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| **Guideline: Telephone Triage** | Guideline #: |
| Effective Date: | Review Date: [annually, bi-annually, etc.] |
| Approved By: | Revision Date: |
| Approval Date: |

**Guideline Statement:** Telephone triage is the practice of reviewing, developing, and documenting a plan to resolve the patient’s specific medical complaints and symptoms. Recommendations may be given to the patient to determine when/where to access treatment. Implementing telephone triage guidelines helps improve physician-patient communication, service, care, and safety.

*Limitations of telephone triage*:

* Helps to define symptoms, but cannot provide a medical diagnosis.
* Does not replace the physician’s professional judgment or medical care.

**Considerations when creating telephone triage guidelines:**

* Have triage guidelines approved and reviewed annually by a physician.
* Document triaged calls in the patient’s medical record.
* Guidelines apply to established patients.
* Consider a method to qualify/quantify emergent or non-emergent symptoms.
* Outline specific examples for staff, including questions to ask the caller and recommended responses.
* Consider the range of patient complaints and symptoms specific to practice’s specialty.
* Physician to review all telephone triage decisions for appropriateness.

**Telephone Triage Personnel Role and Responsibilities:**

* Telephone triage personnel are individuals trained to assist a patient via telephone through the use of physician-approved, established guidelines and protocols. Assigned personnel provide assessments without the benefit of an in-person exam.
* Triage personnel are educated and trained to clarify information (e.g., repeating information and asking the caller to repeat back what they hear).
* Triage personnel qualifications and training are outlined in related   
  job descriptions.

1

* Involved personnel are educated about scope-of-practice concerns.
* A clear policy is in place that outlines the role and/or limitations of non-clinical or unlicensed staff.
* Telephone triage personnel document the following during each phone call:
* Patient name, phone number, and DOB;
* If caller is not the patient, record the name and phone number of the person calling;
* Patient’s physician;
* Date and time of the call;
* The name of the person handling the call;
* The patient’s complaint(s) and symptom(s);
* Instructions or advice given, per triage guidelines;
* Allergies and current medications;
* Any medications prescribed or refilled;
* Pharmacy and phone number; and
* Final disposition.

2