

Telephone Triage Sample Policy

- I. Policy Title: _____
- II. Approvals: _____ Date: _____
- III. Annual Review Date: _____
- IV. Scope: Describe program elements.
 - Prescription refill.
 - Appointments.
 - Clinical advice.
- V. Purpose: State the intent of the program.
 - Sort and prioritize telephone calls.
 - Improve accessibility to care.
 - Improve use of resources.
- VI. Personnel
 - Specify who will be involved.
 - Define and describe duties and responsibilities.
 - Define qualifications.
 - Reference responsibility in job description.
 - Provide structured staff education and document competence.
 - Define scope of clinical triage.
- VII. Hours of Practice Availability
 - Define the hours the practice will be open to receive telephone calls.
 - Define how after-hours calls will be handled.
 - Define how calls will be managed when the physician is on vacation, in surgery, etc.
- VIII. Program Components
 - Telephone Call Management Process: Develop a referral algorithm. Define who gets what call when. Define the routing process. Detail the triage process. [Telephone Triage Sample Algorithm](#)
 - Clinical Telephone Triage Protocols: Clinical Telephone Triage Protocols are clinical rules for handling calls and giving advice, a standardized approach to problem-solving, guiding the staff in decision-making, and should provide structure. Should be written, reviewed, and approved annually by clinical staff and physicians.
 - Documentation: Define required elements for medical record documentation.
 - Quality Review: Monitor compliance with new processes daily. Monitor compliance with established processes quarterly. Provide feedback to staff and document as an education program.

Resources

ECRI. (2023, December 19). *Triage, Resource Collection*. ECRI.

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