Clinical Protocol Training

Lesson 6: Navigating Protocols Steps 8-10 – Supplemental Material

How Can My Nurses Handle and Document Office Patient Phone Calls?

Many physician practices have nurse staff in the office available to take patient phone calls during the day. While office nurses may already have the necessary medical training, doctors often worry about making sure their nurses give appropriate care advice and ask, all of the relevant questions to patients. Many physicians spend countless hours training nurses on how to ask all the relevant questions, especially as new nurses join their team. Other physicians take frequent breaks in between patients to answer nurse questions about how to handle certain calls. What is a good solution to help providers ensure that nurses ask all the relevant questions to guarantee patient safety, and at the same time document the interaction?

The solution is to use standardized telephone triage medical protocols in the office. These protocols are available in book form (such as Dr. Schmitt and Dr. Thompson's books) or in an electronic format (such as MyTriageChecklist™).

Why have protocols at all times?

It is very important to have protocols at all times. Daytime protocols for doctor's offices act as a checklist for the nurses to use when handling patient phone calls during office hours. Making some investments in setting up protocols for office nurses can save time and money. First, they ensure that nurses ask the right questions and not miss anything when handling patient calls. Second, they decrease liability because the call and the protocols used are documented.

Offices need to make a decision on whether they want to use telephone triage books or electronic protocols. Books tend to be cumbersome and difficult to use. Nurses also need to adapt to new books every time a new version is released. In most cases, nurses end up leaving the books in the shelves instead of using them because of the time it takes to follow guidelines with books and then manually document the call.

Electronic protocols for daytime offices are available from vendors such as TriageLogic, LLC. Electronic guidelines are easy to teach and use, and can be integrated with EHRs. In addition, the vendor is responsible for updating the questions and the care advice, allowing nurses to adopt seamlessly as new guidelines become available. As a result, they can save valuable nursing time in following the protocols and in documenting the information. The savings on nursing time and ease of adoption will usually offset additional costs of purchasing electronic guidelines.

Questions to ask when selecting an electronic protocol vendor:

1. Is the software using the daytime gold standard protocols (Schmitt-Thompson Protocols)?

2. Can the triage information be copied or integrate securely with the office's EHR?

3. How easy is it to learn the software? What is the training time to learn the software?

4. Who trains your office nurses? What happens if you have a new nurse? Do you need to pay extra to train in new nurses that join later?

As doctors know, medical mistakes can cause serious issues to a patient's health. Establishing systems in place to ensure patient safety is a key aspect of a well functioning practice.