

Lesson 1: What are the Critical Steps to a Triage Call?

Goals of this Course:

1. _____ how to gather proper patient information.
2. Know how to _____ a call.
3. Know how to _____ patients feel their _____ have been answered.
4. Understand the proper steps to make sure you are staying within the _____ .

What are the 10 Critical Steps to taking a Triage Call?

1. _____ yourself.
2. _____ (or confirm) brief demographic information.
3. Obtain brief _____ .
4. Document a brief _____ of the patient's illness.
5. Identify the _____ and most serious _____ .
6. Select the correct _____ .
7. Triage the patient into an appropriate _____ category.
8. Provide _____ .
9. Give _____ instructions.
10. Wrap up.

Introducing yourself:

Key Points

1. Time of day
2. Your Name
3. Role in the office
4. Location calling from
5. Why you are calling

Collect brief demographic information:

Patient's name, DOB, and phone number

After hours call centers need to confirm _____

Obtain a brief medical history:

1. Existing conditions?
2. Medications?
3. Hospital stays?

Document a brief description of the patient's illness:

2 Goals:

1. Listen for most medically _____ symptom.
2. Listen to what the patient is _____ about.

Identify the chief complaint and most serious symptom:

Give them at least 30-60 seconds to tell their stories.

Select the correct protocol:

Triage is a _____ - based practice.

Triage the patient into an appropriate disposition category:

1. _____ the protocol.
2. Ask _____ questions based on the protocol.
3. Pick the appropriate _____.

Disposition = _____

YOU ARE NOT TREATING THE PATIENT.

Provide care advice:

Doctors _____ to see their patients.

1. NO _____ or treatment.
2. _____ protocols and stay within the scope of your job.
3. If you have to find it on the _____, you're making a mistake.
4. Every physician handles things _____, so if it is _____ the protocol, ask the MD.
5. (if after hours) Always refer back to the physician.

Give Call Back instructions:

1. Give _____ instructions on when to call back.
2. Protocols may _____ conditions for calling back.
3. Especially _____, in case new symptoms manifest and the patient needs a _____.

Wrap up:

Do you have any other questions or concerns?

Please call back if you have any other issues.

We are here to help.

Practice _____ in every step of the call process!