Clinical Protocol Training

Lesson 2: What are Protocols and How to Use Them

Telephone triage nurses use protocols to be sure the patients are receiving the most _______________ and _______________ level of care,

What does triage mean?

1. “trier” - to __________________, __________________, __________________
2. Triage-
   • to determine the _______________ of patients’ treatments.
   • to determine the _______ and _______________ of emergency treatment, emergency transport, or transport _______________.
   • Originated in the ________________.

3 Main Categories of Triage in History

1. Those who were likely to live _______________ of the care they received.
2. Those who were likely to _____________ regardless of the care they received.
3. Those for whom _________ care might make a ______________ difference in their outcome.

A similar model is still used today in emergent situations, or when emergency room census is _______________ ________________.

Other ways that Triage is used today:

1. Still used as __________ _________________ (after registration) in emergency room situations
2. _________________ offices.
3. _______________ working in _________________ will do a mini-triage of all their assigned patients, taking into consideration their diagnosis, medications they are on, vital signs, and general condition to see which patients need more immediate attention.
4. Used by nurse triage _________________

Roots of telephone Triage

1. ______________ - first nurse triage call centers established
2. ______________ - Computerized guidelines and documentations
3. ______________ and ______________ made it possible for nurses to work remotely from home
   • Challenges include- HIPAA compliance, managing remote staff, quality control.
4. Advanced triage platforms are _________________, ________________, include call recordings, and __________ _________. 
What are protocols?

1. _________ that allow a nurse to ask _________ questions and give consistent care advice to patients.
2. Protocols are
   • _________
   • _________
   • _________
3. One of many tools, which compliment their nursing experience, judgment, and critical thinking skills.
4. Help nurses explore a caller’s symptoms and the recommend a proper _________ ______
   _________.
5. Allow nurses to recommend a _________ _________, make an appointment, or refer to a _________ or an urgent-care facility as appropriate.

The most important function of a protocol is to ensure _________ and _________ among those who interact over the phone with patients that are calling about their health concerns or symptoms.

Who writes protocols?

1. Dr. Bart Schmitt and Dr. David Thompson- Protocols used in 90% of triage call centers today.
2. _________ based protocols with these goals.
   • _________ to diagnose the patient.
   • Assess the patient’s _________
   • Direct them to the _________ level of care based on the _________ of their current symptoms.
3. They are _________ _________ . Cover over ______% of all symptoms.
4. Thoroughly reviewed and _________ regularly.

How does a typical nurse triage call center actually work?

1. In the beginning-
   • Nurses worked in large _______ _________.
   • Patient encounters were faxed to the call center by outside sources such as _________ _________.
   • Nurses would gather faxes, create patient records, call the patient back, perform triage, and then fax the completed form back to the physician’s office
   • _________ and _________ at times.
   • Often short staffed.
2. More recently.
   • Patient encounters are entered directly into the _________ _________ giving nurses
quicker access to ______________ ________________.
• More secure method of transferring ________________ than a fax machine.
• Quicker call back time = increased patient ________________
• Can manage a higher patient call volume due to nurses having access to sign on from ________________
• Nurses save the expense of ________________, ________________, and ________________ to work.

Steps of a typical triage call
1. Patient Calls
2. Answering service enters information
3. Nurse claims the call
4. Nurse calls patient to gather medical history and symptoms.
5. The nurse selects the most appropriate protocol based on the caller’s most urgent symptom.
6. Nurse asks patient standardized questions which guide the caller to the most appropriate level of care.
7. Nurse provides care advice based on protocol ranging from 911 down to home care.

After the call
1. Once the nurse and patient are in ______________ of which plan the patient will follow, she will close her ______________ and ______ it to the appropriate physician office.
2. More ______________ offices are set up to receive the encounter via ______________ ______________ (FTP) or directly into their ______________ system.

Software Features
1. Secure texting
2. Smartphone Apps
3. Direct integration with EMRs
4. Ability to view a brief ________________ ________________ from the patients medical chart within the software
5. Schedule patient appointments
6. Can be customized for use in making ________________ follow-up calls, disease __________, surveys, and other telephonic encounters.