

# IGGUIDE043: Best practice for leaving answering machine, voicemail or text messages for patients

<p><b>Data Protection Act 2018</b></p> <ul style="list-style-type: none"> <li>• Used fairly, lawfully and transparently</li> <li>• Used for specified, explicit purposes</li> <li>• Used in a way that is adequate, relevant and limited to only what is necessary</li> <li>• Accurate and, where necessary, kept up to date</li> <li>• Kept for no longer than is necessary</li> <li>• Handled in a way that ensures appropriate security, including protection against unlawful or unauthorised processing, access, loss, destruction or damage</li> </ul>	<p><b>Caldicott Principles</b></p> <ul style="list-style-type: none"> <li>• Justify the purpose(s) for using confidential information</li> <li>• Use confidential information only when it is necessary</li> <li>• Use the minimum necessary confidential information</li> <li>• Access to confidential information should be on a strict need-to-know basis</li> <li>• Everyone with access to confidential information should be aware of their responsibilities</li> <li>• Comply with the law</li> <li>• The duty to share information for individual care is as important as the duty to protect patient confidentiality</li> <li>• Inform patients and service users about how their confidential information is used</li> </ul>	
A	<p>This guidance will refer to ‘events’ and this covers any event that the patient may be attending – such as an appointment, an admission or attendance at an outlying service or site. The principles of leaving messages apply to any attendance</p>	<p>Add any legal requirements or best practice points here</p>
B	<p>Data Protection considerations to note if a message is to be left for a patient, and the patient may not be the first to hear/see it;</p> <ul style="list-style-type: none"> <li>• Who else might hear/see the message?</li> <li>• Are you sure you have used the correct number?</li> <li>• Will the patient fully understand the content of the message?</li> <li>• How can you be certain the message has been received?</li> <li>• Will leaving even a simple message inadvertently breach the patient’s confidentiality?</li> <li>• Will leaving a message put the patient at risk of harm</li> </ul>	
C	<p>There is a balance to be struck between respecting the privacy of the patient, not unduly worrying them with an obscure message, and ensuring that the recipient understands that it is a genuine message (e.g. not a scam that is looking to get them to call back a premium rate number).</p>	
D	<p>Please do not presume that patients will be aware that they may receive a message from the Trust, for the following reasons:</p> <ul style="list-style-type: none"> <li>• Patients who have received a letter confirming an event, may have seen the notice about message reminders, but as they will not have yet attended the event, they will not have confirmed or consented to be contacted</li> <li>• For patients who have attended an event, they may have confirmed telephone numbers and consented to be contacted on the numbers, and asked/not asked if messages could be left</li> <li>• For new patients, they will not have been asked about messages, and as the information will have been provided by a referring organisation, they may not have actively consented to have the numbers used to leave messages</li> </ul> <p>Therefore, please consider when leaving a message, to use the best practice in section E</p>	
E	<p>Best practice for leaving messages:</p> <ul style="list-style-type: none"> <li>• Ensure that you use the minimum amount of information within the message</li> <li>• You do not identify where you are calling from.</li> <li>• You do not refer to a specialty or area within the Trust</li> </ul>	

	<ul style="list-style-type: none"> <li>Refer to an event in the broadest terms possible – do not state that the call is referring to a ‘procedure’ or ‘operation’. Simply state that the call is regarding an appointment. Use the term ‘appointment’ to cover all events to ensure limited information is included.</li> <li>If you leave a message, ensure that you have a process in place to follow up any patients who do not call back</li> </ul>
F	<p>Approved script to be used (including for text messages):</p> <p>For messages left, requesting a call back (for cancellations/re-scheduling/booking for future dates)</p> <ul style="list-style-type: none"> <li>Hello, could you please call back on 01905 123 456, regarding your scheduled appointment for 20th December 2023.</li> <li>Hello, could you please call back on 01905 123 456, regarding your recent referral</li> </ul> <p>For very short notice cancellations:</p> <ul style="list-style-type: none"> <li>Hello, I’m afraid that your appointment for this afternoon/tomorrow has had to be cancelled. We are very sorry about the short notice. Could you please call back on 01905 123 456 to reschedule the appointment.</li> </ul>
G	<p>When patients call back, you MUST ensure that you check details with them to ensure that you are speaking with the patient, and not someone who has heard the message. You should do this by asking for confirmation of demographic details AND a separate confirmation where possible. Do not say – do you still live at # - ask them to confirm their address to you</p> <p>Please ask for both types of demographic detail:</p> <ul style="list-style-type: none"> <li>Can you please confirm your full name and date of birth or 1<sup>st</sup> line of your address etc.</li> <li>Can you please confirm your hospital number or NHS number</li> </ul> <p>Separate confirmation should be requested around the event you left the message for. Answering ‘my appointment tomorrow at 10am’, when this information was left in the message is not confirmation that you are speaking to the patient</p> <p>Examples of questions are:</p> <ul style="list-style-type: none"> <li>Can you confirm which consultant/specialty the (event) is for please?</li> <li>Can you confirm the department/site for the (event) is please?</li> </ul> <p>Please be aware that if a patient replies to a call back message and attempts to update a telephone number, this should not be updated at this point (to ensure the correct person giving the correct information). Telephone numbers can be confirmed via the GP or when the patient attends.</p>
<b>Managing Confidentiality Risks</b>	
By following this guidance, the risk of a breach to patient confidentiality is less likely to occur and in particular where there are safeguarding issues or where a patient does not wish family members to know about their appointments.	
<b>Managing Availability Risks</b>	
By following this guidance and leaving messages in a confidential way, patients are more likely to receive the messages and attend or not attend if appointments are booked/rescheduled/cancelled.	
<b>Managing Integrity Risks</b>	
By following this guidance and ensuring that the correct contact number correlates with the intended patient, the integrity of the record is maintained.	