<table>
<thead>
<tr>
<th>Policy #: 401-1514</th>
<th>Lead Department: Quality Improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title: In-Office Telephone Triage</td>
<td></td>
</tr>
<tr>
<td>Original Date: 01/01/1996</td>
<td>Last Revision Date: 01/23/2012</td>
</tr>
<tr>
<td>Approved by: Barbara Flynn, RN</td>
<td></td>
</tr>
<tr>
<td>Effective Date: 01/23/2012</td>
<td></td>
</tr>
</tbody>
</table>

**Purpose:**
To identify who may conduct telephone triage in a provider's office when a member calls in with a medical illness or problem, and to provide guidelines by which the triage will be performed.

**Policy:**
Telephone triage is to be conducted by the RN, Mid-level practitioner or the physician. The LVN or Medical Assistants cannot conduct telephone triage.

**Definitions:**

**Procedures:**
1. The RN or mid-level practitioner must assess the situation and consult with the physician when necessary.
2. Protocols will be used to assure a consistent triage process by RNs and Mid-level practitioners. The primary care physician and/or the Medical Director will approve these protocols.
3. All PCP sites and the Alliance should maintain procedures for all personnel answering telephones which detail triage instructions for specific presenting signs and symptoms including medical emergencies.
4. When telephone triage for a member is performed, it is highly recommended that a short summary of the problem and the advice or information given to the member be documented in the patient's medical record and signed by the individual performing the triage.
5. True medical emergencies will be referred to the emergency room for care or given instructions to call 911, depending on the nature with this policy will be monitored through on-site medical records audits.
6. Compliance with this policy will be monitored through on-site medical records audits.

**References:**
Alliance Policies:
Regulatory:
Contractual:
Legislative:
MMCD Policy Letter:
POLICIES AND PROCEDURES

Policy #: 401-1514

Lead Department: Quality Improvement

Title: In-Office Telephone Triage

Original Date: 01/01/1996

Last Revision Date: 01/23/2012

Approved by: Barbara Flynn, RN

Effective Date: 01/23/2012

Lines of Business This Policy Applies To:
- Medi-Cal
- Healthy Families
- Healthy Kids Santa Cruz
- Healthy Kids Merced
- Alliance Care IHSS
- Access for Infants and Mothers
- Individual Conversion
- Santa Cruz County LIHP Program
- Monterey County LIHP Program
- Merced County LIHP Program

Revision History:

<table>
<thead>
<tr>
<th>Review Date</th>
<th>Revised Date</th>
<th>Changes Made By</th>
<th>Approved By</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/01/1998</td>
<td>12/01/1998</td>
<td>Barbara Flynn, RN</td>
<td>Barbara Flynn, RN</td>
</tr>
<tr>
<td>07/01/2000</td>
<td>07/01/2000</td>
<td>Barbara Flynn, RN</td>
<td>Barbara Flynn, RN</td>
</tr>
<tr>
<td>07/01/2002</td>
<td>07/01/2002</td>
<td>Barbara Flynn, RN</td>
<td>Barbara Flynn, RN</td>
</tr>
<tr>
<td>07/01/2003</td>
<td>07/01/2003</td>
<td>Barbara Flynn, RN</td>
<td>Barbara Flynn, RN</td>
</tr>
<tr>
<td>08/01/2004</td>
<td>08/01/2004</td>
<td>Barbara Flynn, RN</td>
<td>Barbara Flynn, RN</td>
</tr>
<tr>
<td>08/01/2005</td>
<td>08/01/2005</td>
<td>Barbara Flynn, RN</td>
<td>Barbara Flynn, RN</td>
</tr>
<tr>
<td>03/01/2010</td>
<td>03/01/2010</td>
<td>Barbara Flynn, RN</td>
<td>Barbara Flynn, RN</td>
</tr>
<tr>
<td>01/23/2012</td>
<td>01/23/2012</td>
<td>Barbara Flynn, RN</td>
<td>Barbara Flynn, RN</td>
</tr>
</tbody>
</table>