Name of Policy:	**Triage Protocols And The Handling Of Phone Calls In The Ambulatory Setting**	THE UNIVERSITY OF TOLEDO 1872
Policy Number:	3364-101-03-09	
Department:	Ambulatory Services	
Approving Officer:	Sr. Vice President and Executive Director, UTMC	
Responsible Agent:	Director of Clinic Operations	
Scope:	Ambulatory Services	**Effective Date**: October 1, 2011 Initial Effective Date: February 1, 2008

_____ New policy proposal	__X__ Minor/technical revision of existing policy
_____ Major revision of existing policy	_____ Reaffirmation of existing policy

(A) Policy Statement

To provide accurate phone management for patients in the ambulatory setting.

(B) Purpose of Policy

The management of phone calls and the performance of triage in the ambulatory setting is an integral part of providing comprehensive patient care. A large amount of care is provided through phone management in the ambulatory setting and must be done courteously, timely and competently.

(C) Procedure

1. Triage by phone will only be performed by the RN. Triage is defined as the assessment of the patient after pertinent information has been gathered via the phone, with the patient and/or significant other, and following standard protocols and determining the course of action. Only RNs may perform this due to their training in nursing process and critical thinking.
2. MA's, LPN's, MHT's, Call Center Reps and Clinic Coordinators may take phone messages, provide the messages to the physician for interventions, and gather data via the phone, with the patient, and/or significant other.
3. All clinics will develop their own protocols for handling messages including the role of the RN and/or other caregivers.
4. Standard protocols may be used as guidelines in all clinical settings, once reviewed by the manager and approved by the physician.
5. Staff that are managing incoming phone calls, must be trained on the protocols of the particular clinic.

Approved by:	**Review/Revision Date:**
Olivia Dacre 10/1/11 Olivia Dacre, MBA Director, Clinic Operations Date Scott Scarborough 10/24/11 Scott Scarborough, PhD Sr. Vice President and Executive Director, UTMC Date *Review/Revision Completed By:* *Ambulatory Services* *Health Information Management*	5/26/09 10/1/11 **Next Review Date:** 10/1/2014
Policies Superseded by This Policy:	

It is the responsibility of the reader to verify with the responsible agent that this is the most current version of the policy.