

INTRODUCTION

The increasing prevalence and use of ‘Smart Phones’ has brought with it the equally increasing use of ‘text messages’ as a substitute for the ‘old fashioned’ phone call, or even in lieu of more formal written communication. For many reasons, the use of this method for communication with clients is not optimal. It lacks essential elements of privacy, is often difficult to convert into a permanent record, and it certainly does not provide a proper platform for the delivery of services. On the other hand, however, our clients increasingly take advantage of the ease and freedom of texting as a means of communication. For many it is their preferred method. Given that reality, and in order to not place unnecessary barriers to open communication with our clients, we must recognize that communication by text is a reality, but at the same time be careful to keep it within proper constraints. The protocols which follow provide those ground rules and must be followed in all instances in which communication with clients will or may occur by use of text messages.

REQUIRED STEPS

Prior to the use or contemplated use of text messages as a method of communication with a client, the following requirements must be observed:

- ✓ The client must sign the agency issued written consent form explaining the proper use and potential issues of text message communication, after it has been explained to them by staff and questions answered. The acceptable form of consent may be found at the end of this policy.
- ✓ Staff phones which will receive client text messages must be password protected or otherwise secured from unauthorized viewing.
- ✓ Staff may not identify client names in their contact list, though code or initials may be used.
- ✓ Client names and contact information as well as all remaining text messages must be deleted from staff phones at the end of service.
- ✓ Staff may not respond to a text message from an unidentified number without assurance that it is a protected communication to the client.

APPROPRIATE/INAPPROPRIATE USE OF TEXT MESSAGES

Text messages are less secure than email. For that reason there are certain things for which the use of text messages is simply not appropriate. A certain amount of discretion is required to make those distinctions, but the following chart, while not all inclusive, provides guidance:

Appropriate Use of Texting	Inappropriate Use of texting
Scheduling/Rescheduling Appointments	Replacing attendance or participating in treatment sessions
Reminders to verify an appointment	Situations involving risk of harm to self or others
Respond to questions about appointments, resources or referrals.	To hold conversations with clients

Emergency situations ONLY when it is unsafe for the client to communicate in other ways	To communicate case updates, coverage needs or emergency situations to a supervisor
	Sending client photos

DOCUMENTATION

It is all too easy to forget that a text message sent or received is a client contact and does not automatically make a permanent record of itself. Any text message must be recorded in the client record as it deserves according to its content. Appointment scheduling, for example may be recorded in the same way a phone call would have been. A substantive message, however, may have to be reported fully in the client record in the same way a full conversation would be reported making note clearly, however that the communication was by text and not person to person by phone or in person.

CONSENT FORM

The vast majority of our clients who rely on digital communications use them in a social context and do not immediately consider the potential risks to confidentiality that would apply to their use in communication with in the context of our helping relationship. For that reason is important that any consent obtained to use those methods must be informed in the sense that we are assured that any client giving consent is aware of the risk. The protocols which follow therefor govern how we use the consent:

- ✓ The consent form which follows is to be used anytime it may be expected that digital communication may be used.
- ✓ Staff employing the consent must have reasonable assurance that the client has read or had the consent red to them and understands the contents.
- ✓ Client’s initials are required in appropriate spaces for a consent to be valid.
- ✓ Clients must be advised that we cannot communicate through or respond to a text message from an unidentified number.
- ✓ If the client obtains a new contact number, this form must be updated.

CONSENT FOR DIGITAL COMMUNICATION

PURPOSE

Clear and effective communication is essential to a productive relationship between you and your Family Resources worker. The use of text messages, e mail, or other forms of ‘digital communication are becoming increasingly common and may be your preferred way of communicating other than in person conversation. *These forms of digital communication however, are not secure between client and worker and could pose risk to your protected information being accessed by others. To protect your confidentiality, Family Resources staff are prohibited from communicating with you through text or email without your written consent.* For that reason we ask that you review this document and indicate whether or not you consent to the use of digital communication within the limits we outline.

I. RISKS, BENEFITS, ALTERNATIVES TO EMAIL OR TEXT USE:

Risks:

- ✓ Messages may be sent but not received or delivered to wrong party
- ✓ Confidentiality may be breached by phone messages or email being intercepted on either the sending or receiving side, or in transit.
- ✓ Voice messages may be overheard by others.

Benefits:

- ✓ Access to send messages at any time
- ✓ Record of communications (such as appointment times, and resources) for ongoing reference

Alternatives:

- ✓ The alternative to digital communication includes personal discussion in sessions, and telephone calls.

II. CLIENT CONSENT

CLIENT INITIALS		
	I do not give my permission for my Family Resources worker to communicate to with me through texting, email or telephone messages	
	I wish to communication with my Family Resources for the purposes of scheduling/verifying appointments and consent to communication via:	
	<i>Texting to this cell number (s):</i>	
	<i>Emailing to this address:</i>	
	<i>Phone messages left at this number (s)</i>	

III. GENERAL STATEMENTS OF UNDERSTANDING

CLIENT INITIALS	
	I understand that email or text messages must not be used for urgent or emergency situations and that I must use the telephone including emergency/on call access in an emergency where immediate response is needed (consent invalid unless initialed by client)
	<p>General Statements of Understanding (consent invalid unless initialed by client)</p> <ul style="list-style-type: none"> ✓ I understand that my digital communications with my worker will be kept as part of my treatment record ✓ I understand that I am responsible for safeguarding my sent and received email, text, phone or video communications from access by others in my home or work environment; or from shared or public computers if applicable. I understand that a separate password protected account is preferable. ✓ Through my email carrier, I may request “return receipt” to acknowledge that the message has been received. ✓ I understand that Email from my work accounts is NOT CONFIDENTIAL and should not be used for any sensitive personal or treatment information. ✓ My worker and I may establish guidelines as necessary regarding the volume and frequency of digital communication which support effective treatment. ✓ My worker may opt to discontinue email or other digital communication if it is inappropriate or unsafe to continue it ✓ I understand that Family Resources has established, and adheres to, confidentiality practices for all client information including communications by phone, email, text, and distance treatment; as well as safeguards on the privacy of emails received by employees. ✓ I understand that my phone number, email address and any other private information will not be disclosed by Family Resources to anyone else without my consent, in accordance with agency policies ✓ I may revoke my consent for email or other digital communication at any time by informing my Family Resources worker.

Client Printed Name

Client Signature Date Signed

Witness