Clinical Triage Standard and Checklist

* Begin opening advance form
* Call patient and introduce yourself

Example:

*“Hi this is Dr Andrew Miller from Bush Road Medical Centre; we have appointments today. Can you give me an idea about what’s going on so we can work out the best plan of action” ….*

* Confirm patient identity
* Explain benefits of talking to GP or nurse now if necessary
* Take a full history of presenting complaint
* Review patient records, e.g. meds, warnings, classifications, etc
* Consider need for physical examination to come to a diagnosis. Book face to face consult if necessary
* Discuss options if confident you can manage patient without physical exam
* Remember, patients can still request a face-to-face consult at any time
* Agree management plan with patient
* Ask patient to recap the agreed plan
* Safety net - “If your condition deteriorates or you develop XYZ (relevant to presenting complaint) please let us know, remember to call 111 in an emergency”
* “Do you have any further questions right now?”
* Say goodbye and hang up
* Fully document in PMS including coding triage outcome. Consider sentence confirming patient happy with outcome.
* Save/Close advance form