Sample Policy: Telephone Triage Program

I. Policy Title: ____________________________

II. Approvals: ____________________________ Date: ____________

III. Scope: Describe program elements.
  o Prescription refill.
  o Appointments.
  o Clinical advice.

IV. Purpose: State the intent of the program.
  o Sort and prioritize telephone calls.
  o Improve accessibility to care.
  o Improve use of resources.

V. Personnel
  o Specify who will be involved.
  o Define and describe duties and responsibilities.
  o Define qualifications.
  o Reference responsibility in job description.
  o Provide structured staff education and document competence.
  o Define scope of clinical triage.

VI. Hours of Practice Availability
  o Define the hours the practice will be open to receive telephone calls.
  o Define how after-hours calls will be handled.
  o Define how calls will be managed when the physician is on vacation, in surgery, etc.

VII. Program Components
  o Telephone Call Management Process: Develop a referral algorithm. Define who gets what call when. Define the routing process. Detail the triage process. [Sample Telephone Algorithm]
  o Clinical Telephone Triage Protocols: Clinical Telephone Triage Protocols are clinical rules for handling calls and giving advice, a standardized approach to problem solving, guide the staff in decision making, should provide structure. Should be written, reviewed, and approved annually by clinical staff and physicians.
  o Documentation: Define required elements for medical record documentation.
  o Quality Review: Monitor compliance with new processes daily. Monitor compliance with established processes quarterly. Provide feedback to staff and document as an education program. [Sample Quality Review Checklist]

Annual Review Date: ________________

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