



Telephone (Consultation)

Development Date:	April 15, 2019	Reviewed/Revised Date:	October 28, 2019
Intended Users:	CHNs, Nurse Practitioners		

OPTION 1:		Receiving a patient call after regular hours or during regular clinic hours, and documenting the telephone triage utilizing the Telephone Consultation Record.
STEP:	PROCESS:	
1.	Complete your documentation for your telephone triage assessment on the paper-based Telephone Consultation Record.	
2.	In the patient’s EMR, initiate a “Telephone Triage Note”. This should be done as soon as possible. If after regular hours (during the evening or night), this should be completed the next morning.	
3.	On the “Telephone Triage Note”, enter the date and time the Telephone Consultation Record was generated. The date and time should correspond with what was entered on the Telephone Consultation Record.	
4.	Once the telephone triage note is completed, select “Save”. Do not change the name of the note.	
5.	Place the Telephone Consultation Record in the designated bin.	
6.	The EMR Scanning Clerk will scan the Telephone Consultation Record into the patient’s EMR the next morning, under the document category “Telephone Consultation Record”.	
OPTION 2:		Receiving a patient call after regular hours or during regular clinic hours, and documenting the telephone triage on the patient’s EMR.
STEP:	PROCESS:	
1.	In the patient’s EMR, initiate a “Telephone Triage Note”.	
2.	Delete the entire text below the heading “Telephone Triage Note”.	
3.	Complete your documentation for your telephone triage assessment.	
4.	Once the note is completed, select “Save”. Do not change the name of the note.	