

## Sample Policy: Telephone Triage Program

I. Policy Title: \_\_\_\_\_

II. Approvals: \_\_\_\_\_ Date: \_\_\_\_\_

III. Scope: Describe program elements.

- Prescription refill.
- Appointments.
- Clinical advice.

IV. Purpose: State the intent of the program.

- Sort and prioritize telephone calls.
- Improve accessibility to care.
- Improve use of resources.

V. Personnel: State who will be involved.

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

VI. Hours of Practice Availability

- Define the hours the practice will be open to receive telephone calls.
- Define how after hour calls are handled.
- Define how calls will be managed when the physician is on vacation, in surgery, etc.

VII. Program Components

- 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](#)]
- 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.
- Documentation: Define required elements for medical record documentation. [[Sample Telephone Encounter Sheet](#)]
- 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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