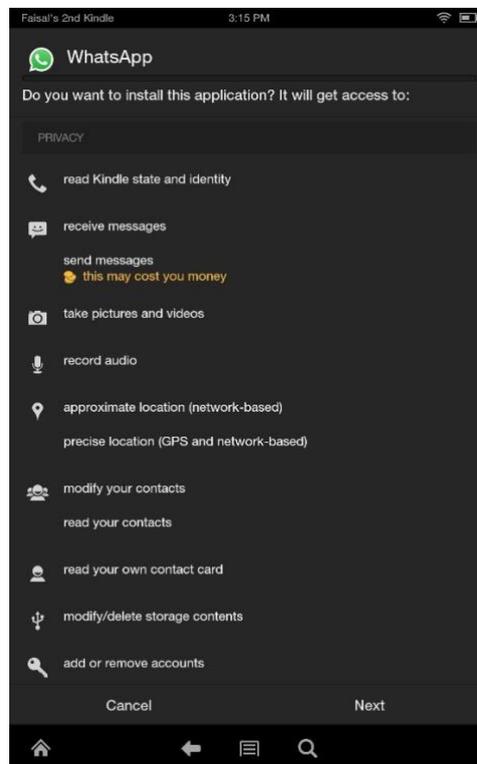
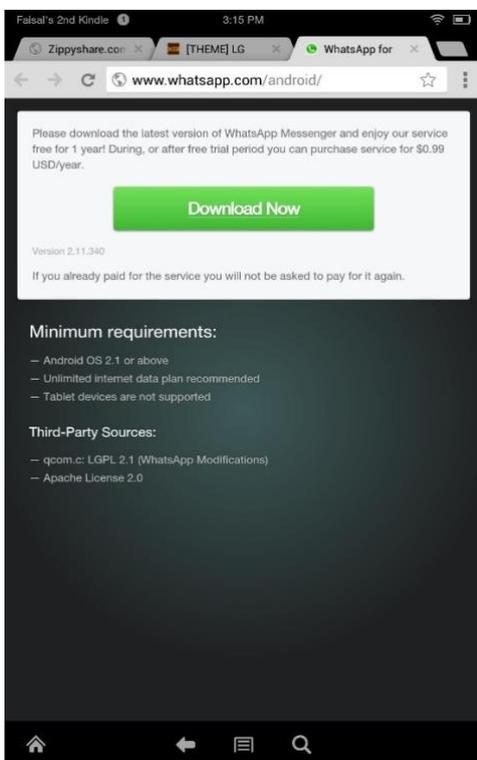


A practical guide to Using WhatsApp Messenger



© Paula Stather, Rachel Hatfield 2020, assert their rights under the Copyright, Designs and Patents Act 1988 to be identified as the authors of this work. All rights reserved. Any part of this publication may be reproduced or transmitted, in any form or by any means without prior permission of the copyright owners, but please attribute them.

Disclaimer

All the guidance, ideas and suggestions included in the content of this guide are intended to inform readers about how to use WhatsApp Messenger – in their work setting; for example to interact with colleagues or patients but take care to limit the use of personal/confidential patient information as much as possible. The content is not a substitute for national advice and guidance from professional or regulatory organizations about WhatsApp; please be aware that you must comply with your organisation's (eg CCG or Trust) IG guidance, clinical indemnity and GDPR regulations – which are not covered in this booklet. While every effort has been made to include accurate and up to date information knowledge and understanding, regulations relating to social media channels are constantly being updated and an Instagram user must endorse national requirements relating to IT security, clinical safety, data quality, the use of patient data, data protection and privacy, setting strong passwords, and information standards. So you need to use the content of the guide to learn more about how you can adopt or enhance your use of WhatsApp and weigh up the choices, information and guidance for your own work circumstances.

For more information

go to: www.digihealthwell.co.uk

About WhatsApp

WhatsApp is a popular internet messaging service used around the world as an alternative to text messages, phone calls and more. You can send photos and videos for free, and voice chat for free – so long as you’re connected to the internet via Wi-Fi / data plan. It also offers strong end-to-end encryption by default, meaning nobody can see any of your correspondence except you and the person you’re chatting with. In short, it’s a very good way to communicate with friends and family.

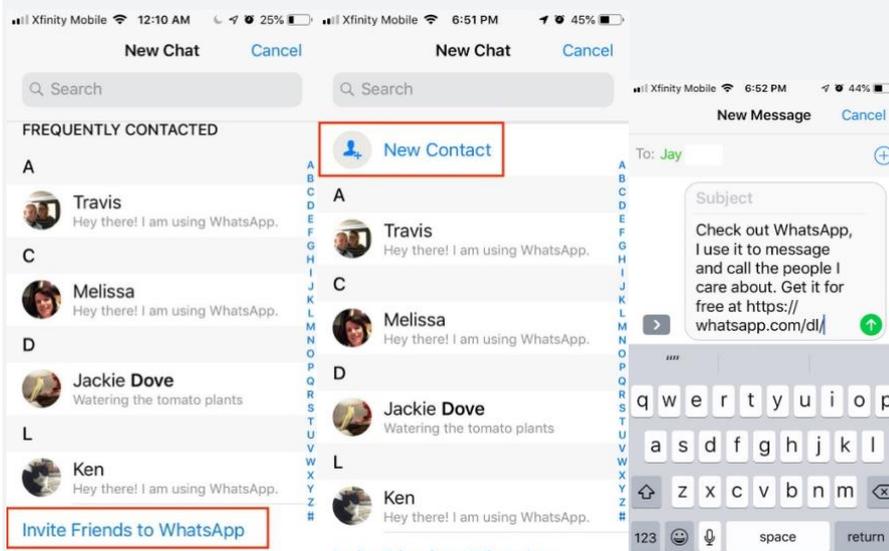
Note: You can only chat to other people with the WhatsApp app installed (roughly one in seven people living on Earth today have WhatsApp!).

Setting up the app

Once you’ve downloaded and opened WhatsApp, you’ll need to configure a few things before you can start using it properly. Follow through the guided instructions – the app will need your phone number to automatically match contacts, and to text you a verification code to prove ownership of your device. Once you’ve followed these basic steps, you’re in.

Before getting started, you may want to configure your profile. This is what other people will see when messaging you and includes your name and an optional profile picture. Go to the Settings tab and press your name at the top of the screen to Edit Profile. You can press the Facebook link to import your existing data from the social network (Facebook owns WhatsApp, hence the easy integration) or enter details manually. You can also come back to this page later if you want to change your *About* message, which is an indication of your current availability. By default, it’s set to *Available*, but you can change this as required.

Add new contacts



To view contacts in WhatsApp, you don’t have to do much. That’s because all your contacts who use WhatsApp are already known without you having to add them manually. WhatsApp defines contacts by phone number, so anyone in your address book who has their phone number on WhatsApp is immediately revealed when you join. However, you may want to invite contacts who are not already on WhatsApp, as well as people you know who are not currently in your contact list.

To add domestic users to your contacts, do the following

- Tap the chat icon.
- Tap *New Contact*.
- Add the name and phone number of that person.
- You can invite a new user by scrolling down to the bottom of the window and tapping *Invite Friends to WhatsApp*, where you can choose to send an email or text message invite.
- Select the person you want to chat with.
- Tap the chat box at the bottom of the screen.
- Type in your message and feel free to add emojis, images, videos, or voice messages using the icons to the right of the chat box. The little square lets you add a sticker. The camera lets you add a photo or video, and the microphone lets you press and hold to immediately record a voice message in the app. You can also format your text with bold, italic, strikethrough, or code.
- Then tap the arrow icon to send.

Sending and receiving messages

Navigate to the *Chats* tab and it will show a list of people you're messaging, with the most recent activity at the top. Tap any of the names to see your full chat history with that person or group, and to write and send a message. Or, press the *New Chat* button in the top right to choose somebody new to speak to.



Remember, unlike SMS texts, you'll need an active internet connection to send a message via WhatsApp. You can tell a message has sent when it gets a little grey tick next to the timestamp, and a second tick means it's been received by the target's device. If your chat buddy has read receipts turned on, those ticks will turn blue to indicate they've actually seen the message.

From here you can tap your friend's photo thumbnail to see their display picture in full-screen or tap their name for a full page of details. This is where you'll come if you need to block somebody from messaging you, clear your chat history, or view a full record of the media you've shared with one another.

If you receive a message you want to remember for later, you can long-press on it and tap the *Star* icon. This will save it to the *Starred Messages* folder, tucked away in the *Settings* tab for easy access. To un-star something, repeat the previous steps.

Group messaging

Group chats let you [share messages, photos, and videos](#) with up to 256 people at one time. You can also name your group, mute or customize notifications, and more. A group setting that lets [only admins send messages](#) to a group, can streamline communications in specific circumstances.

- Tap the chat icon.

From the main *Chats* tab, if you click on the three dots at the top of the screen, you'll notice two buttons near the top: *Broadcast Lists* and *New Group*. They're handy timesavers if you need to message more than one person at a time.



- Select *New Group*.
- Tap to add all the participants you want to include (up to 256).
- Tap *Next*.
- Add a subject for the chat and an icon.
- Tap *Create*.
- In the resulting chat dialogue, begin your encrypted message with stickers, images, or a voice message.



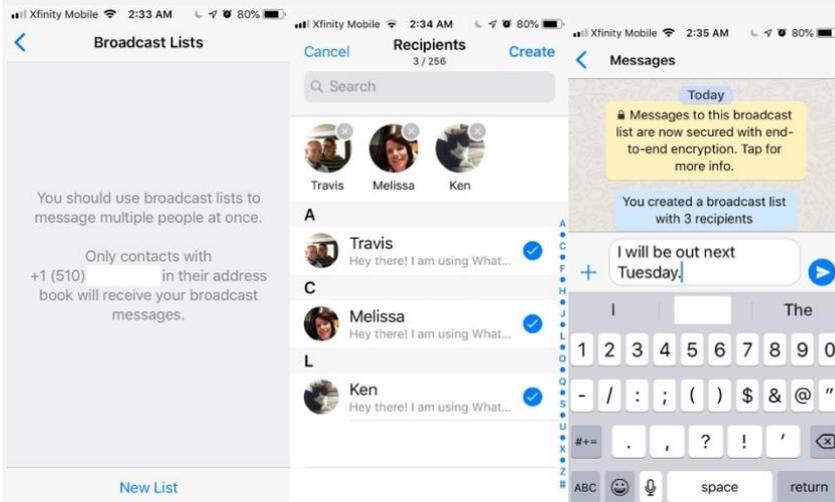
New group allows you to choose a series of participants. Any message you send will be viewable by everyone at once. They'll be able to chat to one another and see who else is part of the group.



Broadcast Lists allows you to fire off the same single message to multiple contacts at once – tap the button, followed by *New List*, and then choose whoever you like from your address book to send something to. Each recipient will

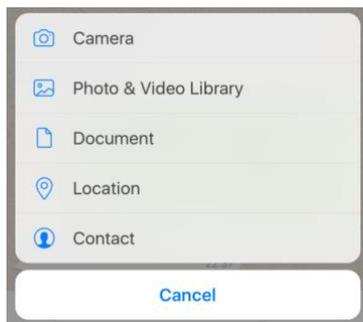
receive the message individually, as if you'd typed it out to them manually in your one-on-one chat and can only reply to you individually via chat, as opposed to group messages

Broadcast Lists



Multimedia messages

WhatsApp is quite minimal. Press the *Plus* button to the left of the text input box and you'll be given options to send attachments to your chat.



Most importantly is the *Photo & Video Library* button, which lets you choose something from the *Camera Roll* to share, while there's also easy access to a *Camera* function if you want to quickly send a live snapshot. Diving a bit deeper, there are also options to share *Document*, *Location*, or *Contact* details.

To the right of the text input box you'll see a camera and microphone button. Tap the camera to quickly send a snapshot, or the microphone to record and send an audio clip, which can be a more personal way to leave somebody a message.

Your Status

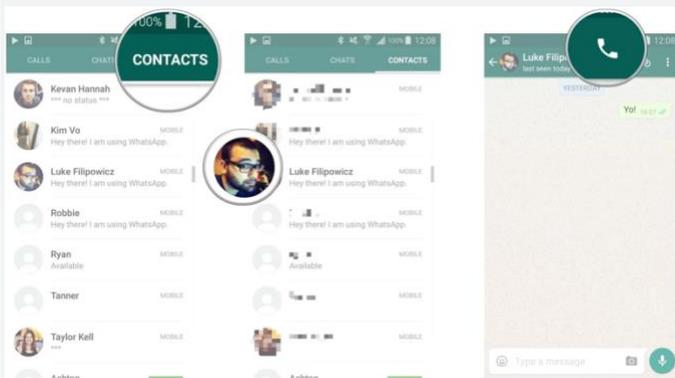
One modern trend WhatsApp has embraced is that of the every-changing personal *status* or *story*, similar to the kind of thing seen in Snapchat or Facebook Messenger. It's essentially a stream of photo and video updates that can be viewed by any of your contacts who care to look. Content added to your status auto-deletes after 24 hours.

By default, all of your contacts can see everything you post here but pressing *Privacy* in the top left gives you a chance to adjust that using either a whitelist or blacklist system to single people out. This only affects future statuses, though, not ones that have already been sent.

Voice and video calls

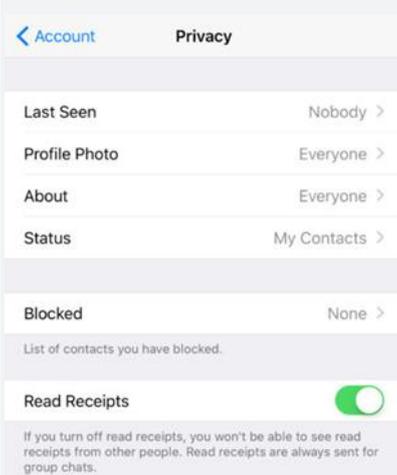
One benefit of WhatsApp is it seamlessly rolls messaging and calls into one single app. You can contact anybody who has the app installed with an audio call completely free, so long as you're both connected to the internet.

To initiate a call, select the Calls tab in the app and press the Phone icon in the top right. You can then choose somebody from your contacts list to call. In this part of the app you'll also see a chronological list of all the people you've spoken to before, including missed calls. For more detail see pages 9-12.

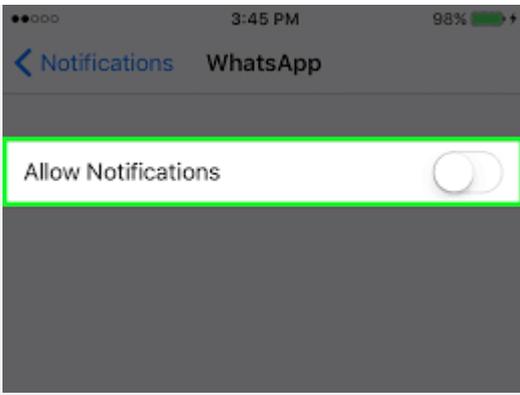


Important settings

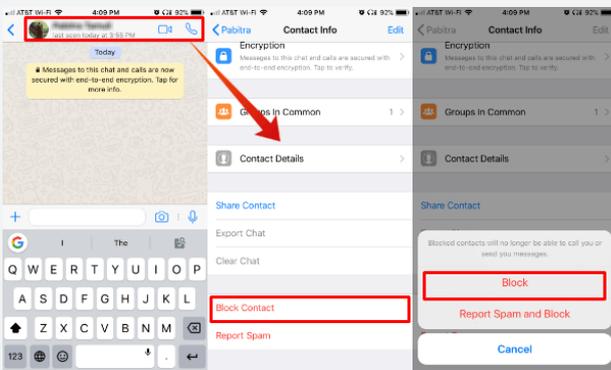
Once you've got to grips with using WhatsApp, you'll want to be aware of these important but easily overlooked settings. For starters, going to Settings > Account > Privacy will let you customise exactly who can see your personal details, such as your profile photo and when you were last active on the app. You can also disable Read Receipts if you don't want anyone to know when you've seen their messages – but turning them off works both ways. You won't be able to see when people have read your messages, either.



Another good tip if you're concerned with privacy is to go to Settings > Notifications and turn off Show Preview. This means that incoming messages will still show as alerts on the lock screen but will only display the sender's name and not the content of the message itself. Important if you tend to leave your device out on the table and you don't want prying eyes snooping on your private conversations.



WhatsApp gives you a range of choices about who can see you on WhatsApp and how much information the app can divulge about your activities. You can set *Last Seen*, *Profile Photo*, *About*, and *Status* to be seen by everyone, only your contacts, or no one. *Last Seen* shows when you were last logged into the app. It also indicates your live location, if you have that enabled in your smartphone settings. You can also choose who can see your status updates. You can also use privacy settings to block contacts. A blocked person cannot call or send messages to you.



> **Data and Storage Usage**, allows you to choose which types of media will auto-download on a data sim card connection. You can enable **Low Data Usage** if you want to make audio calls without using too much of your data limit.



Using WhatsApp to video call

Adding a contact

WhatsApp quickly and easily recognizes which of your contacts are using WhatsApp by accessing your phone's address book. To undertake a video call with a patient they need to be using the app themselves. You will then need their phone number. Add this to your contacts in your tablet (address book) -remember you can delete this after each call so you aren't holding patient personal information.

If it's a local number: Save the number in the same format you would use if you were to call that contact.

If it's a foreign number: Save the number in full international format: + [Country Code] [Full Phone Number].

Video calling

Video calling lets you video call your contacts using WhatsApp. (NOTE: On Android, video calling is only available on Android 4.1+. If your phone's operating system isn't supported, video calling won't be available to you). The tablet we have supplied is compatible with video call but you will need to check with any patients that they have the suitable operating system. Make sure you have a strong Internet connection when placing or receiving video calls. A poor or improperly configured connection might result in poor video and audio quality. If you're connected to Wi-Fi, your video call quality is dependent on your wireless network signal and network data speed.

To place a video call:

Open a new chat – click the chat icon



Click the contact you want to call. NOTE: If you can't see your contacts: Make sure you have allowed WhatsApp to access your phone's contacts in your phone's Settings app.

In your phone's address book, make sure that all accounts and groups are set to "visible" or "viewable".

Tap Video call icon



. Top of screen to the right of the contact name.

This will start the call.

You will see your face in the screen whilst the app is dialling – when the recipient answers your face will go to a small box on the screen and the recipient will fill the screen. You can move the box with your face to anywhere on the screen – just hold and drag the box.

When the call is complete just hang up as usual (tap screen and icons will appear – click the red phone icon)



Receiving a video call

When someone video calls you, you'll see an incoming WHATSAPP VIDEO CALL screen, where you can:

- Swipe up to accept.
- Swipe up to decline.
- Swipe up to reply to decline the call with a quick message.

To switch from a video call to a voice call:

1. While on the video call, tap Video off, which will notify the contact you're video calling.
2. Once the contact turns their video off, the call will be switched to a voice call.

To switch from a voice call to a video call:

1. While on the voice call, tap Video call.
2. The contact you're voice calling will see a request to switch to a video call and can accept or decline the switch.

Making a group video call

Group Calling allows up to four participants to video call with each other using WhatsApp.

To make a group video call from a group:

1. Go to the group you want to video call.
2. Tap Group call.
3. Search for or select the contacts you want to add to the call.
4. Tap Video Call.

NOTE: Make sure you and your contacts have strong Internet connections when placing or receiving group video calls. The quality of the video call will depend on the contact with the weakest connection.

- When you receive a group video call, the incoming WHATSAPP VIDEO CALL screen will show the participants currently on the call, and the first contact listed will be the participant that added you.
- During a group video call, you have the option to turn your video off by tapping Video off.
- You can't remove a contact during a group video call. The contact would need to hang up their phone to disconnect from the call.
- Group video call history will appear in the CALLS tab. You can tap the call history to view the individual contacts from the call.
- While it's possible to be in a group video call with someone you've blocked, you can't add a contact that you've blocked to the call or a contact that has blocked you.

Deleting and clearing chats

Deleting a chat allows you to delete a chat from your Chats tab.

To delete an individual chat:

- In the Chats tab, click on the chat you wish to delete.
- Tap More (or three dots at the top right of the screen) > Delete Chat > Delete Chat.
- Alternatively, in the Chats tab, tap Edit in the top left corner > Select the chat you wish to delete > Tap Delete in the bottom right corner > Delete Chat.

To delete the contact you will need to delete that from your device address book.

Using WhatsApp to message

Adding a contact

WhatsApp quickly and easily recognizes which of your contacts are using WhatsApp by accessing your phone's address book. To undertake a video call with a patient they need to be using the app themselves. You will then need their phone number. Add this to your contacts in your tablet (address book) -remember you can delete this after each call so you aren't holding patient personal information.

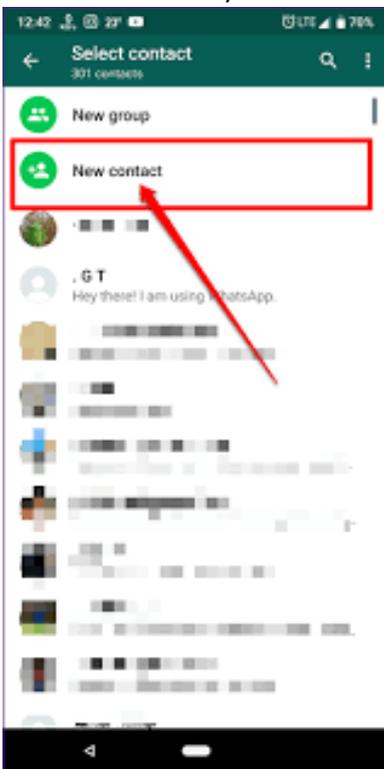
If it's a local number: Save the number in the same format you would use if you were to call that contact.

If it's a foreign number: Save the number in full international format: + [Country Code] [Full Phone Number].

Open a new chat – click the chat icon  on the home screen - usually towards the bottom right of the screen.

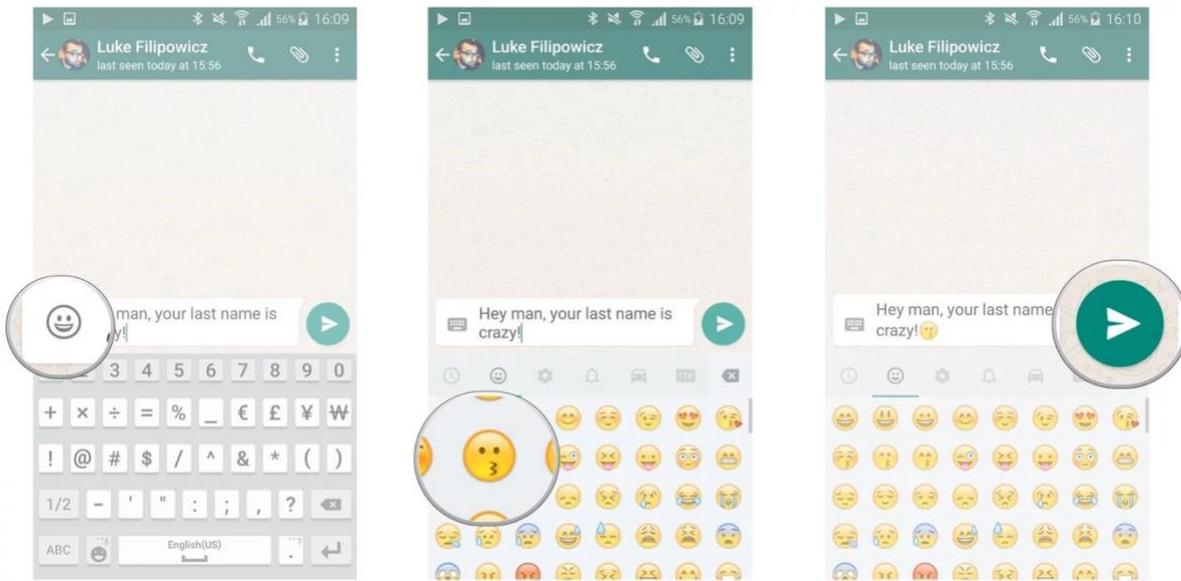
Click the contact you want to message. NOTE: If you can't see your contacts: Make sure you have allowed WhatsApp to access your phone's contacts in your phone's Settings app.

In your phone's address book, make sure that all accounts and groups are set to *visible* or *viewable*. If you haven't saved the contact you can add the number instead – select New contact at the top of the page.



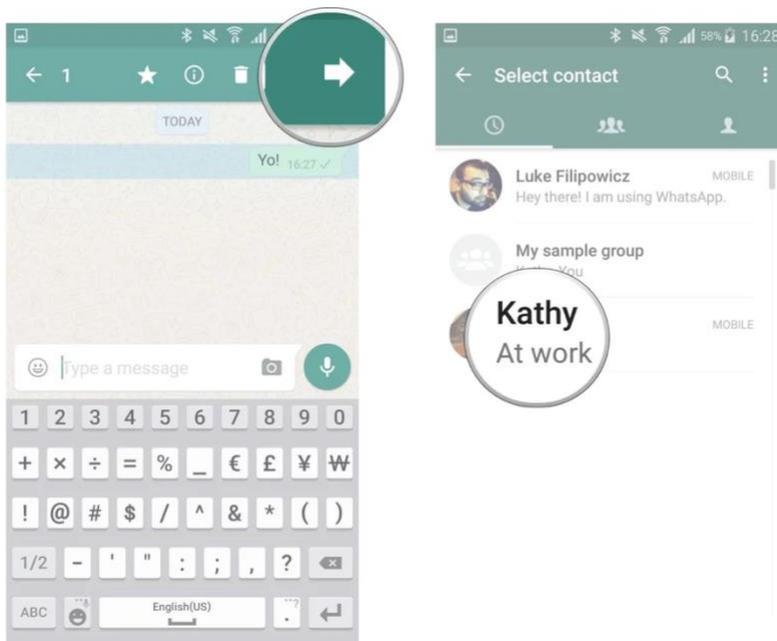
Type your message in the message field.

- To send an emoji, tap the smiley face on the left of the message field. To switch back to your keyboard, simply tap the mini keyboard icon that has replaced the smiley face.
- Tap the emoji you want to send from one of the six categories.
- Tap the send icon on the right of the message field. It's the green circle with a white paper airplane inside.



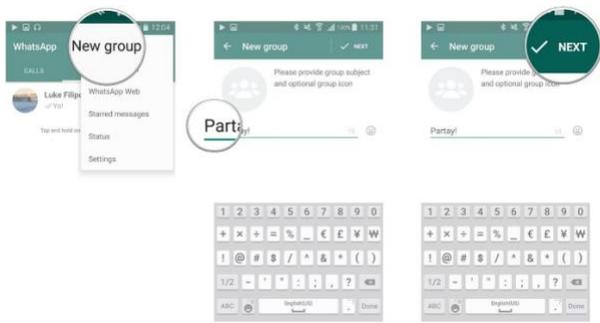
How to forward messages and media using WhatsApp

- Tap and hold the message or media you want to forward. It will turn blue.
- Tap the forward icon on the top right of your screen. It's the white arrow.
- Choose the recipient.



Tap the recent chats icon to forward a message to someone you were chatting with recently (it's the clock icon on the top left) / tap the group icon to send to a group chat (three heads in the top middle of your screen) / tap the contact icon to send to a specific contact (single head on the top right of the screen).

1. Tap **New group**.
2. Type a **group subject** in the "Type group subject here..." field. Tap the smiley face on the righthand side to add emojis if you like.
3. Tap **Next** on the top right of the screen.



4. Add **contacts** to the group.

- Type a **contact's name** into the field.
- Tap a **contact** to add them to the group.
- Repeat **steps 1 and 2** to add more contacts.
- Tap **Create** on the top right of your screen to create your group chat.

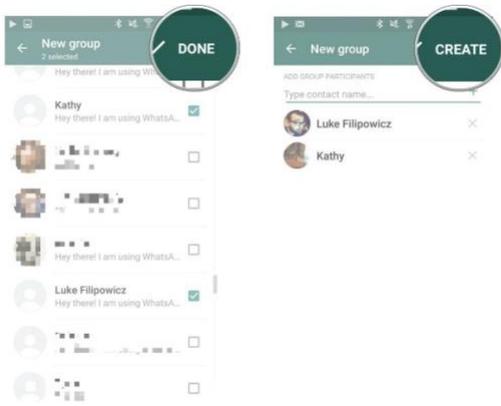


OR

- Tap the **add icon**, which looks like a plus sign, to open your contacts list.
- Tap the **contact** you'd like to add to the group. You can add multiple contacts to your group simply tapping the box next to their names.



- Tap **Done**.
- Tap **Create** to enter your group chat.



Deleting and clearing chats

Deleting a chat allows you to delete a chat from your Chats tab. To delete an individual chat:

- In the Chats tab, click on the chat you wish to delete.
- Tap More (or three dots at the top right of the screen) > Delete Chat > Delete Chat.
- Alternatively, in the Chats tab, tap Edit in the top left corner > Select the chat you wish to delete > Tap Delete in the bottom right corner > Delete Chat.

To delete the contact you will need to delete it from your device address book.