

## CHANGE PACKAGE

# How to implement GP triage

### What is GP triage?

Receptionists receiving calls from patients asking for a same-day appointment offer the option of a doctor ringing them back. A GP then contacts the patient to determine how they can most appropriately meet the patient's needs.

### Why should we implement GP triage?

GP triage is a telephone-based service that increases capacity for practices and convenience for patients by triaging those patients requesting a same day appointment. It allows a practice to identify why a patient wants to be seen and then decide the most appropriate outcome for that patient. It ensures same day appointment slots are reserved for those with a true same day need.

Evidence from practices undertaking GP triage suggest that approximately 50-60% of patients requesting same day appointments can be managed without needing to come into the practice. These requests are also resolved faster than the standard 15 minute consult.

### What are the benefits?

- Increased capacity to see patients
- Reserves on the day appointments for those who actually require them
- Improved access to doctors; patients have access to doctors when they need it, within ten minutes from calling the practice
- Avoids unnecessary visits to the practice
- Increased patient satisfaction

### Who does what?

Staff	Role
<b>Receptionists</b>	<ul style="list-style-type: none"> <li>• Answer calls according to triage script<sup>1</sup> and enter patients into doctor triage template as appropriate</li> <li>• Process paperwork associated with costs</li> <li>• Data collection</li> </ul>
<b>General practitioners</b>	<ul style="list-style-type: none"> <li>• Contact patients</li> <li>• Book same-day appointments as appropriate</li> <li>• Generate paperwork associated with costs</li> <li>• Data collection (triage codes)</li> </ul>
<b>Management</b>	<ul style="list-style-type: none"> <li>• Allocate physical space for GP triage room</li> <li>• Adjust GP hours to cover peak morning period (8-9am)</li> <li>• Arrange increased telephone system capacity</li> <li>• Organise training in booking appointments for GPs</li> </ul>
<b>Practice nurses</b>	<ul style="list-style-type: none"> <li>• Follow up any patients the GP is unable to contact</li> </ul>

<sup>1</sup>See Appendix: Triage script

### **When should we use it?**

Use GP triage during peak call periods; for many practices this is between 8 and 9am. You can use GP triage every day your practice is open. However, Mondays and Fridays are the busiest days for many practices, so you may need to allocate more GPs to do triage on these days.

### **How will it affect staffing?**

If your GPs currently start consulting at 8:30 or 9am, you may need to adjust their hours to cover the peak morning call period.

Because GP triage is quicker and more efficient than face-to-face appointments and frees up appointment time for patients who need it, you may find that your practice can see the same number of patients with reduced FTE (full-time equivalent) GPs.

### **Will we need additional resources?**

Yes. You will need:

- a room for GPs to do triage
- a call monitoring telephony report
- additional telephone capacity as you may need to consider increasing the number of incoming lines during peak call periods – tracking your dropped call rate and complaints from people unable to get through, will help you refine this for your own practice. You may also need an additional separate outgoing line so that doctors doing triage can reach patients quickly and easily.

### **How can we promote it to our patients?**

There are various channels you can use to raise patient awareness about GP triage:

- Display posters in prominent areas at your practice
- Photocopy information onto the backs of invoices, statements and prescriptions
- Encourage reception and clinical staff to talk to patients about the service
- Change the telephone message to tell patients about the service
- Put information about the service on your website and social media channels

At first, some patients may be concerned that the GP won't call back promptly. For this reason, it's important that the GP contacts the patient within the timeframe the receptionist gave. Once patients realise this, most are happy to use the GP triage service again.

Give patients a follow-up phone call a couple of days after they use GP triage to get feedback. You may like to do this every day when you begin and then reduce the follow-up calls to once or twice a week once you're satisfied that feedback is consistently positive. You can also invite patients who are triaged to come in for an appointment to complete a patient satisfaction survey.

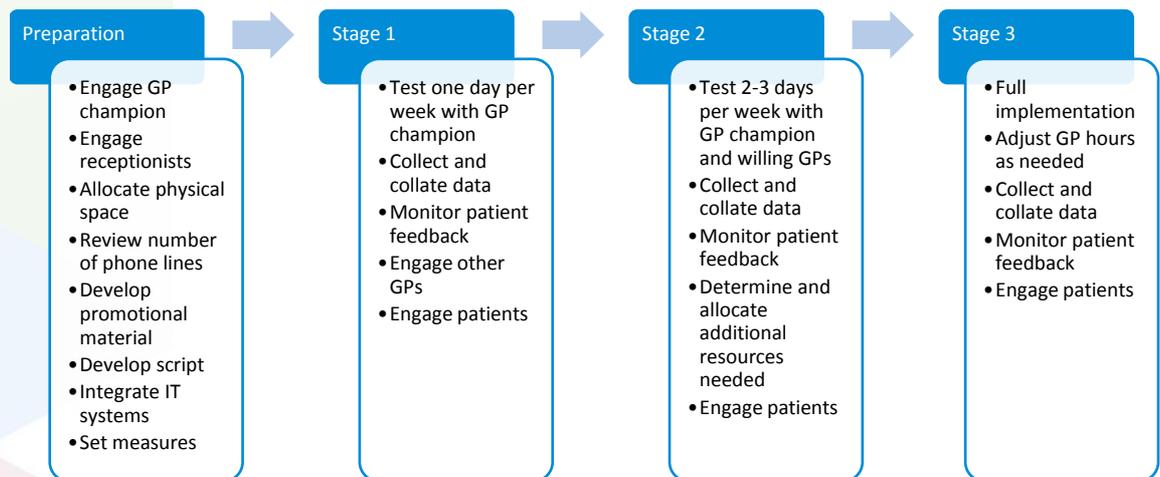
### **How should we integrate it with our IT systems?**

You will need to create or consider purchasing a doctor triage tool (available for MedTechPMS). Some PHOs may cover the cost of the triage tool, so talk to your practice advisors.

## What is the implementation timeline?

Start with a small test period and work with willing staff to develop the GP triage service. It's helpful to appoint a GP champion to lead the test period. Bring others on board by showing them the benefits the service is delivering.

The stages as outlined below have not been allocated timeframes as this will depend on the individual practice resources available. Ideally, stage 1 should take one month to complete, stage 2 should be 2-3 months and stage 3 should be around the 4-month mark.



## What should we measure?

The IT tools may capture some information for you, but you can also consider capturing the below:

Query	Source of data	Where it goes
Total number of incoming calls between 8-9am	Telephone system	Spreadsheet
Total number of calls on medical triage template	Practice management system query	Spreadsheet
Waiting time median	Practice management system query	Spreadsheet
Outcome of call	<ul style="list-style-type: none"> <li>• Practice management system query</li> <li>• Triage codes (manual count)</li> </ul>	Spreadsheet
Number of appointments available when open	Practice management system (manual count)	Spreadsheet
Number of unused appointments at end of day	Practice management system (manual count)	Spreadsheet
Outgoing call information by GP	Telephone system	Shared drive
Total number of GP hours worked on triage	Triage timesheet	
No notes entered	Day book – needs to be run as soon as triage has finished	Task allocated to triage GP
Patient satisfaction	<ul style="list-style-type: none"> <li>• Follow-up phone call and/or survey</li> <li>• Complaints (e.g. about being unable to get through on the phone)</li> </ul>	Spreadsheet
Dropped call rate	Telephone system	Spreadsheet
% request resolved in triage	Number of request resolved without needing an appointment divided by the total number of requests *100	

### **What else do we need to know?**

- It's helpful to provide training to ensure GPs know the difference between triage and consultation.
- Clinical safety is paramount. Make it clear to GPs that triage isn't about trying to stop patients from being seen. If a GP has concerns during triage, the patient should be seen. Similarly, patients should be told to contact the practice again if they continue to feel unwell.
- GP triage should only be provided for enrolled patients with notes available.
- Triage is purely to decide how the patient needs to be managed. If you are unable to determine the needs of the patient in a few minutes, then book them in for an appointment (virtual or face to face).
- The triage service is offered for free, however you can charge for the outcome, e.g. if a prescription, appointment or off work certificate is required. Ensure there is consistent messaging from the team, that there may be a charge associated with the outcome.

### **How do I charge patients if they don't come into the practice?**

- There are several ways to manage this, and it will depend on the characteristics of the practice as to which will work best
- Email an invoice through (ensure reception confirms the email address)
- Some patients portals are working on the ability to pay online through the portal

APPENDIX

# Triage script

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<b>Patient:</b>	I would like an appointment.
<b>Receptionist:</b>	When do you want the appointment for?
<b>Patient:</b>	Today, please.
<b>Receptionist:</b>	Is it due to you being unwell or for some other reason?
<b>Patient:</b>	Unwell.
<b>Receptionist:</b>	Do you feel that you need to be seen today?
<b>Patient:</b>	Yes.
<b>Receptionist:</b>	We currently have a high demand on our appointments. I can get our phone doctor to call you back to see how he/she can help you today.  <i>Advise that he/she will call back in around [X] minutes (alter as the template indicates).</i> <ul style="list-style-type: none"><li>• <i>Put on doctor triage template</i></li><li>• <i>Follow PMS process for notifying patient contact/arrival</i></li><li>• <i>Write the number that the patient needs to be called back on in the note line</i></li></ul> <i>If the patient indicates that they can be seen another day then book as appropriate.</i>  <i>If the patient indicates that it could be something else, e.g. RX, lab results/form, referral or just advice, then put on the nurse template. Please put any calls added to the nurse template in the urgent 8-9am slot so they can be audited easily.</i>