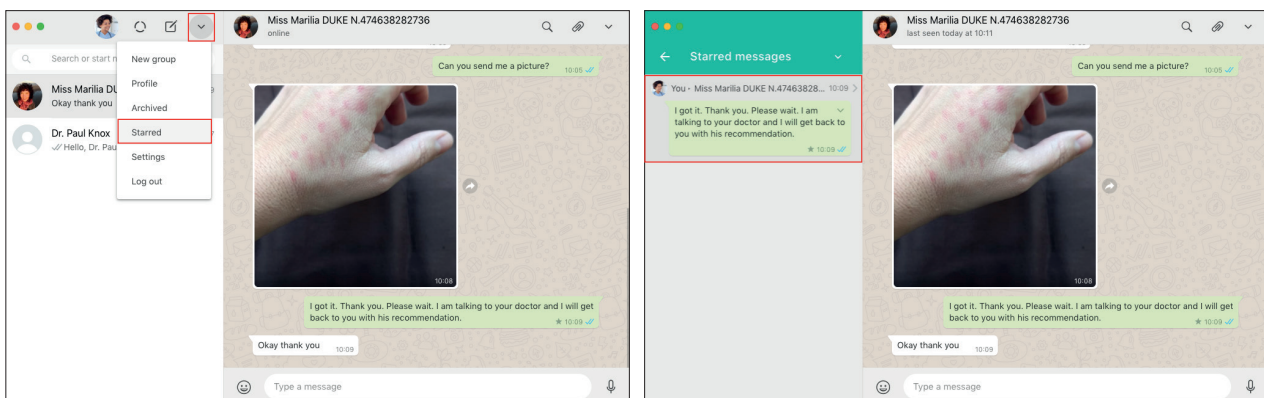
INSTRUCTIONS FOR STARRING MESSAGES TO DENOTE THEIR STATUS AS PENDING (FOR LEVEL II)

- Hover over the top-right corner of the patient message you want to star. You will see an ARROW.
- Tap the ARROW and select the "STAR MESSAGE" option.
- This message will be saved in a directory called "STARRED".



INSTRUCTIONS FOR VIEWING THE DIRECTORY OF STARRED MESSAGES

- You can access the directory of all the starred messages at the top bar of the left column on your WhatsApp Web.
- Tap the arrow and select "STARRED".
- You will now be able to access all starred messages as pending.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

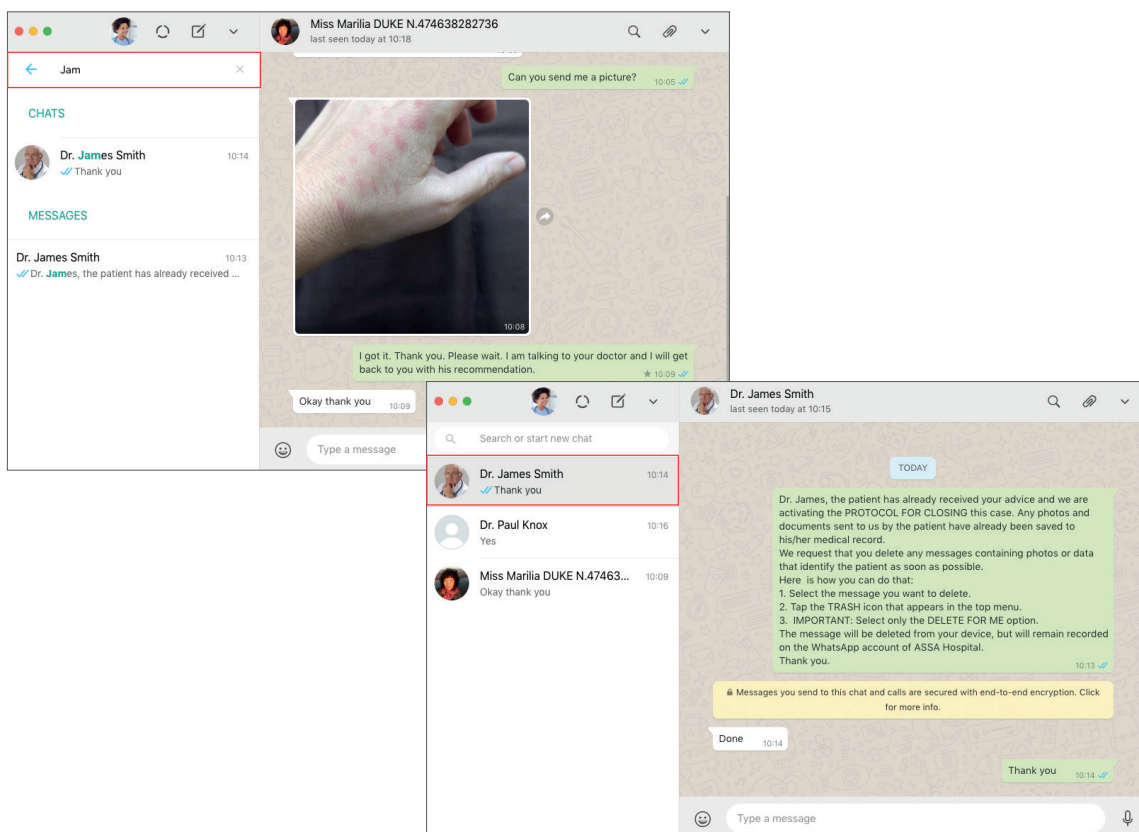
LEVEL II MEDICAL CARE - WITH THE DOCTOR IN CHARGE

3. Pinning the WhatsApp chat between the nursing professional and the doctor in charge of the patient's care

We recommend that when the doctor in charge of a particular patient is engaged for Level II medical care, the chat between the nursing professional and this doctor should be pinned to the top of the WhatsApp chat list. WhatsApp organises chats in chronological order, from the newest to the oldest conversation. **The PIN CHAT feature pins the chat with the doctor in charge, keeping it on the top of the list and making it easier for the nurse to consult and view.** WhatsApp allows up to 3 chats to be pinned, so we recommend that only the doctors in charge who are **ACTIVE** in delivering medical care remain pinned. The chat may then be unpinned after the completion of a specific cycle of medical care.

INSTRUCTIONS FOR PINNING A CHAT WITH THE DOCTOR IN CHARGE DURING LEVEL II MEDICAL CARE

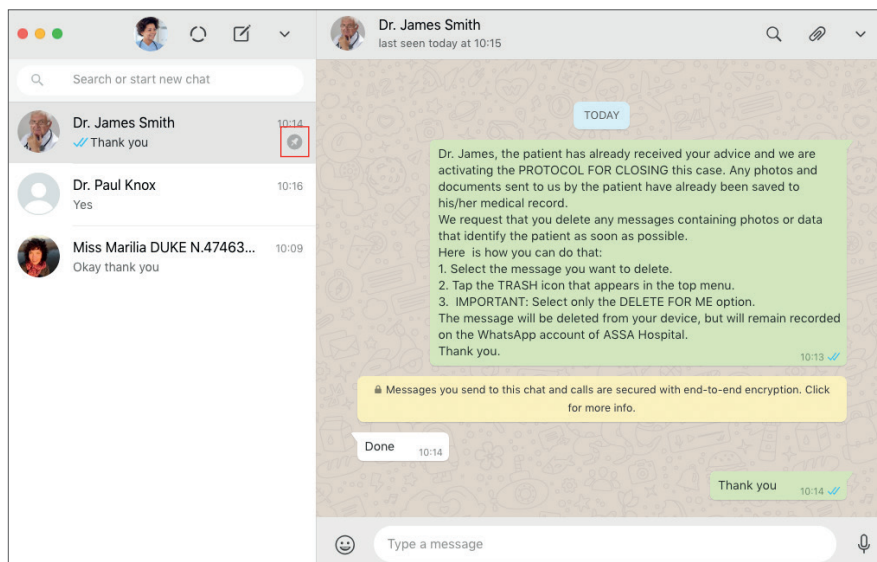
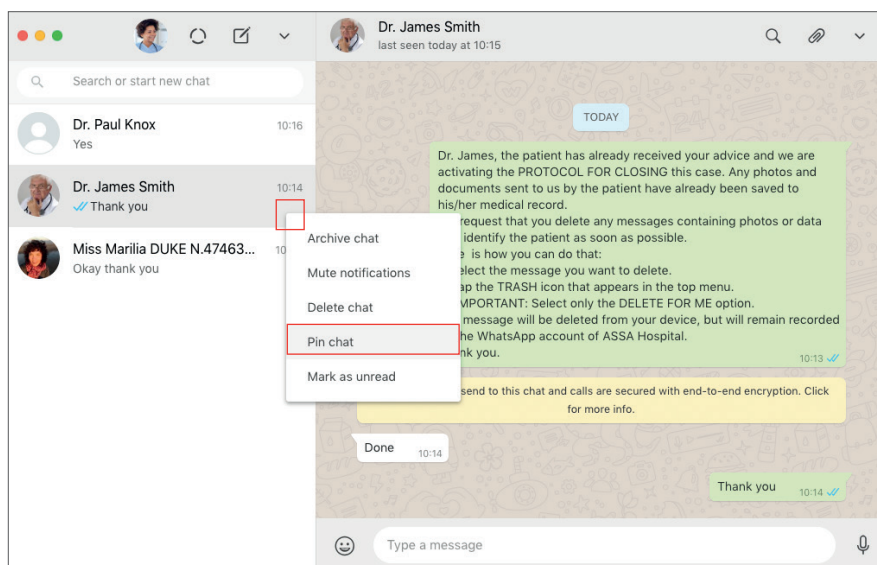
- On the main screen of WhatsApp Web, use the SEARCH OR START NEW CHAT field located in the left column to type the name of the doctor you want to chat to for Level II medical care. The doctor's contact must have previously been saved in the hospital or clinic WhatsApp.
- WhatsApp will display a list of possible results. Select the doctor you want to text message.
- The doctor chat window will open on the screen on the right side of WhatsApp Web.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - WITH THE DOCTOR IN CHARGE

- In the left column, hover over the doctor's contact details, just below the date the last message was sent.
- You will see an ARROW. Tap the ARROW and select the PIN CHAT option.
- The chat with the selected doctor will be pinned to the top of the WhatsApp chat list.

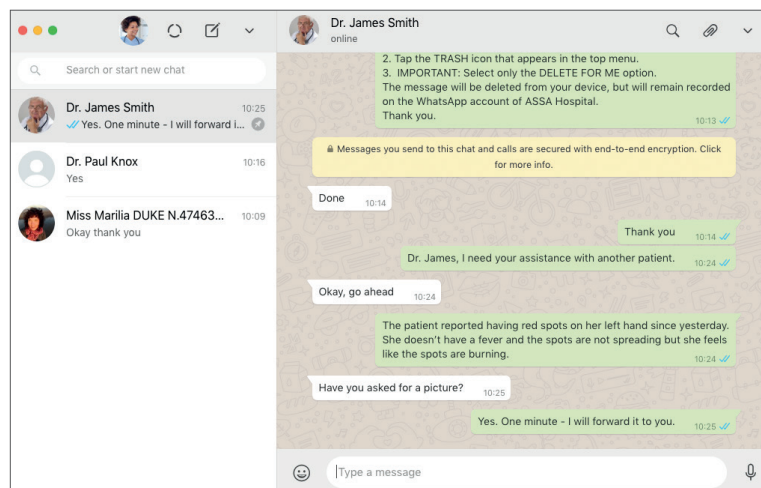


PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - WITH THE DOCTOR IN CHARGE

4. Sending the patient's photos and documents to the doctor in charge via WhatsApp Web

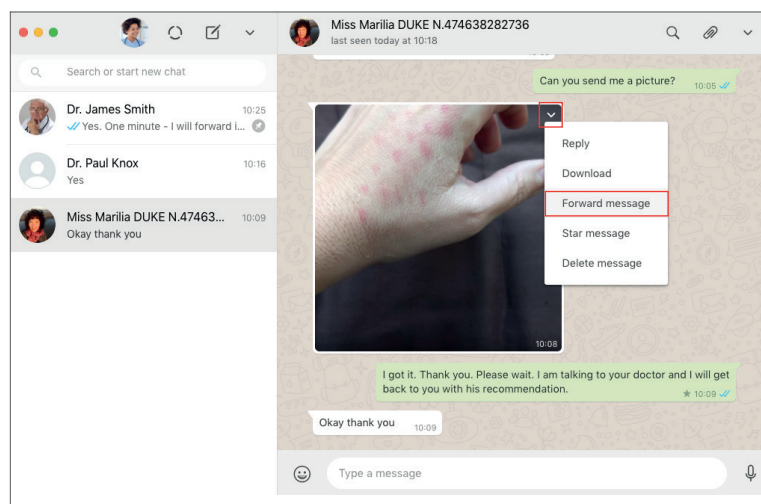
The doctor in charge may guide the nursing professional to request a photo from the patient.



If the nursing professional is required to forward a photo or PDF file, he/she should follow the procedure described below.

INSTRUCTIONS FOR FORWARDING A PHOTO SENT BY THE PATIENT TO THE DOCTOR IN CHARGE OF THEIR CARE

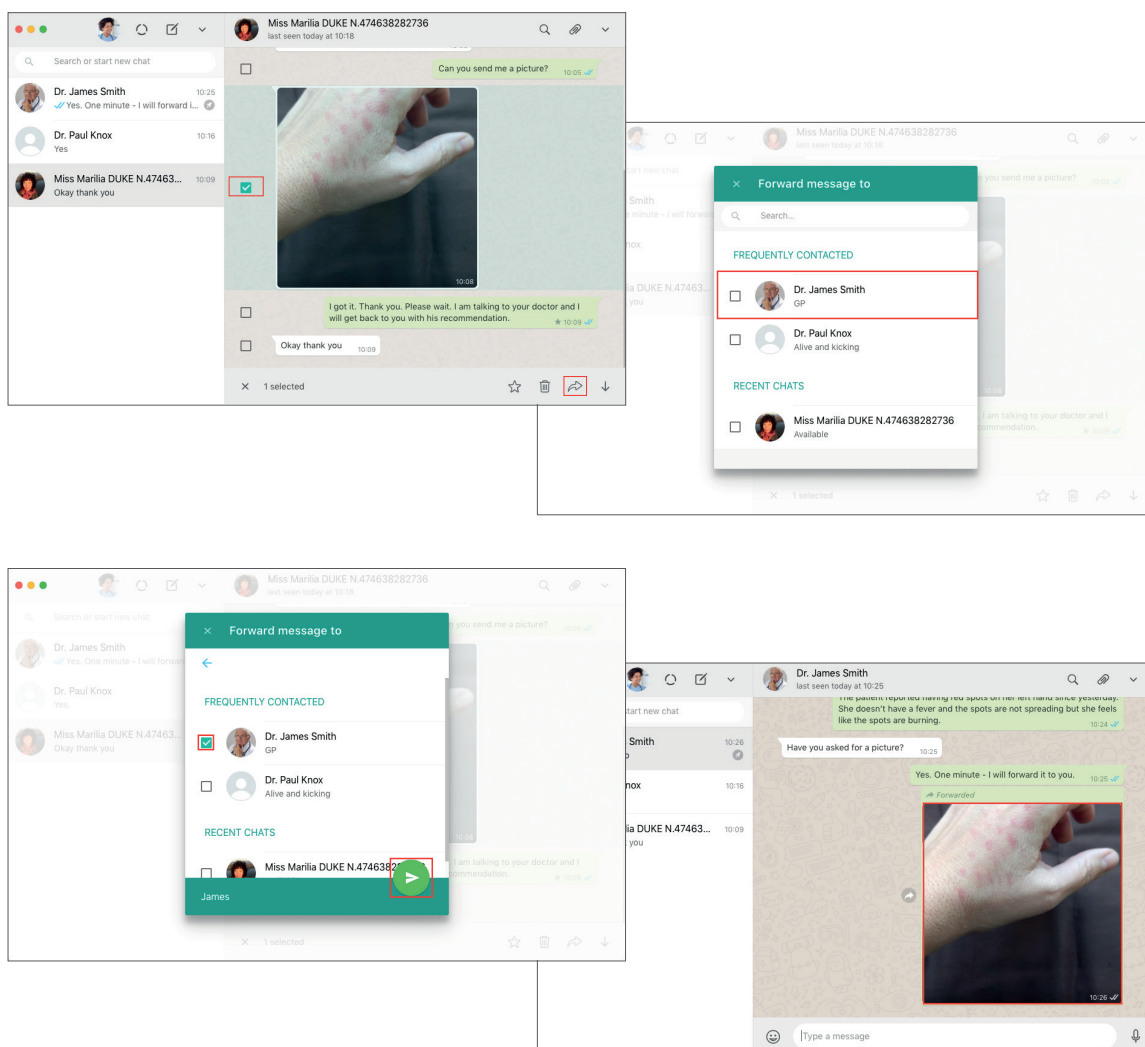
- Hover over the top-right corner of the photo you want to forward to the doctor in charge. You will see an ARROW.
- Tap the ARROW and select FORWARD MESSAGE.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - WITH THE DOCTOR IN CHARGE

- The photo will then be selected.
- A bar will appear at the bottom of the menu.
- Select the ARROW pointing right to forward the photo.
- You will be directed to the Forward Message screen, where you will be able to select the contact details of the doctor in charge. If the doctor's contact details do not automatically appear in the contact list, type the name of the doctor in the SEARCH field.
- Select the contact details of the doctor in charge of the patient's care.
- Tap the green ARROW at the bottom-right corner of the screen to confirm the action.



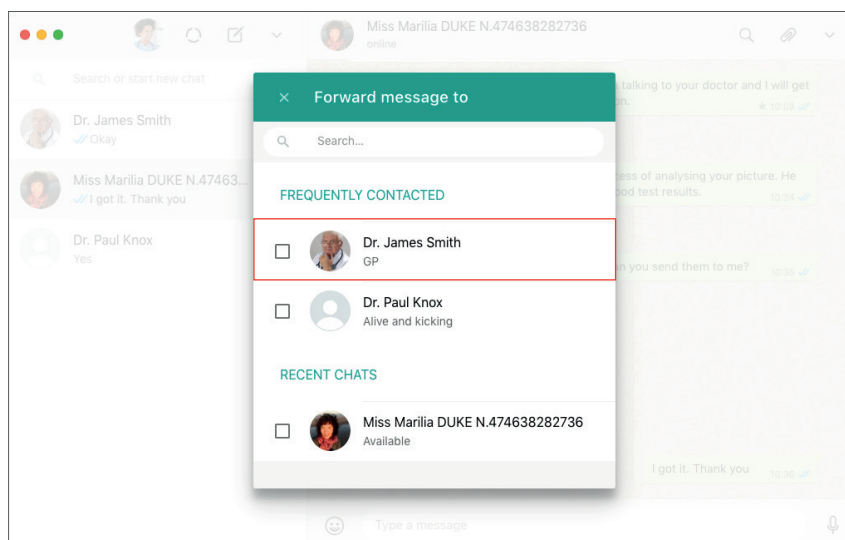
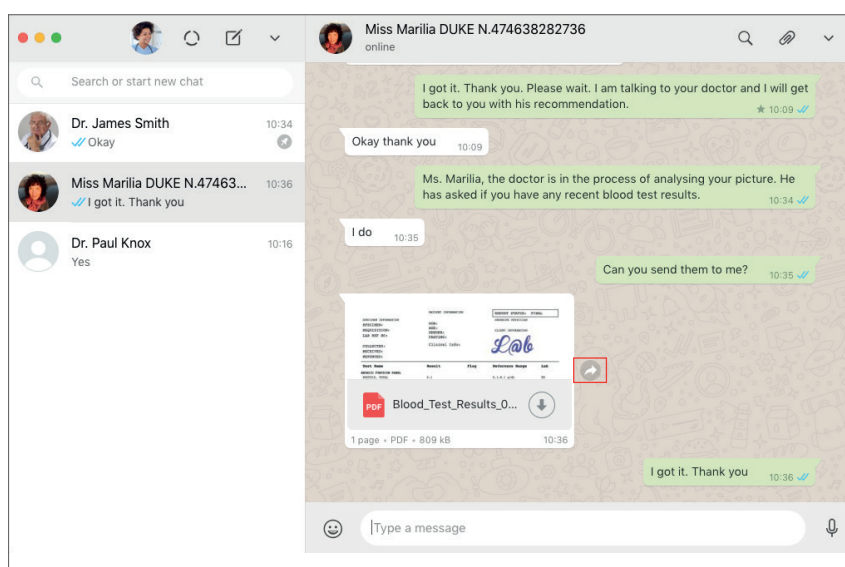
It is always recommended that the nursing professional send a message with information that explains what the photo refers to, adding context to accompany the photo sent to the doctor in charge of the patient. This is likely to lead to a higher quality of care.

PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - WITH THE DOCTOR IN CHARGE

INSTRUCTIONS FOR FORWARDING A PDF OR DOCUMENT SENT BY THE PATIENT TO THE DOCTOR IN CHARGE

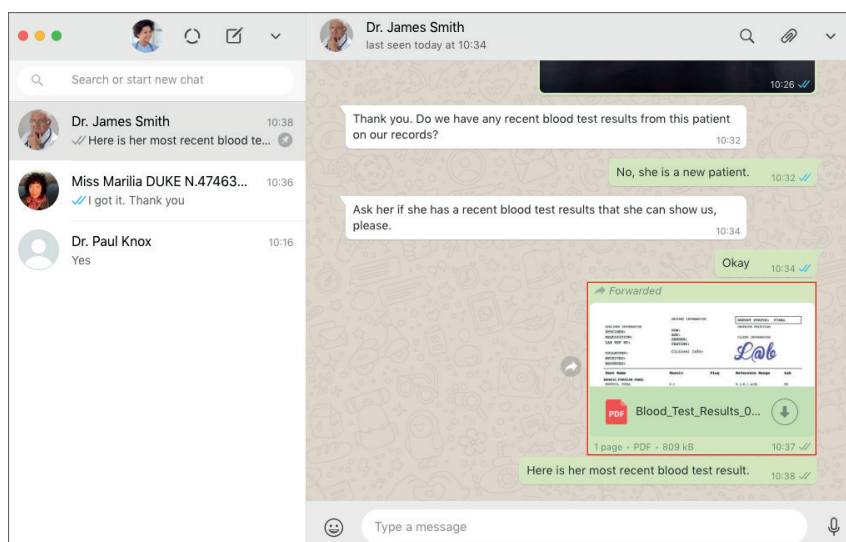
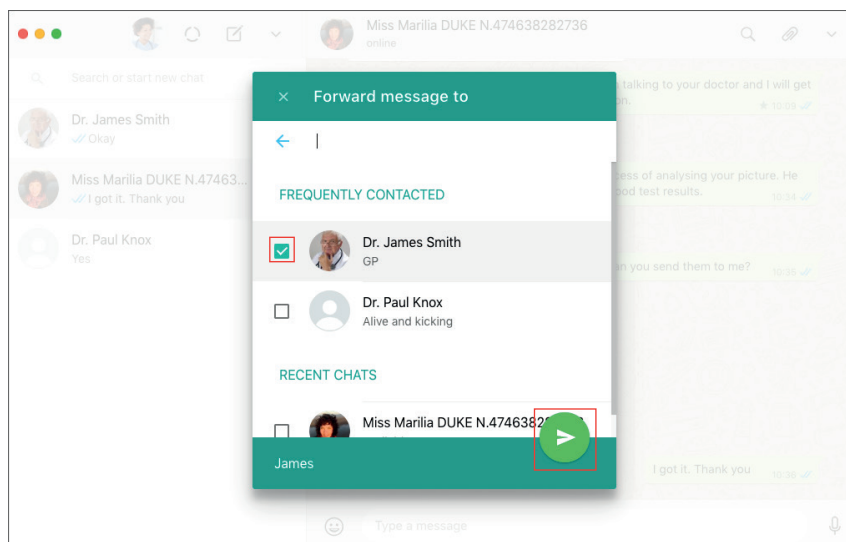
- There is an ARROW in the right side of the document you want to forward to the doctor in charge.
- Tap the ARROW and select FORWARD MESSAGE.
- You will be directed to the FORWARD MESSAGE TO screen, where you will select the contact details of the doctor in charge. If the doctor's contact details do not automatically appear in the contact list, type the name of the doctor in the SEARCH field.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - WITH THE DOCTOR IN CHARGE

- Select the contact details of the doctor in charge of the patient's care.
 - Tap the green ARROW at the bottom right corner of the screen to confirm the action.
- (!) Done: the document has been sent successfully.



It is always recommended that the nursing professional send a message with information that explains what the PDF/document refers to, adding context to accompany the files sent to the doctor in charge of the patient. This is likely to lead to a higher quality of care.

PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - WITH THE DOCTOR IN CHARGE

5. Coordination of medical care

The nursing professional assumes the role of intermediary between the patient and the doctor in charge of their care.

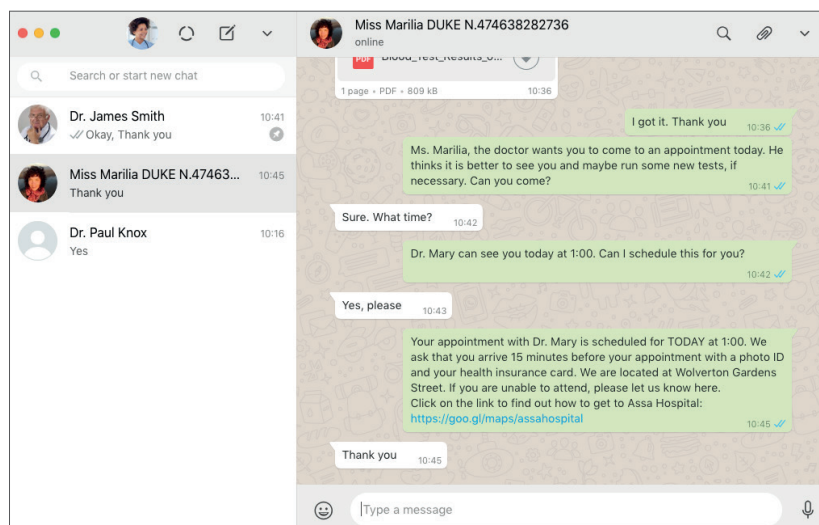
His/her responsibilities are as follows:

- To provide the doctor in charge with the patient's request or demand, including their medical record number, in a clear and direct manner;
- To ask the patient additional questions if requested by the doctor;
- To pass on to the patient any advice from the doctor in charge of their care in a clear and direct manner;
- To check if the patient has understood the doctor's advice;
- To close the LEVEL II MEDICAL CARE PROTOCOL when the provision care has been completed or the case has been resolved.

In cases of referral for an appointment:

- If the doctor in charge of the patient's care recommends that after medical care has been provided remotely via WhatsApp, the patient should schedule an appointment, the nursing professional should activate the **PROTOCOL for SCHEDULING APPOINTMENTS**.
- If the doctor in charge of the patient's care recommends that the patient should immediately go to the hospital or clinic or access a point of care or go to the emergency room, the nursing professional should activate the **PROTOCOL for LEVEL III MEDICAL CARE**.

After referral, the nursing professional and doctor in charge should activate the **PROTOCOL FOR CLOSING THE PROVISION OF THE LEVEL II MEDICAL CARE**.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - WITH THE DOCTOR IN CHARGE

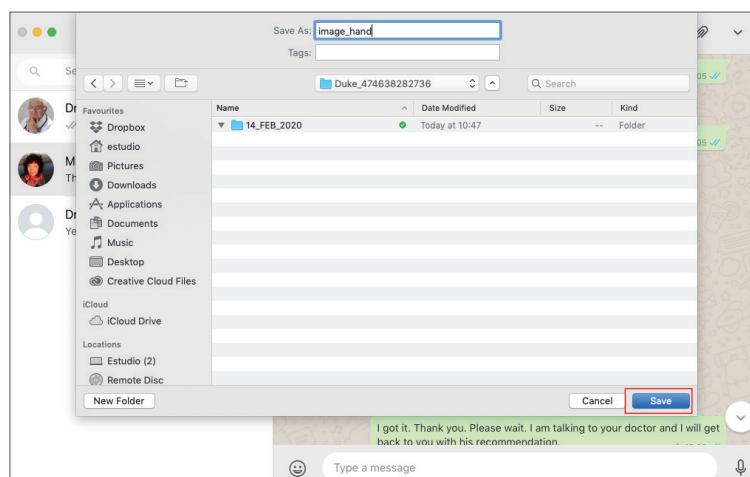
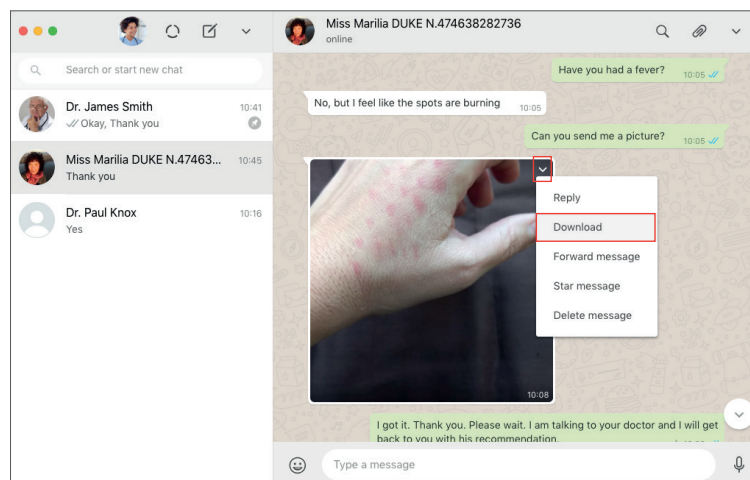
6. Protocol for closing the provision of Level II Medical Care involving a nursing professional and the doctor in charge

6.1. Updating the patient's medical record

The nursing professional should update the patient's medical record following guidance from the doctor, as well as saving any photos and documents shared with the doctor and that guided his/her provision of care onto the patient's medical record.

INSTRUCTIONS FOR SAVING A PHOTO SENT BY THE PATIENT (USING WHATSAPP WEB):

- Hover over the top-right corner of the photo. You will see an ARROW.
- Tap the ARROW.
- Select DOWNLOAD.
- Choose the directory on your computer that you want to save the photo to.
- You can also rename the photo by specifying the name of the test result it refers to.
- Tap SAVE to complete the procedure.

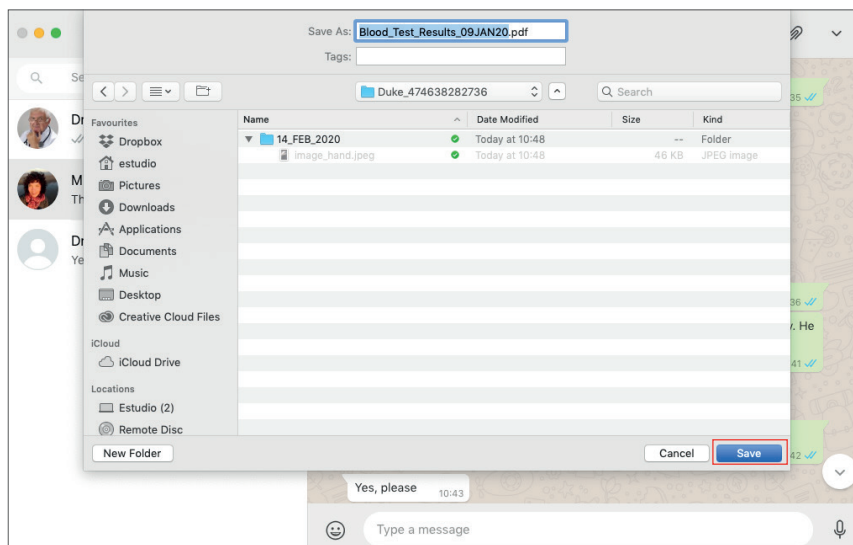
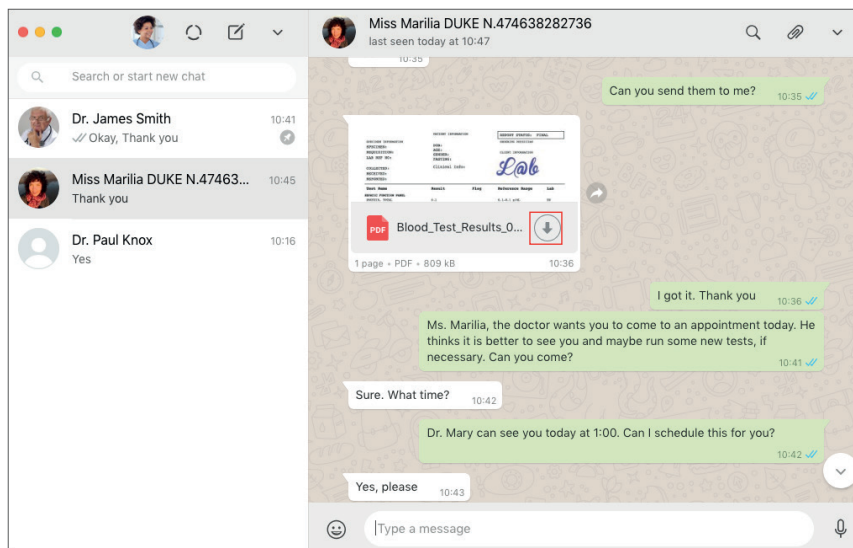


PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - WITH THE DOCTOR IN CHARGE

INSTRUCTIONS FOR SAVING A PDF SENT BY THE PATIENT (USING WHATSAPP WEB):

- WhatsApp already provides a preview of the file with the PDF icon.
- Tap the ARROW to download the file.
- Choose the directory on your computer where you want to save the PDF.
- You can also rename the PDF by specifying the test results that it refers to.
- Tap SAVE to complete the procedure.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - WITH THE DOCTOR IN CHARGE

6.2. Patient Data Protection: Ethical Considerations and Protocols

After updating the patient's medical record, including saving any photos and documents shared with the doctor in charge who provided care to the patient in question, the nursing professional must notify the doctor that the update has been completed. He or she should then recommend that the doctor follow the appropriate procedure for closing the case, as specified by the CLOSING PROTOCOL. This increases patient data protection. We recommend sending a template message.

[template message for protocol closing of Level II medical care closing]

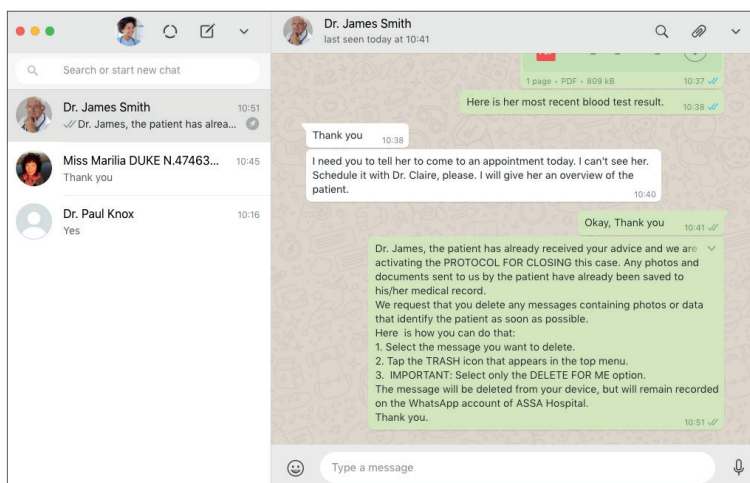
Doctor [NAME OF DOCTOR], the patient has already received your advice and we are activating the PROTOCOL FOR CLOSING this case. Any photos and documents sent by the patient have already been saved to his/her medical record.

We request that you delete any messages containing photos or data that identify the patient as soon as possible.

1. Select the message you want to delete.
2. Tap the TRASH icon that appears in the top menu.
3. IMPORTANT: Select only the DELETE FOR ME option.

The message will be deleted from your device, but will remain recorded on the WhatsApp account of [NAME OF THE HOSPITAL OR CLINIC].

Thank you.



The doctor in charge then has the option of deleting any photos or documents shared on WhatsApp that can identify the patient. This feature allows patient-identifying data to be protected even in the event of loss or theft of the device belonging to the doctor in charge. The doctor in charge should then select the photos and documents to be deleted, and should only delete them on his/her device. This means the record of the entire chat will continue to be fully preserved on the hospital or clinic WhatsApp.

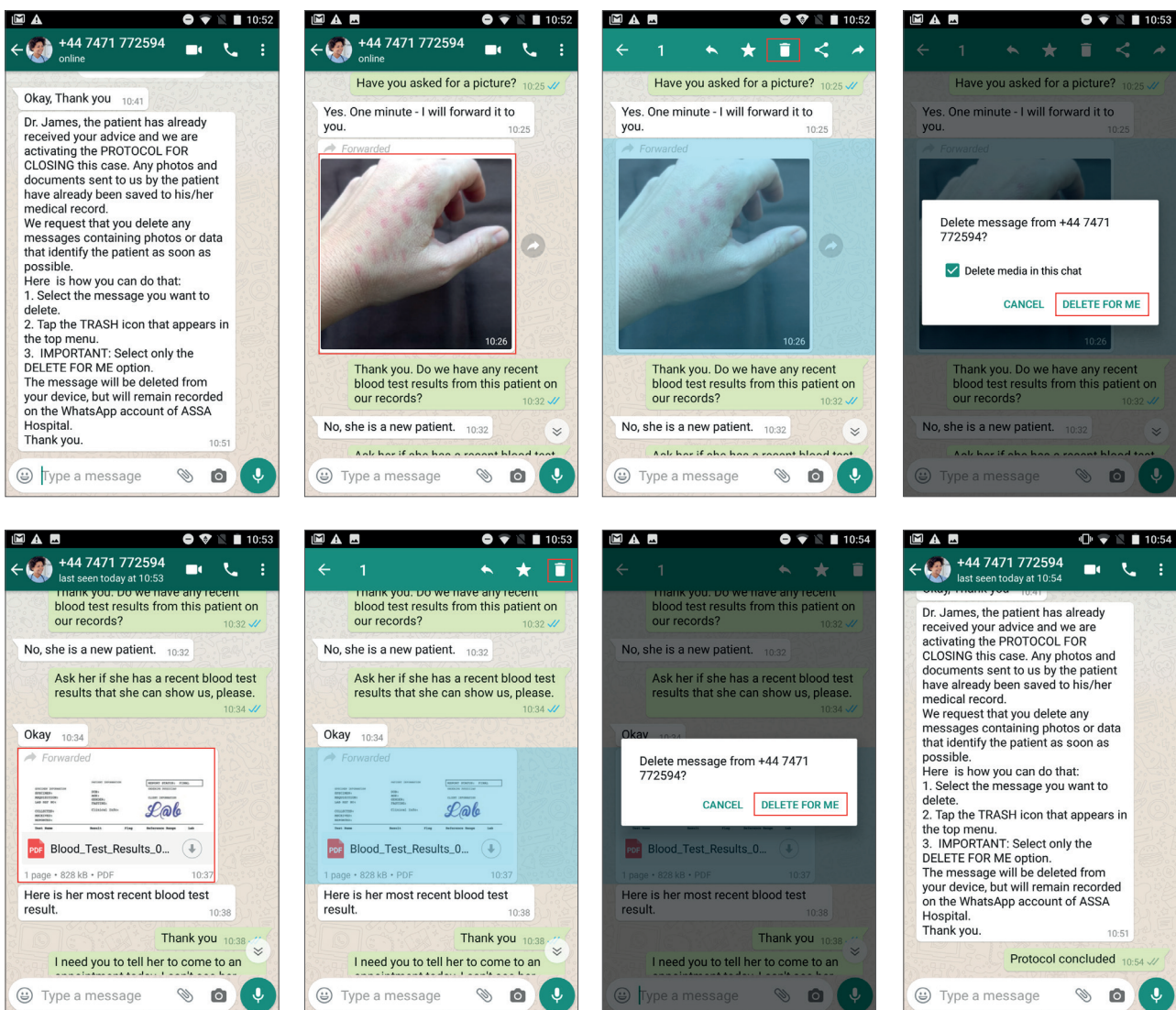
PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - WITH THE DOCTOR IN CHARGE

To delete messages containing photos or documents that identify the patient on his/her device, the doctor in charge should follow the procedure below. The message containing photos or PDFs will thus be deleted from the doctor's device, but a record of it will still be kept on the hospital or clinic's WhatsApp account.

INSTRUCTIONS FOR DOCTORS WANTING TO DELETE PHOTOS AND DOCUMENTS VIA WHATSAPP (USING THE MOBILE VERSION)

- Select the message that contains the photo or document you want to delete (tap and hold the photo until it is selected).
- A menu at the top of the screen will appear.
- Select the TRASH icon.
- You will be directed to a screen that will give you the option to delete the message on your device only.
- Select the DELETE FOR ME option.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

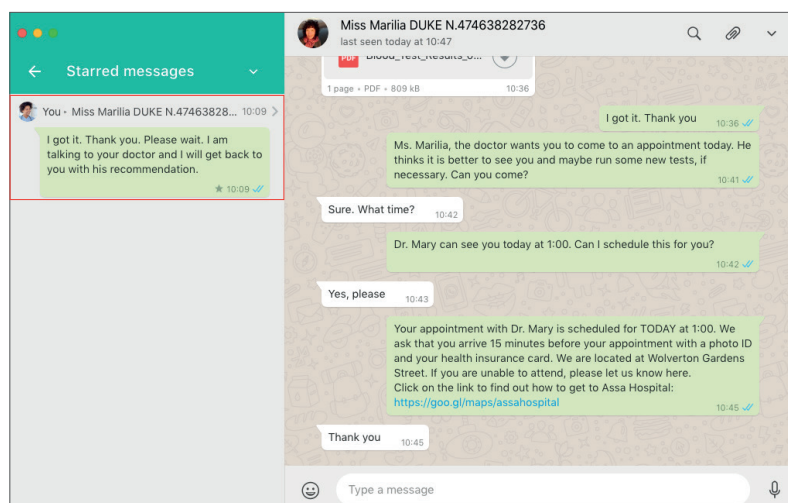
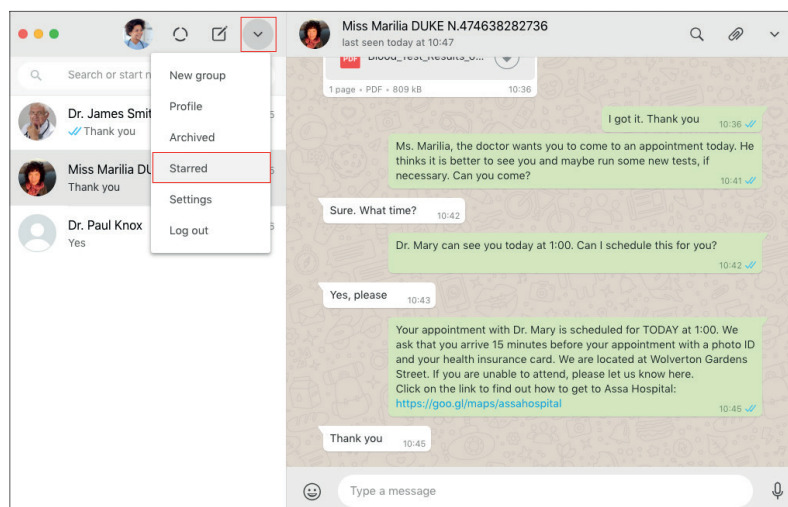
LEVEL II MEDICAL CARE - WITH THE DOCTOR IN CHARGE

6.3. Updating the list of pending messages

The nursing professional should unstar the patient's message upon the completion of the medical care process (bearing in mind that the chat with the patient was starred in order to be marked as pending when the LEVEL II MEDICAL CARE PROTOCOL was activated). This will update his/her pending lists, which are organised by starring and should be shown in the WhatsApp STARRED MESSAGES list.

INSTRUCTIONS FOR UNSTARRING A MESSAGE FROM THE LIST OF PENDING MESSAGES (USING WHATSAPP WEB):

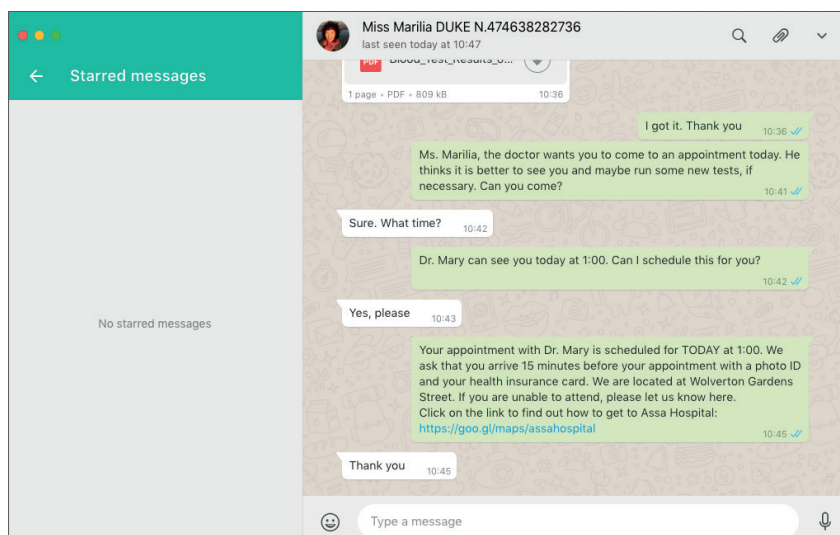
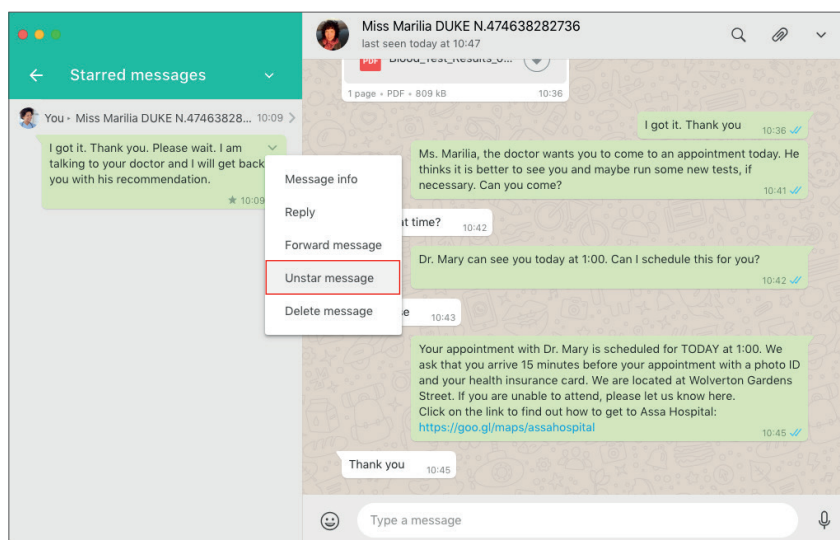
- Access all starred messages in the top bar of the left column of your WhatsApp Web.
- Tap the arrow and select "STARRED".
- You will then be able to access all starred messages (which are your pending cases, or messages).
- Find the pending message that has already been solved.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - WITH THE DOCTOR IN CHARGE

- Hover over the top-right corner of this message. You will see an arrow.
 - Tap the arrow and select the “UNSTAR MESSAGE” option.
- (!) Done: The message has been removed from your list of pending messages (starred messages).



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

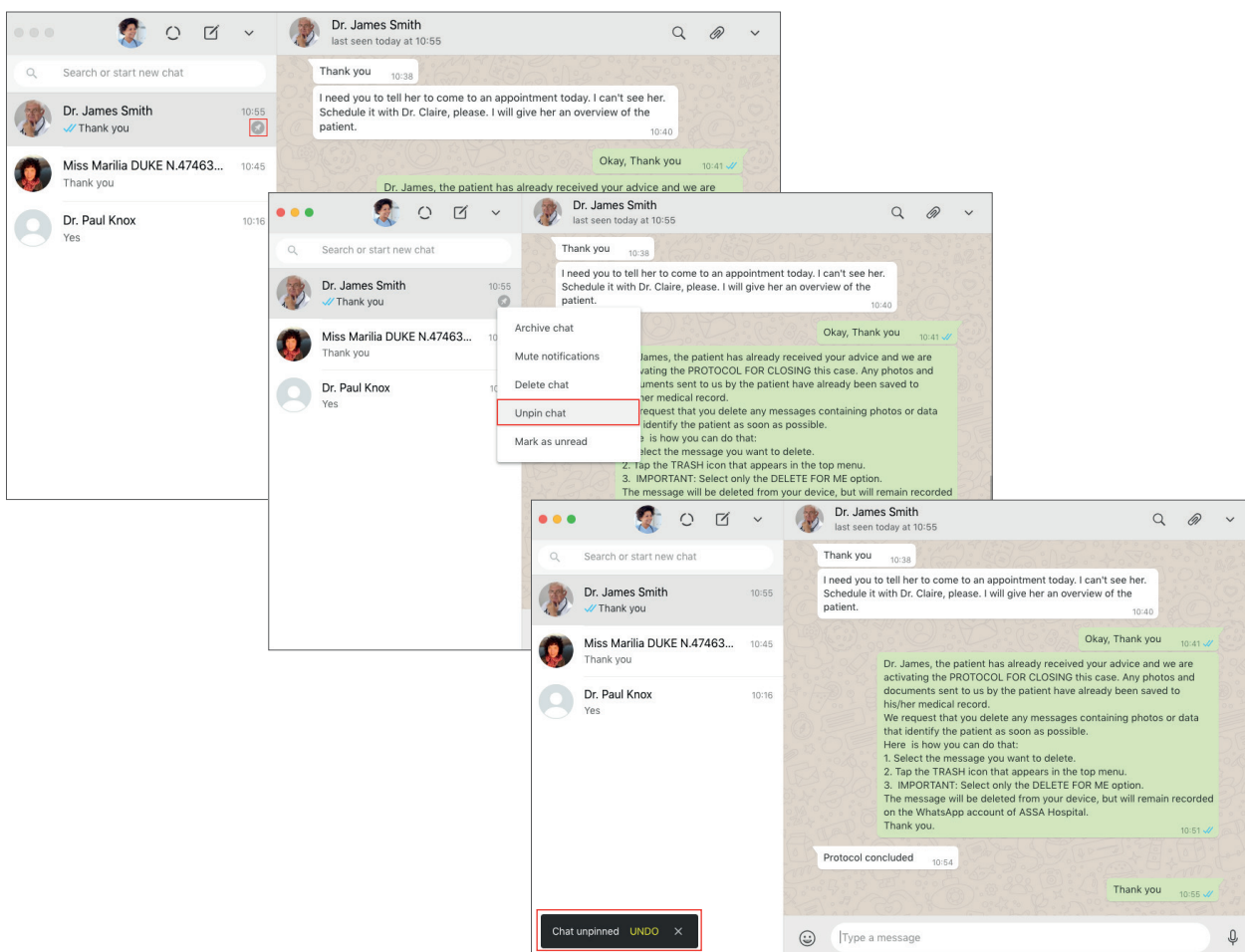
LEVEL II MEDICAL CARE - WITH THE DOCTOR IN CHARGE

6.4. Unpinning chats between the nursing professional and the doctor in charge after care has been provided

Upon the completion of Level II medical care with the involvement of the doctor in charge, the nursing professional may choose to UNPIN the chat with the doctor. We recommend this because WhatsApp only allows up to 3 chats to be pinned to the top of the chat list. That is why our recommendation is that only those doctors who are in charge of specific patients' care and are currently **ACTIVE in providing medical care** remain pinned.

INSTRUCTIONS FOR UNPINNING THE CHAT BETWEEN THE NURSING PROFESSIONAL AND THE DOCTOR IN CHARGE AFTER LEVEL II MEDICAL CARE HAS BEEN PROVIDED/COMPLETED.

- In the left column of the WhatsApp main screen you will see up to 3 pinned chats flagged with a PIN.
- Find the contact details of the doctor whose chat you want to UNPIN.
- To unpin the chat with this doctor, hover over his or her contact details just below the date the last message was sent.
- You will see an ARROW. Tap the arrow and select the UNPIN CHAT option.
- The chat with the doctor will go back to the default chronological order that the Whatsapp chat list is organised in.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - INVOLVING HEALTHCARE TEAM

Level II Medical Care via WhatsApp with the involvement of Healthcare Team

LEVEL II MEDICAL CARE refers to cases that involve a doctor or a healthcare team. The hospital or clinic must have defined the organisational chart relating to a specific patient's care in advance to use these protocols. **The protocols presented below concern Level II medical care, which happens when the nursing professional responsible for engaging with patients directly via Whatsapp's interface engages and interacts with a healthcare team.** If he/she reports to a healthcare team, he/she will need to create a WhatsApp group for the staff member team he/she wants to access.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

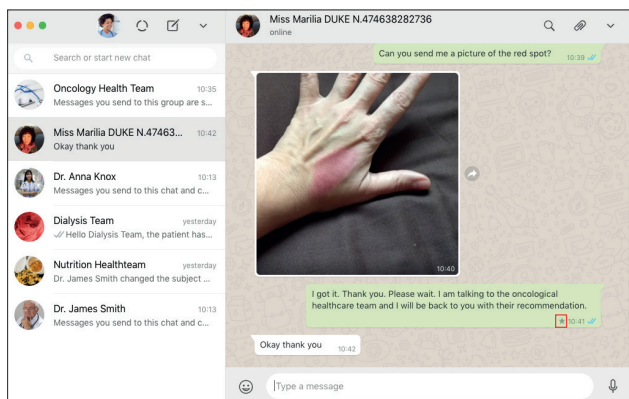
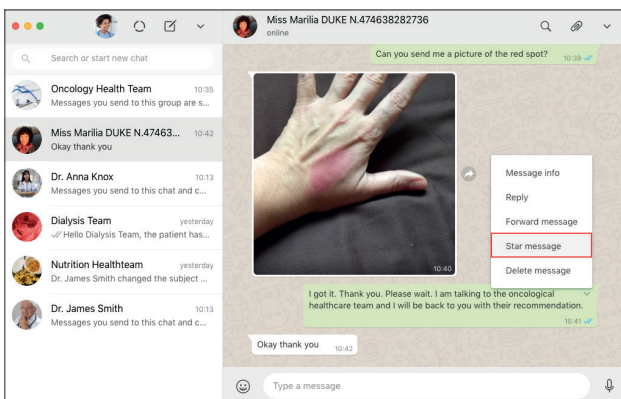
LEVEL II MEDICAL CARE - INVOLVING HEALTHCARE TEAM

1. Before you start

The nursing professional may star messages when a case is reclassified as Level II, meaning it requires the involvement of the healthcare team. Using the WhatsApp Web STAR MESSAGE feature, he/she can group all of the messages with 'pending' status into a single list. It might be useful considering that the nursing professional may manage the conversation with several patients, doctors or healthcare teams simultaneously. Make sure you starred the last message with a patient before starting the chat with the the doctor.

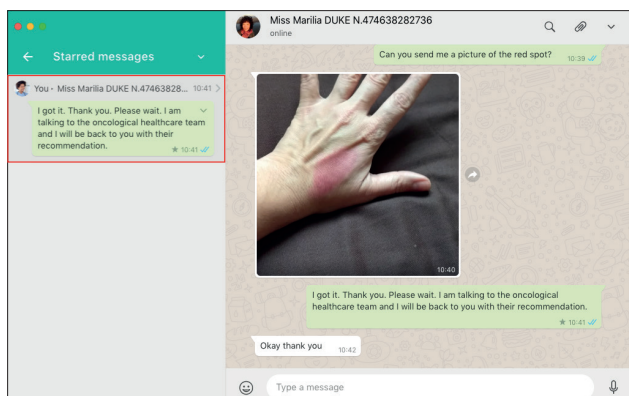
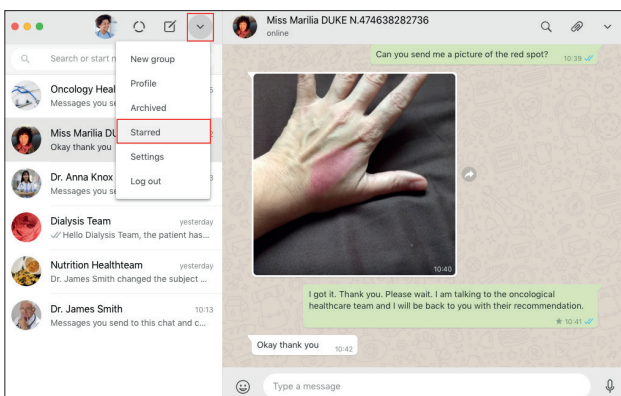
INSTRUCTIONS FOR STARRING MESSAGES TO DENOTE THEIR STATUS AS PENDING (FOR LEVEL II)

- Hover over the top-right corner of the patient message you want to star. You will see an ARROW.
- Tap the ARROW and select the "STAR MESSAGE" option.
- This message will be saved in a directory called "STARRED".



INSTRUCTIONS FOR VIEWING THE DIRECTORY OF STARRED MESSAGES

- You can access the directory of all the starred messages at the top bar of the left column on your WhatsApp Web.
- Tap the arrow and select "STARRED".
- You will now be able to access all starred messages as pending.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

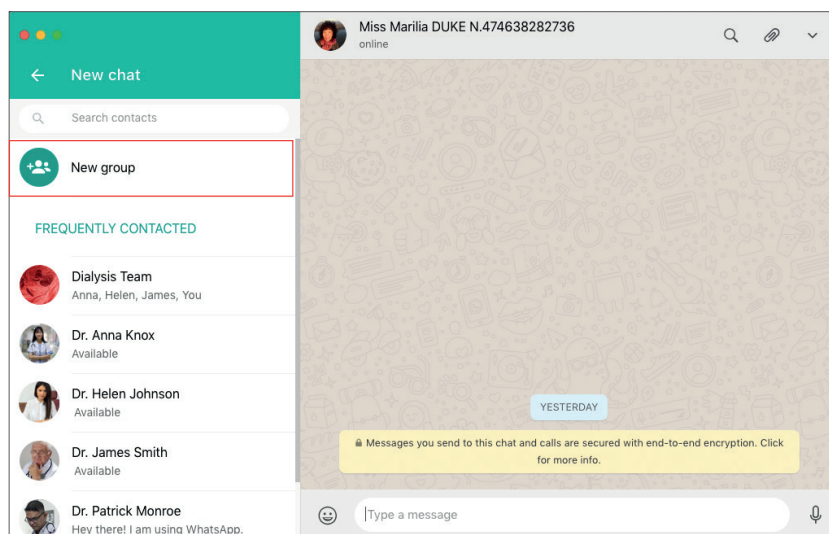
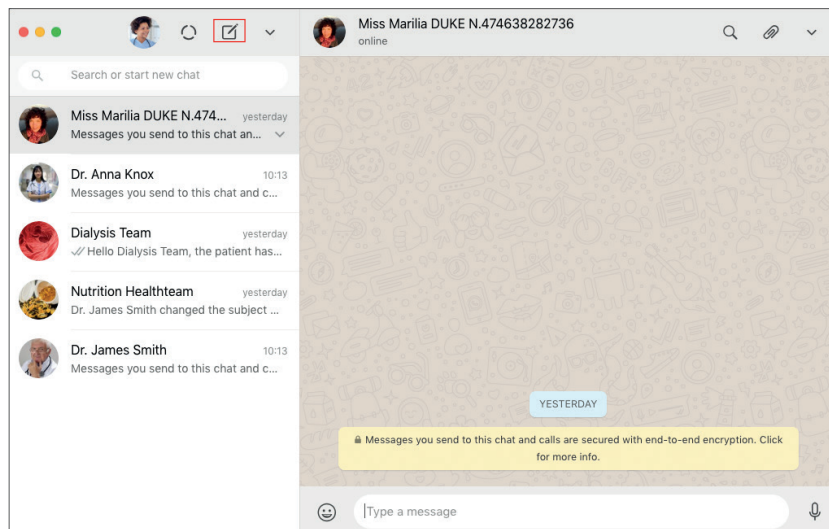
LEVEL II MEDICAL CARE - INVOLVING HEALTHCARE TEAM

2. Creating a WhatsApp group to chat with a healthcare team

Group usage and message exchange among members of healthcare teams is the same as for a common WhatsApp group.

INSTRUCTIONS FOR CREATING WHATSAPP GROUPS FOR HEALTHCARE TEAM

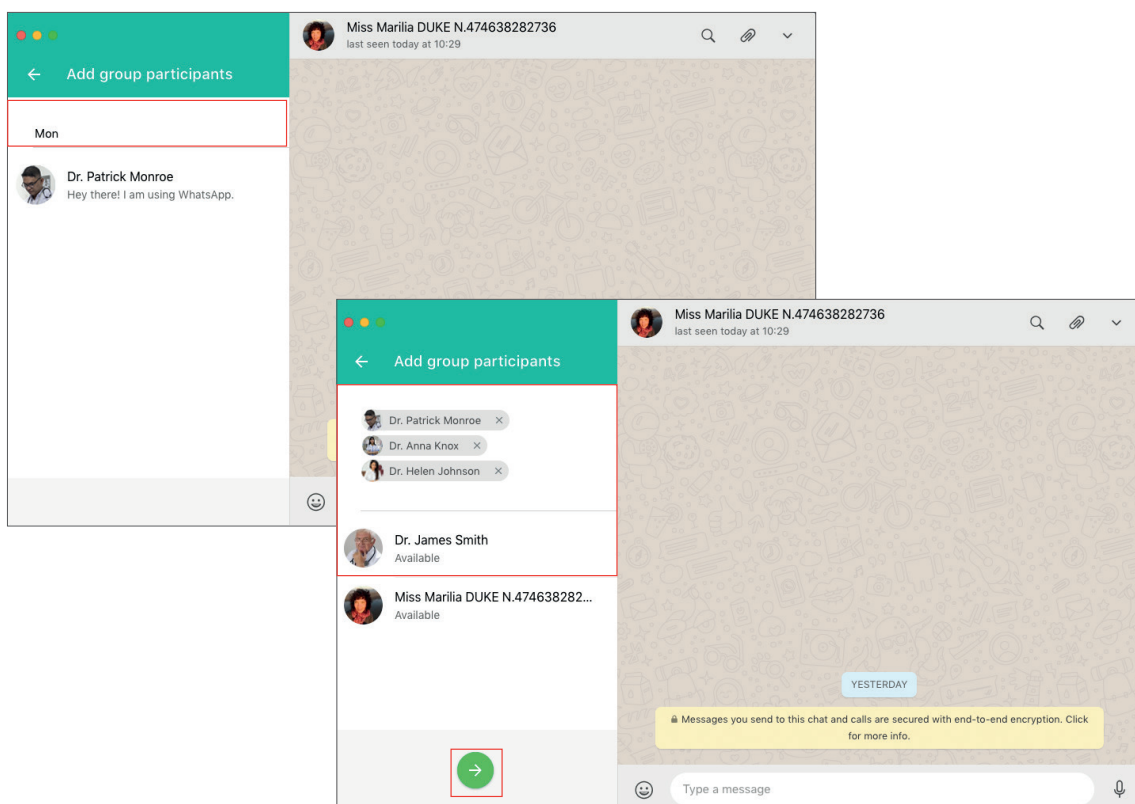
- On WhatsApp Web, find the left column where the chat history is located.
- Tap the ARROW on the top bar of this column.
- Tap NEW GROUP.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - INVOLVING HEALTHCARE TEAM

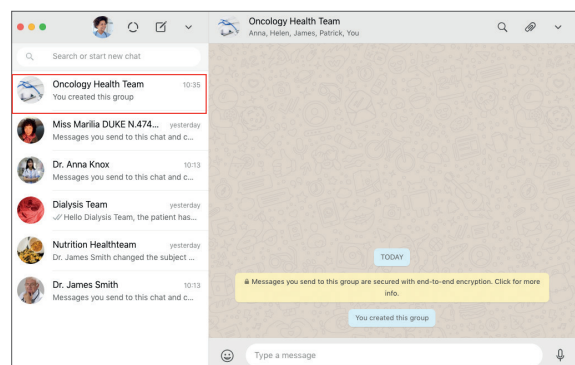
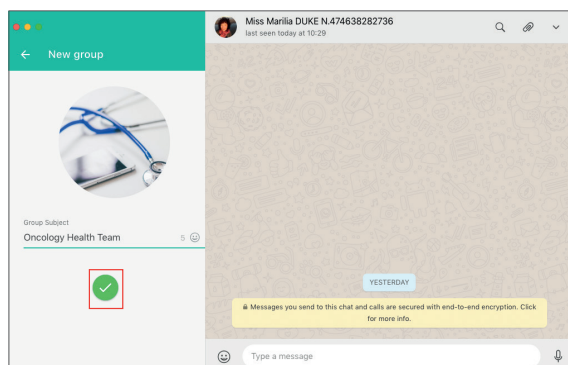
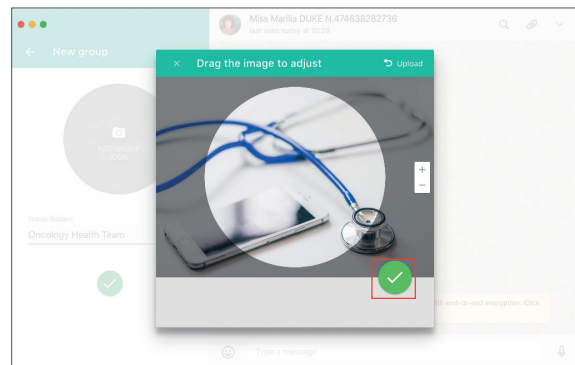
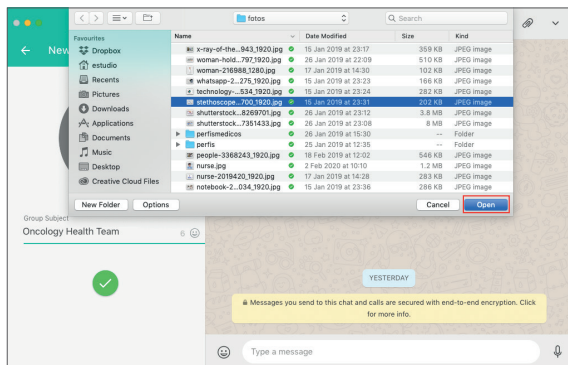
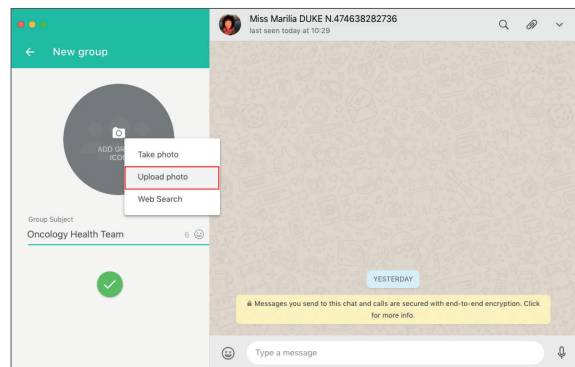
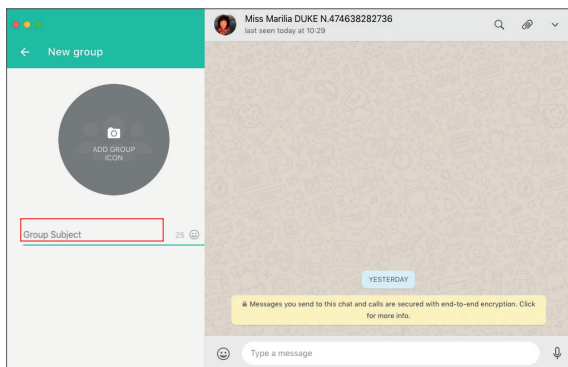
- You will be directed to the ADD GROUP PARTICIPANTS screen.
- The contact details for the healthcare team members in question must have already been saved in the hospital or clinic WhatsApp.
- In the first item of the column is the TYPE CONTACT NAME field.
- Type the first name of the person you want to add in the group into this field.
- When you type the first few letters of the staff member's name, WhatsApp will start to display a list of possible contacts.
- Select the person you want to add.
- The person's name and their photo will appear in the column as the first item.
- In the field below this contact, type the name of the second person you want to add to the group.
- Select the name of the person you want to text message.
- Repeat the procedure until you have added all medical staff members required to this group.
- If you want to remove someone, just tap the "X" next to his/her name.
- At the bottom of the right column there is a green ARROW. Tap the ARROW to go to the next step.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - INVOLVING HEALTHCARE TEAM

- Choose a group chat name: our suggestion is to choose a name that differentiates one healthcare team from another. For example: “Dr. Robert’s Team” (if Dr. Robert is the coordinator of this healthcare team).
- Tap the CAMERA icon to upload a photo representing the healthcare team in question. You have the option to take a photo using your computer’s camera, as well as being able to upload a photo saved on your computer or network, or search for a photo from the internet.
- Below the group name there is a green icon that looks like this “√”. Tap this button to confirm the action.
- The newly created group will appear in the right column with the note “You created this group”.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

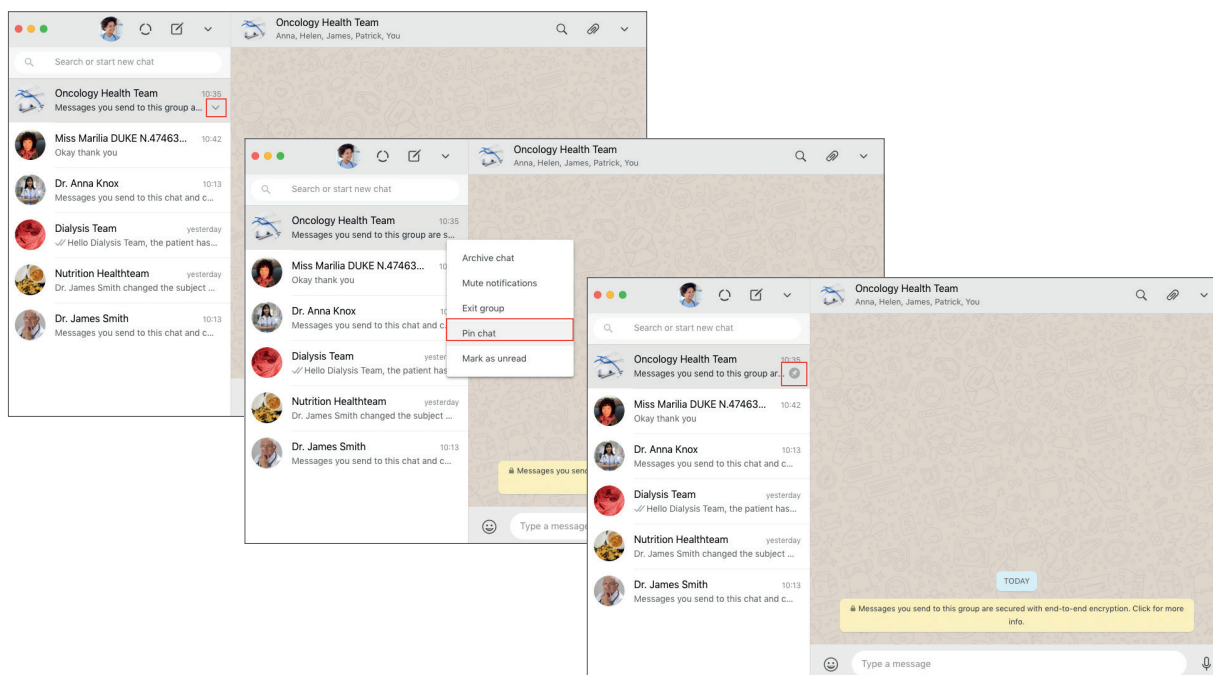
LEVEL II MEDICAL CARE - INVOLVING HEALTHCARE TEAM

3. Pinning a WhatsApp chat between the nursing professional and a healthcare team

We recommend that when a healthcare team is involved in Level II medical care, the chat with the healthcare team in question should be pinned to the top of the WhatsApp chat list. WhatsApp organises chats in chronological order, from the newest to the oldest conversation. **The PIN CHAT feature sends chats with the healthcare team to the top of the list, making it easier for the nurse responsible for care to consult and view these when needed.** WhatsApp allows up to 3 chats to be pinned, so we recommend that **only healthcare teams who are ACTIVE in the provision of medical care remain pinned.** The chat may be unpinned after medical care has been provided/completed.

INSTRUCTIONS FOR PINNING A CHAT WITH HEALTHCARE TEAM DURING THE PROVISION OF LEVEL II MEDICAL CARE

- On the WhatsApp Web main screen, use the SEARCH OR START NEW CHAT field located in the left column to type the name of the desired Whatsapp group (in this case, a group or healthcare team including medical members of staff that are involved in the provision of Level II Medical Care).
- WhatsApp will display a list of possible results. Select the healthcare team WhatsApp group you want to chat with.
- The group chat window will open on the right side of the WhatsApp Web screen.
- In the left column, hover over the healthcare team's group name, just below the date the last message was sent.
- You will see an ARROW. Tap the arrow and select the PIN CHAT option.
- The chat with the selected group will be pinned to the top of the WhatsApp chat list.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - INVOLVING HEALTHCARE TEAM

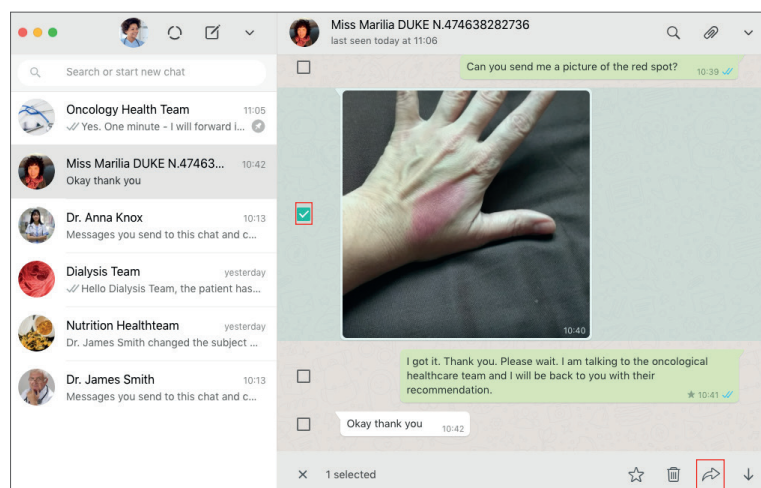
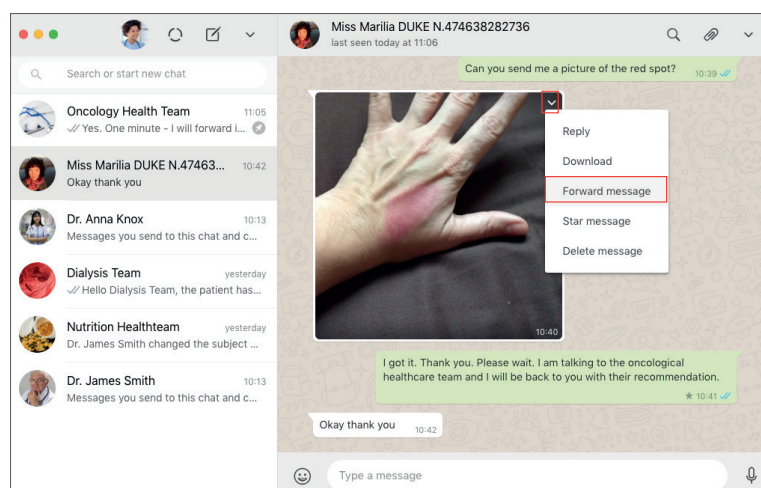
4. Useful functionalities to coordinate the healthcare team work via WhatsApp Web

4.1. Sending patient photos and documents to healthcare team via WhatsApp Web

If the nursing professional is required to forward a photo sent by the patient, he/she should adopt the following procedure.

INSTRUCTIONS FOR FORWARDING A PHOTO SENT BY THE PATIENT TO THE HEALTHCARE TEAM

- Hover over the top-right corner of the photo. You will see an ARROW.
- Tap the arrow and select FORWARD MESSAGE.
- The photo will be selected.
- A bar will appear at the bottom of the menu.
- Select the ARROW pointing right to forward the photo.

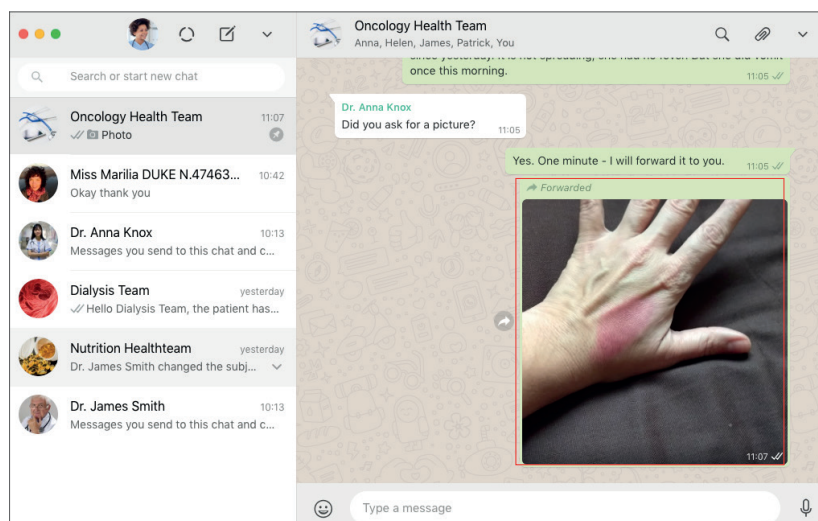
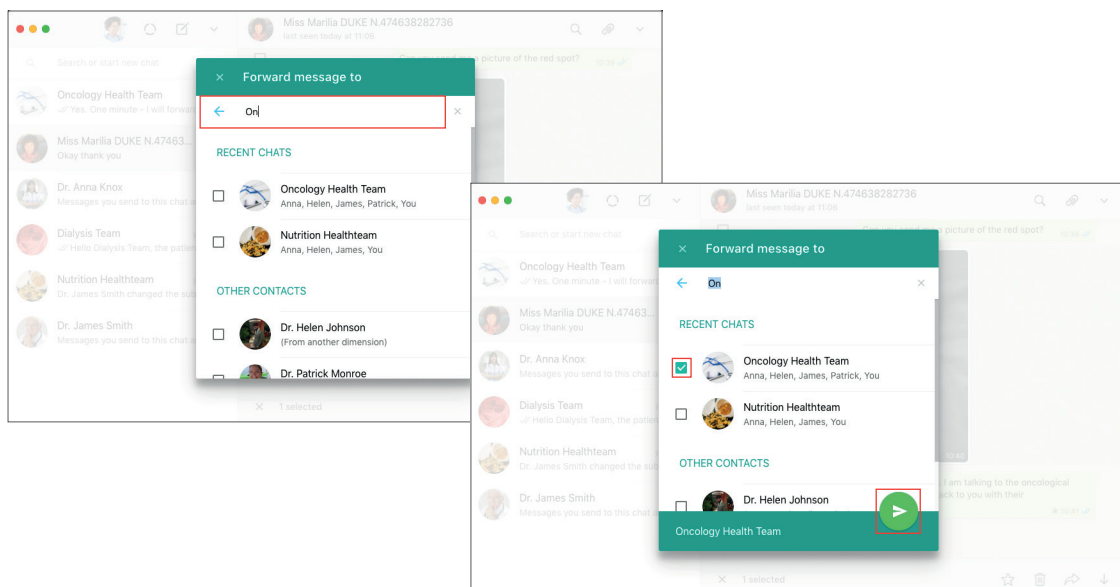


PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - INVOLVING HEALTHCARE TEAM

- You will be directed to the Forward Message screen where you will select the healthcare team group. If the healthcare team group does not automatically appear in the list of contacts, type the healthcare team group's name in the SEARCH field.
- Select the healthcare team group in question.
- Tap the green ARROW at the bottom of the right corner of the screen to confirm the action.

It is always recommended that the nursing professional send a message with information that explains what the photo refers to, adding context to accompany the photo sent to the healthcare team group. This is likely to lead to a higher quality of care.

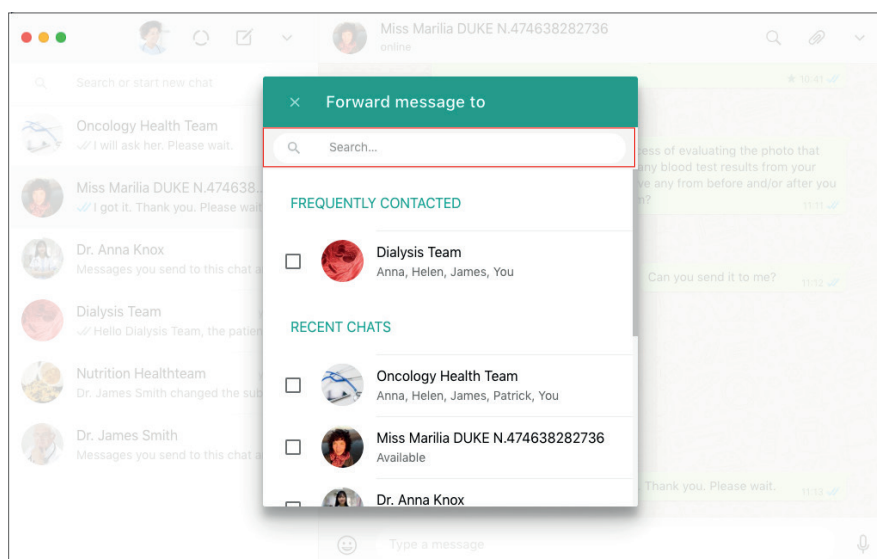
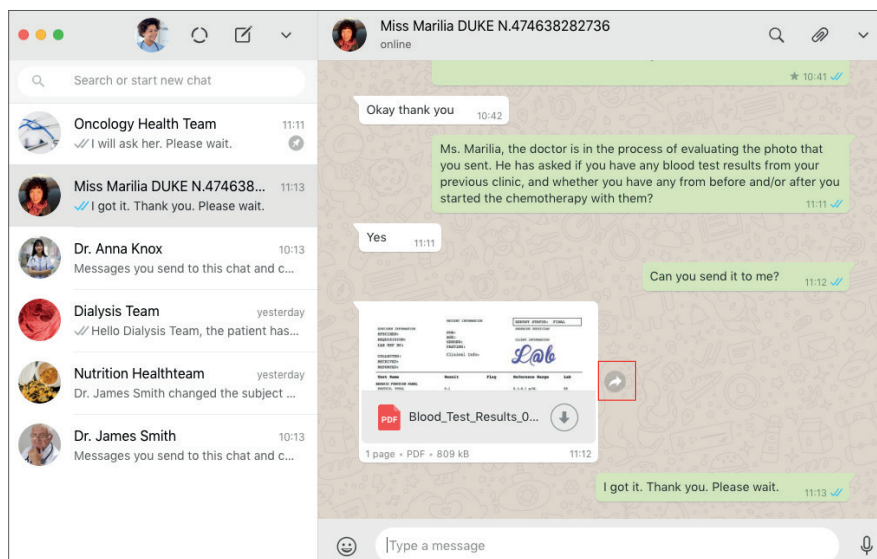


PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - INVOLVING HEALTHCARE TEAM

INSTRUCTIONS FOR FORWARDING A PDF OR DOCUMENT SENT BY THE PATIENT TO THE HEALTHCARE TEAM

- Find the message with the PDF or document you want to forward to the healthcare team group.
- Tap the ARROW on the right side of the message.
- The document will be selected.
- If the healthcare team group does not automatically appear in the list of contacts, type the healthcare team group name into the SEARCH field.

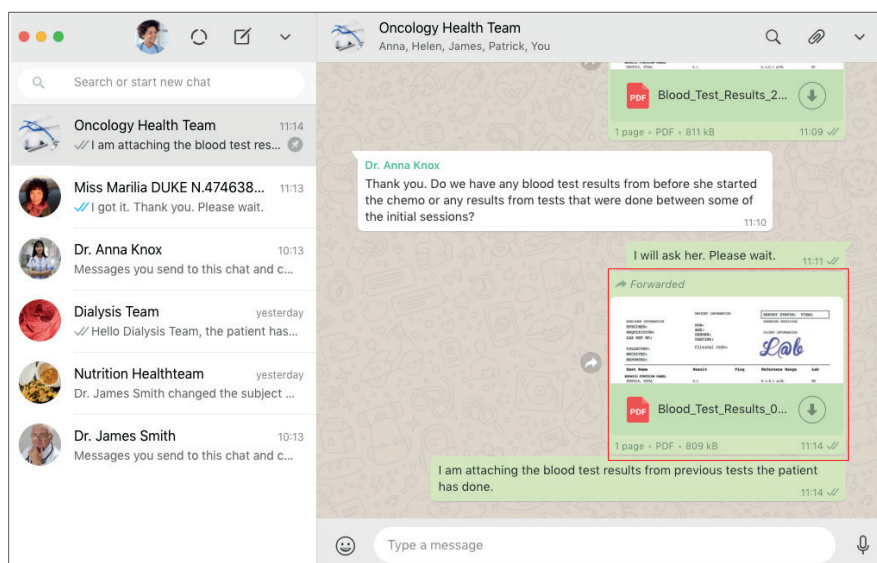
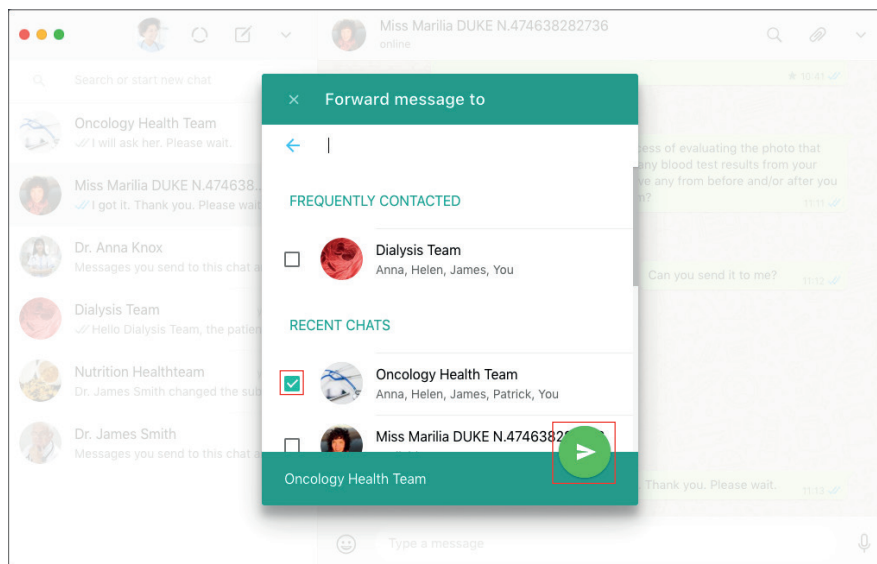


PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - INVOLVING HEALTHCARE TEAM

- Select the desired healthcare team group.
- Tap the green ARROW at the top-right corner of the screen to confirm the action.

It is always recommended that the nursing professional send a message with information that explains what the documents refers to, adding context to accompany the PDF sent to the healthcare team group. This is likely to lead to a higher quality of care.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

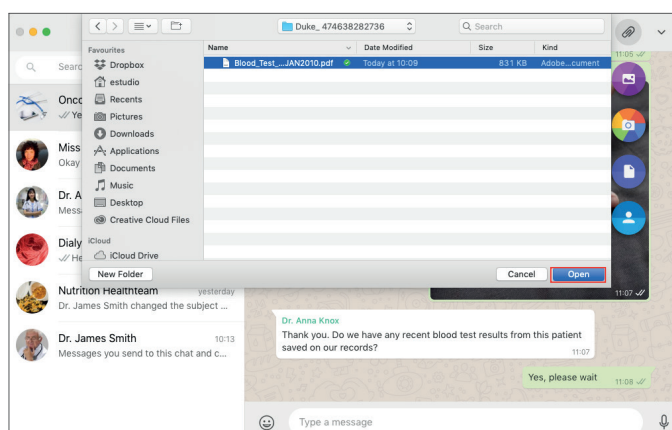
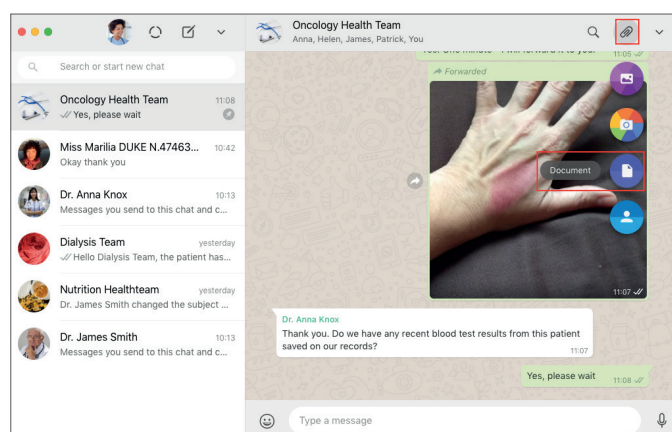
LEVEL II MEDICAL CARE - INVOLVING HEALTHCARE TEAM

4.2. Attaching documents from the patient's medical record

The job of the nursing professional is to consolidate in the healthcare team's WhatsApp group all the information necessary for the healthcare team to evaluate the patient and make an accurate decision. This can include sharing with them some information from the patient's medical record, which should be saved on the hospital or clinic's patient management system. If documents saved in the medical record, such as previous test results for example, need to be accessed by the healthcare team, the nursing professional can then choose to attach them when sending a message to the healthcare team's Whatsapp group chat, following the procedure below.

INSTRUCTIONS FOR ATTACHING DOCUMENTS FROM THE PATIENT'S MEDICAL RECORD TO A MESSAGE SENT IN THE HEALTHCARE TEAM'S WHATSAPP GROUP

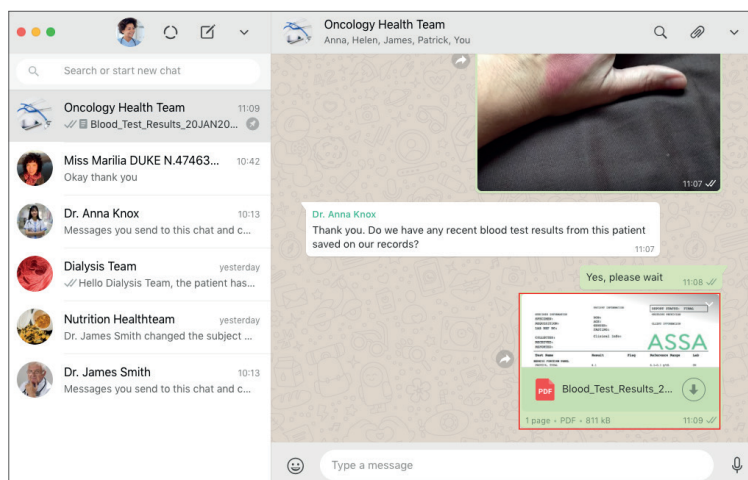
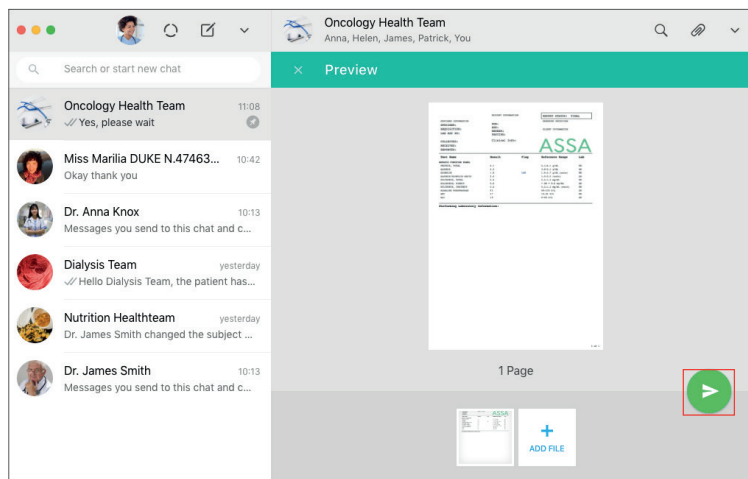
- Select the chat with the healthcare team group with whom you want to share the document in question (which should have already been saved on the hospital or clinic computer or network or patient management system).
- On the top menu of the right column of WhatsApp Web, select the PAPER CLIP icon.
- Select the DOCUMENT option.
- Select the document you want to attach.
- Tap OPEN.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - INVOLVING HEALTHCARE TEAM

- You will be directed to the PREVIEW screen.
- Tap the green ARROW at the bottom-right corner of the screen to send the document to the healthcare team group.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

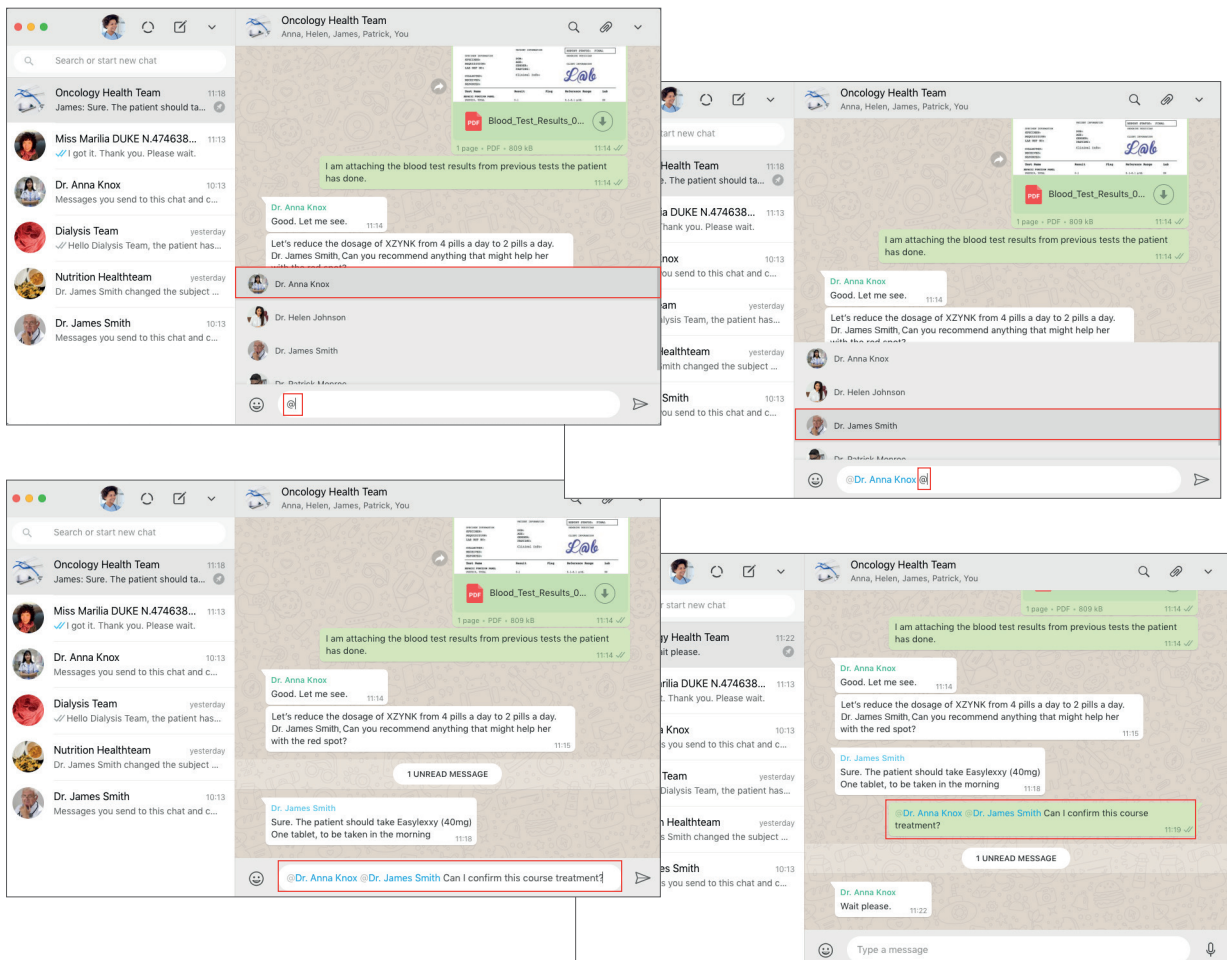
LEVEL II MEDICAL CARE - INVOLVING HEALTHCARE TEAM

4.3. Specifying which member of the healthcare team group a specific message is addressed to

When sending a message to a healthcare team group, the nursing professional may specify that the message shared is addressed to a specific member of this group. To specify the healthcare team members to whom a message is addressed and draw their attention to this message, the nursing professional should use the following feature.

INSTRUCTIONS TO TAG PEOPLE IN MESSAGES IN A GROUP CHAT (FOR HEALTHCARE TEAM'S GROUPS)

- Before typing the message, tap the text field and type @.
- WhatsApp will open a list of all group members.
- Select the person you want to tag in the message.
- Repeat the procedure if you want to tag other people.
- Then type your message normally and tap SEND.
- Your message will be sent highlighting the name of the person with an @ symbol in front of their name.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

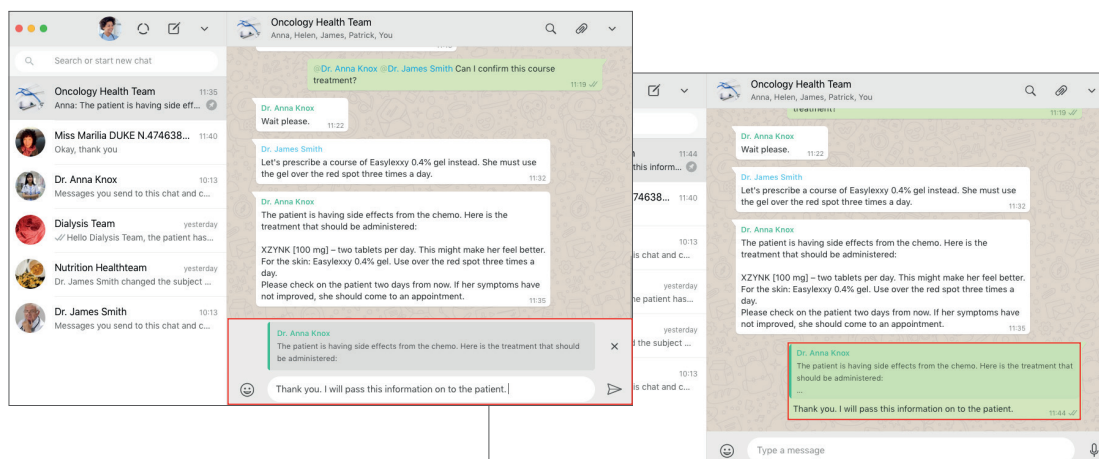
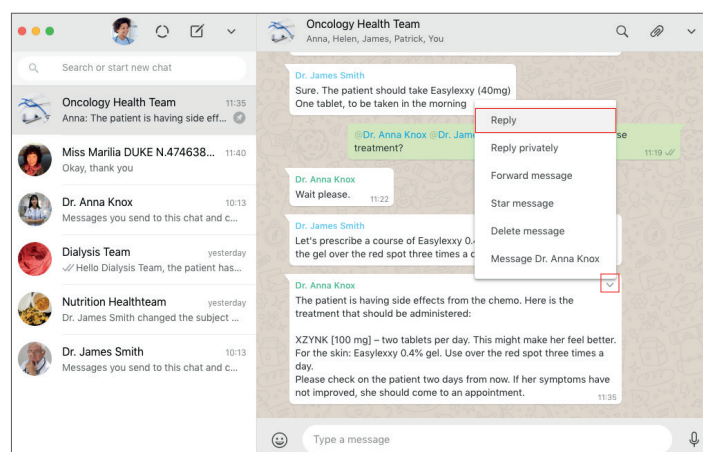
LEVEL II MEDICAL CARE - INVOLVING HEALTHCARE TEAM

4.4. Referring to a specific message within a group chat

The nursing professional can mark what message his/her reply or clarification refers to. This helps organise the general chat flow, highlighting what he/she identifies as a priority.

INSTRUCTIONS FOR REFERRING TO A SPECIFIC MESSAGE SHARED WITHIN THE HEALTHCARE TEAM GROUP CHAT

- Identify which message from which doctor you want to refer to.
- Hover over the top-right corner of the message. You will see an ARROW.
- Tap the ARROW and select REPLY.
- The message from the doctor you selected will be highlighted and “pasted” into your comment.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - INVOLVING HEALTHCARE TEAM

4.5. Reply/Chat privately to group members

A healthcare team member may feel the need to chat privately with another member who sent a message to the group before formalising his/her decision and announcing it in the group. For this purpose, the mobile version of WhatsApp provides the REPLY PRIVATELY feature.

USING THE REPLY PRIVATELY FEATURE: INSTRUCTIONS FOR DOCTORS

- From your smartphone, select the message you want to reply privately to.
- To select the message, tap and hold the message until it is selected (note that this is different from tapping on the message).
- With the message selected, tap the MORE OPTIONS menu on the top-right corner of the screen.
- Select REPLY PRIVATELY
- You will be directed to a private chat with the contact who sent the message in the group.
- Note that the private chat that will start between you and this contact will have already highlighted which message you want to refer to.

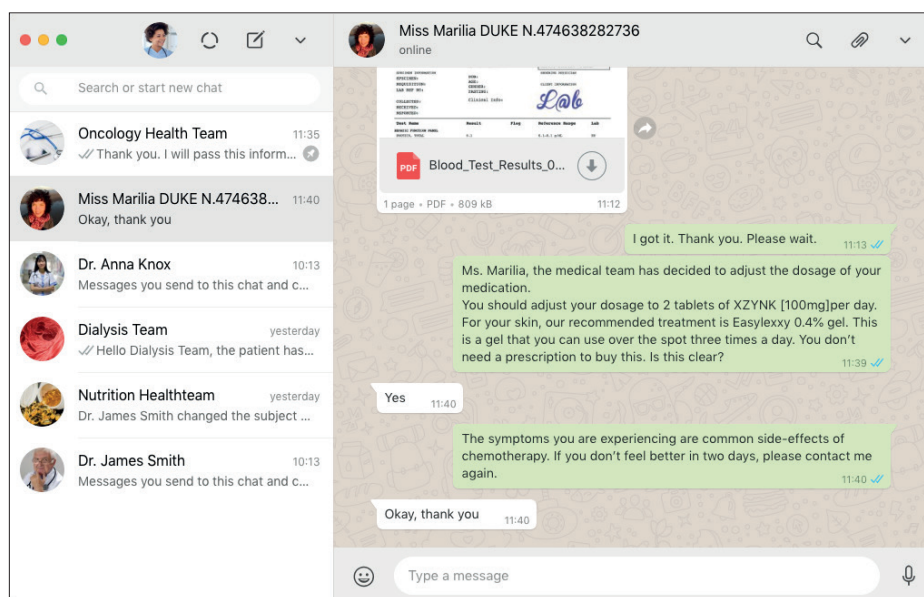


PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - INVOLVING HEALTHCARE TEAM

5. Protocol for the coordination of LEVEL II medical care: interfacing with patients

- The healthcare team may request additional information from the patient, which should be requested from them through the nursing professional who is in charge of interacting with the patient.
- The members of the healthcare team should then agree on a decision or a piece of advice and convey this to the nursing professional in a clear and objective manner.
- The nursing professional should convey the advice to the patient in a clear and objective manner, ensuring that the patient understands this advice.



In cases of referral:

- If the members of the healthcare team recommend that after medical care has been provided via WhatsApp, the patient should still schedule an appointment, the nursing professional should use the [PROTOCOL FOR SCHEDULING APPOINTMENTS](#).
- If any of the healthcare team recommend that the patient should immediately go to the hospital or clinic or to a point of care or to the emergency room, as a result of receiving information from the patient, the nursing professional should use the [PROTOCOL FOR LEVEL III MEDICAL CARE](#).
- The nursing professional and healthcare team should then use the [PROTOCOL FOR CLOSING THE PROVISION OF LEVEL II MEDICAL CARE \(involving healthcare team\)](#).

PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - INVOLVING HEALTHCARE TEAM

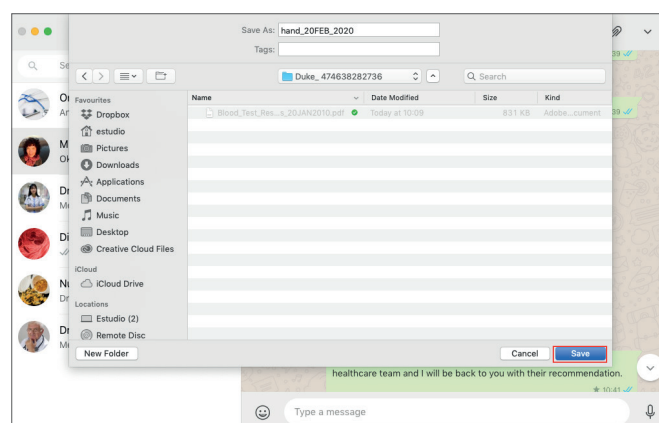
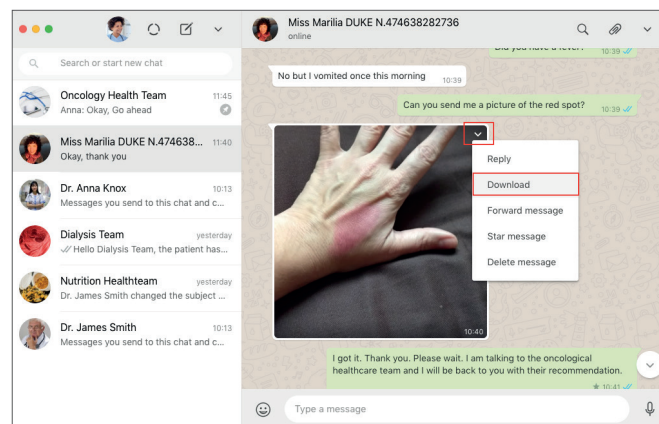
6. Protocol for closing the provision of LEVEL II medical care (when there is a healthcare team involvement)

6.1. Updating medical records

The nursing professional should update the patient's medical record with the guidance of the healthcare team, as well as saving any photos or documents that were shared with the medical staff in order to provide care. These should be saved on the patient's medical record.

INSTRUCTIONS FOR SAVING A PHOTO SENT BY THE PATIENT VIA WHATSAPP

- Hover over the top-right corner of the photo. You will see an ARROW.
- Tap the ARROW.
- Select DOWNLOAD.
- Choose the directory on your computer where you want to save the photo.
- You can also rename the photo by specifying the name of the test result it refers to.
- Tap SAVE to complete the procedure.

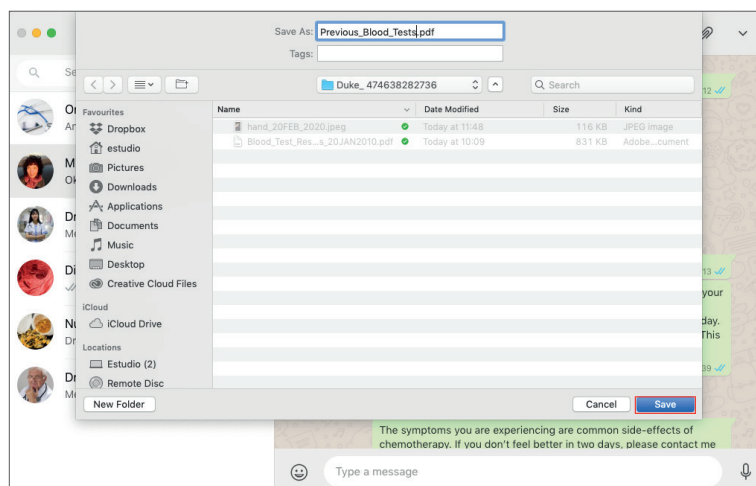
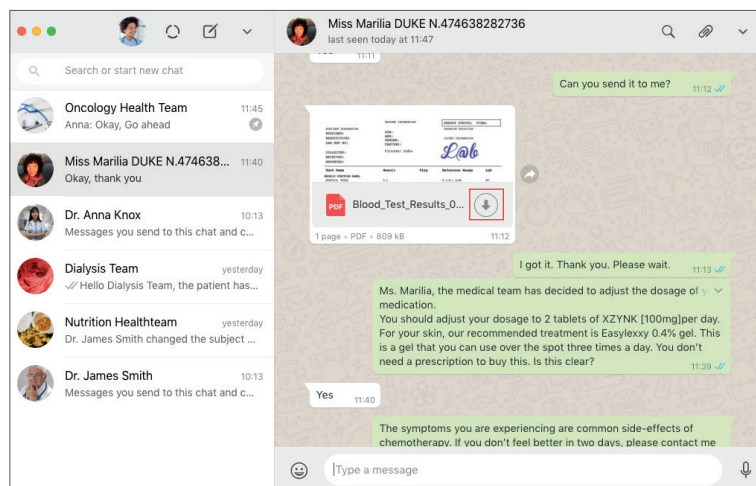


PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - INVOLVING HEALTHCARE TEAM

INSTRUCTIONS FOR SAVING A PDF SENT BY THE PATIENT VIA WHATSAPP

- WhatsApp already provides a preview of the file with the PDF icon.
- Tap the ARROW pointing down to download the file.
- Choose the directory on your computer where you want to save the PDF.
- You can also rename the PDF by specifying the name of the test result it refers to.
- Tap SAVE to complete the procedure.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - INVOLVING HEALTHCARE TEAM

6.2. Patient data management: ethical considerations

After updating the patient's medical record, including saving any photos or documents shared with the healthcare team and that oversaw the care process, the nursing professional must notify the healthcare team's members that the update to the patient's case has been completed.

[template message for of protocol closing of Level II medical care closing]

Doctors, the patient has already received your advice and we are activating the PROTOCOL FOR CLOSING this case. Any photos and documents sent by the patient have already been saved to his/her medical record.

We request that you delete any messages containing photos or data that identify the patient as soon as possible.

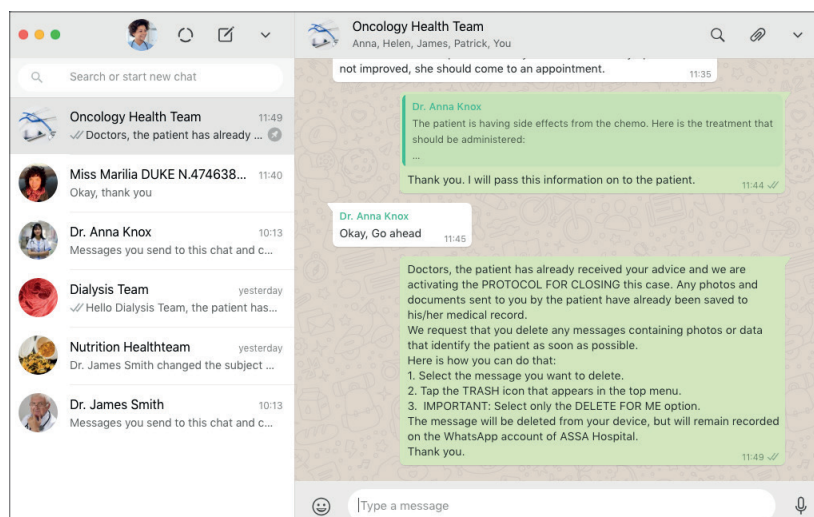
1. Select the message you want to delete.
2. Tap the TRASH icon that appears in the top menu.
3. IMPORTANT: Select only the DELETE FOR ME option.

The message will be deleted from your device, but will remain recorded on the WhatsApp account of [NAME OF THE HOSPITAL OR CLINIC].

Thank you.

All healthcare team members then have the option of deleting any photos or documents shared by WhatsApp that can identify the patient. This feature allows patient confidentiality to be protected even in the event of loss or theft of a device owned by one of the healthcare team members overseeing this patient.

Healthcare team members should select the photos and documents to be deleted and should only delete them on their device. That way, the entire chat will continue to be preserved on the hospital or clinic's WhatsApp account. To delete messages that contain photos or documents that may identify the patient (on their device only), the medical staff member must follow the following procedure.



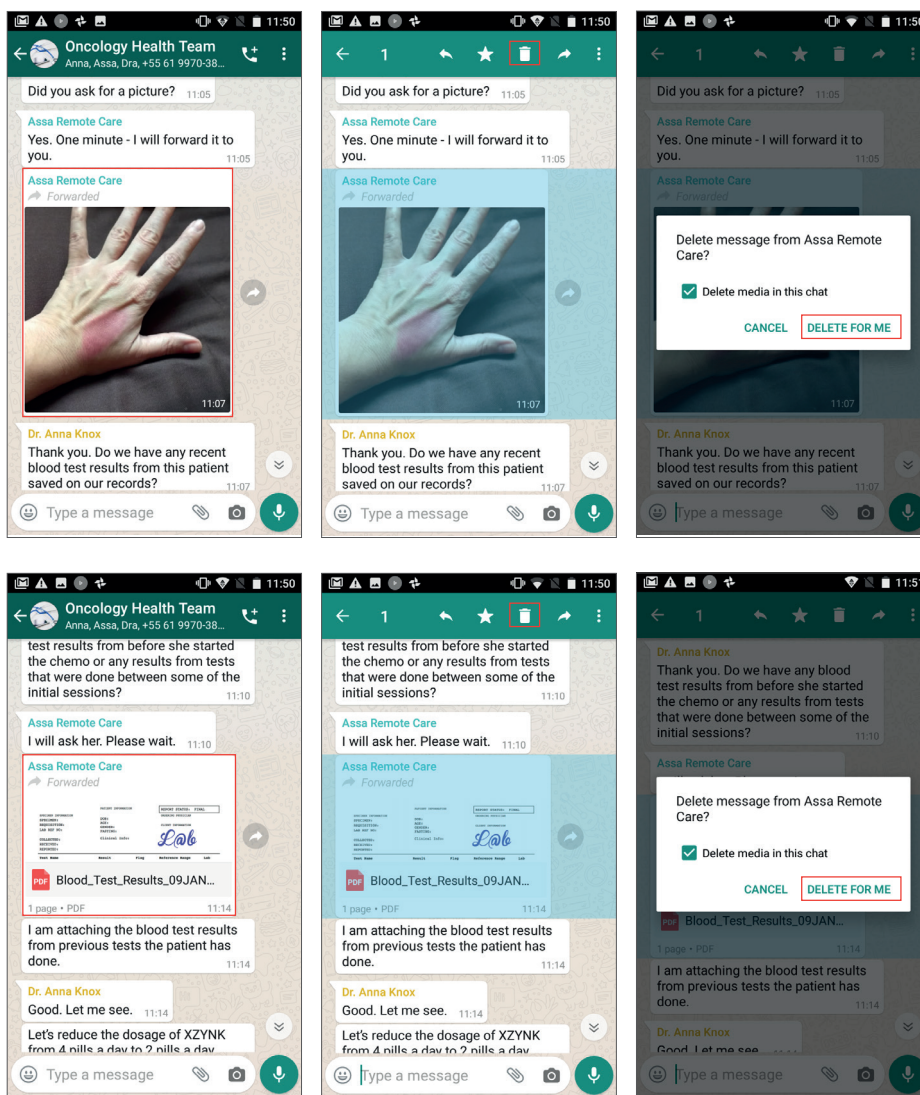
PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - INVOLVING HEALTHCARE TEAM

INSTRUCTIONS FOR DELETING PATIENT PHOTOS AND DOCUMENTS VIA WHATSAPP (MOBILE VERSION)

- Select the message that contains the photo or document you want to delete (tap and hold the photo until you select it).
- A menu will appear at the top of the screen.
- Select the TRASH icon.
- You will be directed to a screen that will give you the option to delete the message on your device only.
- Select the DELETE FOR ME option.

(!) Done: the message containing the photo or PDF file has now been deleted from the doctor's device but is still preserved on the hospital or clinic's WhatsApp account.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

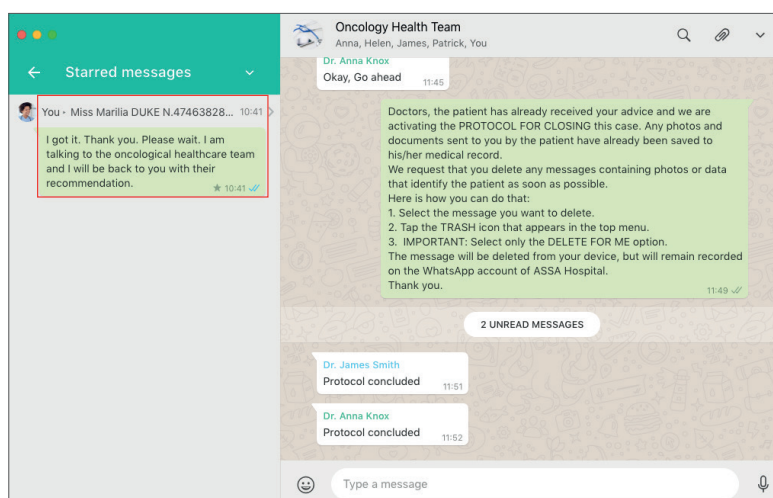
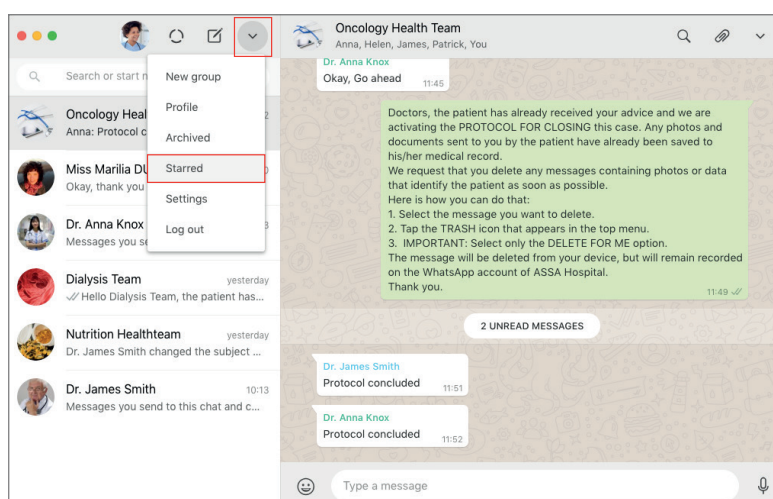
LEVEL II MEDICAL CARE - INVOLVING HEALTHCARE TEAM

6.3. Updating the list of pending messages

The nursing professional should unstar the patient's message upon closing the process of providing medical care (or when the case has been solved), thus removing it from his/her pending list.

INSTRUCTIONS FOR UNSTARRING A MESSAGE TO INDICATE IT IS NO LONGER PENDING (USING WHATSAPP WEB):

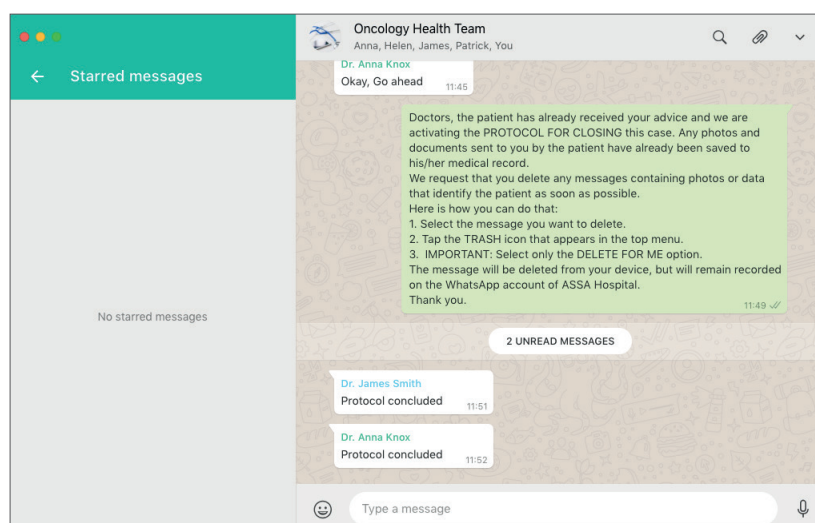
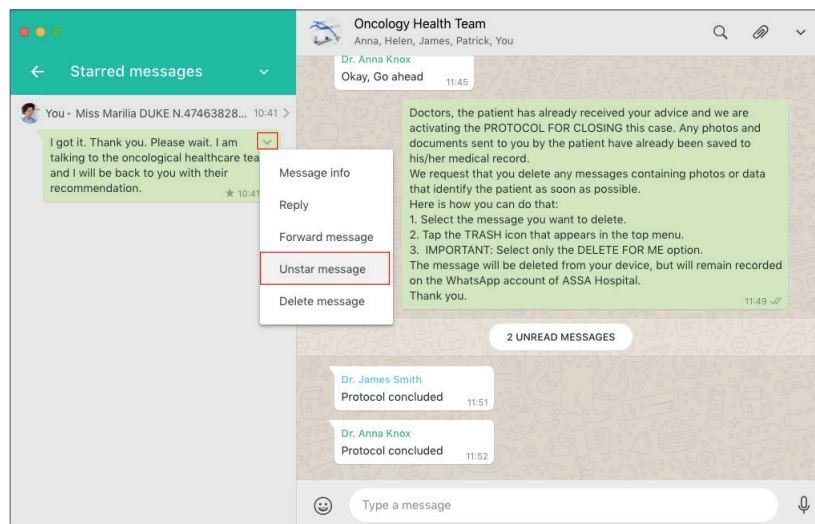
- Access all starred messages in the top bar of the left column of your WhatsApp Web.
- Tap the arrow and select "STARRED".
- You will now be able to access all pending (starred) messages.



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL II MEDICAL CARE - INVOLVING HEALTHCARE TEAM

- Find the message that has already been solved.
 - Hover over the top-right corner of this message. You will see an ARROW.
 - Tap the ARROW and select the “UNSTAR MESSAGE” option.
- (!) Done: the message has been removed from your pending list (starred messages).



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

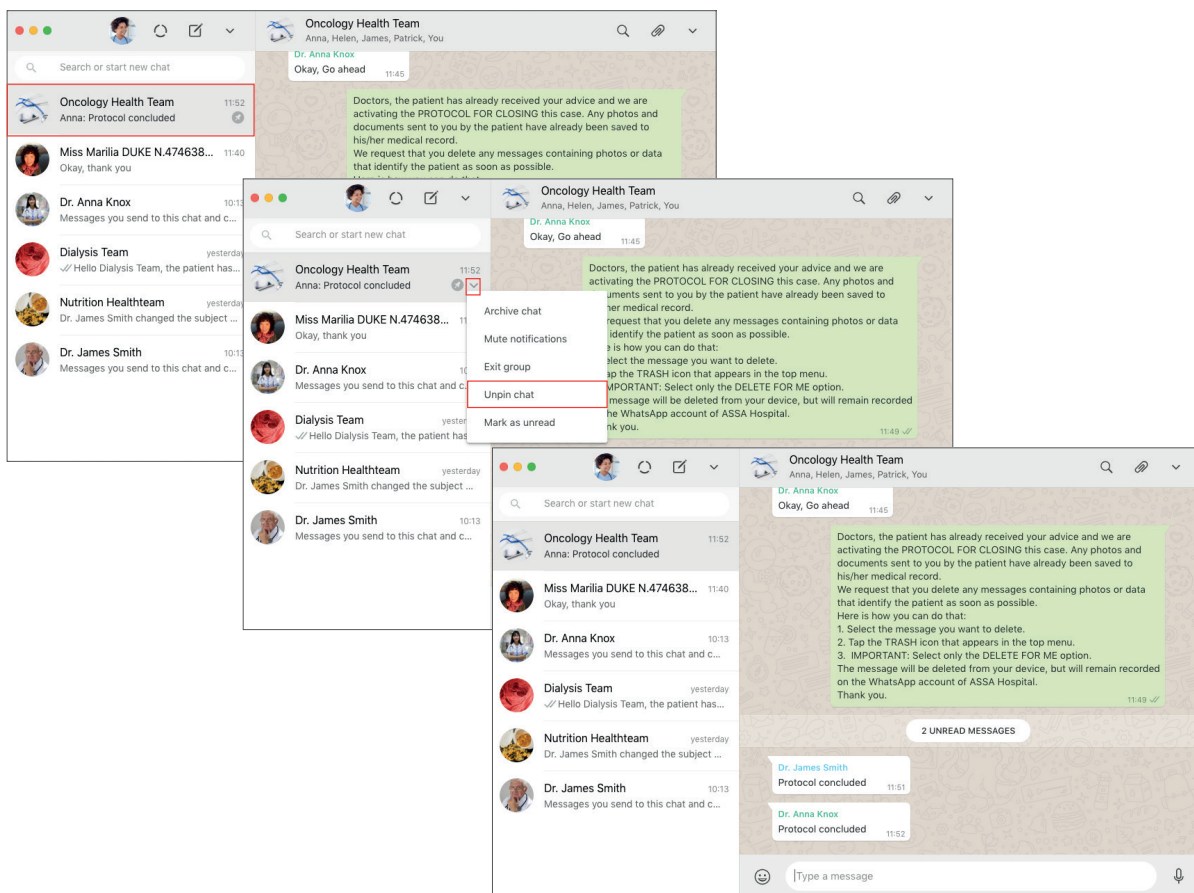
LEVEL II MEDICAL CARE - INVOLVING HEALTHCARE TEAM

6.4. Unpinning group chats after Level II medical care (involving healthcare team) has been provided

Upon completion of Level II medical care (cases involving healthcare team) the nursing professional may choose to UNPIN the group chat in question. We recommend doing this because WhatsApp only allows up to 3 chats to be pinned to the top of the chat list. That is why **our recommendation is that only healthcare teams who are ACTIVE in providing medical care remain pinned.**

INSTRUCTIONS FOR UNPINNING CHAT WITH HEALTHCARE TEAM GROUP AFTER LEVEL II MEDICAL CARE

- In the left column of the WhatsApp main screen you will see up to 3 pinned chats flagged with a PIN.
- Find the healthcare team group chat that you want to UNPIN.
- To unpin the chat, hover over the group contact details, just below the date the last message was sent.
- You will see an ARROW. Tap the arrow and select the UNPIN CHAT option.
- The group chat consisting of members of healthcare team will then go back to where it belongs chronologically (Whatsapp organises chats in chronological order).



PROTOCOLS FOR HOSPITAL OR CLINIC TO PROVIDE REMOTE CARE USING WHATSAPP

LEVEL III MEDICAL CARE

Level III remote medical care Via WhatsApp

LEVEL III MEDICAL CARE cases are cases that require the patient to go to the hospital or clinic, access another point of care or go to an emergency room. These cases can either be identified initially by the nursing professional himself/herself, or after further evaluation from the doctor or healthcare team in charge of the patient's care.



We recommend that the nursing professional works with patient advice template replies in cases like these.

[template reply for Level III case referral]

After consulting our healthcare team, we recommend that you go to a point of care or emergency room, where you can be assisted in person. Our doctors will be able to better evaluate your condition and advise you on the best procedure to follow. If possible, call a person you trust and ask them to accompany you.

If you have any questions, we are at your disposal.

The nursing professional can also recommend what hospital or clinic the patient should go to, with the option of providing the link to the clinic's address to facilitate their care.

[template reply for Level III case referral to the same hospital or clinic]

After the consulting with our medical staff, we recommend that you come to the HOSPITAL or CLINIC where you can be assisted in person. Our doctors can better evaluate your condition and advise you on the procedure to follow. If possible, call a person you trust to accompany you.

Click on the link to find out how to get to [NAME OF THE HOSPITAL OR CLINIC]: <https://goo.gl/maps/youraddress>

If Level III patients have gone through Level II medical care, the nursing professional, doctor in charge, or staff members in charge of patient care, should follow the **PROTOCOL FOR CLOSING LEVEL II MEDICAL CARE**.

PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

In the triage and remote medical care protocols presented earlier, the patient care delivered via WhatsApp is reactive. This means that the patient looks for the hospital or clinic with a health demand and the nursing professional, doctor in charge or healthcare team then guide the patient via WhatsApp.

In the protocols aimed at Health Strategy Management, the service offered via WhatsApp is proactive, meaning that it assists the patient in preventive care or helps them adhere to treatment. This means that the hospital or clinic needs to decide whether they want to be involved in the remote management of patient health and how they intend to do it.

In this regard, we will present a series of WhatsApp Health Strategy Management protocols that can be implemented independently, depending on the hospital or clinic strategy and action plan. We would like to emphasise that in this case it is preferable that the interaction with patients via WhatsApp is done by a nursing professional, because he or she will have the necessary experience to be confident in evaluating the patient's requests and replies, as well as reassessing cases or referring them further. Therefore, we will present the protocols on the assumption that the administration of the hospital or clinic WhatsApp account is being done by a nursing professional.

PROTOCOLS PRESENTED FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP:

1. Sending guidelines to patients
2. Managing medical care schedules and preventive routines
3. Health status update
4. Using WhatsApp as an educational channel
5. Support group management via WhatsApp



PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

Case Study: Amparo Clínica de Saúde, São Paulo, Brazil

Amparo Saúde is a clinic whose business model is based on a monthly subscription charge paid by the patient (today some supplementary health insurance providers pay for their clients to use the Amparo services). In addition to providing support via WhatsApp, the clinic has centralised medical care provided to patients by assigning them a GP who monitors and manages the patient's health. The GP in charge of a patient is someone who will provide advice about the procedures and exams he/she really needs to do in order to avoid unnecessary health-related expenses. After an appointment with the doctor, the patient is referred to a post-appointment with a nursing professional. In addition to clarifying any advice given by the doctor, the nursing professional also presents the patient with a timetable for future actions such as returns and check-ups, as well as reminders that will later be sent by WhatsApp. This is the kind of service we refer to when we talk about 'health strategy management'.

To know more about the Amparo Saúde, access:
<https://www.amparosaude.com.br/>

Case Study: Ambulatory Oncology Center, Hospital Dr. Sótero del Río, in Santiago, Chile

At the ambulatory oncology center at Dr. Sótero del Río Hospital in Santiago, Chile, a team of four nurses has taken over the management of the health strategy for cancer patients with solid tumours. They manage about 150 patients via WhatsApp, including those undergoing chemotherapy (called active patients) or after chemotherapy (called inactive patients). Their work begins by having a one-hour meeting with the patient after they have had their appointment with the doctor. In these meetings, they explain the treatment and educate patients about the chemotherapy process, alerting them to any necessary preparations and adverse reactions. The patient follow-up is then managed via WhatsApp. Nurses manage patients' schedules, send educational material, and manage chemotherapy-related adverse events and reactions. In some cases, the nurses themselves advise the patient. In other cases, they call the doctor in charge of the patient to report the patient's condition and receive guidance. Nurses play a key role in patient follow-up via WhatsApp, freeing up doctors for appointments for patient assessment and reassessment.

PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

1. Providing guidance to the patient via WhatsApp

After the patient has had their appointment and a decision regarding their care and any future appointment has been made, the hospital or clinic may produce PDF documents that detail the patient's daily treatment, explaining details around the medications he or she is taking, dosages, adverse reactions, when they should return for their next appointment(s) and other schedule-related matters, as well as other useful treatment information. We recommend that these post-appointment activities be conducted by nursing professionals. It is also important that the instructions provided for in these documents are compliant with hospital or clinic guidelines and medical advice. It is also important that these are recorded on the patient's medical record.

This procedure can be used to:

- Send the patient any schedule-related information, such as the time and date of their next appointment or follow-up appointments;
- Send the patient detailed instructions on how to follow the doctor's prescribed treatment;
- Inform the patient about any potential adverse reactions expected from treatment;
- Send the patient instructions on how to prepare for future medical tests;
- Send the patient a 'social prescription', with courses and activities recommended for the patient;
- Send the patient a specific diet to follow;
- Provide advice on physical exercise.

Being intuitive in naming the files:

When receiving a PDF via WhatsApp, the patient can preview the name of the document. Therefore, it is of utmost importance that the name given to the file when the PDF is generated is clear and provides a good idea of its content.

Examples:

Diet_Week1.pdf

How_to_take_your_medication.pdf

Preparation_Endoscopy_test.pdf

Healthcare_Schedule_APRIl2018.pdf

Return_Schedule.pdf

PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

We recommend that any instructional PDF files sent to the patient are accompanied by a message explaining their content to the patient. The hospital or clinic can set up templates for different categories of messages and customise these for each patient as per the examples below.

[template message for sending medical care schedule via WhatsApp]

Hello! You are receiving a document that contains important information about your health. Tap the document to read the file. If you have any questions, we are at your disposal.

[template message for sending medication-related guidelines via WhatsApp]

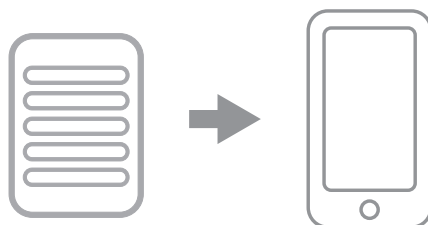
Hello! You are receiving a document that contains detailed guidelines on how to take the medications prescribed by your doctor. Tap the document to read the file. If you have any questions, we are at your disposal.

[template message for adverse reaction-related guidelines via WhatsApp]

Hello! You are receiving a document prepared by our medical staff that explains in detail what to expect from your treatment, including possible adverse drug reactions. Tap the document to read the file. If you have any questions, we are at your disposal.

[template message for sending diet guidelines via WhatsApp]

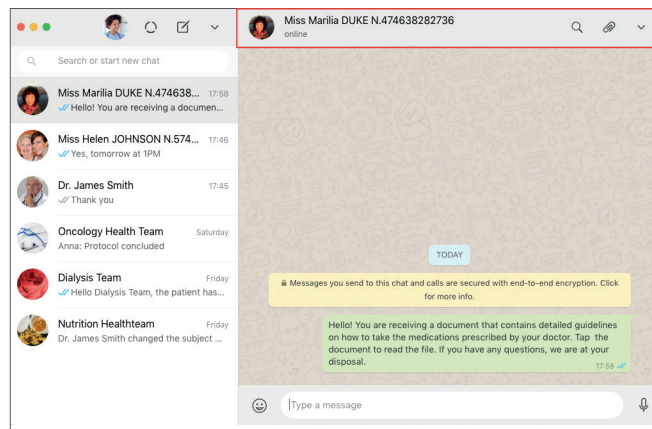
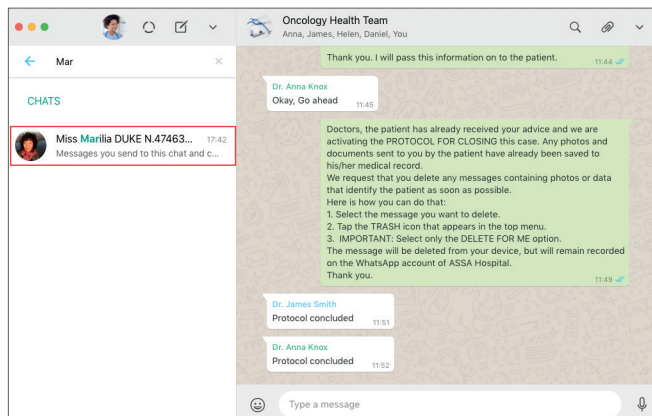
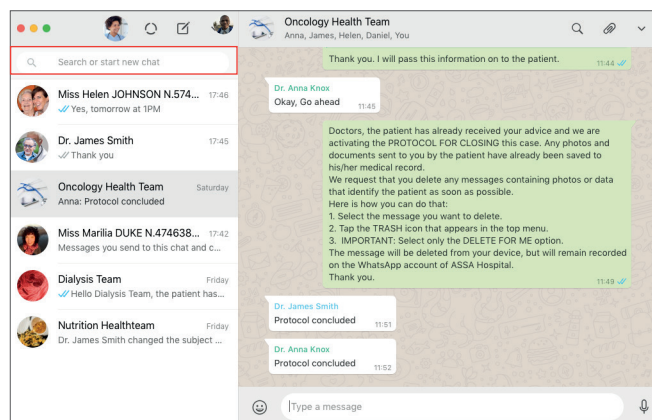
Hello! You are receiving a document with detailed guidelines on the daily diet prepared for you by your doctor. Tap the document to read the file. If you have any questions, we are at your disposal.



PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

INSTRUCTIONS FOR ATTACHING PATIENT GUIDANCE PDF VIA WHATSAPP WEB

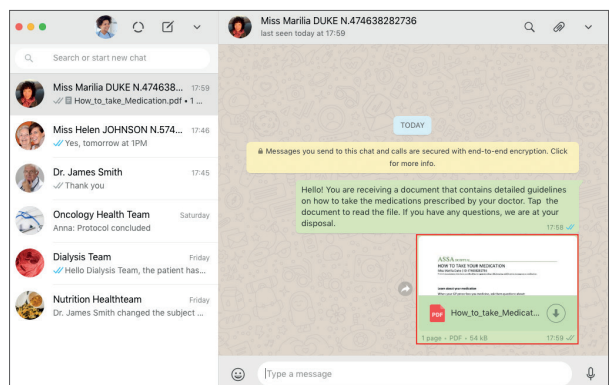
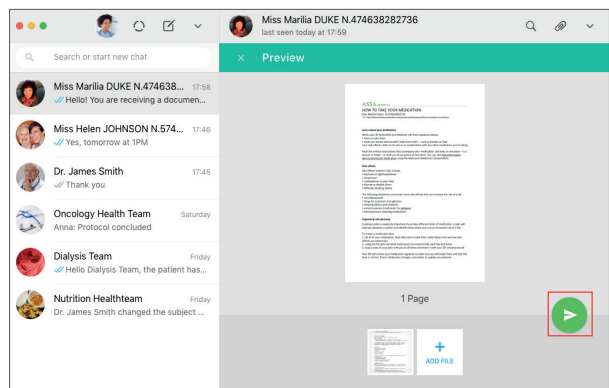
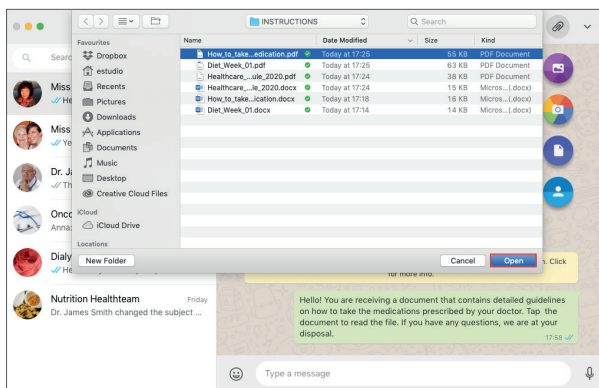
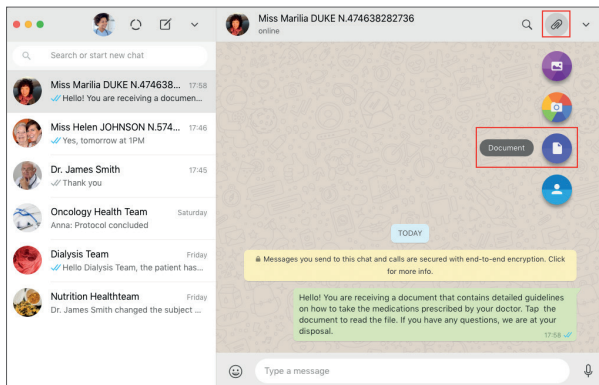
- On WhatsApp Web, in the left column where chats appear, use the SEARCH OR START NEW CHAT field to select the patient.
- Type the name of the patient.
- Select the chat with the patient.
- You might send first a message explaining the PDF you will send.



PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

- At the top-right corner of the WhatsApp Web screen, tap the PAPER CLIP icon.
- Select the DOCUMENT option.
- Search for the PDF you want to send in the files on your computer or network.
- Tap OPEN.
- You will be directed to the WhatsApp Web PREVIEW screen.
- Tap the green ARROW at the bottom of the screen to send the PDF.

(!) Done: the PDF has been sent.

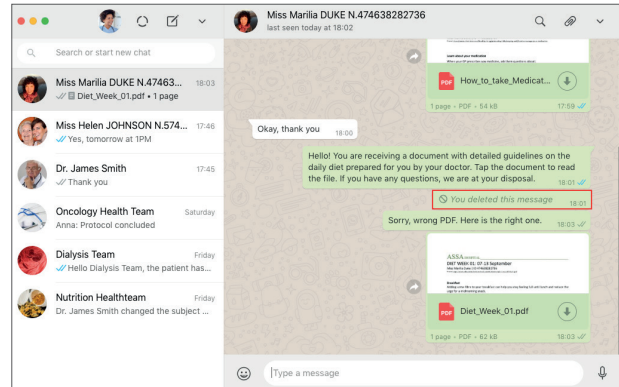
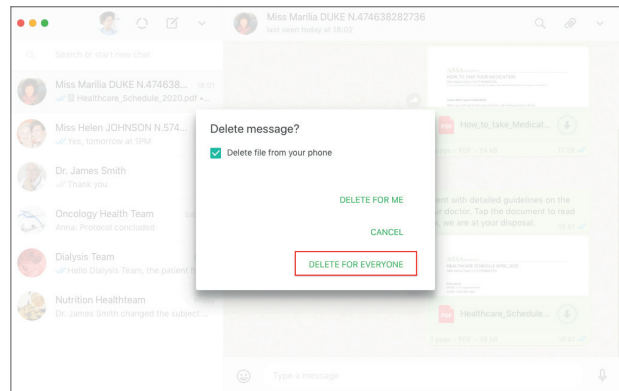
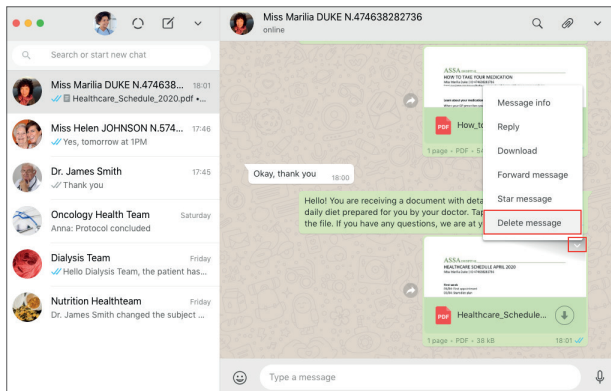
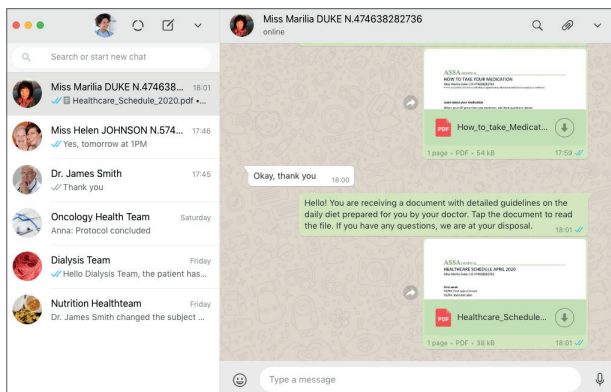


PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

If the nursing professional sends the wrong PDF, he/she can delete the document from the chat.

INSTRUCTIONS FOR DELETING A PDF FILE SENT TO THE PATIENT BY MISTAKE VIA WHATSAPP WEB

- Hover over the top-right corner of the message containing the PDF you want to delete. You will see an ARROW.
 - Tap the ARROW and select the DELETE MESSAGE option.
 - You will be directed to a pop-up screen. Select the DELETE FOR EVERYONE option.
- (!) Done: the wrongly uploaded PDF has been deleted and you can repeat the process for sending files to send the correct PDF file.



PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

1.1. Viewing guidelines sent by PDF in a single library

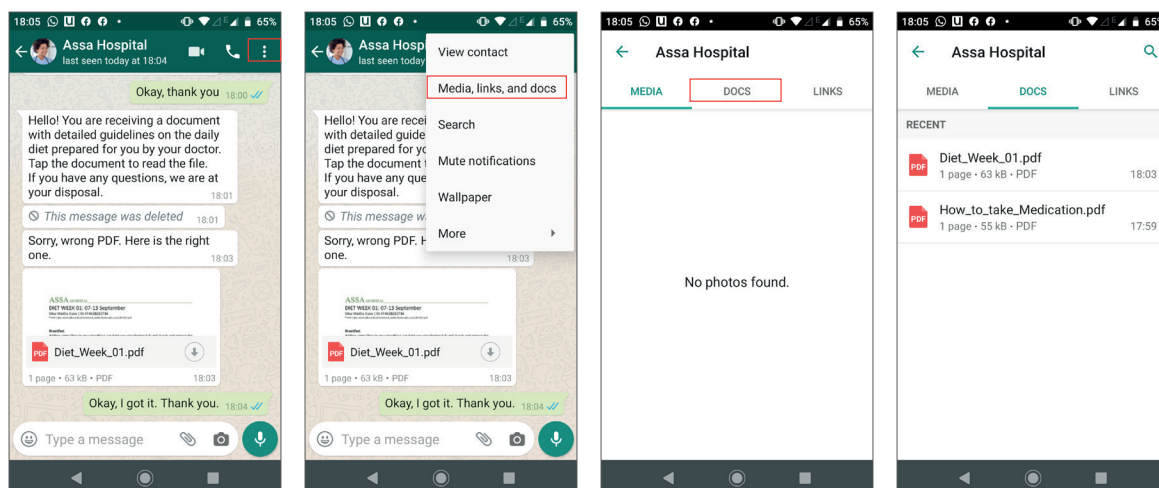
All guidelines sent to the patient as PDF files can be viewed in a single library on WhatsApp by both patients (on their smartphones) and nursing professionals (on the hospital or clinic WhatsApp Web).

1.2. File organisation and viewing on Patient WhatsApp

WhatsApp organises all sent and received documents in a particular chat in one directory, facilitating the patient's consultation and viewing of these documents. If scheduling an appointment via WhatsApp, the nursing professional can guide the patient to access this directory and find the PDF file previously sent to them. If the hospital or clinic arrange post-appointment meetings between the nursing professional and patient, we recommend that the nursing professional also demonstrate the following procedure to the patient in person.

INSTRUCTIONS FOR THE PATIENT TO VIEW THE DOCUMENTS DIRECTORY CONTAINING THE GUIDELINES SENT BY THE NURSING PROFESSIONAL

- In the chat screen with the hospital or clinic, tap the MORE OPTIONS menu located in the top-right corner of the screen.
- Select the MEDIA option.
- The patient will see three columns: MEDIA (with photos and videos stored in the chat); DOCS (with documents and PDFs stored in the chat) and LINKS (with the history of the links that have already been shared in the chat).
- By tapping the DOCS column, the patient will be able to view all of the PDFs that have already been shared in the chat.



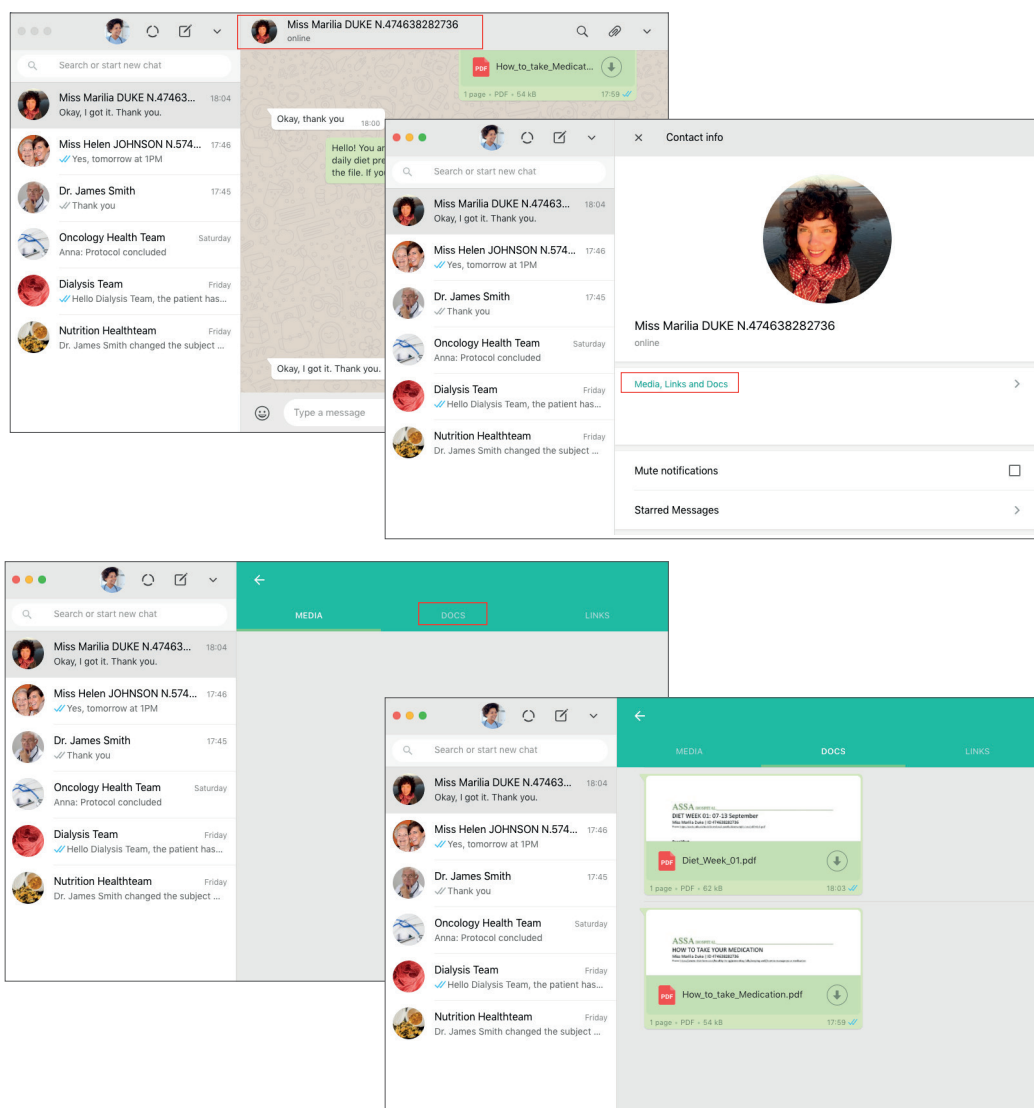
PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

1.3. Visualising files sent to the patient from the hospital or clinic's WhatsApp Web account

The directory of uploaded PDFs can also be viewed by the nursing professional, making it easy for him or her to see which documents have already been shared with the patient.

INSTRUCTIONS FOR VISUALISING THE PATIENT'S DOCUMENTS DIRECTORY FROM THE HOSPITAL OR CLINIC WHATSAPP WEB ACCOUNT

- On WhatsApp Web, in the patient chat, tap the top bar of the chat screen (where you can see patient's name).
- You will now be able to access the CONTACT INFO screen.
- Just below the phone number is a link called MEDIA, LINKS AND DOCS.
- Tap the link and select the DOCS option.
- You will now be able to see all of the PDFs that have already been shared in this chat.



PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

2. Managing medical care schedules and preventive routines

The hospital or clinic may include dates for return appointments, appointments, preventive examination, or check-ups on the patient's medical record. The nursing professional responsible for WhatsApp interactions can contact the patient during these periods to remind him/her of any medical care routines and upcoming face-to-face appointments. We recommend that the nursing professional reminds the patient of these events via WhatsApp using template messages that can and should be adapted by the hospital or clinic.

[template message for instructing the patient to return to the hospital or clinic via WhatsApp]

Hello! We hope you are well! We would like to remind you that your ROUTINE TEST, CHECK-UP, or FOLLOW-UP is due soon, according to the doctor's recommendations. If you want to schedule your APPOINTMENT or TEST, we can do it here by WhatsApp. We are at your disposal. Thank you.

3. Health status update

The hospital or clinic may make a note of the date on which to contact the patient in order to prompt them to send an update regarding their health status. This note should be included on the patient's medical record. It is essential that the nursing professional updates the patient medical record with the feedback received from them via WhatsApp. Depending on the assessment of the patient's response, the nursing professional may use the PROTOCOLS FOR TRIAGE and REMOTE CARE AT LEVEL I, II, or III.

We recommend that the nursing professional responsible for interacting with the patient via WhatsApp works with a template message to start the chat with the patient. This template can and should be adapted to the hospital or clinic needs. If the patient reports any event that the nursing professional would like more details about, he or she may use the TRIAGE PROTOCOL.

[template message for starting a chat about the health status of a patient via WhatsApp]

Hello! Your doctor would like to know how you are feeling today. If you need to talk to us, we are at your disposal.

Patient impact: case study

Bete is 66 years old. She is concerned about bothering her relatives with her health problems. Reproducing behaviour commonly found among elderly people in Sao Paulo, she goes to have medical tests done by herself and lies about her accompanying person being on their way. Bete's case is special because she lives by herself in Sao Paulo. Her only daughter lives in Spain, but she has organised a series of procedures to check if Bete is fine, including sending a message that should be answered by 10 am everyday. Although they live far away,

interacting with her daughter via Whatsapp on a daily basis makes Bete feel safe. Since she had an aneurysm 3 years ago, she also periodically receives a phone call from her health insurance provider asking her about her health status and to reminding her to have her periodic check-ups. Together with the WhatsApp chat with her daughter, this phone call puts Bete at ease because she feels she is being assisted and cared for. This phone call is an example of proactive health management and can be done via WhatsApp as a text message or call.

PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

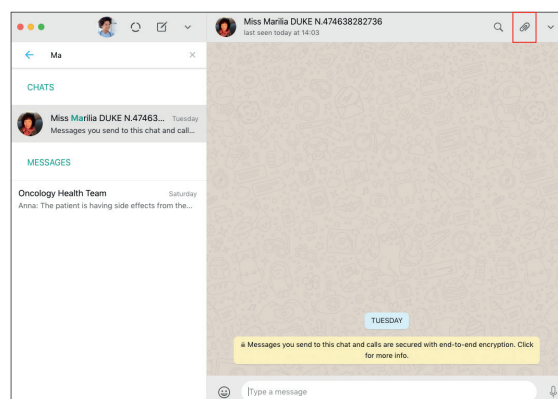
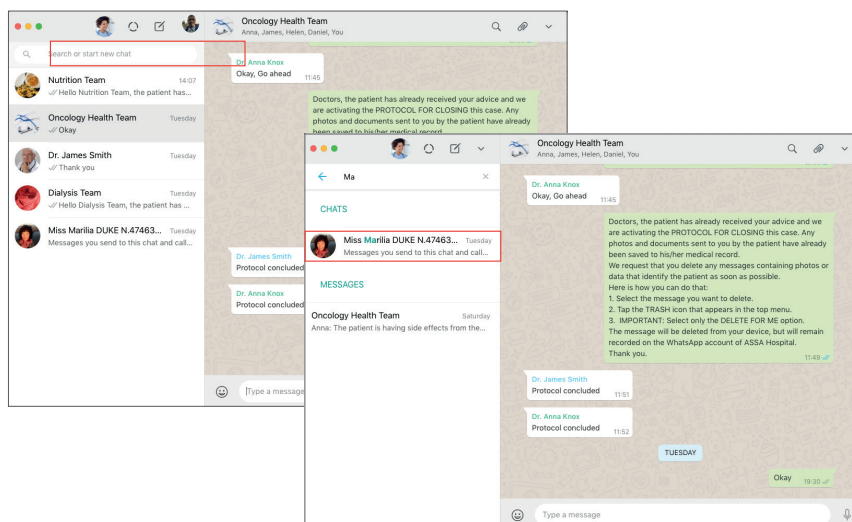
4. Using WhatsApp as an educational channel

WhatsApp can also be used as a powerful patient awareness and educational tool. The hospital or clinic, through its medical staff, may curate content produced by third parties or may produce its own content for this purpose. Content can be made available directly by the nursing professional in charge of interacting with patients via WhatsApp by sharing photos, videos and PDFs.

Another option is to share links that direct the patient to content out of WhatsApp. The contents may provide information relevant to the patient's specific case, address healthy habits or other issues chosen by the doctor or healthcare team in charge of their care.

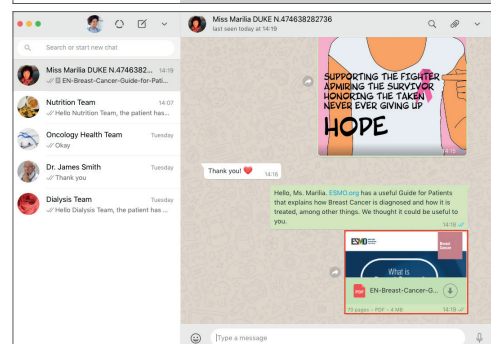
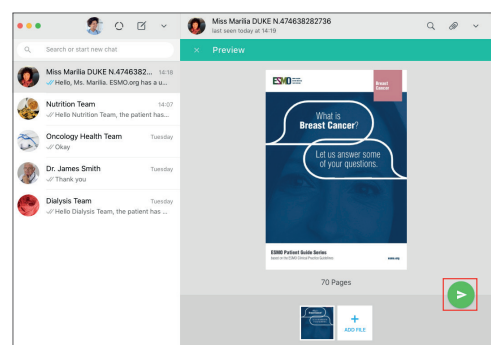
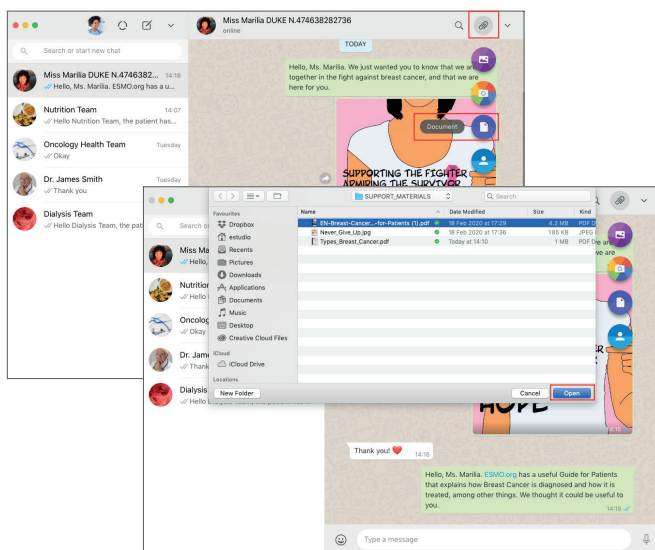
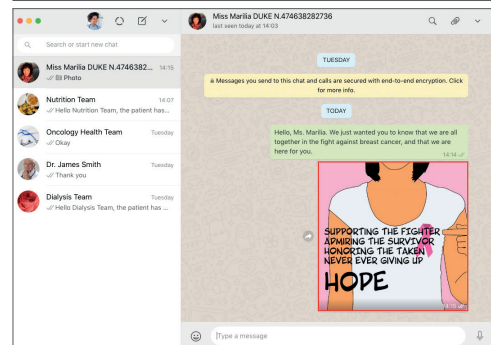
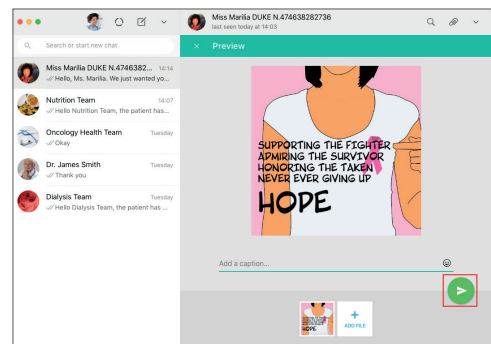
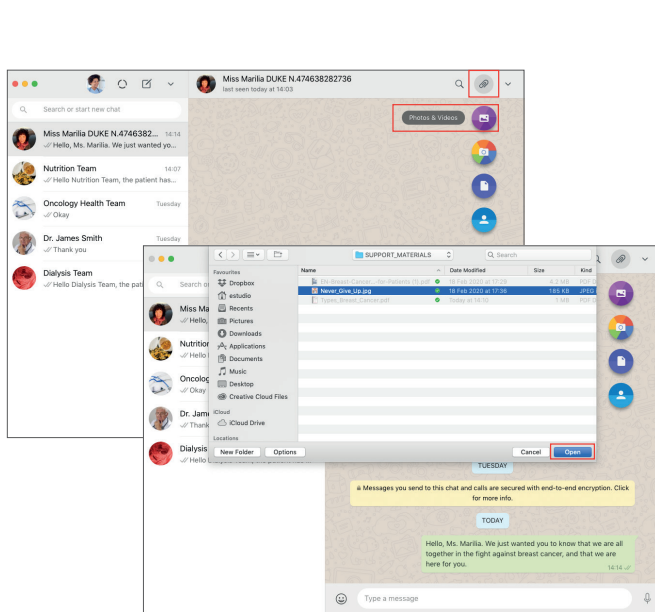
INSTRUCTIONS FOR SENDING CONTENT VIA WHATSAPP – PHOTOS, VIDEOS AND DOCUMENTS

- In the list of recent chats that appears in the left sidebar of WhatsApp Web, search for the patient you want to share content with.
- If you cannot find the patient, type his/her name in the search field that says SEARCH OR START NEW CHAT.
- Open the patient chat screen.
- On the top chat menu, in the right corner, tap the PAPER CLIP icon.



PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

- Select PHOTOS & VIDEOS or DOCUMENTS icon.
- In your files, select the photo, video or document you want to share with the patient. Tap OPEN.
- You will be directed to the PREVIEW screen on WhatsApp Web.
- Tap the green ARROW at the bottom of the screen to confirm the action.

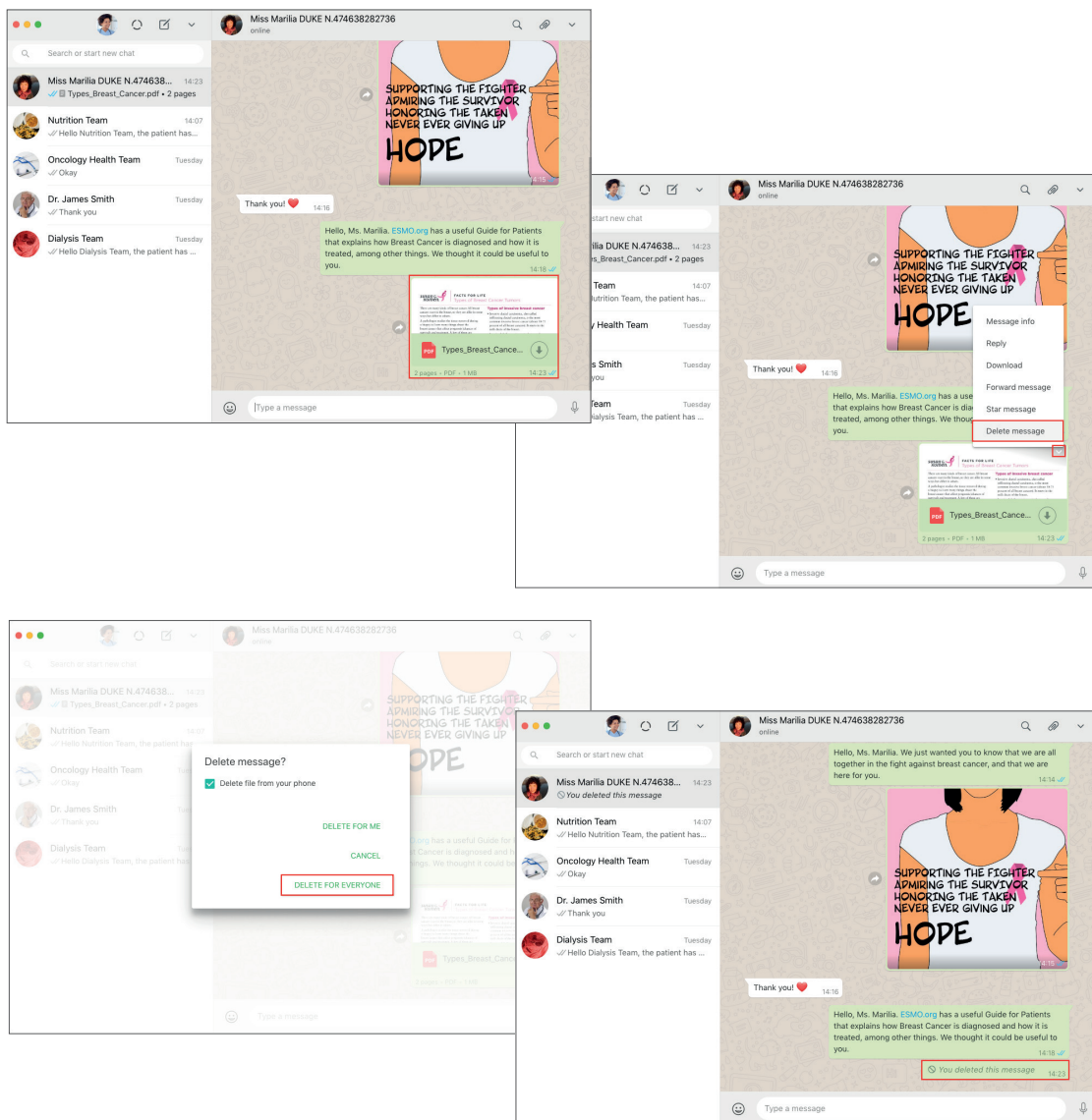


PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

If the nursing professional sends a message with the wrong content, he/she can delete the message from the chat.

INSTRUCTIONS FOR DELETING CONTENT VIA WHATSAPP - PHOTOS, VIDEOS AND DOCUMENTS

- Hover over the top-right corner of the message containing the photo, video, or document you want to delete.
You will see an ARROW.
 - Tap the ARROW and select the DELETE MESSAGE option.
 - You will be directed to a pop-up screen. Select the DELETE FOR EVERYONE option.
- (!) Done: the wrongly uploaded content has been deleted and you can now repeat the process to send the correct content.

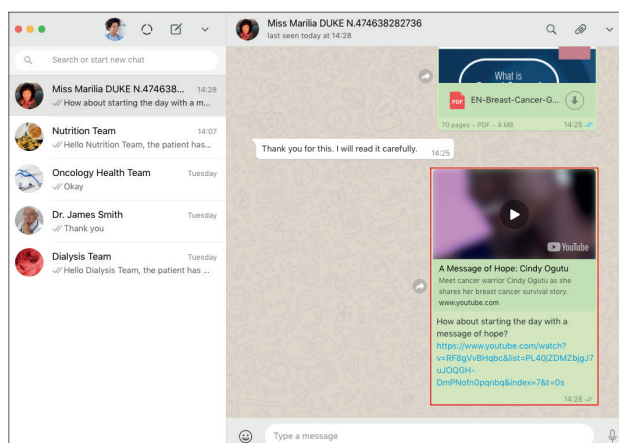
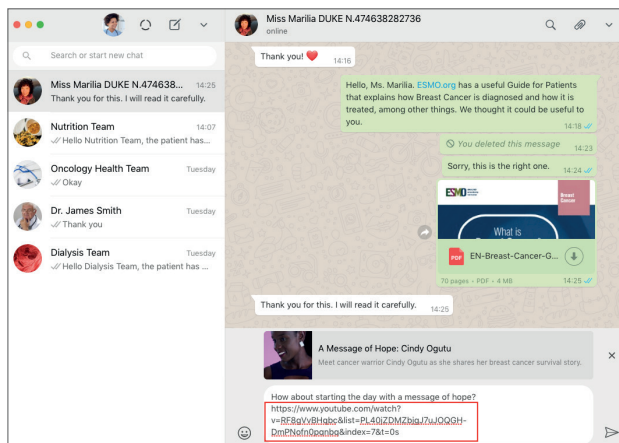
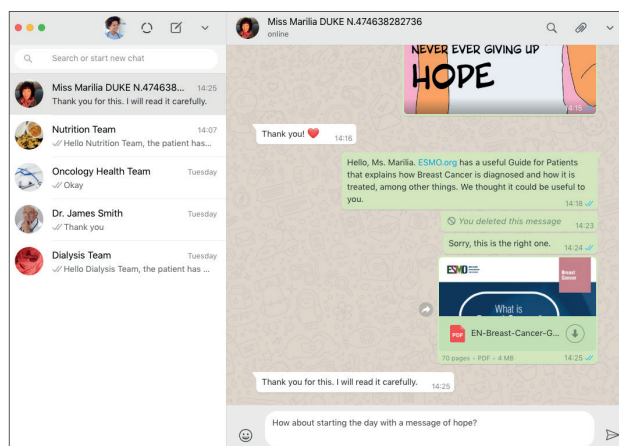


PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

Links to content outside of WhatsApp can be sent to the patient by copying and pasting the URL direct into the text field.

INSTRUCTIONS FOR SENDING CONTENT VIA WHATSAPP – LINKS

- Copy the link you want to share with the patient via WhatsApp (CTRL + C).
- Position the cursor in the text field of the patient chat.
- Paste the link you want to share (CTRL + V).
- Tap the ARROW to send the link.



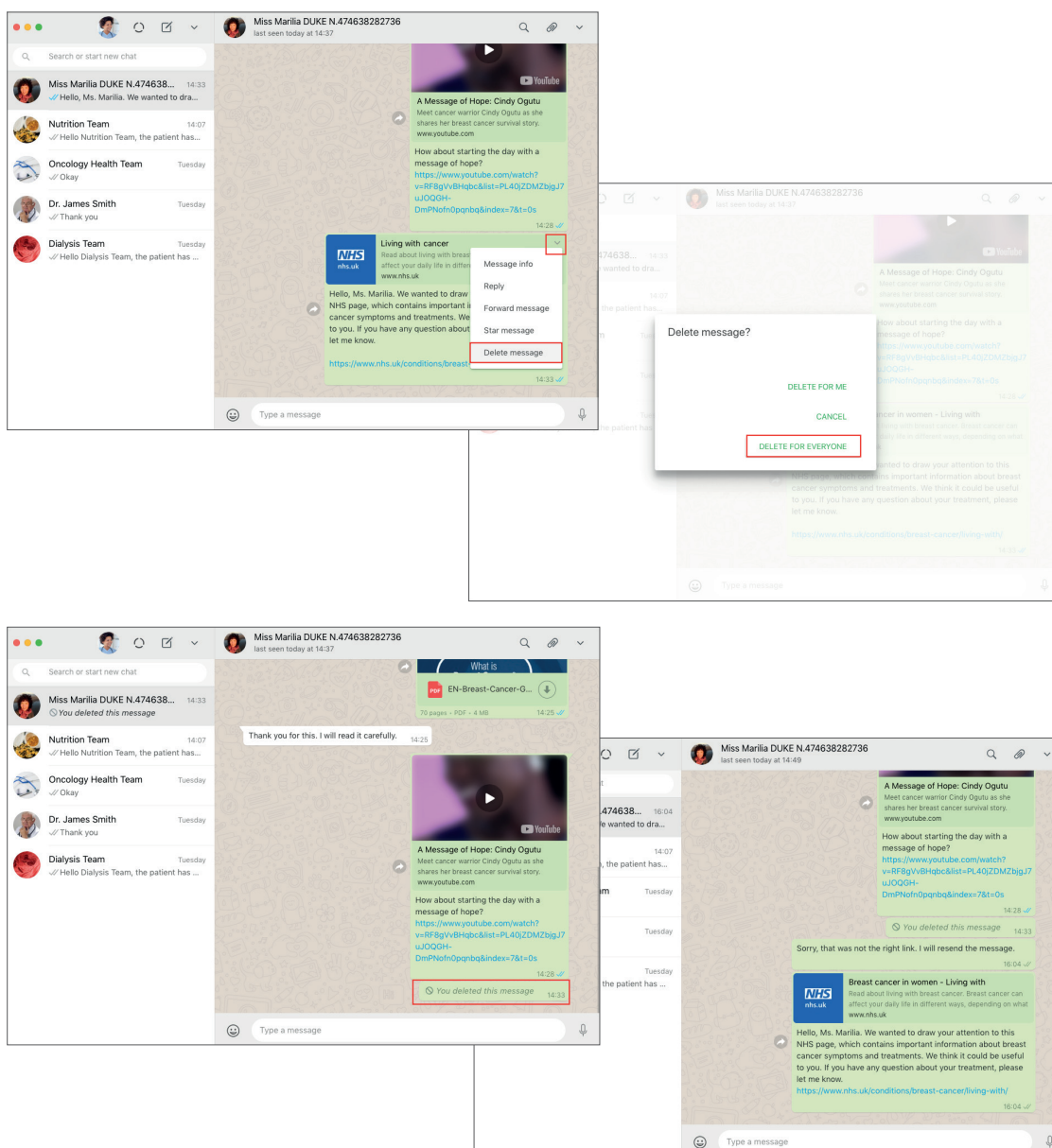
PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

If the nursing professional sends a message with the wrong link, he/she can delete the message from the chat.

INSTRUCTIONS FOR DELETING CONTENT VIA WHATSAPP - LINKS

- Hover over the top-right corner of the message containing the link you want to delete. You will see an ARROW.
- Tap the ARROW and select the DELETE MESSAGE option.
- You will be directed to a pop-up screen. Select the DELETE FOR EVERYONE option.

(!) Done: the link that was wrongly sent has been deleted and you can now repeat the process of sending links in order to send the patient the correct link.



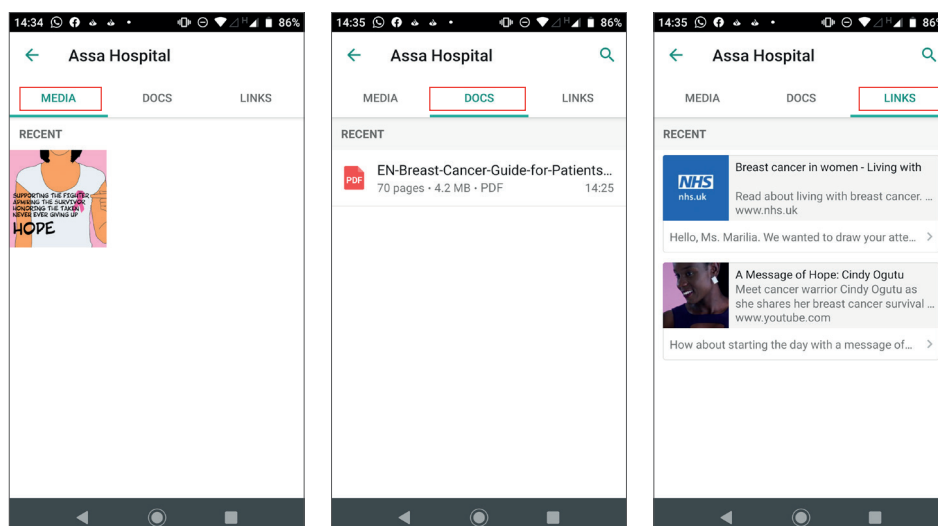
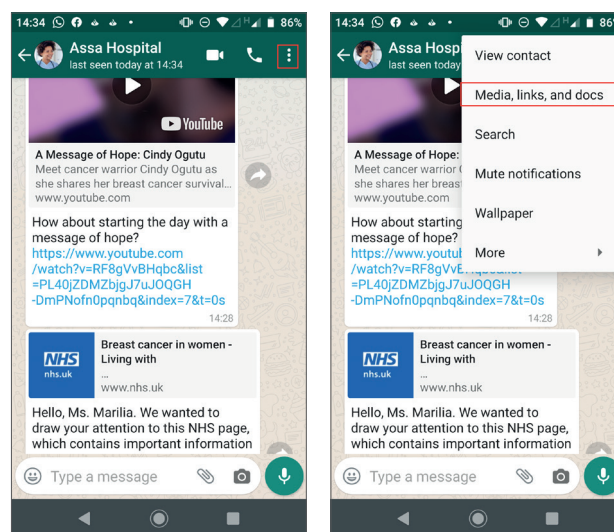
PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

4.1. Viewing the educational content libraries

WhatsApp organises all photos, videos, documents, and links sent and received in one chat in a single directory (called MEDIA), making it easy for the patient to view and consult these. Through WhatsApp itself, the nursing professional can guide the patient to access this directory and find previously sent content in an organised and simple manner.

INSTRUCTIONS FOR INSTRUCTING THE PATIENT PATIENT TO VIEW THE MEDIA DIRECTORY ON HIS/HER WHATSAPP

- On the chat screen with the hospital or clinic, tap the menu located at the top-right corner of the screen.
- Select the MEDIA, LINKS AND DOCS option.
- The patient will see three columns: MEDIA (with photos and videos stored in the chat); DOCS (with documents and PDFs stored in the chat) and LINKS (with history of links that have already been shared in the chat).

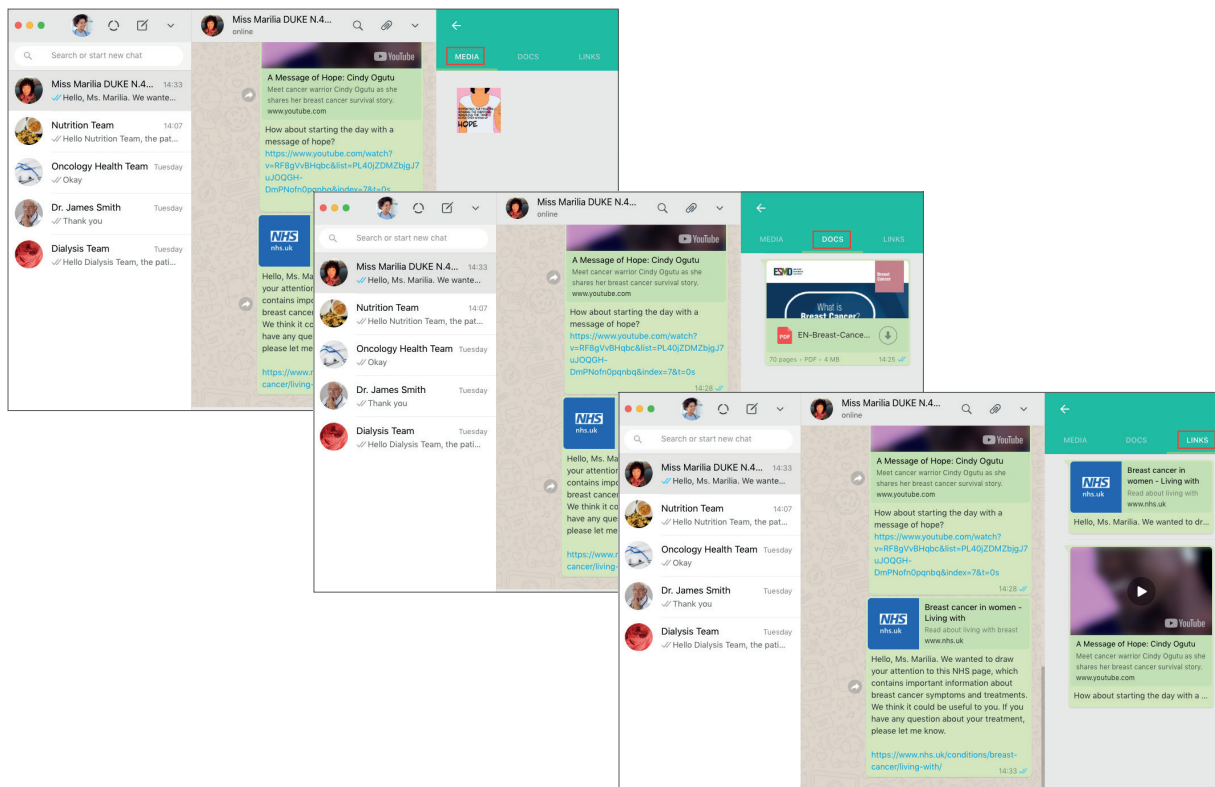
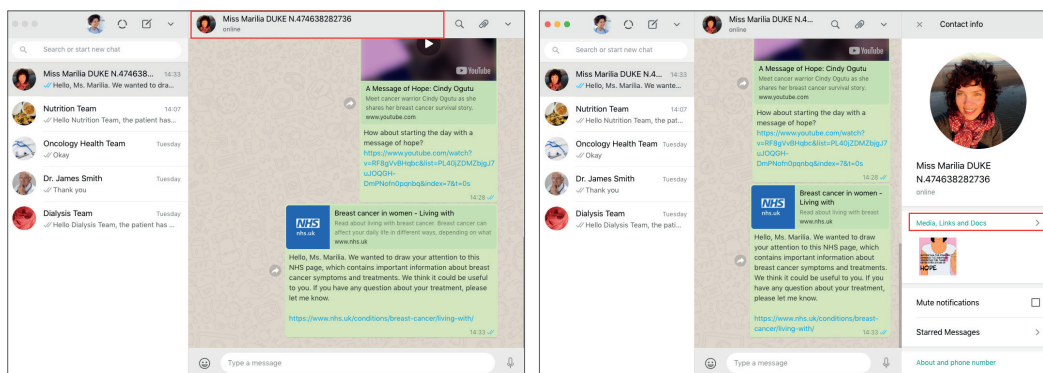


PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

The MEDIA, LINKS AND DOCUMENT directory can also be viewed by the nursing professional:

INSTRUCTIONS FOR VIEWING THE PATIENT'S MEDIA DIRECTORY ON WHATSAPP WEB:

- On WhatsApp Web, on the chat with the patient, tap the patient photo icon at the top bar of the screen.
- You will now be able to access the CONTACT INFO screen.
- Just below the phone number is a link called MEDIA, LINKS AND DOCS.
- You will be directed to a screen that says MEDIA, LINKS AND DOCS.
- You will be able to see columns: MEDIA (with photos and videos stored in the chat); DOCS (with documents and PDFs stored in the chat) and LINKS (with history of links that have already been shared in the chat).



PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

5. Support Group Management via WhatsApp

The hospital or clinic can organise groups on WhatsApp based on patients' interests and needs. The group connects patients who experience the same challenges, functioning as a space for empathy, support, awareness and education.

We recommend that a nursing professional coordinates the group, providing clarification to group members whenever necessary. In addition, the hospital or clinic can also invite specialists to reply to patient questions.

The maximum number of people per group is limited to 256 people on WhatsApp's 'basic' version.

Case study: the 'Saber para Cuidar' support groups

Saber para Cuidar is a support service offered via WhatsApp to patients, families and carers of patients with diabetes and Alzheimer's (a trial group for menopause was closed recently). Each group has a curator who is responsible for replying to questions and doubts and providing advice that is of interest to the group. In addition, groups are used to share relevant, informative, and educational content that is selected and validated by the administrators.

Periodically, the groups are also visited by specialists, in special events via WhatsApp. This works the way it would if doctors were 'on call'. "The Dentist Hour", for example, brought in a dentist to answer questions about dental treatments and procedures in patients with diabetes. For one hour, the guest dentist replied to questions from the WhatsApp group members. Saber para Cuidar announces events a few days

in advance and invites participants to send their questions. During the event, the guest replies to previously submitted questions as well as questions sent during the event.

Another interesting initiative included in the Saber para Cuidar programme is their gathering of all the questions answered by the specialist, which results in the generation of an eBook with consolidated questions and answers. The educational material is shared in PDF format with the group on WhatsApp.

In doing so, the initiative achieves two different goals: to support people and to disseminate trustworthy information through an educational channel.

To learn more about Saber para Cuidar, visit: <http://www.saberparacuidar.com>

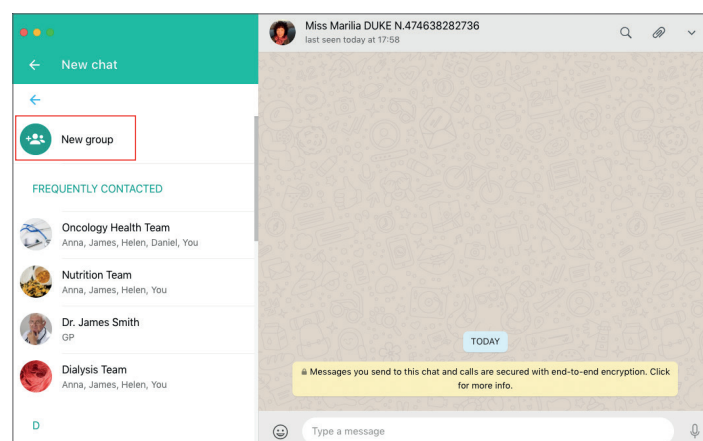
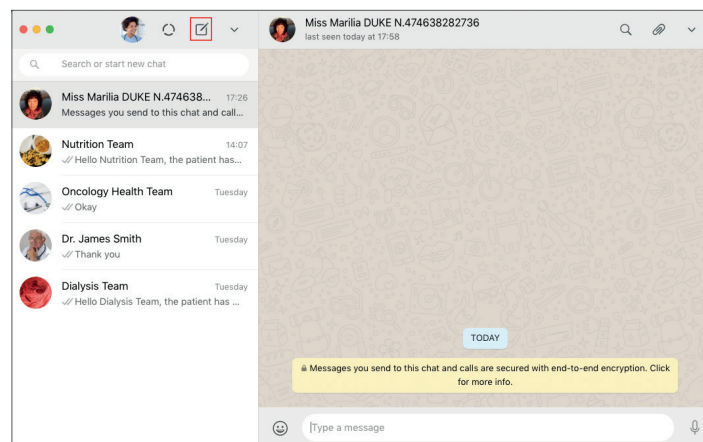
PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

5.1. Creating patient support groups via WhatsApp

It is essential that the hospital or clinic be judicious in deciding whether to invite to, or include a patient in a specific WhatsApp support group. We recommend that the hospital or clinic establish the exact purpose of each group created and which issues will be addressed in the group. Any invitations issued to patients should have their best interests in mind. **The patient should agree to participating in the group before he or she is added to it.** Including patients in groups without their consent can be a breach of rules governing the sharing of personal data, as this lets the other members of the group know that he/she has an interest in the group topic. Examples of possible ways to divide groups are as follows: Breast Cancer Patient Support Group, Type 1 Diabetes Patient Support Group, Fibromyalgia Patient Support Group, etc.

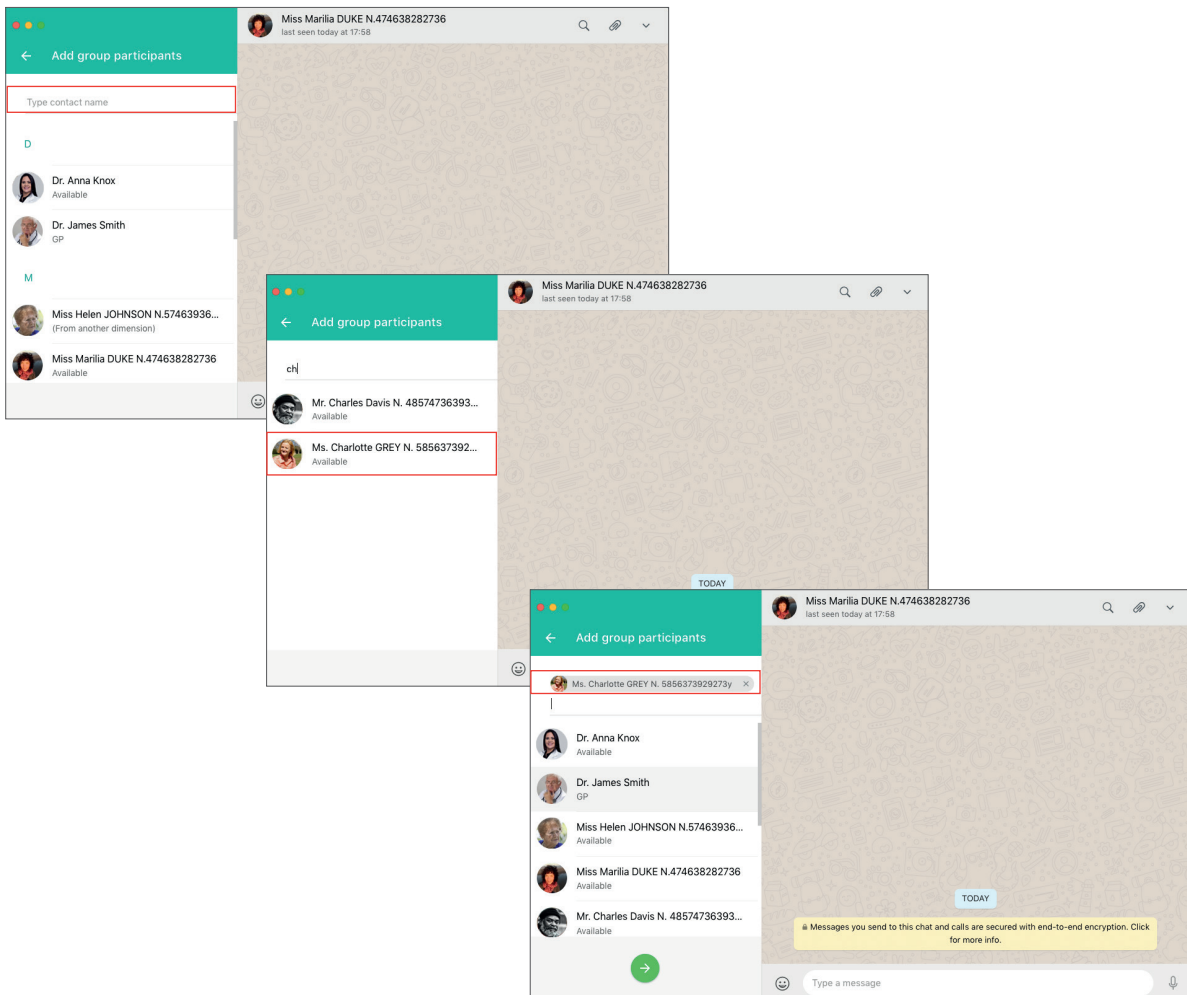
INSTRUCTIONS FOR CREATING PATIENT SUPPORT GROUPS VIA WHATSAPP

- On WhatsApp Web, find the left column where the chat history is (column on the left).
- Tap the notebook on the top bar of this column.
- You will be directed to the NEW CHAT screen
- Tap NEW GROUP



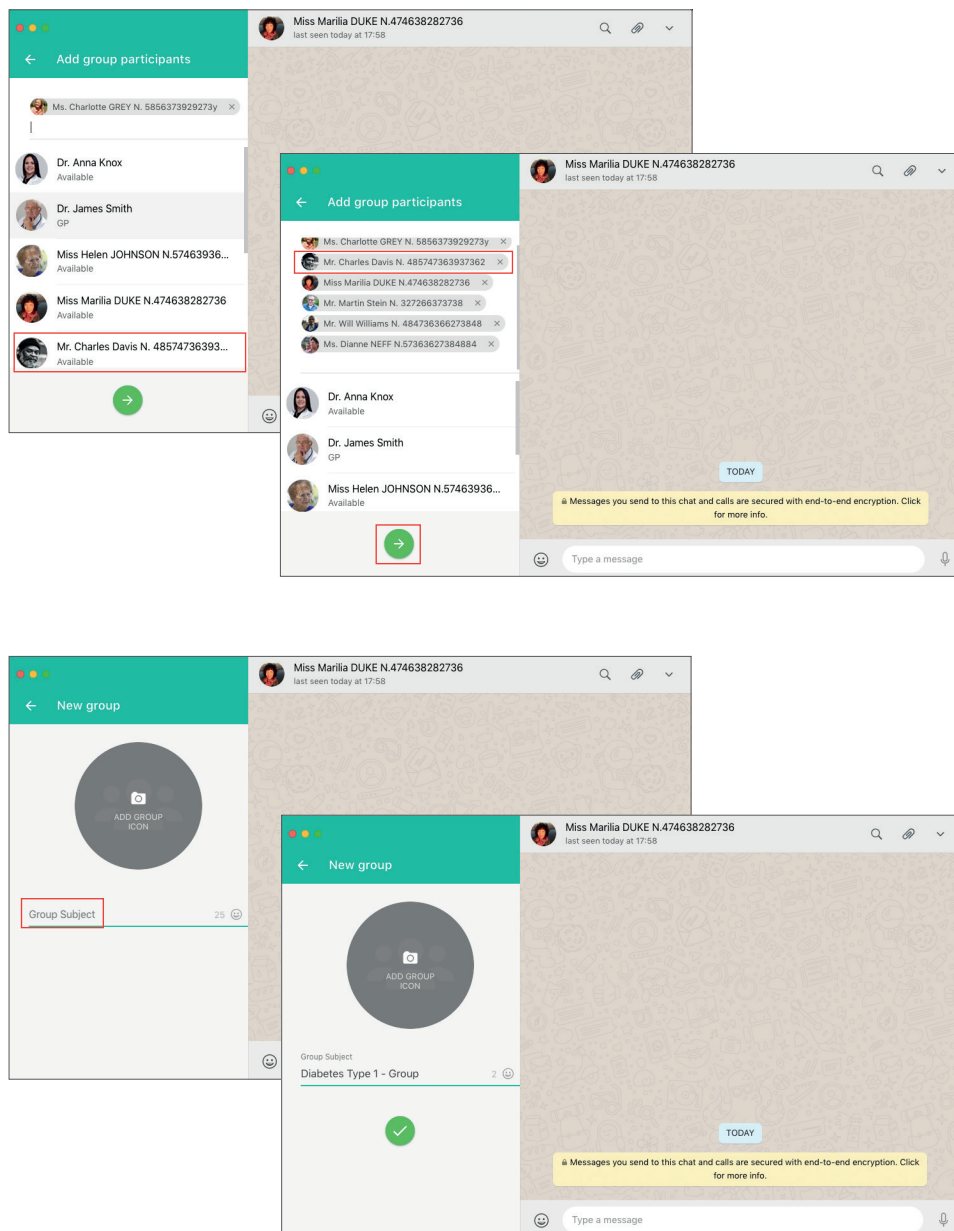
PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

- You will be directed to a screen that says ADD GROUP PARTICIPANTS.
- Patient contact details must already be saved in hospital or clinic WhatsApp.
- In the first item of the column is the TYPE CONTACT NAME field.
- Type the first name of the person you want to add in the group.
- When typing the first few letters of the name, WhatsApp will display a list of contacts it thinks you may want to select.
- Select the person you want to add to the group.
- The photo with the person's name will appear as the first item in the column on the left.



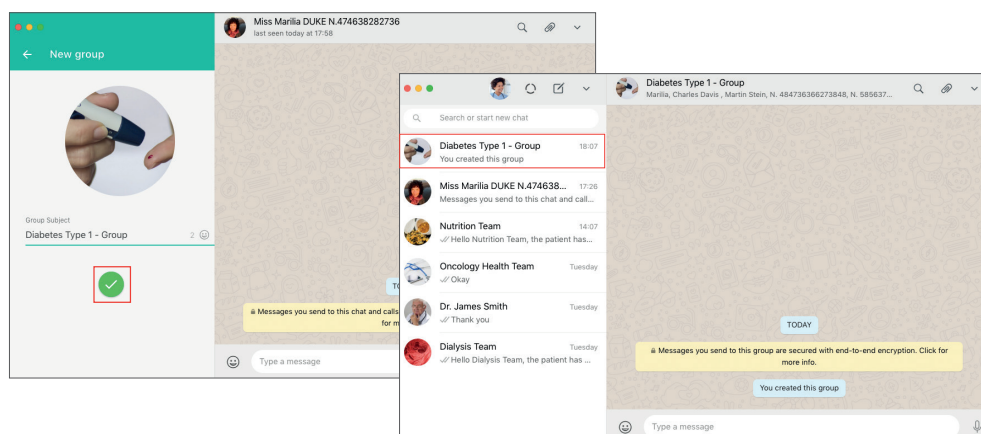
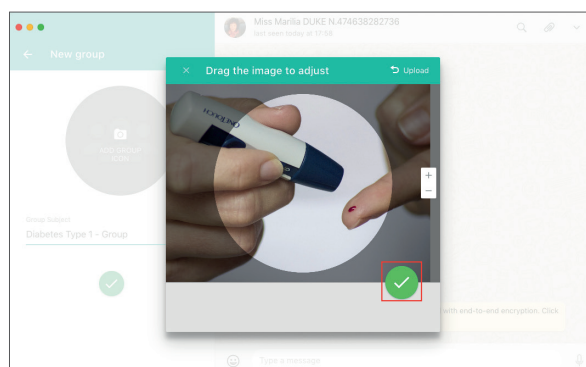
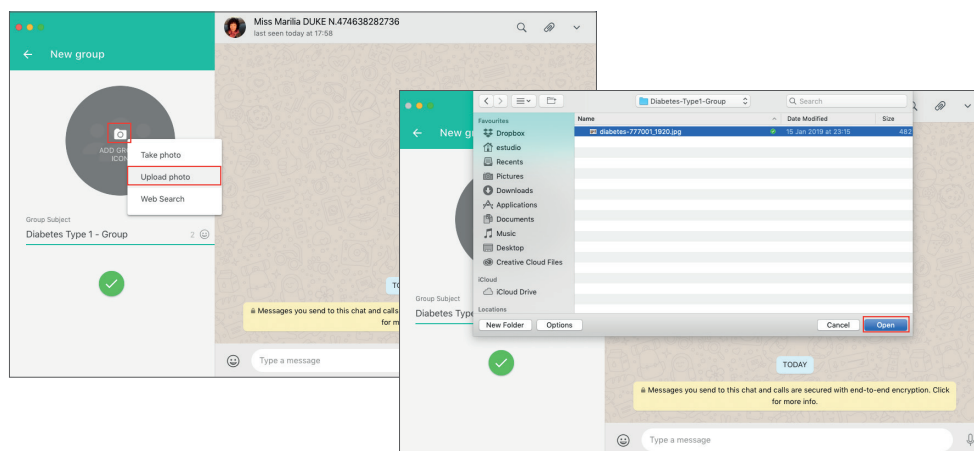
PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

- In the field below this contact, type the name of the second person you want to add to the group. You will also see your contact list and can select people directly from here.
- Select the name of the person you want to text message.
- Repeat the procedure until all patients related to this group are added.
- If you want to remove someone, just tap the "X" next to their name.
- At the bottom of the right column there is a green arrow. Tap the arrow to go to the next step.
- Create a group subject: our suggestion is to give a name that differentiates one support group from another.



PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

- Tap the CAMERA icon to upload a photo representing the group. You have the option of taking a photo using your computer camera, uploading a photo saved on your computer or network, or searching for a photo on the internet.
 - Below the group name is a green icon that looks like this: “√”. Tap this to confirm the action.
 - The newly created group will appear in the left column with the note “You created this group”.
- (!) The mechanisms of chat usage and message exchange among members are the same as that in a ‘common’ WhatsApp group.

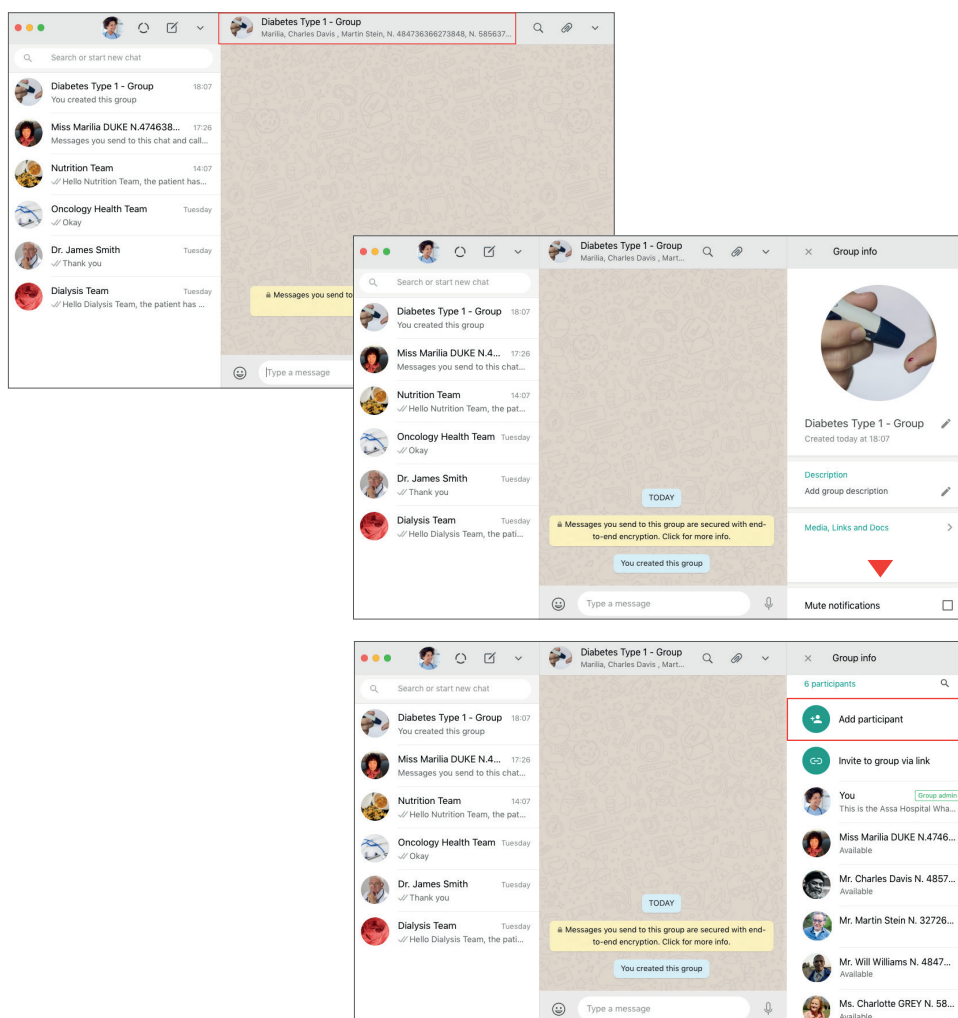


PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

The group administrator (professional in charge) can also add new patients after the group has already been created.

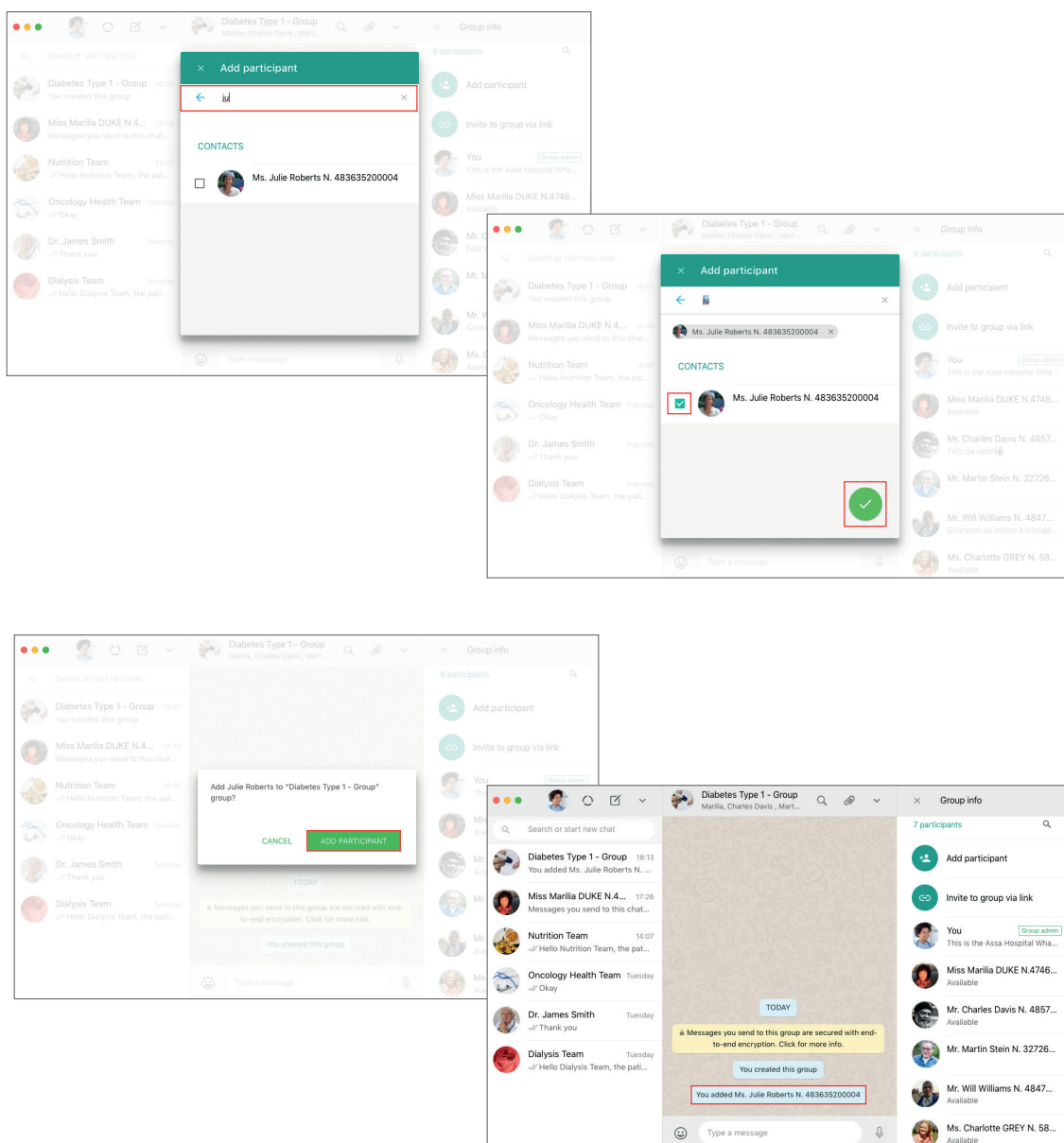
INSTRUCTIONS FOR ADDING NEW MEMBERS TO THE PATIENT SUPPORT GROUP VIA WHATSAPP

- Tap the top bar of the right column where the group icon, group description and preview of some participants are located.
- You will be directed to the GROUP INFO screen.
- Scroll down until you see the ADD PARTICIPANT option and the INVITE TO GROUP VIA LINK option. The difference between both is that in the ADD PARTICIPANT option, the patient has the choice to opt-out. In the INVITE TO GROUP VIA LINK option, the patient has the option to opt-in.
- We will demonstrate the tutorial considering the ADD PARTICIPANT option. The process of searching and finding contacts are similar in both cases.



PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

- You will be taken to the ADD PARTICIPANT screen where you can select the contact you want to add, or you can use the search field to find the contact you want to add (just type the contact's name into the field).
 - Tap the green icon ("✓") located at the bottom-right corner of the screen to confirm.
 - You will be directed to a screen where you must confirm that you want to add the selected contacts to the group. Tap ADD PARTICIPANT to confirm.
- (!) Done: new participants have been successfully added to the group.



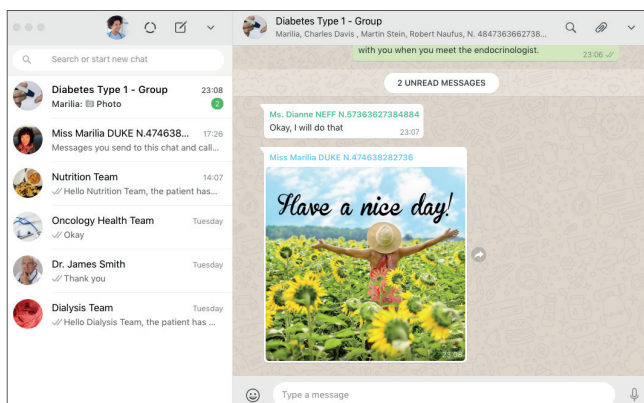
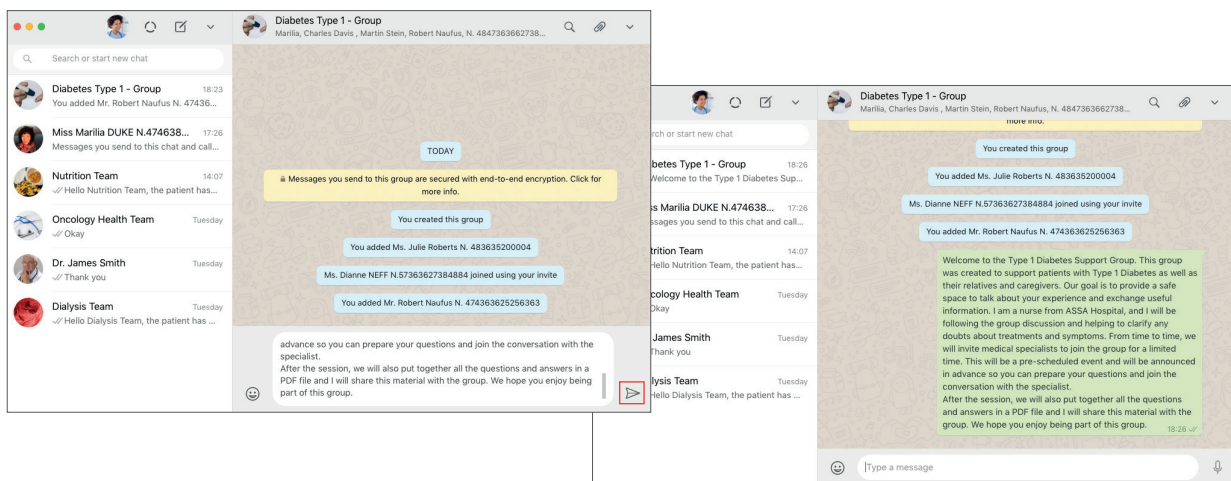
PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

5.2. Establishing rules for support groups on WhatsApp

In order to make interest or support groups function more efficiently via WhatsApp, it is essential to establish some rules of engagement. This means clearly communicating the following:

- What the purpose of the group is, in other words, what the patient can and cannot expect;
- What content is allowed in the group;
- What the role of the group coordinator is;
- At what time(s) nursing professionals, doctors, or guest specialists will be available to take patient questions (also known as the times when they are 'on call').

Please make sure that every time a patient is added to a hospital or clinic WhatsApp interest /support group, he/she will receive a message with the group's rules and information. The message specifying group rules and information can and should be customised according to each group and can be resent whenever the group coordinator judges it necessary.



Having observed WhatsApp groups and group behaviour for 16 months over the course of this piece of research, we can say it is frequently that participants starting to share content not related to the group's subject happens quite frequently. This can overwhelm the participants and some will decide to leave the group. Because of that, it is important to remind the group about its purpose fairly frequently, especially with regards to the rules specifying what content is allowed.

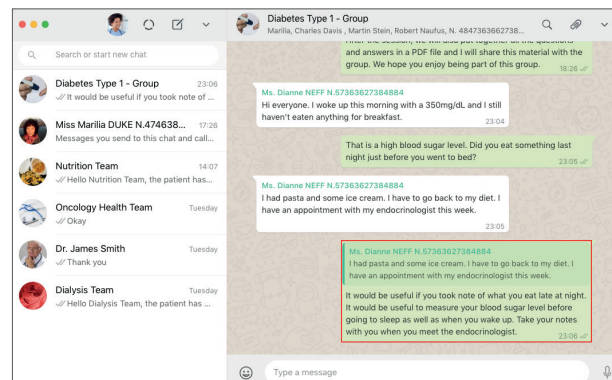
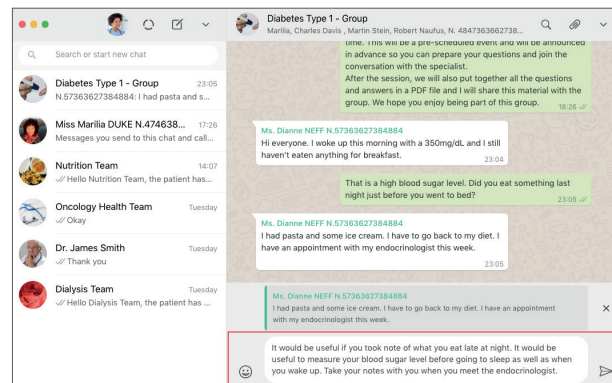
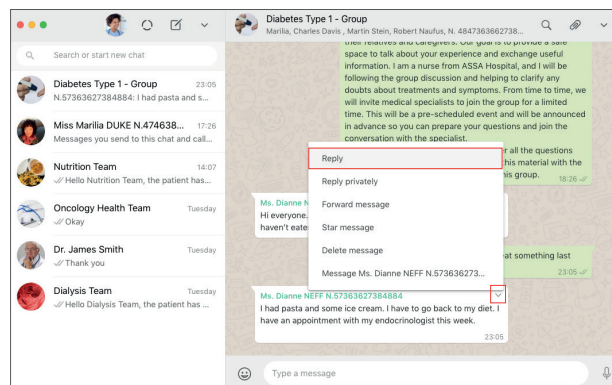
PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

5.3. Organizing replies in the chat flow: referring to a specific message

The coordinator of the Whatsapp interest/support group can highlight what message his/her reply or clarification refers to. This is important for organising the flow of messages, which can be frequent and intense depending on how engaged members become.

INSTRUCTIONS FOR REFERRING TO A SPECIFIC PATIENT'S MESSAGE WITHIN THE GROUP CHAT

- Identify the patient message you want to refer to.
- Hover over the top-right corner of the message. You will see an ARROW.
- Tap the ARROW and select REPLY.
- The patient message you selected will be highlighted and pasted to your comment.



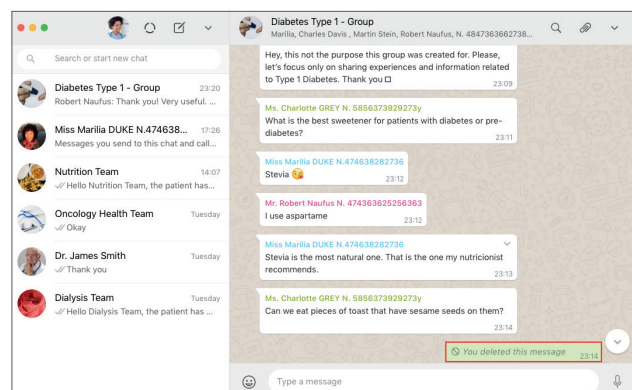
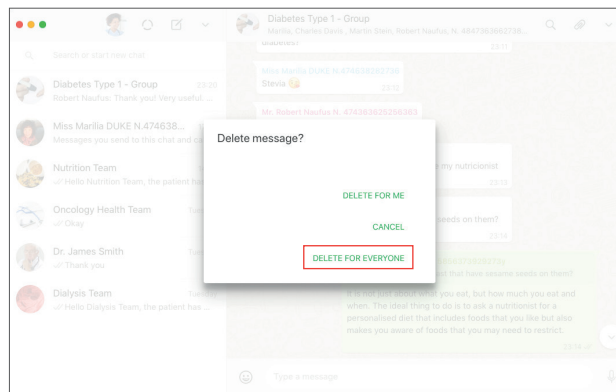
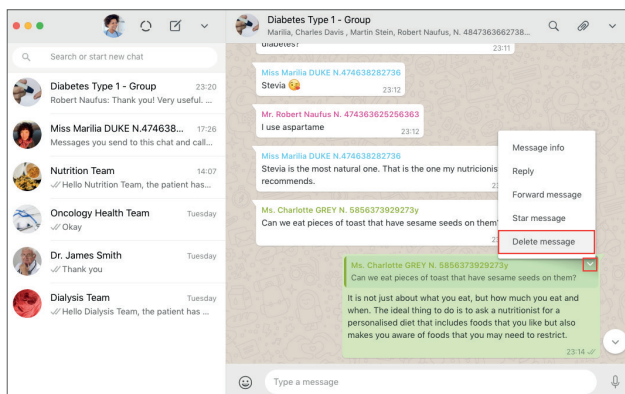
PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

5.4. Deleting messages sent to the support group

If the coordinator of the Whatsapp interest/support group sends a message to the group and then wants to delete it, he/she should follow the instructions below.

INSTRUCTIONS FOR DELETING MESSAGES SENT TO THE GROUP VIA WHATSAPP WEB

- Hover over the top-right corner of the message you want to delete. You will see an arrow.
- Tap the arrow and select the DELETE MESSAGE option.
- You will be directed to a pop-up screen. Select the DELETE FOR EVERYONE option.



PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

5.5. Disseminating educational content in Support Groups

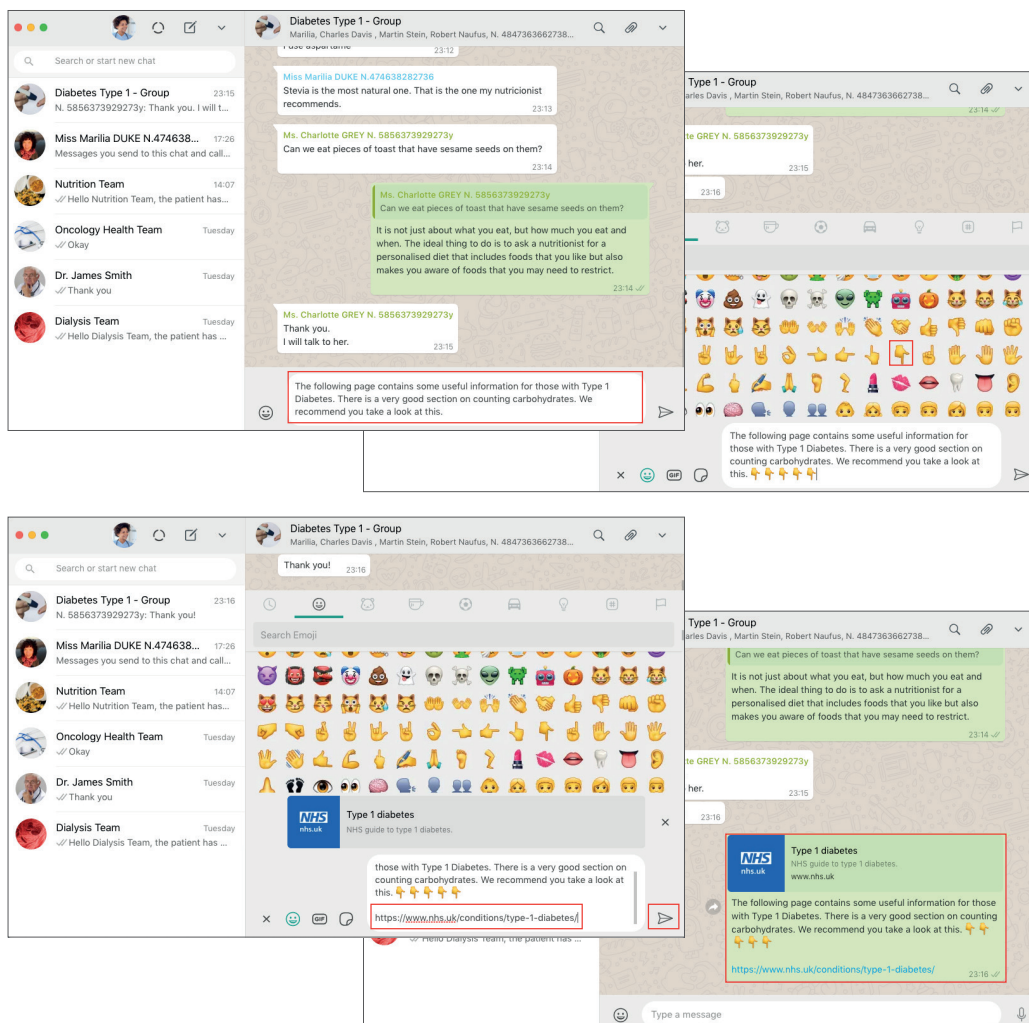
Support groups created on WhatsApp are also the perfect environment to promote education by disseminating relevant content to members. The hospital or clinic, through its medical staff, can curate content produced by third parties or may produce their own content. Content can be made available by the nursing professional who is the group's administrator through the sharing of photos, videos and PDFs or by sharing links that direct patients to content outside of WhatsApp.

INSTRUCTIONS FOR SENDING CONTENT VIA WHATSAPP – LINKS

You can share content created outside WhatsApp by copying and pasting the URL direct into the text field.

- Write the message which explains the content of the link you will share. You can add visual icons to call attention.
- Copy the link you want to share with the group (CTRL + C).
- Position the cursor in the text field of the patient chat. Paste the link you want to share (CTRL + V).
- Tap the ARROW to send the link.

(!) Done: the link has been successfully sent.

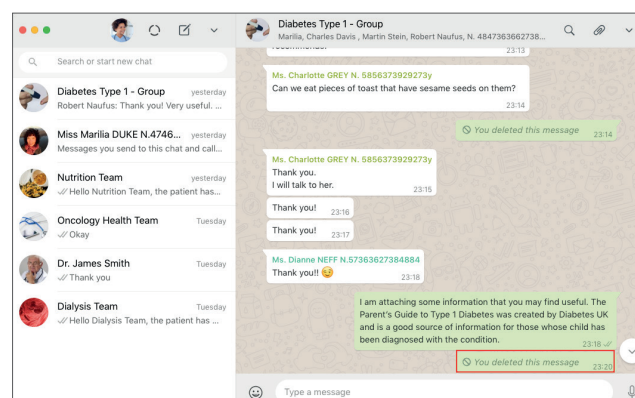
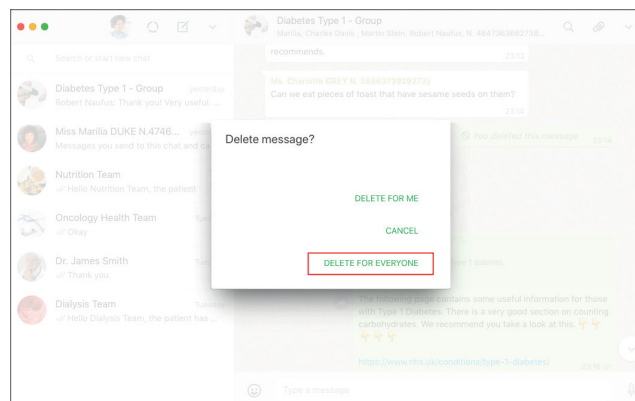
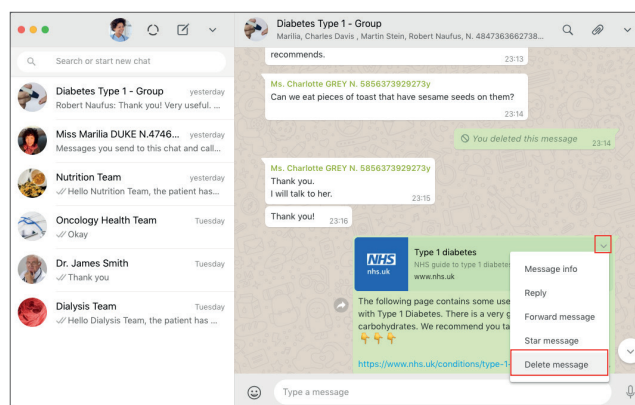


PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

If the coordinator of the Whatsapp interest/support group sends a message with a wrong link, he/she can delete the message from the chat.

INSTRUCTIONS FOR DELETING CONTENT VIA WHATSAPP – LINKS

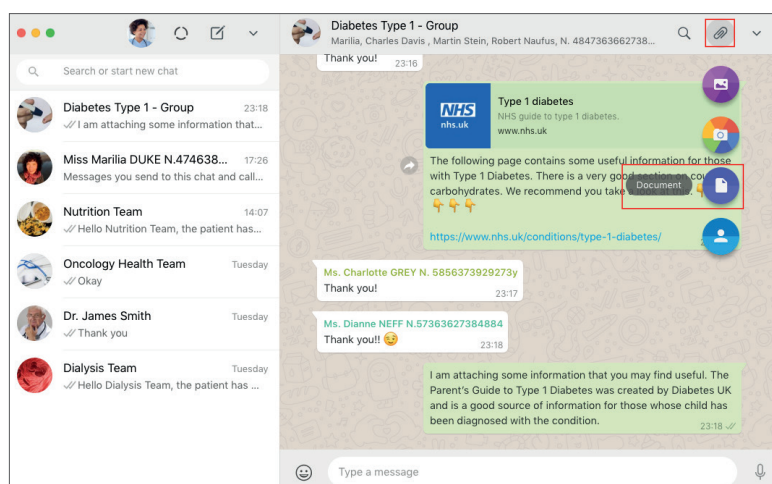
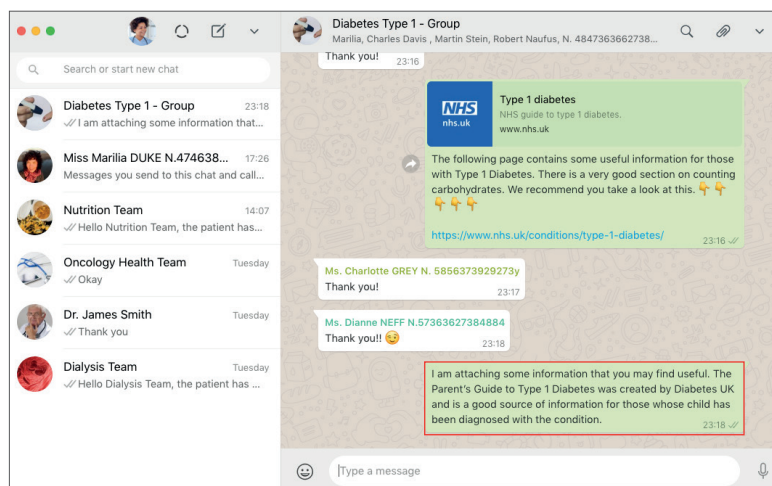
- Hover over the top-right corner of the message containing the link you want to delete. You will see an arrow.
 - Tap the arrow and select the DELETE MESSAGE option.
 - You will be directed to a pop-up screen. Select the DELETE FOR EVERYONE option.
- (!) Done: the wrongly sent link has been deleted and you can repeat the sending process to send the correct link.



PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

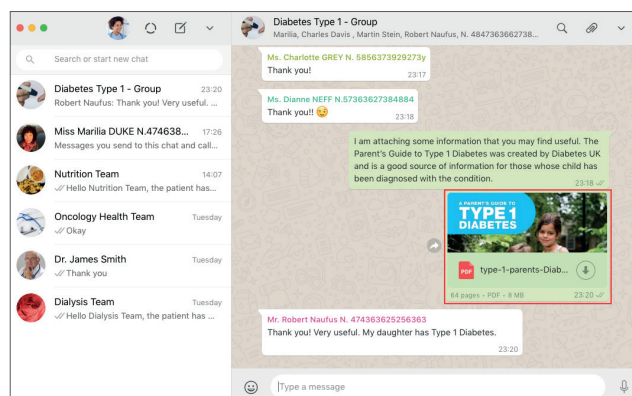
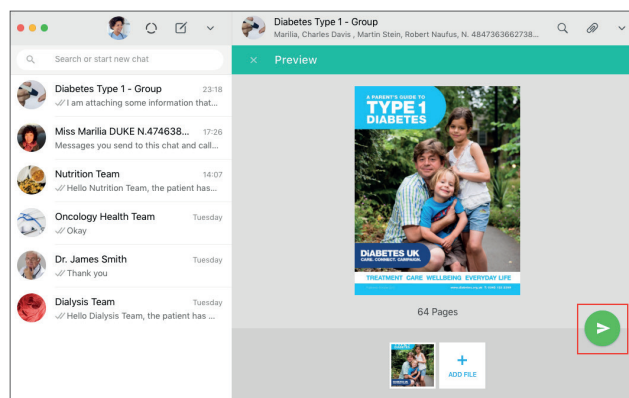
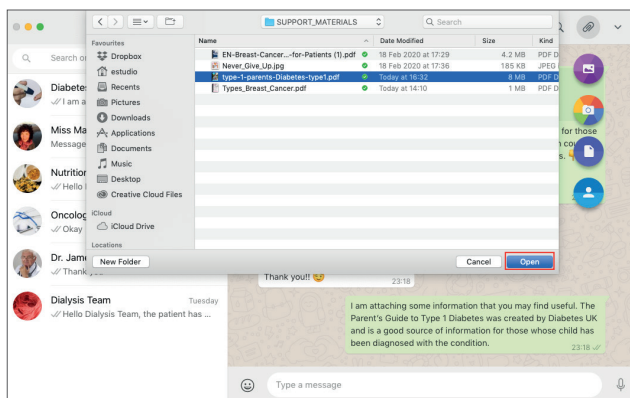
INSTRUCTIONS FOR SENDING CONTENT VIA WHATSAPP – PHOTOS, VIDEOS AND DOCUMENTS

- Start by writing a message to explain the content you will share with the group.
- In the top menu of the chat, in the right corner, tap the PAPER CLIP icon.
- Select the PHOTOS & VIDEOS or DOCUMENTS option.



PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

- Select from the directory of your computer or network the PHOTOS, VIDEOS or DOCUMENT you want to send to the patient.
 - Tap OPEN.
 - You will be directed to the PREVIEW screen on WhatsApp Web.
 - Tap the green ARROW at the bottom of the screen to confirm the action.
- (!) Done: your photo, video or document has been successfully sent.

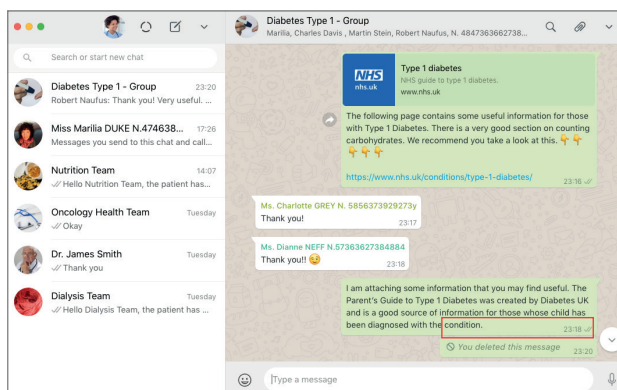
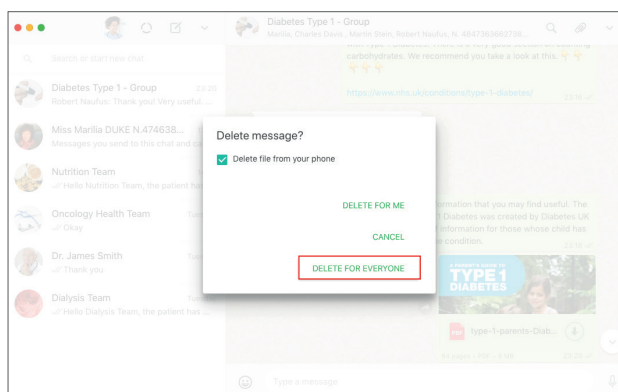
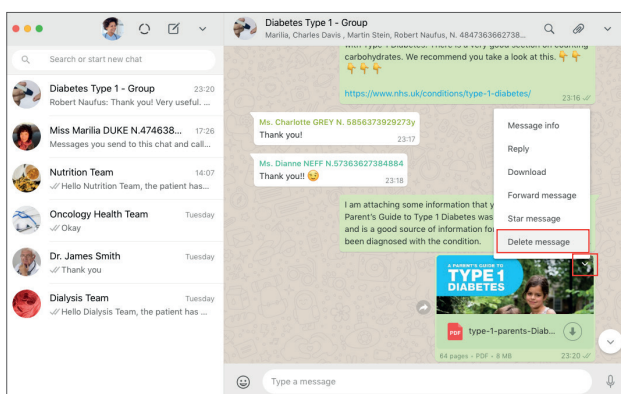


PROTOCOLS FOR HEALTH STRATEGY MANAGEMENT AND PATIENT EDUCATION USING WHATSAPP

If the coordinator of the Whatsapp interest/support group sends a message with a wrong content, he/she can delete the message from the chat.

INSTRUCTIONS FOR DELETING CONTENT VIA WHATSAPP - PHOTOS, VIDEOS AND DOCUMENTS

- Hover over the top-right corner of the message containing the photo, video, or document you want to delete. You will see an arrow.
 - Tap the ARROW and select the DELETE MESSAGE option.
 - You will be directed to a pop-up screen. Select the DELETE FOR EVERYONE option.
- (!) Done: the wrongly uploaded content has been deleted and you can repeat the upload process to send the correct content.



FINAL CONSIDERATIONS


The *Learning with WhatsApp Best Practices for Health* handbook aims to serve as a reference for the possibilities of using WhatsApp in the health ecosystem, with communication protocols designed for hospitals and medical clinics based on formal and informal practices observed by the author in her 16-month ethnography conducted in São Paulo. It is an open access publication which is available to download for free. The protocols proposed herein can and should be adapted according to the needs and objectives of medical professionals and subject to any local legal regulation, which is entirely their responsibility.

This material is a collaborative one and in a process of continuous improvement. Therefore, contributions from hospitals and medical clinics testing the protocols are welcome. If you would like to send feedback about the protocols, contribute to them or ask any questions, please contact the the author of the book Marilia Duque by sending her an email at: mariliaduque@gmail.com

ACKNOWLEDGEMENT

The *Learning with WhatsApp Best Practices for Health* handbook is a collaboration between ESPM São Paulo, where Marilia Duque's PhD research is based, and the *Anthropology of Smartphones and Smart Ageing* project, founded by the European Research Council and registered under the name ERC–2016–Adg–SmartPhoneSmartAging–740472. (<https://www.ucl.ac.uk/anthropology/assa/>). The translation of this handbook from Portuguese into English was fully funded by the ERC.





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COMMUNICATION PROTOCOLS FOR HOSPITALS AND MEDICAL CLINICS

ASSA Publication - Anthropology of Smartphones and Smart Ageing

Author: Marília Duque

Formatting and Layout: Duke And Dots

Learning from WhatsApp Best Practices for Health: Communication Protocols for Hospitals and Medical Clinics consists is an open access publication which is the result of an academic research. The handbook can be used for commercial and non-commercial purposes by crediting or citing the author.

MARÍLIA DUQUE

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