

Clinician checklist for phone triage



- Introduce yourself
- 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.
- Time for house keeping