Developing Effective Telephone Triage Protocols in Healthcare Practices

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Staff members who answer the telephone are a valuable asset to any healthcare practice. As the "front line" of communication, they make an important first impression on behalf of the practice and its healthcare providers. Staff members also might be the first to identify a patient who has an urgent or emergent condition — one that needs clinical assessment, advice, and perhaps even prompt intervention.

Yet, few healthcare office staff members have a clinical background, and one cannot assume that they will always know the appropriate response to a patient's questions or concerns. Every healthcare practice should have clear guidelines that specify the extent of telephone interaction that each employee may engage in with patients. Telephone conversations generally fall into the following categories:

- Business-related interactions — e.g., appointment scheduling and billing/insurance questions.

- Assessment of a patient's clinical need (at an educational or informational level) — e.g., the patient has nonurgent questions about a referral or a treatment plan; the patient requests a telephone discussion with the healthcare provider; or the patient has a complaint that does not involve the need for an immediate clinical response.

- Assessment of a patient's immediate clinical condition — e.g., follow-up after treatment or a reminder of the need for compliance in home care; the healthcare provider sends a direct follow-up message via designated staff.

- Clinician only — e.g., response to a patient's report of pain, clinical question, or urgent problem.

Staff members may play a greater or lesser role in each of the above categories, depending on their background and experience. However, job descriptions and practice protocols should

clearly stipulate the exact degree to which nonclinical and clinical staff should participate in telephone interactions with patients.

Nonclinical Staff

Although the entire practice benefits when nonclinical staff have some understanding of health-related terms and concepts, the decision-making necessary to triage the concerns that patients might report over the telephone requires special training. Nonclinical staff members should know that, in general, it is their job to forward any calls directly related to clinical care to the doctor, advanced practice provider, or nurse.

Healthcare practices that provide education for their nonclinical staff generally include a list of patients' most frequently asked questions, along with scripts that staff members can use to help determine how to handle calls. Staff members who answer the phone should have a list of "hot topic" conditions or statements that patients might report or say that should automatically trigger notification to a clinician.

Patients who are advised that they should be seen immediately at the office should arrange such appointments only with approval of clinical staff — in other words, the healthcare provider should know, at the time the visit is scheduled, that the patient is coming to the office and expects to be seen for an urgent appointment.

In general, patients who believe that they have a medical emergency should be referred to the local emergency department (ED), with appropriate documentation and notification to the treating clinician. In general, patients who are too ill to speak for themselves on the telephone also should be referred to the ED.

Clinical Staff

If nonclinical staff members, including medical assistants, accept accountability for forwarding patient calls and concerns to appropriately trained clinical staff, those who have licenses/certificates also are bound to promptly respond when receiving these notices or calls.

State laws related to scope of practice might define which clinical roles can perform telephone triage and assess the urgency level of patients' needs. For example, in terms of nursing, some states limit telephone triage activities to registered nurses (RNs), while others permit licensed

practical nurses (LPNs) to perform these duties. Therefore, healthcare practice protocols should delineate the extent to which RNs, LPNs, or other clinical staff may provide healthcare advice.

In Summary

Every healthcare practice should identify and formalize the ways in which nonclinical and clinical staff interact with patients over the phone; doing so can help:

- Reduce variation in the way that telephone calls are handled and referred

- Reinforce staff members' understanding of the necessity of telephone protocols

- Ensure consistency in how employees follow office protocols

- Provide a common sense approach to ensuring that important information gets to the individual who needs it in an appropriate timeframe

Practices can accomplish this approach by developing detailed job descriptions and competencies, providing thorough orientation for new employees, offering in-service training for clinical and nonclinical staff members, and developing detailed written policies and procedures that are approved by clinical staff.