# Clinical Protocol Training

## Lesson 2: What are Protocols and How to Use Them

Telephone triage nurses use protocols to be sure the patients are receiving the most
_____ and _____ level of care,

**What does triage mean?**

1. "trier"- to _____, _____, _____
2. Triage-
   - to determine the _____ of  patients' treatments.
   - to determine the _____ and _____ of emergency treatment, emergency t ransport, or transport _____.
   - Originated in the _____.

**3 Main Categories of Triage in History**
   1. Those who were likely to live _____ of the care they received.
   2. Those who were likely to _____ regardless of the care they received.
   3. Those for whom _____ care might make a _____ difference in their outcome.

A similar model is still used today in emergent situations, or when emergency room census is
_____ _____.

**Other ways that Triage is used today:**
   1. Still used as _____ _____ (after registration) in emergency room situations
   2. _____ offices.
   3. _____ working in _____ will do a mini-triage of all their assigned patients, taking into consideration their diagnosis, medications they are on, vital signs, and general condition to see which patients need more immediate attention.
   4. Used by nurse triage _____

**Roots of telephone Triage**

   1. _____- first  nurse triage call centers established
   2. _____- Computerized guidelines and documentations
   3. _____ and _____ made it possible for nurses to work remotely from home
      - Challenges include- HIPAA compliance,  managing remote staff, quality control.
   4. Advanced triage platforms are _____, _____, include call recordings, and _____ _____.

**What are protocols?**

1. _____ that allow a nurse to ask _____ questions and give consistent care advice to patients.
2. Protocols are
    - _____
    - _____
    - _____
3. One of many tools, which compliment their nursing experience, judgment, and critical thinking skills.
4. Help nurses explore a caller's symptoms and the recommend a proper _____ _____ _____.
5. Allow nurses to recommend a _____ _____, make an appointment, or refer to a _____ or an urgent-care facility as appropriate.

The most important function of a protocol is to ensure _____ and _____ among those who interact over the phone with patients that are calling about their health concerns or symptoms.

**Who writes protocols?**

1. Dr. Bart Schmitt and Dr. David Thompson- Protocols used in 90% of triage call centers today.
2. _____ bas ed protocols with these goals.
    - _____ to diagnose the patient.
    - Assess the patient's _____
    - Direct them to the _____ level of care based on the _____ of their current symptoms.
3. They are _____. Cover over _____ % of all symptoms.
4. Thoroughly reviewed and _____ regularly.

**How does a typical nurse triage call center actually work?**

1. In the beginning-
    - Nurses worked in large _____ _____.
    - Patient encounters were faxed to the call center by outside sources such as _____ _____.
    - Nurses would gather faxes, create patient records, call the patient back, perform triage, and then fax the completed form back to the physician's office
    - _____ and _____ at times.
    - Often short staffed.
2. More recently.
    - Patient encounters are entered directly into the _____ giving nurses

quicker access to _____ _____.

- More secure method of transferring _____ than a fax machine.
- Quicker call back time = increased patient _____
- Can manage a higher patient call volume due to nurses having access to sign on from _____.
- Nurses save the expense of _____, _____, and _____ to work.

**Steps of a typical triage call**
1. Patient Calls
2. Answering service enters information
3. Nurse claims the call
4. Nurse calls patient to gather medical history and symptoms.
5. The nurse selects the most appropriate protocol based on the caller's most urgent symptom.
6. Nurse asks patient standardized questions which guide the caller to the most appropriate level of care.
7. Nurse provides care advice based on protocol ranging from 911 down to home care.

**After the call**
1. Once the nurse and patient are in _____ of which plan the patient will follow, she will close her _____ and _____ it to the appropriate physician office.
2. More _____ offices are set up to receive the encounter via _____ _____ _____ (FTP) or directly into their _____ system.

**Software Features**
1. Secure texting
2. Smartphone Apps
3. Direct integration with EMRs
4. Ability to view a brief _____ _____ from the patients medical chart within the software
5. Schedule patient appointments
6. Can be customized for use in making _____ follw-up calls , disease _____ , surveys, and other telephonic encounters.