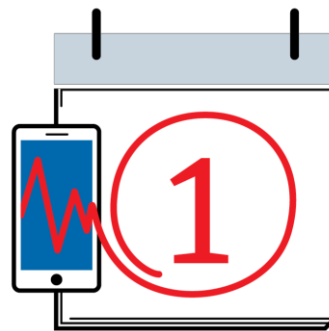


Neighbourhood Healthcare Homes

Clinical Phone Triage Resource Kit



Telephone assessment & treatment (clinical triage)



Same day access and appointment systems



Alternatives to F2F consults

Neighbourhood Healthcare Homes

How to implement Clinical Phone Triage

What is Clinical Phone Triage?

Receptionists receiving calls from patients asking for a same-day appointment offer the option of a doctor ringing them back. A GP or Nurse then contacts the patient to determine how they can most appropriately meet the patient's needs.

Why should we implement GP triage?

Clinical Phone Triage is a telephone-based service that increases capacity for practices and convenience for patients by triaging those patients requesting a same day appointment. It allows a practice to identify why a patient wants to be seen and then decide the most appropriate outcome for that patient. It ensures same day appointment slots are reserved for those with a true same day need.

Evidence from practices undertaking Clinical Phone Triage suggest that approximately 30-40% of patients requesting same day appointments can be managed without needing to come into the practice. These requests are also resolved faster than the standard 15 minute consult.

What are the benefits?

- Increased capacity to see patients
- Reserves on the day appointments for those who actually require them
- Improved access to doctors; patients have access to doctors when they need it, within ten minutes from calling the practice
- Avoids unnecessary visits to the practice
- Increased patient satisfaction



Who does what?

Staff	Role
Receptionists	<ul style="list-style-type: none">• Answer calls according to triage script and enter patients into triage template as appropriate
General Practitioner/Practice Nurses	<ul style="list-style-type: none">• Contact patients• Book same-day appointments as appropriate• Generate paperwork associated with costs
Practice Nurses	<ul style="list-style-type: none">• Contact patients• Book same-day appointments as appropriate• Generate paperwork associated with costs
Management	<ul style="list-style-type: none">• Adjust GP hours to cover peak morning period (8-9am) and adjust telephone system capacity

When should we use it?

Use Clinical Phone Triage during peak call periods; for many practices this is between 8 and 9am.

You can use Clinical Phone Triage every day your practice is open. However, Mondays and Fridays are the busiest days for many practices, so you may need to allocate more GPs to do triage on these days.

How will it affect staffing?

If your GPs currently start consulting at 8:30 or 9am, you may need to adjust their hours to cover the peak morning call period.

Because Clinical Phone Triage is quicker and more efficient than face-to-face appointments and frees up appointment time for patients who need it, you may find that your practice can see the same number of patients with reduced FTE (full-time equivalent) GPs.

Will we need additional resources?

Yes. You will need:

- A call monitoring telephony report
- Additional telephone capacity as you may need to consider increasing the number of incoming lines during peak call periods – tracking your dropped call rate and complaints from people unable to get through, will help you refine this for your own practice. You may also need an additional separate outgoing line so that doctors doing triage can reach patients quickly and easily.

How can we promote it to our patients?

There are various channels you can use to raise patient awareness about Clinical Phone Triage:

- Display posters in prominent areas at your practice
- Photocopy information onto the backs of invoices, statements and prescriptions
- Encourage reception and clinical staff to talk to patients about the service
- Change the telephone message to tell patients about the service
- Put information about the service on your website and social media channels

At first, it's important that the GP contacts the patient within the timeframe the receptionist gave. Once patients realise this, most are happy to use the Clinical Phone Triage service again.

How should we integrate it with our IT systems?

Contact the NHH Change Team who will assist you with loading the Clinical Phone Triage advanced form and KPI reporting template into your PMS.

What is the implementation timeline?

Start with a small test period and work with willing staff to develop the Clinical Phone Triage service. It's helpful to appoint a GP champion to lead the test period. Bring others on board by showing them the benefits the service is delivering.

What else do we need to know?

- It's helpful to provide training to ensure GPs know the difference between triage and consultation.
- Clinical safety is paramount. Make it clear to GPs that triage isn't about trying to stop patients from being seen. If a GP has concerns during triage, the patient should be seen. Similarly, patients should be told to contact the practice again if they continue to feel unwell.
- Clinical Phone Triage should only be provided for enrolled patients with notes available.
- Triage is purely to decide how the patient needs to be managed. If you are unable to determine the needs of the patient in a few minutes, then book them in for an appointment (virtual or face to face).
- The triage service is offered for free, however you can charge for the outcome, e.g. if a prescription, appointment or off work certificate is required. Ensure there is consistent messaging from the team, that there may be a charge associated with the outcome.

How do I charge patients if they don't come into the practice?

- There are several ways to manage this, and it will depend on the characteristics of the practice as to which will work best
- Email an invoice through (ensure reception confirms the email address)
- Some patients portals are working on the ability to pay online through the portal

What is the implementation timeline?

Start with a small test period and work with willing staff to develop the GP triage service. It's helpful to appoint a GP champion to lead the test period. Bring others on board by showing them the benefits the service is delivering.

The stages as outlined below have not been allocated timeframes as this will depend on the individual practice resources available. Ideally, stage 1 should take one month to complete, stage 2 should be 2-3 months and stage 3 should be around the 4-month mark.

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Implementation Checklist for Clinical Phone Triage

Implementation Checklist for Clinical Phone Triage

This is not an exhaustive list but gives an idea of the sorts of things you will need to do or think about before implementing doctor phone triage

- Doctor phone triage process - clearly outlines the steps of the triage process and the roles and responsibilities of those involved
- Demand analysis for same day appointments in order to decide when to triage and for how long
- Change templates
- Develop algorithm to support decision making for call handlers
- Develop scripts and training for call handlers
- Training of all call handlers
- Communications to patients about the change
- Training for all doctors & nurses undertaking triage
- Install Clinical Triage advanced form and load any new invoice codes (see Clinical Triage Advanced Form Set-Up OPL)
- Develop measures for call handling and triage on Visual Board to ensure that call and triage data is monitored and evaluated (see OPL Advanced Form Reporting).....
- PDSA of change after first 2 weeks to make improvements to use, effectiveness, efficiency and safety

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Same Day Appointment Daily Demand Data Collection Template

Same day appointment requests via phone or walk-in (write "P" for phone "W" for walk-in)

Week starting:

Hour	Monday	Tuesday	Wednesday	Thursday	Friday
7-7:30					
7:30-8					
8-8:30					
8:30-9					
9-10					
10-11					
11-12					
12-1					
1-2					
2-3					
3-4					
4-5					

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PMS Triage Booking Templates

PMS Triage Booking Templates

1. GP specific triage scheduling

- Set up 9 x 3-minute appointment slots between 9 and 9:27am
- As patients are queued for a call back, call handler books the 3 min slot in the GP's schedule.
- Each GP works through their own list and calls patients back at the scheduled times or until their list is completed

Time	Patient	Note	Stat	Location Type
08:00 am				
08:15 am				
08:30 am				
08:45 am		DAILY HUDDLE		
09:00 am		Triage		
09:04 am		Triage		
09:08 am		Triage		
09:12 am		Triage		
09:16 am		Triage		
09:20 am		Triage		
09:24 am		Triage		
09:30 am				
09:45 am				
10:00 am		BREAK		
10:15 am		Dr only to book		
10:30 am				
10:45 am				
11:00 am		Dr only to book		
11:15 am				
11:30 am		Admin		
11:45 am		Admin		
12:00 pm		LUNCH		
01:00 pm				
01:15 pm		Dr only to book		
01:30 pm				
01:45 pm				
02:00 pm		Dr only to book		
02:15 pm				
02:30 pm		Admin		
02:45 pm		Admin		
03:00 pm		BREAK		
03:15 pm				
03:30 pm				
03:45 pm				

2. Single shared triage queue

- Set up a single shared Triage queue in MedTech with patient name and notes columns.
- Block out a 30-minute Phone Triage slot in each GP's template e.g. 9-9:30am
- As patients are queued for a call back, call handler adds the patient to the Triage template with a note stating the preferred GP and patient's preferred phone number.
- During the GP's allocated Phone Triage slot, they will open the shared queue and work down the list. They should call back their own patient's first before moving on to others if they have any time left.

Time	Patient	Note	Stat	SMS	Lock
07:30 am					
07:35 am					
07:40 am					
07:45 am					
07:50 am					
07:55 am					
08:00 am					
08:05 am					
08:10 am					
08:15 am					
08:20 am					
08:25 am					
08:30 am					
08:35 am					
08:40 am					
08:45 am					
08:50 am					
08:55 am					
09:00 am					
09:05 am					
09:10 am					
09:15 am					
09:20 am					
09:25 am					
09:30 am					
09:35 am					
09:40 am					
09:45 am					

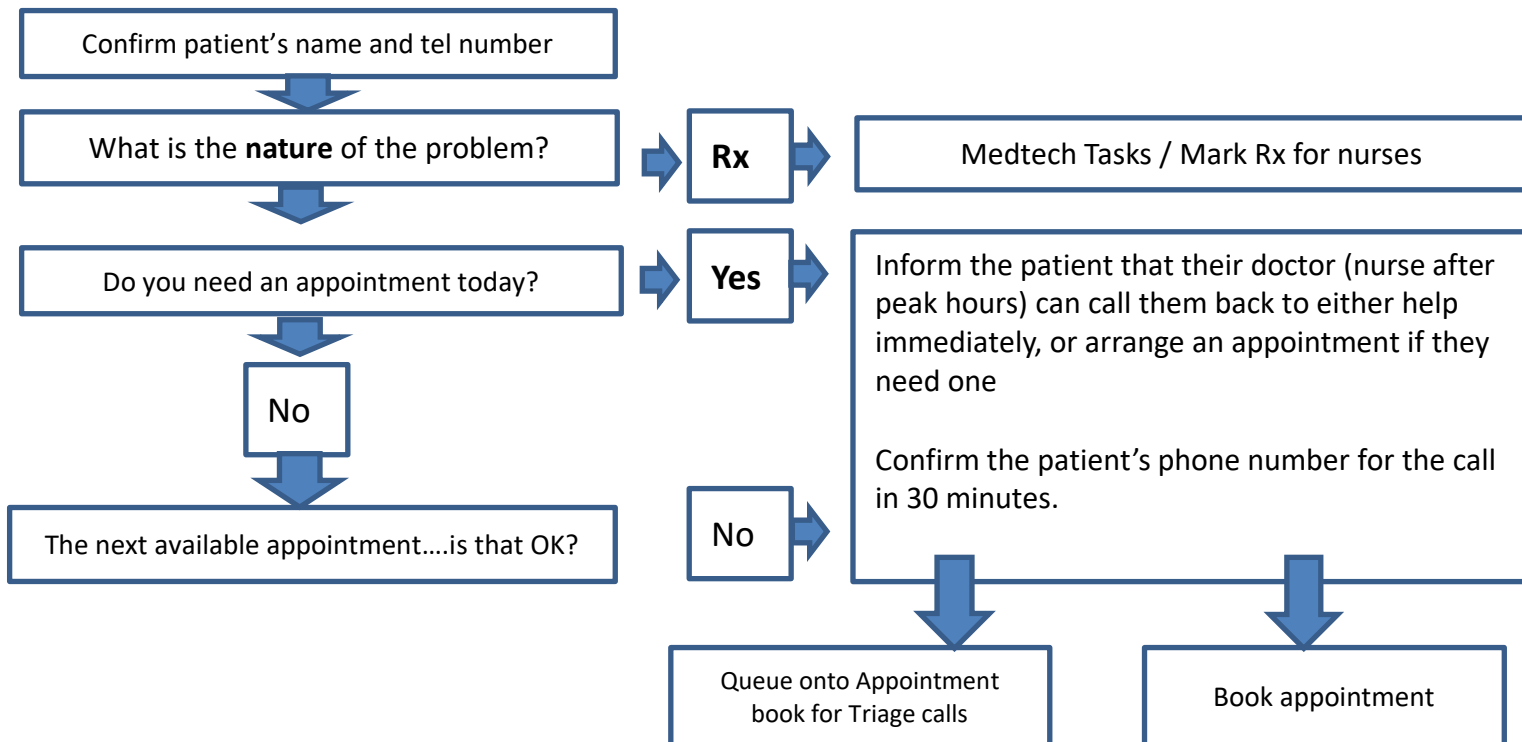
Time	Patient	Note	Stat	SMS	Lock
08:00 am					
08:15 am	GPTriage				
08:30 am	HUDDLE				
08:45 am					
09:00 am					
09:15 am					
09:30 am	BOOK ON THE DAY ONLY				
09:45 am					
10:00 am	MORNING TEA				
10:15 am	ACUTE				
10:30 am					
10:45 am					
11:00 am					
11:15 am	BOOK ON THE DAY ONLY				
11:30 am					
11:45 am					
12:00 pm	LUNCH				
01:15 pm					
01:30 pm					
01:45 pm					
02:00 pm	BOOK ON THE DAY ONLY				
02:15 pm					
02:30 pm					
02:45 pm					

Other notes

- The patient should be triage by their own GP if possible
- Each GP has face-to-face slots available to book if needed.

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Call Handling Guide for incoming telephone calls requesting an appointment



111

Chest Pain
 Breathing difficulties / trouble talking
 Facial swelling & rash
 Collapse/Altered Consciousness
 Facial / limb weakness
 Extensive burns
 Fitting
 Bleeding (**persistent or heavy**)
 Spinal or Head injury / trauma
 Heart Palpitations
 Pregnancy / In labour / pain / bleeding
 Poisoning / overdose
 Chemical in eyes
 Unable to urinate

Clinical Triage

Urgent, Same day appointment
 EXCEPT: (go straight to GP appointment)
 Accident / wound
 Children (under 12)

Nurse Appointment

Child immunisations
 Travel vaccines / Barb
 Cervical Smears
 Flu vaccines
 Blood pressure checks
 Depo / B12 injections
 Kia Ora Vision
 Repeat scripts
 Change of dressings
 Review wounds
 Removal of sutures

Example of Clinical Phone Triage Standard

Example of Clinical Triage Standard

1. Begin by opening the Clinical Triage advanced form
2. Call patient
3. Introduce yourself
4. Confirm patient identity
5. Explain benefits of talking to GP or nurse now if necessary
6. Take a full history of presenting complaint
7. Review patient records, e.g. meds, warnings, classifications
8. Consider need for physical examination to come to a diagnosis. Book face to face consult if necessary
9. Discuss options if confident you can manage patient without physical exam
10. Remember, patients can still request a face to face consult at any time
11. Agree management plan with patient
12. Ask patient to recap the agreed plan
13. Safety net - "If your condition deteriorates or you develop XYZ (relevant to presenting complaint) please let us know, remember to call 111 in an emergency"
14. "Do you have any further questions right now?"
15. Say goodbye and hang up
16. Save the form

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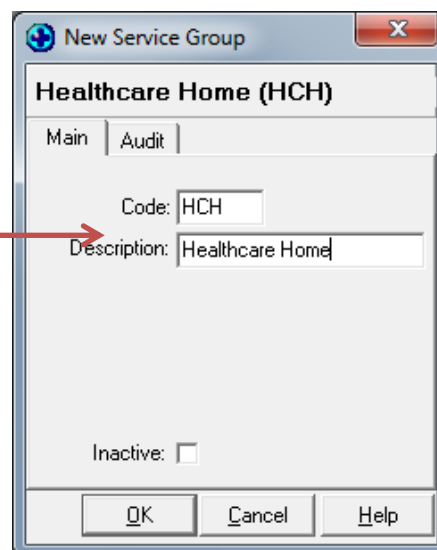
Clinical Triage Advanced Form Setup

1. Get Clinical Triage Form loaded into MedTech

- Contact Nikki Canter-Burgoyne to arrange install: Email: nikki.canter-burgoyne@mahitahihauora.co.nz, Phone: 027 238 0996

2. Set up HCH service group

- Set up a new Service Group for all healthcare home services. Use **HCH** as the code and **Healthcare Home** as the description.



3. Set up mandatory HCH service codes

- The form requires 2 mandatory codes to be set up for Prescriptions or Medical Certificates provided during triage. These must be set up as follows:

Code	Description	Service Fee
HCHRX	Prescription	Practice to determine
HCHMC	Medical Certificate	Practice to determine

- Select **HCH Healthcare Home** as the service Group

4. Set up any additional HCH service codes

- Set up any further services that would be provided and charged for during a triage call.
- The code must start with the prefix "HCH" to ensure the form recognises the service. There is no limit to the number of services you can set up and no restrictions around the code suffix or description.



- **IMPORTANT NOTE:** Do not set up codes for non-billable activity e.g. “Resolved with brief advice”. The information submitted on the form is saved meaning the user does not separately need to submit an invoice for the outcome to be recorded.

5. What you should see on the Clinical Triage form

The triage for should now show any buttons relating to the codes just set up (as shown below). These buttons are used to invoice for services provided during triage.

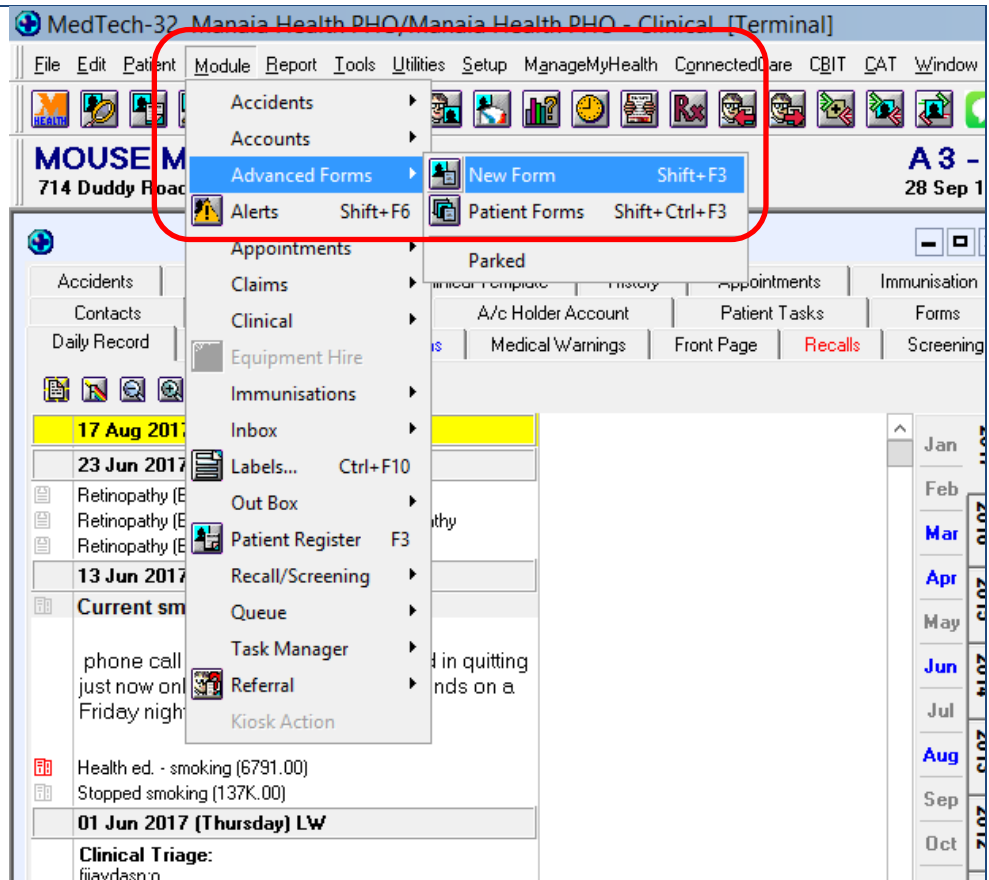
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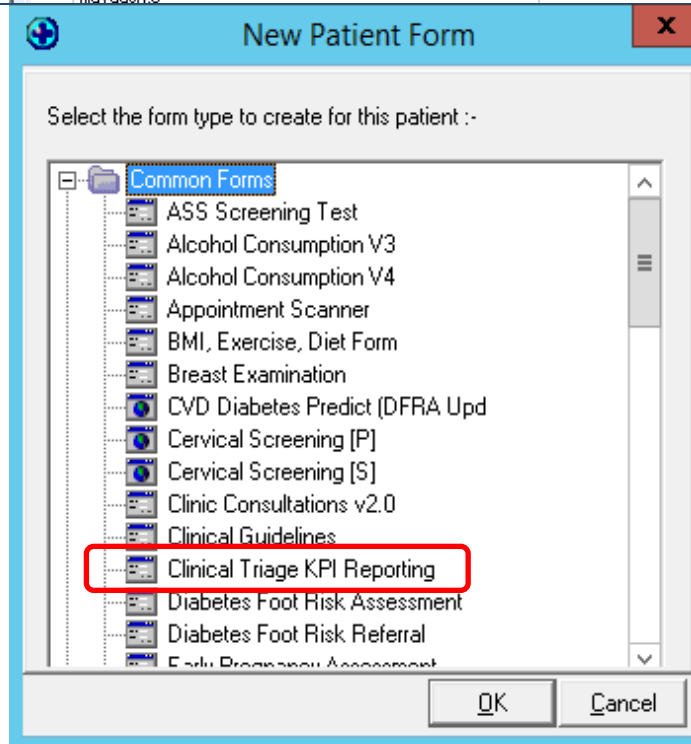
Neighbourhood Healthcare Homes

Clinical Triage KPI Reporting Form

1. Open Advanced Forms



2. Select Clinical Triage KPI reporting



3. Select filters

Select reporting period (from/to)

Filter by role
Anyone, Dr,
Nurse?

Or

Specify clinician

Or

Specify clinician
patients are
registered to

Click: Run Report

New Clinical Triage KPI Reporting (Procon Limited)

Main | Clinical Triage Reporting | More | Audit

Clinical Triage Reporting

KPI Reporting | KPI Report Output

From Date: 01/08/2017

To Date: 30/08/2017

Include triage submitted by:

- Anyone
- Any Doctor
- Any Nurse
- A specific person

Only patients registered with: Anyone

Run Report

Download Raw Data

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Note: The form assumes the role is a doctor if a medical council number is entered against a provider (refer to staff setup in MedTech).

4. Reading the report

KPI Data from 01/08/2017 to

Outcomes

Outcome	Calls	Total	Percent	
			Maori	Non-Maori
Same day face to face	4	50%	67%	40%
Future face to face	1	13%	33%	0%
Other	1	13%	0%	20%
Resolved in triage	2	25%	0%	40%
Contact not made	0	0%	0%	0%
Total triage calls	8	100%	100%	100%

Triage calls made during the reporting period

Outcome of triage calls as a percentage

Same breakdown by outcome but for Maori or non-Maori

Who Did the Triage

Role	Calls	Percent
Dr	0	0%
Nurse	0	0%
Unknown	8	100%
Total	8	100%

Total calls by role
Note: prior to 28 August Unknown = Nurse

Continuity of Care

Triaged By	Calls	Percent
Patient's own GP	0	0%
Someone else	8	100%
Total triage calls	8	100%

% of patients triaged by their own GP.

Daily Phone Triage

Date	Calls	Avg Duration (mm:ss)
Wed 16/08/2017	8	3:34
Total	8	3:34

List of the number of calls made each day and the average time per call

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5. Downloading the raw data into Excel (optional)

Select desired filters as in step 3.

Click: **Download Raw data**

The screenshot shows the 'KPI Reporting' interface with the following details:

- From Date: 01/08/2017
- To Date: 30/08/2017
- Include triage submitted by: Anyone, Any Doctor, Any Nurse, A specific person (dropdown)
- Only patients registered with: Anyone (dropdown)
- Buttons: Run Report, Download Raw Data (highlighted with a red box)

6. Open the spreadsheet

The screenshot shows the 'View Downloads - Internet Explorer' window with the following details:

- Search downloads: [Search bar]
- Table of downloads:

Name	Location	Actions
HCH Data Dow...csv procon3.co.nz	1.67 KB	Do you want to open or save this file? <input checked="" type="button" value="Open"/> Save

Options: Clear list, Close

7. Reading the Raw data extract in excel

Raw Data columns A – H

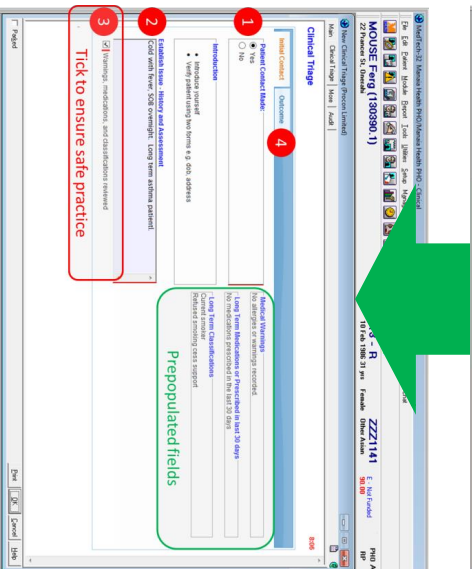
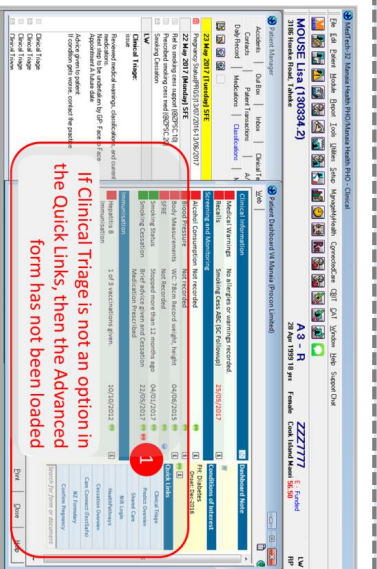
	A	B	Day and time of triage C	D	Patient details E F G H			
1	Practice	Form ID	Date	YYYY-MM	Patient ID	Date of Birth	Age	Gender
2	Millstone Family Practice	21723	16/08/2017 10:06	2017-08	M001448	1/10/1993	23	F
3	Millstone Family Practice	21721	16/08/2017 10:04	2017-08	M001448	1/10/1993	23	F
4	Millstone Family Practice	21720	16/08/2017 10:03	2017-08	M001448	1/10/1993	23	F
5	Millstone Family Practice	21719	16/08/2017 10:00	2017-08	M001587	10/02/1986	31	F
6	Millstone Family Practice	21717	16/08/2017 9:45	2017-08	M001587	10/02/1986	31	F
7	Millstone Family Practice	21716	16/08/2017 9:44	2017-08	M001587	10/02/1986	31	F
8	Millstone Family Practice	21715	16/08/2017 9:40	2017-08	M001587	10/02/1986	31	F
9	Millstone Family Practice	21707	16/08/2017 9:22	2017-08	M001587	10/02/1986	31	F

Raw data ctd...columns I - Q

Patient details				Patient's GP M	Person who did triage and role e.g GP/Nurse N O	Patient contact made? P Q		
I	J	K	L	GP Name	Submitted By	Submitter Role	Patient	Message
Principal	Quintile	Latitude	Longitude	L Wickham	Peck	Unknown Role	Yes	
21	1	-43.576217	172.707261	L Wickham	Peck	Unknown Role	Yes	
21	1	-43.576217	172.707261	L Wickham	Peck	Unknown Role	Yes	
21	1	-43.576217	172.707261	L Wickham	Peck	Unknown Role	Yes	
44	0			Manaia PHO	Peck	Unknown Role	Yes	
44	0			Manaia PHO	Peck	Unknown Role	Yes	
44	0			Manaia PHO	Peck	Unknown Role	Yes	
44	0			Manaia PHO	Peck	Unknown Role	Yes	
44	0			Manaia PHO	Peck	Unknown Role	Yes	checked

Raw data ctd...columns R – AB

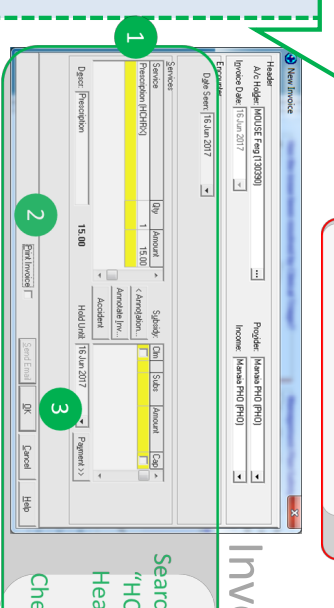
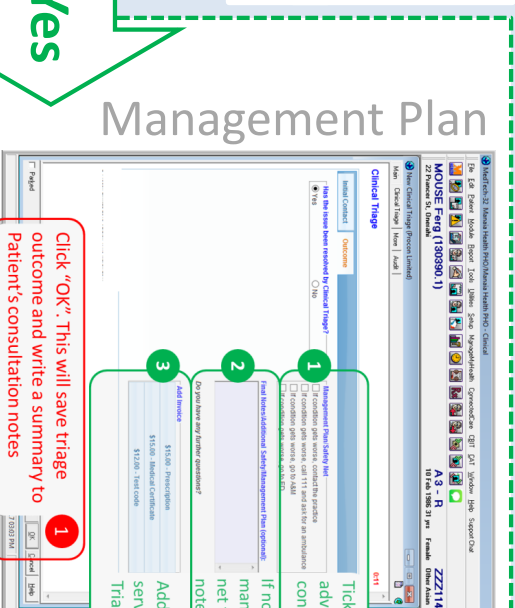
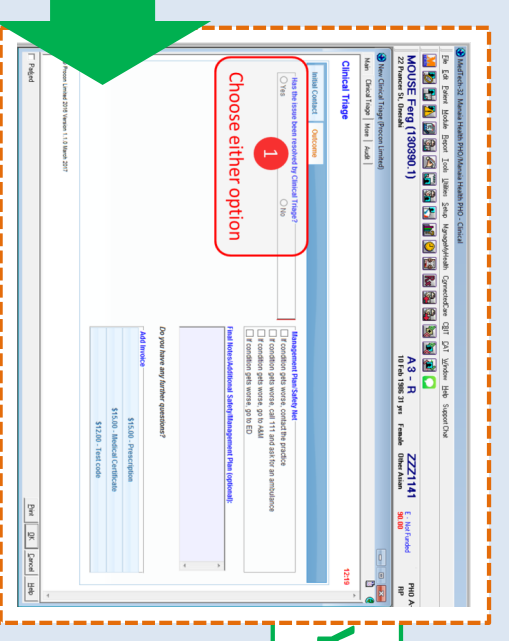
Options ticked on form...Resolved in triage? Next step? What? When?						Triage time (secs) X	\$ amount of invoices raised during triage: Total, Prescription, Med cert and all others			
R	S	T	U	V	W	Duration	Y	Z	AA	
Resolved	Next	Other	Why	What	When	74	Total	Prescription	Med Cert	Ot
No	GP			F2F	Future	74	0			
No	Nurse			F2F	Today	53	0			
No	Nurse			F2F	Today	59	0			
Yes						198	15	15	0	
No	Nurse			Corresp	Today	90	0			
No	GP	Physio		F2F	Today	141	0			
Yes						1050	30	30	0	
No	Nurse			F2F	Today	43	0			



Clinical Triage

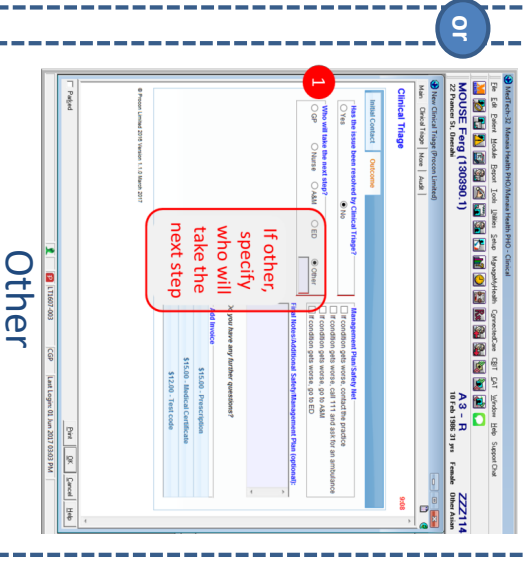
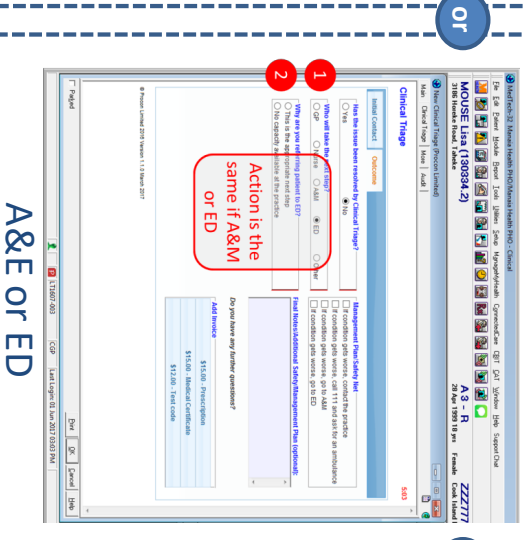
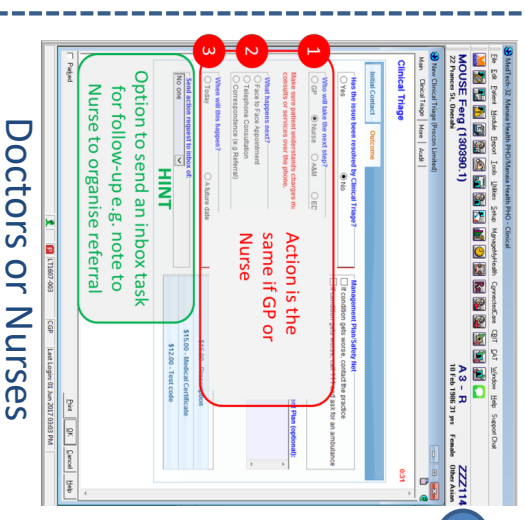
One Point Lesson

● Mandatory Actions
 ● Not Mandatory



HINT
 Search for service type "HCH" to add other Healthcare Services
 Check print invoice

Next Steps: Who and What



Continue to record Management Plan as in screen above

Doctors or Nurses

A&E or ED

Other