Reducing Risks in Telephone Triage

The phone is a key area of responsibility for physicians, and it is critical to make certain that protocols for this important point of contact with patients are set, reviewed, and followed. Otherwise, the practice is at risk.

While at one time it was merely a scheduling tool, phone interactions have become an integral part of practice. Phone triage is a critical tool in managing care delivery. It is frequently the first interaction with a patient and the care team, and can help determine the patient experience. The caller’s health problems are assessed regarding urgency, and education and advice are given. All of this, however, is done without the benefit of seeing the caller who is speaking. Without proper training and supervision, telephone triage can result in improper diagnosis and management, as well as legal liability.

Consider the following recommendations regarding the telephone triage system in your practice to reduce potential risk:

- Outline in written protocols the questions to ask the caller, the recommended responses for minor problems, and which calls should be referred immediately to a doctor or scheduled for an office appointment.
- Recognize top priority calls and instruct the patient to dial 911 for emergency situations that involve, but are not limited to, allergic reactions, chest pain, eye injuries, burns, or shortness of breath/wheezing.
- Only physicians or qualified staff such as RNs, NPs, and PAs should provide telephone triage.
- Document all calls and the triage decision in the medical chart indicating advice provided. As much as possible, use the caller’s own words to describe the reason for the call. Many practices use specific forms—either paper forms or notes in the electronic records—to memorialize telephone calls. These forms then become part of the patient record and are available for other members of the health care team to review.
- Review all telephone triage decisions for appropriateness of actions taken.

Founded by doctors for doctors in 1976 to advance, protect, and reward the practice of good medicine, The Doctors Company is the nation’s largest insurer of physician and surgeon medical liability. For more information on our innovative patient safety products and services, please call (800) 421-2368, extension 1243, or visit us at www.thedoctors.com/patientsafety.

The guidelines suggested here are not rules, do not constitute legal advice, and do not ensure a successful outcome. The ultimate decision regarding the appropriateness of any treatment must be made by each health care provider in light of all circumstances prevailing in the individual situation and in accordance with the laws of the jurisdiction in which the care is rendered.