

Telephone Assessment & Treatment (Clinical Triage)



24th March 2020 Version 1

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Telephone Assessment and Treatment – COVID-19

Example dialogue for receptionists

Receptionist: Kia Ora, welcome to [Name of practice], you are speaking to XXXX, how can I help you today?

Patient: Requests an appointment

Receptionist: Can you please let me know what your appointment is for?"

1. If you feel you need to be seen today a clinician will call you back to see if you can be managed without needing to come in.
2. If you don't need to be seen today, we can schedule you either a telephone or video consultation.

Receptionist: Find a video consult appointment and book.

Same Day Appointment Requests

In order to provide the best outcome for our patients we are making some improvements to the way we manage requests for urgent or same day appointments. This will ensure that those who are unwell are seen quickly, while those who do not need to come in have their problems sorted efficiently without the time and expense of attending in person.

When you call wanting to see a doctor on the day your details will be taken and you will receive a call back from your doctor or the practice nurse at a specified time. If needed, a same day appointment will be booked for you; the usual GP consultation fee will apply for the face-to-face consultation.

Where appropriate patients who are able to have their concerns managed over the phone by their GP, and therefore avoiding the need to come in for a consultation, will be charged \$20.

Why are we doing this?

We are able 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.

Experience from practices undertaking GP triage suggests that approximately 50-60% of patients requesting same-day appointments can be managed without needing to come into the practice.



Telephone Assessment and Treatment (TAT) for HCH Practices

Purpose

Telephone assessment and treatment (triage) is about providing patient choice, continuity of care and managing acute demand.

In this context a patient's usual GP or Nurse Practitioner is the best person to provide assessment and treatment during peak call times.

Outside of peak call times nurses can continue to triage as usual.

Using the triage form

The triage form should only be used with people who phone in requesting a same day appointment. Use of the form by all clinicians ensures consistent data collection.

Triage coding

The following definitions are provided in response to recent enquiries re: coding for telephone and assessment and treatment (triage) activity.

Triage Coding	
TRC	Triage Consult Phone call from patient, assessed by a GP, NP or nurse where advice only has been given and no further action required.
TRX	Triage Prescription Phone call from patient, consultation which results in a prescription being issued.
TRO	Triage Other Phone call from patient, assessed by a GP, NP or nurse where a service other than a TRC or TRX has been completed.

Triage Outcomes

Face to Face Appointment –Today Urgent

Clinically assessed as required to be seen at any time on the day, e.g. someone requiring a physical examination.

Face to Face Appointment – Today Not Urgent


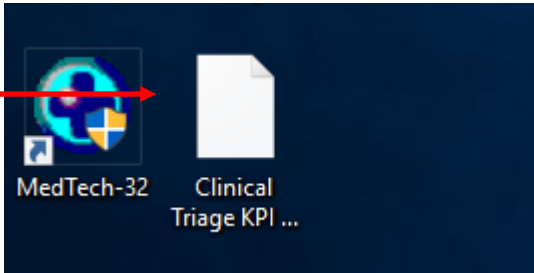
Clinically assessed as not urgent for today however appointment capacity can accommodate an on the day appointment.

Face to Face Appointment – A future date

Clinically assessed as not required to be seen on the day. A future appointment may be set later in the week – in some cases pre-appointment screening, e.g. bloods and or diagnostic testing may be required.



OPL: Importing GP triage Clinical Data KPI reporting form

Responsible	Compass	Date	17/1/18	Version No.	001
<p>1. Open email that has been sent to you with Clinical Triage KPI reporting as an attachment</p> <p>2. Right click on the attachment, copy and paste it to your computer desktop</p>		 			
<p>3. Import the new form</p> <ul style="list-style-type: none">a. Save the new forms to your computerb. In Medtech, open Setup > Advanced Forms > Advanced Forms Managerc. On the top toolbar, open Advanced Forms > Import Formd. Press Browse, then select the first form and press Opene. Press Validatef. Press Importg. Press OK					
<p>4. Install the dynamic icon in Medtech as per OPL Importing Clinical triage form Feb 18</p>					

5. Click on the Clinical Triage KPI Reporting

6. Click on 'OK'

New Patient Form

Select the form type to create for this patient :-

- Alcohol Screening and Assess
- Appointment Scanner
- BMI, Exercise, Diet Form
- CVD Risk Assessment
- Clinical Triage
- Clinical Triage KPI Reporting
- Consult
- Doctor Repeat Script
- HEADS Assessment
- MSD Medical Certificate
- Nurse Repeat Script
- Outreach Service Referral
- PD4 Compass Test
- Partner Screening
- Patient Dashboard V4 Compass
- Primary Solutions Referral

OK Cancel

7. Enter the variables you want to get a report on

8. Click on 'Run Report'

9. Click on 'OK'

New Clinical Triage KPI Reporting (Procon Limited)

Main Clinical Triage Reporting More Audit

Clinical Triage Reporting

KPI Reporting KPI Report Output

From Date: 01/12/2017

To Date: 30/12/2017

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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Print OK Cancel Help

Example of report – note: this report may have different headings to the one you see, but this gives you an idea of what you can generate

KPI Data for from 01/12/2017 to 31/12/2017

Outcomes

Outcome	Calls	Percent		
		Total	Maori	Non-Maori
Same day face to face	0	NaN%	NaN%	NaN%
Future face to face	0	NaN%	NaN%	NaN%
Other	0	NaN%	NaN%	NaN%
Resolved in triage	0	NaN%	NaN%	NaN%
Contact not made	0	NaN%	NaN%	NaN%
Total triage calls	0	100%	100%	100%

Who Did the Triage

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

Continuity of Care

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

Daily Phone Triage



OPL: Clinical Triage Advanced form

Responsible	Compass	Date	17/2/18	Version No.	001
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1. With the patient on the palette, click on the 'Clinical triage' icon on your toolbar

2. The clock will start ticking as soon as you open the form so you can track how long the call is taking

3. This is the initial page that needs to be completed

NOTE:

a. The boxes with red lines are mandatory

b. The page can be parked and completed at a later time

c. The page can be printed

4. If the patient is contacted, click on 'Yes' and complete the other two mandatory boxes

New Clinical Triage (Procon Limited)

Main | Clinical Triage | More | Audit

Clinical Triage 1:36

Initial Contact | Outcome

Patient Contact Made:

☒ Yes
☐ No

Introduction

- Introduce yourself
- Verify patient using two forms e.g. dob, address

Establish Issue - History and Assessment

flu

☒ Warnings, medications, and classifications reviewed

Medical Warnings

Peanut anaphylaxis
Erythromycin - angioedema

Long Term Medications or Prescribed in last 30 days

09/02/2016 METFORMIN HYDROCHLORIDE 500mg Tab 1 tabs, Three Times Daily
05/12/2014 QUETIAPINE 25mg Tab 1 tabs, Once Daily
23/08/2010 WARFARIN SODIUM 1mg Tab as directed according to INR blood test
08/06/2010 COLECALCIFEROL 1.25mg Tab (50,000 IU) monthly

Long Term Classifications

Hepatitis C
HBV status inconclusive
Obesity
Osteoporosis seen by gp
Pure hypercholesterolaemia
Rheumatoid arthritis
[X]Bipolar affective disorder
frail elderly

5. Then click on the outcome tab

6. If the issue has been resolved by Clinical triage, click on 'Yes'

7. Click on Final notes/Additional safety/Management plan box and add any final notes as relevant

8. Ask the patient if they have any further questions

9. Click on relevant 'Add invoice' box

New Clinical Triage (Procon Limited)

Main | Clinical Triage | More | Audit

Clinical Triage 2:19

Initial Contact | **Outcome**

Has the issue been resolved by Clinical Triage?

☒ Yes ☐ No

Management Plan/Safety Net

☐ If condition gets worse, contact the practice
☐ If condition gets worse, call 111 and ask for an ambulance
☐ If condition gets worse, go to A&M
☐ If condition gets worse, go to ED

Final Notes/Additional Safety/Management Plan (optional):

Do you have any further questions?

Add Invoice

\$15.00 - Triage script
\$0.00 - Triage call other
\$20.00 - Triage consultation

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☐ Parked

Print OK Cancel Help

10. The relevant invoice amount can be changed manually if needed – then click on 'OK'

New Invoice

Header

A/c Holder: MOUSE Mo (130421) ... Provider: Sam Eaves (SFE)

Invoice Date: 22 Feb 2018 Income: Sam Eaves (SFE)

Encounter

Date Seen: 22 Feb 2018

Services

Service	Qty	Amount
Triage script (TRX)	1	15.00

Subsidy: Clm Subs Amount Cap

< Annotation... Annotate Inv... Accident

Descr: Triage script 15.00 Hold Until: 22 Feb 2018 Payment >>

Print Invoice Send Email OK Cancel Help

11. Then click on 'OK' at the bottom of the triage form to save the details in the daily record

Print OK Cancel Help

12. If the issue has hasn't been resolved by Clinical triage, click on 'No'.

New Clinical Triage (Procon Limited)

Main Clinical Triage More Audit

Clinical Triage 0:09

Initial Contact Outcome

Has the issue been resolved by Clinical Triage?

Yes No

Management Plan/Safety Net

- If condition gets worse, contact the practice
- If condition gets worse, call 111 and ask for an ambulance
- If condition gets worse, go to A&M
- If condition gets worse, go to ED

13. Then there are several choices to click on 'Who will take the next step?'

14. Click on GP if relevant (if you click on Nurse, the outcome boxes will look the same)

15. Complete:
a. 'What happens next?'
b. When will this happen?
c. Send action request to inbox of (if relevant)*

d. Complete right hand side of template as required

16. Add invoice as per 9. And 10. above

17. Click on OK

- **NOTE:** If you complete the box 'Send action request to inbox of' it will appear in their provider inbox

New Clinical Triage (Procon Limited)

Main Clinical Triage More Audit

Clinical Triage 2:58

Initial Contact Outcome

Has the issue been resolved by Clinical Triage?
☐ Yes ☒ No

Who will take the next step?
☒ GP ☐ Nurse ☐ A&M ☐ ED ☐ Other

Make sure patient understands charges may apply for consults or services over the phone.

What happens next?
☐ Face to Face Appointment
☐ Telephone Consultation
☐ Correspondence (e.g Referral)

When will this happen?
☐ Today Urgent ☐ Today Not Urgent ☐ A future date

Send action request to inbox of:
No one

Management Plan/Safety Net
☐ If condition gets worse, contact the practice
☐ If condition gets worse, call 111 and ask for an ambulance
☐ If condition gets worse, go to A&M
☐ If condition gets worse, go to ED

Final Notes/Additional Safety/Management Plan (optional):

Do you have any further questions?

Add Invoice

\$15.00 - Triage script
\$0.00 - Triage call other
\$20.00 - Triage consultation

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Parked Print OK Cancel Help

18. If relevant click on 'ED' (if you click on 'A&M', the outcome boxes will look the same)

19. Tick whichever box is relevant to 'Why are you referring patient to ED?'

20. Complete right hand side of template as required, including 'Add invoice' and 'OK' to save page

21. If relevant click on 'Other' and complete the box as necessary ie lab/xray/mental health service

22. Complete right hand side of template as required, including 'Add invoice' and 'OK' to save page

New Clinical Triage (Procon Limited)

Main Clinical Triage More Audit

Clinical Triage 4:54

Initial Contact Outcome

Has the issue been resolved by Clinical Triage?

☐ Yes ☒ No

Who will take the next step?

☐ GP ☐ Nurse ☐ A&M ☒ ED ☐ Other

Why are you referring patient to ED?

☒ This is the appropriate next step ☐ No capacity available at the practice

Management Plan/Safety Net

☐ If condition gets worse, contact the practice

☐ If condition gets worse, call 111 and ask for an ambulance

☐ If condition gets worse, go to A&M

☐ If condition gets worse, go to ED

Final Notes/Additional Safety/Management Plan (optional):

Do you have any further questions?

Add Invoice

\$15.00 - Triage script
\$0.00 - Triage call other
\$20.00 - Triage consultation

New Clinical Triage (Procon Limited)

Main Clinical Triage More Audit

Clinical Triage 8:10

Initial Contact Outcome

Has the issue been resolved by Clinical Triage?

☐ Yes ☒ No

Who will take the next step?

☐ GP ☐ Nurse ☐ A&M ☐ ED ☒ Other

Management Plan/Safety Net

☐ If condition gets worse, contact the practice

☐ If condition gets worse, call 111 and ask for an ambulance

☐ If condition gets worse, go to A&M

☐ If condition gets worse, go to ED

Final Notes/Additional Safety/Management Plan (optional):

Do you have any further questions?

Add Invoice

\$15.00 - Triage script
\$0.00 - Triage call other
\$20.00 - Triage consultation

23. If unable to contact patient click on 'No' and make notes as relevant, including clicking on 'OK' to save page

TIPS FOR CLINICAL TRIAGE FROM A NORTHLAND GP

- Use one single GPT template, will 5 minute slots that all the patients get put on to
- The patient's preferred call back number is put in the 'notes' section. To make it easier to read they put spaces in eg 435 4583 or 021 547 8932
- When the GP starts the process of calling back the patient, they press the 'arrive patient without printing slip' – this sets the consult timer going and shows everyone else someone is dealing with that patient
- GPs frequently refresh the GPT template before making calls to keep the information current
- To turn the timer off if you can't get through to the patient press the 'reset appointment' button
-