

<b>SECTION</b>	<b>Approval date:</b>	
Office Management	<b>Approved by:</b>	
<b>POLICY AND PROCEDURE</b>	<b>Effective date:</b>	
Triage	<b>Revision date:</b>	

**POLICY:**

The site shall have sufficient health care personnel to provide timely, appropriate health care services. Triage is the sorting and classification of information to determine priority of need and proper place of treatment. Telephone triage is the system for managing telephone callers during and after office hours.

**PROCEDURE:**

- A. The PCP shall ensure that appropriate personnel handle emergent, urgent and medical advice telephone calls. This includes licensed medical personnel such as a Certified Nurse Mid-Wives, Nurse Practitioners, Registered Nurses or Physician Assistants. Licensed Vocational Nurses (LVN) shall not perform triage independently (MCPB letter 92-15). The California Board of Vocational Nursing and Psychiatric Technician Examiners has determined that the Licensed Vocational Nurse Practice Act does not permit the LVN to perform triage independently (MCPB Letter 92-15). The LVN may perform that part of the triage process that includes observation and data collection relative to basic physical assessment. The LVN may not perform that part of the triage process that includes independent evaluation, interpretation of data, and determination of treatment priorities and levels of care. Unlicensed personnel, such as medical assistants, may provide patient information or instructions only as authorized by the physician (Title 16, §1366 (b)).
  
- B. Staff shall ensure that a telephone answering machine, voice mail system or answering service is utilized whenever office staff does not directly answer phone calls.
  - 1. The providers are responsible for the answering service they utilize. If a member calls after hours or on weekends due to possible medical emergency, the practitioner is responsible for authorization of or referral to, emergency care given by the answering service. There shall be a greeting that immediately state the following or similar instruction to the member: "If this is a life-threatening emergency, hang up and call 911 or go to the nearest emergency room."
  - 2. Answering service staff handling member calls cannot provide telephone medical advice if they are not a licensed, certified or registered health care professional. Staff members may ask questions on behalf of a licensed professional in order to help ascertain the condition of the member so that the member can be referred to licensed staff; however, they are not permitted, under any circumstance, to use the answers to questions in an attempt to assess, evaluate, advise, or make any decision regarding the condition of the member, or to determine when a member needs to be seen by a licensed medical professional.
  - 3. Unlicensed personnel responsible for answering telephone calls shall have clear instructions on parameters related to the appropriate questions to ask and responses to give to members in order to assist a licensed provider in triaging the member for appropriate care.
  
- C. Staff shall ensure that the telephone system, answering service, recorded telephone information, and recording devices are periodically checked and updated (see *Access to Care 24/7 Policy* for periodic monitoring schedule). The Health Plan encourage answering services to follow these steps when receiving a call:

1. Inform the member that if they are experiencing a medical emergency, they should hang up and call 911 or proceed to the nearest emergency medical facility.
2. Ask the member according to the PCP's or Physician Group's established instructions (who, what, when, and where) to assess the nature and extent of the problem.
3. Contact the on-call physician with the facts as stated by the member.
4. After office hours, physicians are required to return telephone calls and pages within 30 minutes. If an on-call physician cannot be reached, direct the member to a medical facility where emergency or urgent care treatment can be given.