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: State who will be involved.
   o Specify who will be involved.
   o Reference responsibility in job description.
   o Describe duties and responsibilities.
   o Define qualifications.
   o Provide structured staff education and document competence.
   o Define scope of clinical screening.

VI. Hours of Practice Availability
   o Define the hours the practice will be open to receive telephone calls.
   o Define how after hour calls are 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. [Sample Telephone Encounter Sheet]
   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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