Teletriage: The Good, the Bad, and the Ugly...

How does your agency rate?

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Today’s Objectives

After today’s session, participants will:
1. Understand the components of teletriage
2. Assess your organization’s current teletriage practices
3. Plan and implement effective teletriage strategies

The Acute Care Hospitalization Puzzle
**Best Practice: Teletriage**

**Definition**
Unscheduled, appropriate disposition of health-related problems by skilled clinicians via telephone or electronic information processing technologies (telemonitors) when initiated by the patient/caregiver.

*Home Telehealth Reference 2005*

The teletriage $ million question...

Your aunt is a patient at your home health agency and calls the agency with complaints of increased weight and SOB.

- Are you confident that all staff know your teletriage protocols?
- Would each staff member handle this situation in the same fashion?
Home Telehealth Reference 2006/2007

www.medqic.org

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Teletriage: The “Ugly” Scenario

IS THIS YOUR AGENCY???

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Building Your Teletriage Program...

- Organizational Considerations
- Orientation/Staff Education
- Ongoing Evaluation
- Outcome Enhancement: ACH
- Decision Support Tools
Organizational Considerations

- Initiated by the patient or caregiver
- Teletriage is not optional
- It occurs daily as part of normal operations
- The organization and the professionals within the organization determine how well teletriage is accomplished

Evaluating Your HHA

- Are calls handled in a similar manner by all clinicians?
- Do clinicians have resources available to them to intervene appropriately?
- Does your organization periodically assess your teletriage processes?

Value of Teletriage

- A mechanism to increase the value of services to patients, caregivers and referral sources
- Illustrated by the increased access to skilled empathetic and effective HHA services
- Effective teletriage promotes the appropriate use of services and resources and supports the reduction of avoidable hospitalizations
How is my agency currently ensuring confidentiality relating to teletriage?

The designated patient contact(s) is the person(s) identified by the patient as being responsible for personal health information shared by health care providers.

CONFIDENTIALITY

Every agency should establish a policy to describe how patient contact information is obtained.

Every agency should establish a policy providing guidelines to ensure patient confidentiality is maintained per the Health Insurance Portability and Accountability Act (HIPAA), enacted by the Congress of the United States of America in 1996.

Routing of Calls/Contacts

☑ Is there a potential for calls to be lost?
☑ Are calls answered promptly?
☑ Are calls transferred to a clinician quickly and efficiently?
☑ Is there a way to track outcomes for calls/contacts?
☑ Is the teletriage process supporting the agency mission and goals?
Teletriage Organizational Evaluation

How is my agency currently performing teletriage?

Orientation/Staff Education
- Teletriage Skills Assessment
  - Rates the skills of the staff performing triage
- Teletriage Orientation Checklist
  - Systematic review for new clinical staff
- Ongoing Teletriage Competencies
  - Ensures that staff are adequately trained and are able to apply training to real-life situations

Ongoing Evaluation

Teletriage Competency Program
Teletriage Program Evaluation
Ongoing Evaluation
Sample Competency Methods:

- Self-Assessment
- Peer Review Case Studies
- Exemplars
- Post-Tests
- Observation of Daily Practice
- Discussion Groups
- QI Monitoring
- Presentations
- Return Demonstration
- Mock Events

Ongoing Evaluation
Teletriage Program Evaluation

- Teletriage Encounter Record Review Form
  - Evaluates teletriage encounters
- Call Log
  - Tracks incoming calls/data for ongoing review
- Patient Satisfaction Survey
  - Incorporated into routine patient satisfaction surveys

Outcome Enhancement:
Acute Care Hospitalization
Teletriage & ACH

Hospitalization Risk Assessment

Teletriage nurses should be aware of high-risk patients and be prepared to intervene and avoid hospitalizations.

Teletriage & ACH

Emergency Contact Plan

Plans should be updated after any contacts by the patient/caregiver to the HHA with questions or problems.

Teletriage & ACH

Patient Self-Care Management

Patients requiring teletriage should be the #1 candidates for self-care management instructions!
Decision Support Tools

- Evidence-based protocols
- Assist with:
  - Teletriage assessments
  - Decision-making
  - Documentation
- Help reduce the chance of overlooking essential information
- Standardize approaches to lessen ambiguity in decision-making

Using Decisions Support in Your HHA

- Educate clinicians
- Enhance critical thinking
- Advise and guide the nurse with assessments
- Organize the call
- Consider extraneous factors
- Support the nursing decision
- Evaluate teletriage encounters
Decision Support Tools

Do Not Replace Nursing Judgment!!!

Use Decision Support Tools with:
- Flexibility
- Nursing Judgment
- Critical Thinking Skills
- Intuition

STOP!!!

Remember... Any rule that applies to nursing applies to teletriage!

Decision Support
Risk Level: Moderate-to-High

<table>
<thead>
<tr>
<th>Assessment</th>
<th>Risk Level</th>
<th>Interventions</th>
<th>Evaluation/Follow-up</th>
</tr>
</thead>
<tbody>
<tr>
<td>Likely Urgent: Emergency Care Likely</td>
<td>Moderate-to-High</td>
<td>Teletriage clinician provides instruction and support to maintain the patient until the physician can be reached.</td>
<td>May result in emergent care at the Physician Office or Emergency Department.</td>
</tr>
<tr>
<td>Urgent</td>
<td>High</td>
<td>Teletriage clinician instructs patient/caretaker to immediately seek 911 transport.</td>
<td></td>
</tr>
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High Urgent

- 911 paramedic transport necessary
- Patient condition may be life threatening
- May result in an onsite visit that day
- May result in emergent care at the physician office or emergency department
- Teletriage clinician provides instruction and support to maintain the patient until the physician is reached.

Moderate-to-High

Likely Urgent: Emergent Care Likely

- Minimally, an immediate contact to physician is necessary
- Consider 911 paramedic transport

Moderate

- Patient condition requires the skills of the homecare provider onsite that day either for assessment or for hands-on interventions

Low-to-Moderate

Assessment

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<td>Potentially Urgent: Nurse Should Fully Assess</td>
<td>Low-to-Moderate</td>
<td>Teletriage clinician provides instruction and support to maintain the patient until the nurse arrives onsite.</td>
<td>May result in physician contact.</td>
</tr>
<tr>
<td>Urgent</td>
<td>Low-to-Moderate</td>
<td>Teletriage clinician instructs patient/caretaker to immediately seek 911 transport.</td>
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Low Urgent

- Patient condition requires the skills of the homecare provider onsite that day either for assessment or for hands-on interventions
Risk Level: Low

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<td>Non-Urgent, Interventions</td>
<td>Low</td>
<td>Onsite visit scheduled for the next day</td>
<td>Teletriage clinician provides instruction; care is coordinated with other agency staff</td>
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<tr>
<td>Non-Urgent, Routine Care</td>
<td>Low</td>
<td>Onsite visit scheduled for the next day</td>
<td>Teletriage clinician provides instruction; care is coordinated with other agency staff</td>
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Symptom Specific (References/Documentation Tools)

- Adverse Drug Reaction
- Anxiety
- Bleeding
- Breathing Difficulty
- Hyperglycemia
- Hypoglycemia
- Confusion
- Constipation
- Depressive Symptoms
  - COPD
  - Diabetes
  - Heart Failure
Teletriage: The “Good” Scenario

This CAN be your agency!!!

Teletriage Implementation Tool

HOMEWORK!!!

QUESTIONS???