

Triage RN Workflows & Resources

MEDICAL RECORD

Family information
Patient name: _____
Birth date: _____
Parent/guardian name: _____ Work phone: _____

In case of emergency, please contact
Please indicate full details of persons who can be called in case of emergency:
Name: _____ Work phone: _____
Relationship: _____

Family doctor
Address: _____
Advertisement: _____

Medical insurance information
Plan number: _____
Name of insurer: _____
Social security ID number: _____

Medical limitations and other allergies
Please indicate relevant information: _____

Treatment permission

Quick Links:

- [Elements of a Triage](#)
- [Using the Clear Triage Tool](#)
- [Triage RN Call Determinations](#)
- [Triage RN Call Escalation](#)
- [Administrative Call Flow](#)
- [Triage RN Management Call Flow](#)
- [Triage RN Tele-UV Call Flow](#)
- [Face-to-Face Visit Request Call Flow](#)
- [Receiving Triage Emails Through InContact](#)

Training Tip:

To view a list of visit types and the procedures necessary to schedule them, please see the “[Managing Appointments](#)” section of the Administrative Process Manual.

Training Tip:

The IT Service Desk does not resolve access issues to the NENA 911 database. Instead, you must try the “Forgot Password” option upon login or contact the NENA 911 Admin for support.

Training Tip:

Whenever posting a UEUV in Teams, send an accompanying email to:

LM1UEhandoff@Landmarkhealth.org

Elements of a Triage

Appropriate triage of a patient allows the provider a “snapshot” of what might be going on with the patient and optimizes patient outcomes.

- It is expected the following elements will be included in each patient triage call:
- Focused review of the chart: alerts, summary, recent encounters, relevant items on problem list and meds
- Use of Hash Keys for documentation
- Focused review of systems
- Pertinent medical history
- SBAR
- Documentation by Notes in Ubiquity is required after every call

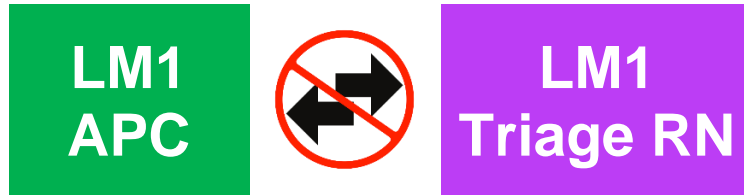
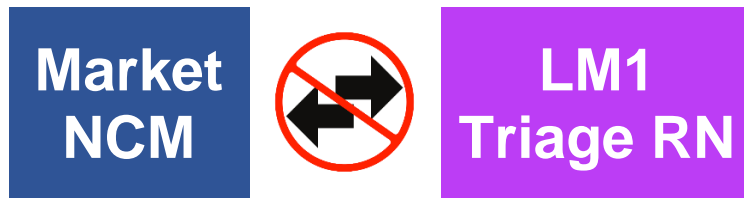
Situation	Background	Assessment / Recommendation
<ul style="list-style-type: none"> • CC • History • Treatment Attempts 	<ul style="list-style-type: none"> • Drivers of disease • Past medical History • Operational reasons <ul style="list-style-type: none"> ○ Newly Engaged ○ Intensity > 1 ○ Recent PDV 	<ul style="list-style-type: none"> • Needs • Needs a visit for • Recommending ED • Need to transfer the call for you to discuss

- Consider differentials (avoid including them in your documentation)
- Guides assessment
- Real time documentation
- Consider use of mnemonics

Nursing Mnemonics for Pain & Symptoms

OLDCARTS	SOCRATES	PQRST
<ul style="list-style-type: none"> • Onset • Location • Duration • Character • Alleviating & aggravating • Radiation • Time • Severity 	<ul style="list-style-type: none"> • Site • Onset • Character • Radiation • Associated Symptoms • Time / Duration • Exacerbating & Relieving • Severity 	<ul style="list-style-type: none"> • Provoking • Quality • Region & Radiation • Severity • Time

Only Call Escalation Call Transfers:



**Unless the LM1 APC is not licensed in that particular market.*



Using the Clear Triage Tool

 Link – Clear Triage Login

<https://app.cleartriage.com/app/login>

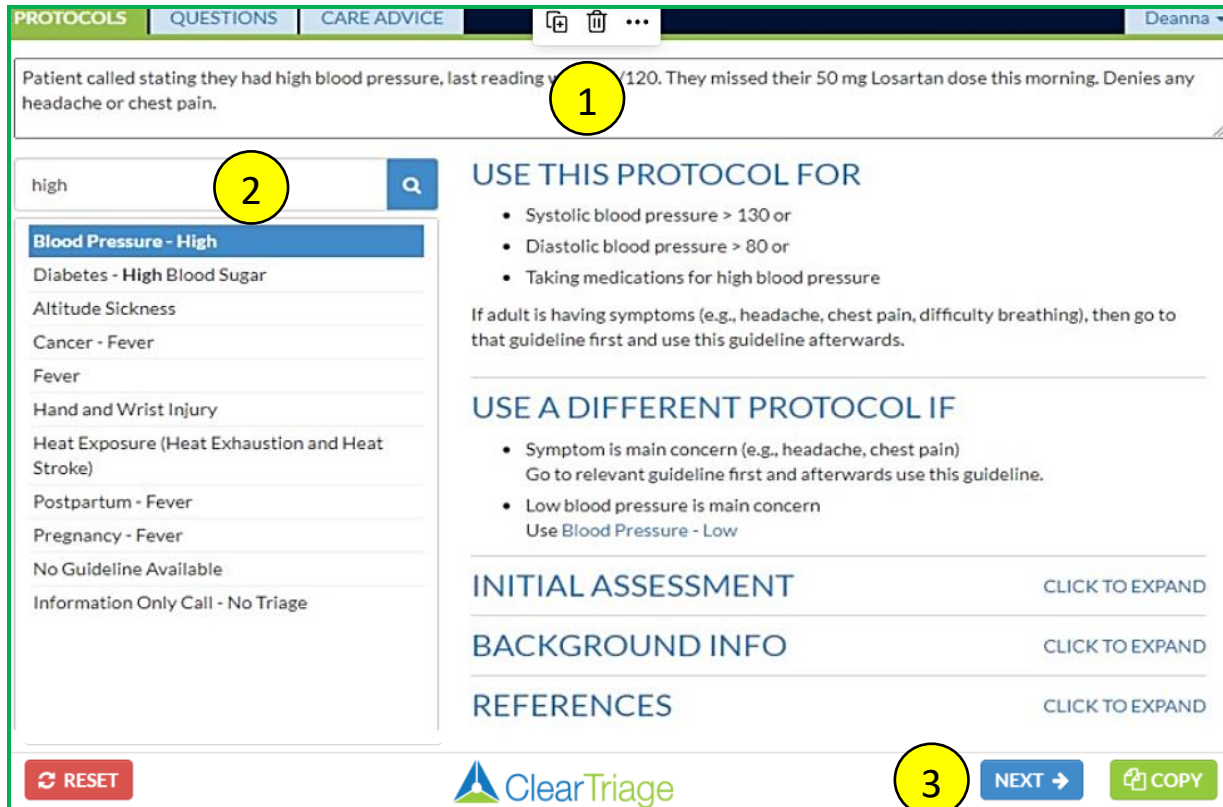
 Link – Clear Triage Video

[Clear Triage Update 6-30-23 with recording \(1\) \(2\).mp4](#)

 Link – Clear Triage Policy Attestation

[Clear Triage Policy Attestation Form](#)

Portal Navigation:



The screenshot shows the Clear Triage portal interface. At the top, there are tabs for PROTOCOLS, QUESTIONS, and CARE ADVICE. A user profile for 'Deanna' is visible in the top right. The main text area contains a patient history entry: 'Patient called stating they had high blood pressure, last reading y /120. They missed their 50 mg Losartan dose this morning. Denies any headache or chest pain.' A yellow circle with the number '1' is placed over this text. Below the text is a search bar with the word 'high' entered. A yellow circle with the number '2' is placed over the search bar. To the left of the search bar is a list of protocols, with 'Blood Pressure - High' selected. To the right of the search bar, under the heading 'USE THIS PROTOCOL FOR', are three bullet points: 'Systolic blood pressure > 130 or', 'Diastolic blood pressure > 80 or', and 'Taking medications for high blood pressure'. Below this is a paragraph: 'If adult is having symptoms (e.g., headache, chest pain, difficulty breathing), then go to that guideline first and use this guideline afterwards.' Further down, under the heading 'USE A DIFFERENT PROTOCOL IF', are two bullet points: 'Symptom is main concern (e.g., headache, chest pain) Go to relevant guideline first and afterwards use this guideline.' and 'Low blood pressure is main concern Use Blood Pressure - Low'. At the bottom, there are three expandable sections: 'INITIAL ASSESSMENT', 'BACKGROUND INFO', and 'REFERENCES', each with a 'CLICK TO EXPAND' link. At the bottom left is a 'RESET' button. At the bottom center is the 'ClearTriage' logo. At the bottom right, there is a yellow circle with the number '3' next to a 'NEXT' button with a right arrow, and a 'COPY' button with a document icon.

1. Document the HPI in the text box at the top of the window.
2. Use the search bar on the left to locate the chief complaint.
3. Select the appropriate complaint from the results and click “Next.”

Triage Dispositions:

Once the HPI information has been entered and the chief complaint is selected, clicking “Next” will take the user to the “Questions” tab to complete a disposition.

Below is a list of color-coded dispositions specific to operations at Landmark First:

Call 911 NOW (Notify escalation afterwards)

Go to ED / UC

Urgent Escalate to Clinician

Non-Urgent Escalate to Clinician

Dispatch F2F (UE or market)

Ubiquity Note

Refer to OB

HHC

Refer to Hospice

Attention – Clear Triage Use

Clear Triage is a tool and does not replace critical clinical thinking.

Call 911 NOW (Notify escalation afterwards)

1. Triage RN will use the NENA 911 database to locate the emergency contact number for the patient's area.
2. The Triage RN will start a conference call between Landmark First, the patient or caregiver, and the 911 dispatcher.
3. The Triage RN shall identify themselves as a Registered Nurse with Landmark First on the line with a sick patient.
4. The Triage RN will allow the 911 dispatcher to talk directly to the patient, or if the patient is unresponsive, provide necessary information to the 911 dispatcher.
5. The Triage RN will NOT disconnect the conference call until help arrives, even if the 911 dispatcher disconnects from the call.
6. If the patient refuses a 911 call, the Triage RN should immediately escalate the call to an advanced clinician.

Example – Clear Triage Call 911 Disposition

Call 911 NOW	
<input type="checkbox"/> Difficult to awaken or acting confused (e.g., disoriented, slurred speech)	
<input type="checkbox"/> SEVERE difficulty breathing (e.g., struggling for each breath, speaks in single words)	
<input type="checkbox"/> [1] Weakness of the face, arm or leg on one side of the body AND [2] new-onset	
<input type="checkbox"/> [1] Numbness (i.e., loss of sensation) of the face, arm or leg on one side of the body AND [2] new-onset	
<input type="checkbox"/> [1] Chest pain lasts > 5 minutes AND [2] history of heart disease (i.e., heart attack, bypass surgery, angina, angioplasty, CHF)	
<input type="checkbox"/> [1] Chest pain AND [2] took nitroglycerin AND [3] pain was not relieved	
<input type="checkbox"/> Sounds like a life-threatening emergency to the triager	
<input type="checkbox"/> [1] Systolic BP >= 160 OR Diastolic >= 100 AND [2] cardiac (e.g., breathing difficulty, chest pain) or neurologic symptoms (e.g., new-onset blurred or double vision, unsteady gait)	

Go to ED / UC

1. The Triage RN will recommend that the patient go to an emergency department or urgent care facility to address their immediate concerns.
2. The Triage RN may assist the patient in locating the nearest emergency department or urgent care facility.
3. If the patient refuses to go to the emergency department or urgent care facility, the Triage RN will immediately escalate the call to an advanced clinician.
4. If the patient does not have transportation to the emergency department or urgent care facility, the Triage RN will offer to call 911 and arrange transportation by ambulance.

Urgent Escalate to Clinician

1. The Triage RN should immediately escalate the call to an advanced clinician.
 - If unavailable, attempt a warm transfer to the on-call provider.
2. If no advanced clinician or on-call provider is available, the Triage RN should direct the patient to the emergency department or urgent care.

Example – Clear Triage Urgent Escalate to Clinician Disposition

Urgent Escalate to Clinician - LM1

☒ [1] Pain lasts > 10 minutes AND [2] age > 50

i

i. The Triage RN should immediately escalate the call to an advanced clinician. LM1 APC if available, if NO LM1 APC escalate to market on call provider

ii. If no advanced clinicians are available, the patient should be directed to the emergency department or urgent care.

☐ [1] Pain lasts > 10 minutes AND [2] age > 40 AND [3] associated chest, arm, neck, upper back or jaw pain

i

☐ [1] Pain lasts > 10 minutes AND [2] age > 35 AND [3] at least one cardiac risk factor (e.g., diabetes, high cholesterol, hypertension, obesity, smoker or strong family history of heart disease)

i


☐ [1] Pain lasts > 10 minutes AND [2] history of heart disease (i.e., heart attack, bypass surgery, angina, angioplasty, CHF; not just a heart murmur)

i

☐ [1] Pain lasts > 10 minutes AND [2] difficulty breathing

i

↺ RESET



← PREV

NEXT →

COPY

Non-Urgent Escalate to Clinician

These calls require advanced clinician involvement but are not as time sensitive as urgent calls.



7:00 AM – 11:00 PM (Local Time)

1. The call should be escalated to an advanced clinician. If an APC is not immediately available, the call should be sent as an email triage.

11:00 PM – 7:00 AM (Local Time)

1. The call should be escalated to a working LM1 APC.
2. If there is no LM1 APC available, the Triage RN should email that LM1 APC with the patient's information and concern.
 - Tag the LM1 APC in Teams.
3. If there are no LM1 APCs currently working who are licensed in the patient's market, the Triage RN will send an email to LM1RTriage@landmarkhealth.org for next-day follow-up.
4. The patient should be instructed to call back if their condition changes or worsens. They should be further informed that a clinician will contact them in the morning and will arrange further care at that time.

Example – Clear Triage Non-Urgent Escalate to Clinician Disposition

Non-Urgent Escalate to Clinician - LM1	
<input type="checkbox"/> Systolic BP >= 180 OR Diastolic >= 110	
<input type="checkbox"/> Ran out of BP medications	

Dispatch F2F (UE or market)

These calls are appropriate for a Face-to-Face visit without additional triaging.

This call flow changes based on whether a market has a UE program available.

NEVER PROMISE A VISIT

If the Market has a UE AVAILABLE:

1. Schedule the UE in Ubiquity.
2. Post the UV request in the applicable MS Teams market UE channel.
 - Tag Dispatch, the market page, and the UE.
 - If the visit is scheduled to take place the next day, send an email to: LM1UEhandoff@landmarkhealth.org.
3. Dispatch will assign an LM1 APC or market coverage to provide oversight based on the UE's ETA.

If the Market has NO UE AVAILABLE or NO UE PROGRAM

1. Ask the patient to hold, if they are willing, to be transferred to an on-call provider.
 - If they are unwilling to hold or the on call provider is not available to speak, then the on-call provider will call patient back during normal market operating business hours between 8:30 AM – 5:00 PM:
 - Post the Urgent Visit request in the market's Urgent Visit MS Teams channel.
2. On days that the market has no operating hours, and if between the hours of 7:00 AM and 11:00 PM, call the on-call Provider to discuss the case.
 - It is then the on-call provider's job to reach out to the patient and discuss next steps.
3. If between 11:00 PM – 7:00 AM Local Market Time:
 - Send an email to LM1RTriage@landmarkhealth.org.
 - The patient will be contacted during operating hours, or when a provider becomes available.
 - Visits will be scheduled as needed.

Example – Clear Triage Urgent Escalate to Clinician Disposition

Dispatch F2F (UE or Market) - LM1

- ☐ [1] Taking BP medications AND [2] feels is having side effects (e.g., impotence, cough, dizzy upon standing) ⓘ
- ☐ Wants doctor to measure BP

Ubiquity Note

This disposition indicates a call that can be handled, from start to finish, by a LM1 Triage RN. Many of these calls are requests for patient education or updates for their care team.

1. The Triage RN will provide education, as needed, based on the Clear Triage education guidance and their own skill set.
2. Include any education provided or updates for the Care Team in a Ubiquity note.

Example – Clear Triage Urgent Escalate to Clinician Disposition

Ubiquity Note - LM1	
<input type="checkbox"/>	Systolic BP between 120-129 with Diastolic < 80 i
<input type="checkbox"/>	Healthy diet, questions about

Refer to OB

Occasionally, Landmark will have patients that are pregnant. When this occurs, the “Refer to OB” disposition may be shown.

1. If the patient has an established OB, advise them to call their OB for further assistance. Record the OB’s name and contact information in your Ubiquity note, if known.
2. If the patient does not have an OB, transfer the patient to the appropriate escalated clinician following the “Urgent Escalate to Clinician” process.

Example – Clear Triage Urgent Escalate to Clinician Disposition

Refer to OB - LM1	
<input type="checkbox"/>	[1] Pregnant 20 or more weeks (or postpartum < 6 weeks) AND [2] new hand or face swelling i
<input type="checkbox"/>	[1] Pregnant 20 or more weeks (or postpartum < 6 weeks) AND [2] Systolic BP >= 160 OR Diastolic >= 110 i
<input type="checkbox"/>	[1] Pregnant 20 or more weeks (or postpartum < 6 weeks) AND [2] Systolic BP >= 140 OR Diastolic >= 90 i
<input type="checkbox"/>	[1] Systolic BP >= 130 OR Diastolic >= 80 AND [2] pregnant i

HHC

This disposition is for calls with complaints regarding Home Health Care issues.

1. If the patient has an established Home Health Care agency, they should be instructed to call the agency for further assistance.
 - Please record the name of the company, if known, in your Ubiquity note.
2. If the patient does not have a Home Health Care agency established, follow the “Non-Urgent Escalate to Clinician” process.

Refer to Hospice

This disposition should not be used often:

- Patients enrolled in Hospice are disengaged from Landmark services.
 - As a result, patients who contact us with questions or concerns should be referred back to their hospice agency.
 - If there is any doubt concerning a patient’s eligibility or engagement in Landmark services, transfer the patient using the “Urgent Escalate to Clinician” call flow.

Care Advice:

The Care Advice tab includes instructions and handouts to be given to the patient and/or caregiver.

- If you select handouts the RN will have the option to send them via email.

The screenshot shows the 'CARE ADVICE' tab selected in a software interface. At the top, there are tabs for 'PROTOCOLS', 'QUESTIONS', and 'CARE ADVICE'. The user's name 'Deanna' is visible in the top right corner. Below the tabs, a text box contains the following information: 'Patient called stating they had high blood pressure, last reading was 186/120. They missed their 50 mg Losartan dose this morning. Denies any headache or chest pain.' Below this, the 'Protocol: Blood Pressure - High' is displayed. There are two buttons: 'HOME CARE' (with a house icon) and 'HANDOUTS (2)' (with an envelope icon). To the right of these buttons is an 'EXPAND ALL' link. Below the buttons, there is a list of handouts, each with a checkbox and a dropdown arrow. The first handout, 'Note to Triager - Missed Medication', is selected with a checked checkbox. Below it are three other handouts: 'Missed Dose of Blood Pressure Medication', 'Hypertension Medications', and 'Reasons To Call Back', all with unchecked checkboxes. At the bottom, there are two more checkboxes: 'Weakness or numbness of the face, arm or leg on one side of the body occurs' and 'Difficulty walking, difficulty talking, or severe headache occurs', both of which are unchecked.

HOME CARE HANDOUTS (2) EXPAND ALL

☒ Note to Triager - Missed Medication

☐ You should schedule a follow-up in 1 to 2 hours, after patient takes his or her missed dose of blood pressure medication.

☐ Missed Dose of Blood Pressure Medication

☐ Hypertension Medications

☒ Reasons To Call Back

☒ Weakness or numbness of the face, arm or leg on one side of the body occurs

☒ Difficulty walking, difficulty talking, or severe headache occurs

☒ Chest pain or difficulty breathing occurs

☒ You become worse.

RESET ClearTriage PREVIOUS COPY

Documenting with Clear Triage:

1. Click the “Copy” button in the lower-right side of the window.
2. Paste your Clear Triage Note below the LM1 Hashtag.

Documentation Guidelines:

- Use the Clear Triage system primarily to document during the call.
- After you have completed the call, use the “Copy” button within the Clear Triage system to copy any information you noted during the call.
- Paste your Clear Triage documentation into a Ubiquity note created in the HPI section.
- Complete the remainder of Ubiquity documentation according to existing practice.

As part of the Quality Assurance processes at Landmark First, charts will be randomly selected for audit to ensure compliance with policy.

- Please note that, as company policies are updated, or if greater compliance guidelines change, the quality assurance process may be updated.

Downtime:

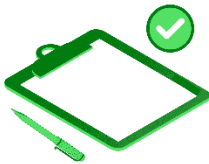
When Clear Triage is not available due to system issues, the Triage RN is expected to USE THEIR BEST MEDICAL JUDGEMENT and LM1 hashtag to guide the conversation and reach out to an LM1APC or physician for support.

- The Triage RN should err on the side of escalating patient complaints to an advanced clinician when able to refer a higher level of care.
- Documentation of the call should specifically note that Clear Triage was unavailable due to system issues.
- When Clear Triage becomes unavailable, the Triage RN MUST notify the available Lead Supervisor of the downtime.
- The Lead Supervisor will notify the Clinical Leadership team if the outage is expected to last longer than two (2) hours.

Triage RN Call Determinations

1. Patient Verification

**Standard*



Actions:

- Verify the patient's identity with three (3) PHI data points:
 - Name
 - Date of birth
 - Visiting address

2. Determine Emergent Call

**Required*



Actions:

- Has the patient described or displayed any emergent symptoms?

3. Determine Landmark First Handling

**Required*



Actions:

- The Triage RN must determine the following:
 - Is this an acute CIC or chronic issue?
 - Is this IDT appropriate?

4. Determine Triage RN Handling

**Required*



Actions:

- Is the patient in need of medication review?
- Is the patient in need of a POC?

5. Determine Tele-UV Need

**Required*



Actions:

- Is this a minor complaint that does not require a face-to-face visit and can be managed telephonically by a LM1 APC?

6. Determine Face-To-Face Necessity

**Required*



Actions:

- Does the patient require a face-to-face visit with a provider or UE to assess and treat?

7. End-Of-Call Checklist

**Required*



Actions:

- Prior to hanging up with the patient:
 - Verify callback number & visit address.
 - Provide ETA for UEUVs

Triage RN Call Escalation

1. LM1 APC Warm Transfer

**Standard*



Actions:

- The LM1 Triage RN will immediately attempt a warm transfer of the patient or caregiver to an available LM1 APC.
- If there is no response to the attempted transfer, proceed to the next conditional step.

2. On-Call Provider Warm Transfer

**Conditional*



Actions:

- If no LM1 APC responds to the attempted warm transfer. Use Humanity to locate the Market on-call provider and attempt a transfer through InContact.
 - Market on-call providers will be listed as “Daytime Clinicians” during business hours and “#1 Providers” after hours.
- If there is no response to the attempted transfer, proceed to the next conditional step.

3. Emergency Department Referral

**Conditional*



Actions:

- If the Market on-call provider does not respond to your attempted warm transfer, refer the patient to their local emergency department.

4. Documentation

**Required*



Actions:

- Document and finalize your note in Ubiquity.
- Complete additional follow-up as needed.

Workflow for Verbal Handoff:

1. Triage the patient:
 - Triage RNs are required to use Clear Triage tool.
2. Gather as much information as you can, relative to the chief complaint (CC).
 - Confirm call back number and visit address.
 - Pre-visit screening questionnaires (COVID and flu).
3. If the patient is willing to hold, keep them on the line for warm transfer.
 - If not, advise someone will call them back with a plan and if they experience any emergent symptoms.
4. Place patient on hold if they are agreeable.
5. Call LM1 APC (RNs only) or the Market on-call provider (whoever is the next person in the call tree):
 - Introduce yourself, name, and title.
 - Inquire if they are available to speak to the patient.
6. If they are available, provide the patient ID and CC.
 - Provide SBAR
 - Give your recommendations:
 - ❖ Patient needs urgent management.
 - ❖ Appropriate for Tele-UV.
 - ❖ Needs a face-to-face visit.
7. Ask "would you like me transfer the call to you now or let patient know you will call back to discuss a plan of care?"
8. Send a follow-up email to the on-call provider, but only after a warm handoff or acknowledgement is confirmed over a private chat in Teams indicating their intention to contact the patient.

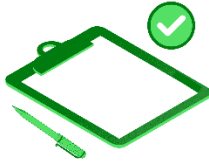
Attention – Verbal Order Exception

Triage RNs are not able to receive verbal orders, only handoff the patient for care

Administrative Call Flow

1. Patient Verification

**Standard*



Actions:

- Verify the patient's identity with three (3) PHI data points:
 - Name
 - Date of birth
 - Visiting address

2. Admin Request

**Suggested Dialogue*



Actions:

- Listen to the caller's request and ask for more information when needed.
- Follow the correct workflow according to the caller's request. Administrative requests may include:
 - Appointment date / time verifications.
 - Appointment cancellation / reschedule.
 - Noting messages for the care team.
 - Noting messages for the Outreach Team.
 - Updating demographic information.
 - Other administrative tasks as needed.
- Consult the [Administrative Workflows](#) section of the Administrative Process Manual for more information.

3. End the Call

**Suggested Dialogue*



Actions:

- Check to see if the caller needs any further assistance before ending the call.
- End the call.

4. Documentation

**Required*



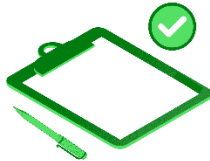
Actions:

- Document and finalize your note in Ubiquity.
- Complete additional follow-up as needed.

Triage RN Management Call Flow

1. Patient Verification

**Standard*



Actions:

- Verify the patient's identity with three (3) PHI data points:
 - Name
 - Date of birth
 - Visiting address

2. Determine Triage RN Handling

**Required*



Actions:

- Is the patient in need of medication review?
- Is the patient in need of a POC?

3. Provide Telephonic Advice

**Required*



Actions:

- The call will be managed by the Triage RN:
 - Review medication
 - POC review
 - Contact a community provider / agency as needed

4. Documentation

**Required*



Actions:

- Document and finalize your note in Ubiquity.
- Complete additional follow-up as needed.

Triage RN Tele-UV Request Call Flow

Completion of a telephonic visit is appropriate when it is determined during triage that the patient is medically stable, and a face-to-face visit will not change the outcome for the patient.

Things to Consider:

- For urgent or Tele-UV escalations, always transfer to an **LM1 APC FIRST**.
- Is the patient able to provide vitals (blood pressure, temperature, pulse, pulse oximetry).
 - Vitals can assist in confirming the patient is stable.
- Can pictures be sent? Secure email to send pics LM1pictures@landmarkhealth.org.
- Does patient have smartphone with video capabilities?
 - Determine prior to a warm handoff to the market on-call provider.

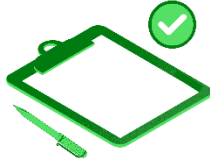
Attention – Risk of Depression

If patient is at increased risk for decompensation, a telephonic visit is NOT appropriate.

Examples – Complaints that MAY be appropriate for a Tele-UV

- Skin rash
- New onset nausea or diarrhea
- New onset sore throat & no other symptoms
- New onset constipation without abdominal pain or emesis
- New onset COVID-19 with mild symptoms.

LM1 APCs Complete a Telephonic UV ENCOUNTER with ANY treatment given including education.

Tele-UV Handoff Call Flow:**1. Patient Verification****Standard***Actions:**

- Verify the patient's identity with three (3) PHI data points:
 - Name
 - Date of birth
 - Visiting address

2. Determine Tele-UV Need**Required***Actions:**

- Is this a minor complaint that does not require a face-to-face visit and can be managed telephonically by a LM1 APC?

3. LM1 APC Warm Transfer**Required***Actions:**

- Use the InContact's MAX panel to attempt a warm transfer to a Landmark First APC:
 - Check in with the patient / caregiver at approximately two-minute intervals to avoid lengthy hold times.
 - When your call is answered by an APC, introduce yourself and provide the patient's ID number. The APC will then confirm the patient's name and DOB.
 - Complete the warm transfer.

Attention – Call Transfer Etiquette**DO NOT** engage in small talk during warm transfers.**4. Documentation****Required***Actions:**

- Document and finalize your note in Ubiquity.
- Complete additional follow-up as needed.

If NO LM1 APC Responds to an Attempted Warm Transfer:**Starting after #3 on the previous page:***4. Send to LM1 Triage Email****Standard***Actions:**

- Email call details to:
 - LM1RTriage@landmarkhealth.org
 - Request that it be assigned to an LM1 APC when one becomes available.

5. Tag LM1 Lead Supervisor**Required***Actions:**

- Open the “LM1 FULL” Teams Channel:
- Tag an active Lead Supervisor from this channel.

Documentation**Required***Actions:**

- Document and finalize your note in Ubiquity.
- Complete additional follow-up as needed.

Finding Available Lead Supervisors:

If you are having trouble finding an available Lead Supervisor, check the “LM1 Support” window from the InContact Dashboard for more information:

Example – Team Support in IC

Team Support (6)	
Agent Name	State
Betty Jackson	Available
Dawn Brown	Outbound
Elizabeth (Betsy) Grieve	Unavailable: Lunch
Eva Vega	Unavailable: LM1 Sup
Jolenne Sandoval	Available
Kayla Robinson	Available

Face-to-Face Visit Request Call Flow

Calls That Need Face-to-Face Visit Follow-Up:

These are visits that need to be done F2F by a market provider, not appropriate for UEUV.

- Non-engaged patient with an acute change in condition - UVIV1 needed.
- Multiple UVs overseen by LM1 in same EOC without market follow-up or only telephonic follow-up.
- A Post Discharge Visit (PDV) is needed if the chief complaint is the SAME as inpatient stay.
- Anticipated lengthy UV due to multiple issues being addressed.
- End of Life or goals of care discussion needed due to significant decline.
- Two-person visit required.
- Behavioral Health (BH) / Red flag in Alert section.
- Patient needs something outside of UE skills.
- Any case that involves assault or criminal behavior.
 - These cases should be referred to the ED.

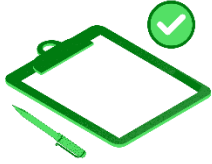
We are to triage these patients include "need market provider to complete the visit" in UV request handoff.

Attention – Reporting

All Landmark First Clinicians are MANDATORY reporters, even for non-Landmark elderly and children.

Examples – Complaints that need the attention of a Market Provider

- Non-engaged patient with an acute change in condition - UVIV1 needed
- Multiple UVs overseen by LM1 in same EOC, without market follow up or only telephonic follow up
- PDV (post discharge visit) needed if the chief complaint is the SAME as inpatient stay
- Anticipated lengthy UV due to multiple issues being addressed
- End of Life or goals of care discussion needed, significant decline
- 2-person visit required; BH (behavioral health)/Red flag in Alert section
- Patient needs something outside of UE skills.
- Any case that involves assault or criminal behavior, these cases should be referred to the ED.

Call Flow:**1. Patient Verification****Standard***Actions:**

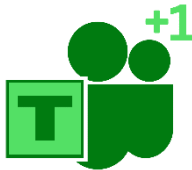
- Verify the patient's identity with three (3) PHI data points:
 - Name
 - Date of birth
 - Visiting address

2. Determine Face-To-Face Necessity**Required***Actions:**

- Does the patient require a face-to-face visit with a provider or UE to assess and treat?

Attention – Time Check

The UV / UEUV request procedure differs based on “Business Hours” and “After Hours” workflows. Check the LOCAL market time before submitting a request.

3. Post UV / UEUV Request in Teams**Business Hours***Actions:**

- DURING BUSINESS HOURS, post a UE / UEUV request in Teams.
- See below for the AFTER HOURS workflow.

4. Call the On-Call Provider**After Hours***Actions:**

- Contact the on-call provider listed in Humanity.
- If unavailable, contact these alternate providers in the following order:
 - Backup Physician
 - Backup Clinician
- If you attempted warm transfers are not answered, attempt to schedule UEUV in Teams, if available.

5. Documentation

**Required*



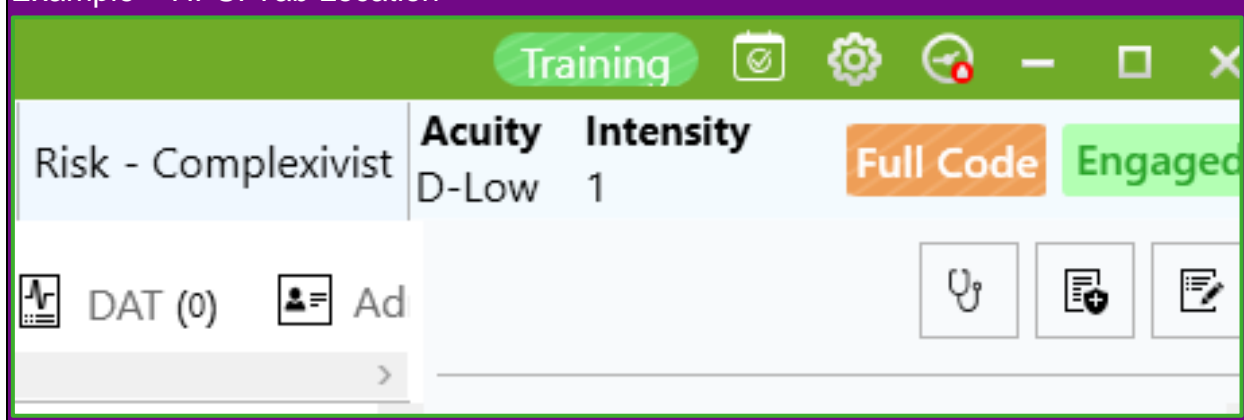
Actions:

- Document in Ubiquity.

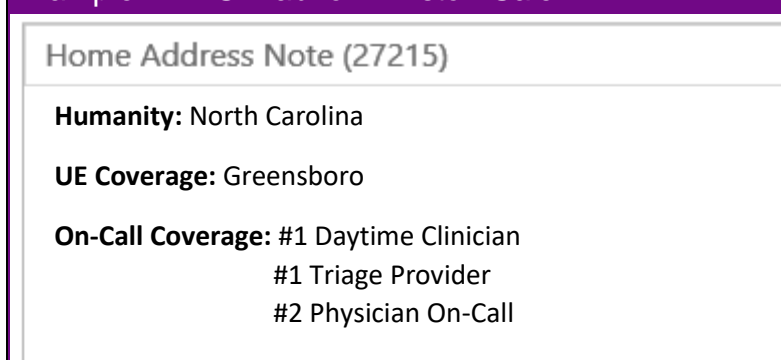
Attention – HPSI Tab in Ubiquity

The HPSI Tab, located in every patient's chart, can be used to view specific instructions regarding Humanity contact for on-call providers and UEUV Requests.

Example – HPSI Tab Location



Example – HPSI Tab for Winston-Salem



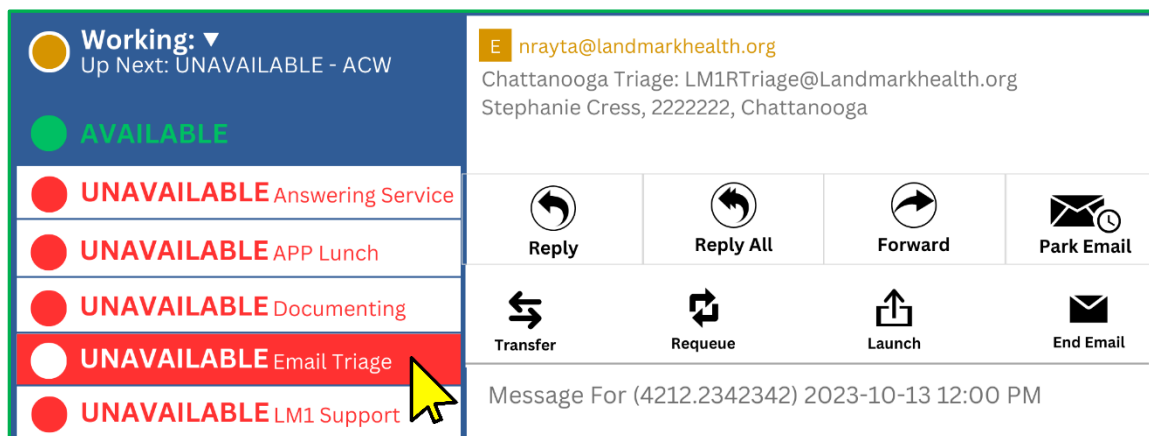
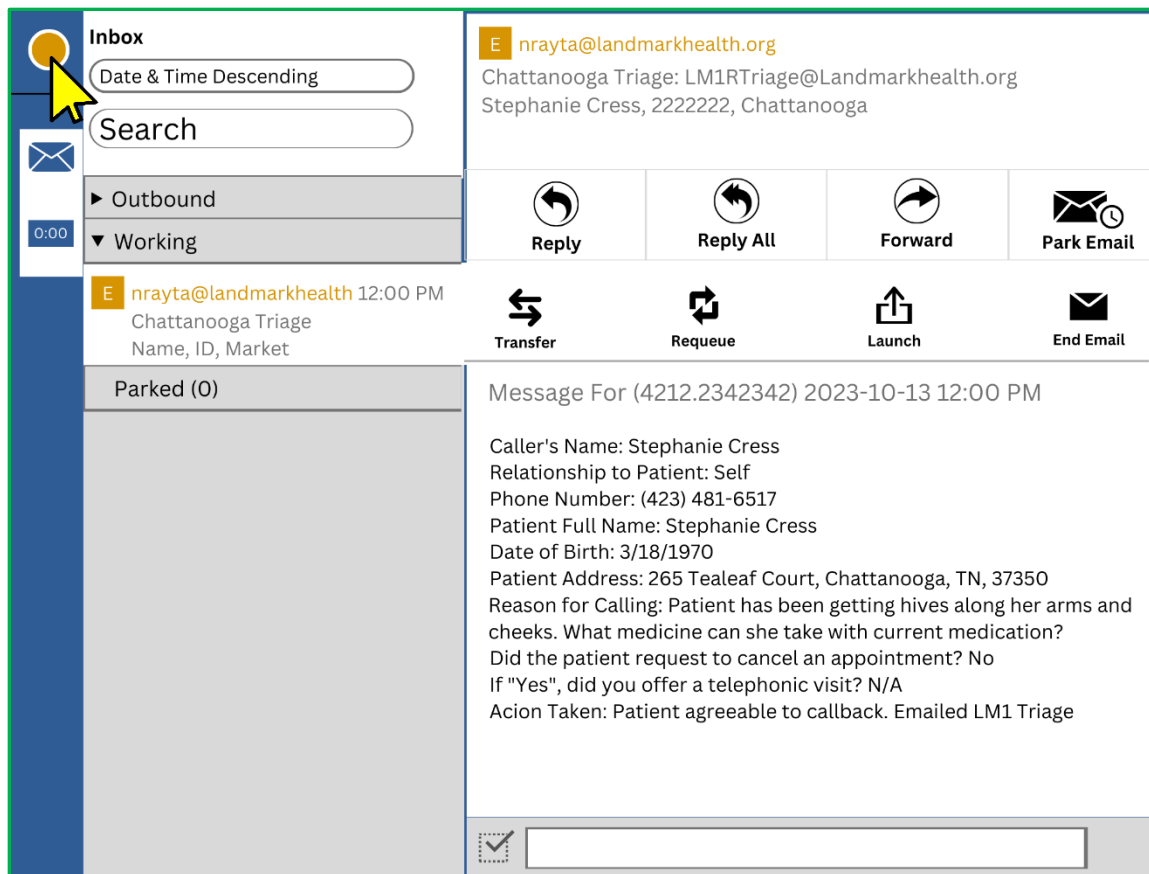
Training Tip:

If the patient needs the ER, or 911 contact, please follow the “Urgent Buzzwords” call flow located in the [Call Transfer Flow Process](#) section of the Administrative Process Manual.

Receiving Triage Emails Through InContact

1. Triage Emails are received via InContact's MAX Panel, as shown:

- Before proceeding to handle the Triage Email, you must first change your current status to "UNAVAILABLE – Email Triage".
- Start by selecting the orange dot in the upper-left corner of the window.



2. Park your email in MAX:

- You will need to call the patient / caregiver, but you will also need to keep the email visible to reference during the call. For this reason, it is necessary to “Park” the email.
- You will know when the email is parked when the “unpark” options appear in blue at the top of the window.

The screenshot shows the MAX email interface. On the left is a sidebar with a red circle icon, an 'Inbox' section with a 'Date & Time Descending' dropdown and a 'Search' bar, and a list of folders: 'Outbound' and 'Working' (selected). Below the folders is a status bar showing '0:00'. The main content area displays an email from 'nrayta@landmarkhealth.org' with the subject 'Chattanooga Triage: LM1RTriage@Landmarkhealth.org' and the body text 'Stephanie Cress, 2222222, Chattanooga'. The email is dated '12:00 PM'. Below the email header is a 'Parked (0)' section. To the right of the email is a toolbar with buttons: 'Reply', 'Reply All', 'Forward', 'Park Email' (highlighted with a yellow mouse cursor), 'Transfer', 'Requeue', 'Launch', and 'End Email'. The email body text is as follows:

Message For (4212.2342342) 2023-10-13 12:00 PM

Caller's Name: Stephanie Cress
 Relationship to Patient: Self
 Phone Number: (423) 481-6517
 Patient Full Name: Stephanie Cress
 Date of Birth: 3/18/1970
 Patient Address: 265 Tealeaf Court, Chattanooga, TN, 37350
 Reason for Calling: Patient has been getting hives along her arms and cheeks. What medicine can she take with current medication?
 Did the patient request to cancel an appointment? No
 If "Yes", did you offer a telephonic visit? N/A
 Acion Taken: Patient agreeable to callback. Emailed LM1 Triage

The screenshot shows the MAX email interface after the email has been parked. The 'Unpark Email' buttons are now visible at the top of the email content area. The buttons are 'Unpark Email (Move to your queue)' and 'Unpark Email (Work Now)'. The email header and body text are the same as in the previous screenshot. The toolbar buttons are also the same, but the 'Park Email' button is no longer highlighted. The email body text is as follows:

Message For (4212.2342342) 2023-10-13 12:00 PM

Caller's Name: Stephanie Cress
 Relationship to Patient: Self
 Phone Number: (423) 481-6517

3. Locate the Patient's chart in Ubiquity:

- Open the Patient Summary once found.

The screenshot shows the Ubiquity search interface. At the top, there are icons for various functions. Below them are search fields for First Name (Stephanie), Last Name (Cress), Date of Birth (3/18/1970), Phone Number, and Patient ID. There are also fields for Health Plan ID and Last Contact Date (From/To). A 'Search' button and a 'Clear' button are present. Below the search fields is a table of search results. The first result is for Stephanie Cress, born 3/18/1970, with phone number (423) 481-6517, patient ID 222222, engaged status, health plan ID M00001553243, and acuity D-Low 1. A yellow mouse cursor is pointing at the 'Patient Summary' link in the last column of the first row.

Name	Date of Birth	Primary Phone	Patient ID	Engaged Status	Health Plan ID	Metr	Acuity	Intensity	Last Contact Date	
Stephanie Cress	3/18/1970	(423) 481-6517	222222	Engaged	M00001553243	PN	D-Low	1		Patient Summary

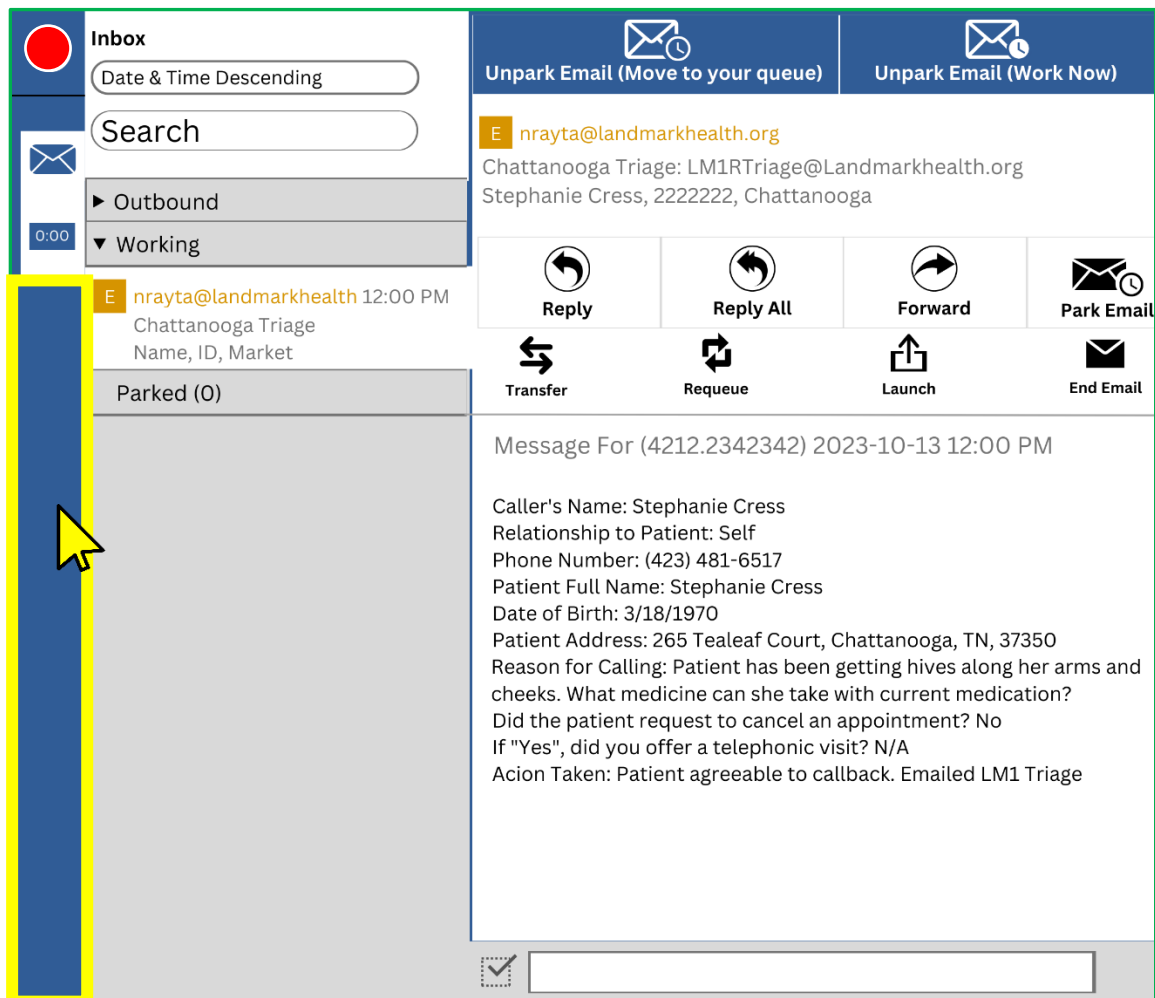
4. Review the Patient's chart:

- Check the Alerts, Notes, and Encounters listed in the chart:
- You can filter notes and encounters using the options on the left panel.
- A list of medications, allergies, and the patient's Care Team is located on the panel to the right.
- Patient Eligibility / Engagement status can be seen in the chart's heading.

The screenshot shows the patient chart for Stephanie Cress. The top header displays the patient's name, age (53 yrs.), date of birth (3/18/1970), gender (Female), and phone number ((423) 481-6517). It also shows the patient's status as 'Eligible' and 'Engaged'. The left sidebar contains navigation options: Clinical Summary, Demographics, Operational Summary, and Note. The main content area is divided into sections: Alert (Close BP gap next visit 7/26/22), Patient Notes, and Interdisciplinary Team Care Plan. The right sidebar contains sections for Allergies Details and Medications (amlodipine 5 mg tablet, atorvastatin 80 mg tablet, Centrum Silver 0.4 mg-300 mcg-250 mcg tablet, clopidogrel 75 mg tablet, DOK 100 mg capsule).

5. Call the Patient / Caregiver:

- Hover your mouse over the blue area of the MAX panel to the left side of the window.
- Select the “New” button.
 - Hovering your mouse over any other area of the window will cause the blue panel to retract.
- Enter the patient’s phone number indicated in the Triage Email without any dashes or spaces in the Address Book and select the “Call” button.
 - You will need to choose the “APP Patient Call” option in order to complete the outgoing call from MAX.
 - Remember to “Accept” the outgoing call in GoTo.
- Complete the call as appropriate.



UNAVAILABLE Email Triage

AGENT LOG - INACTIVE Connect

Email Inbox
Outbound
Working
Parked
1 Parked Email

Personal Queue
Your queue is empty.

Coming Up
You have no scheduled events today.

Call History

Agent Reports

Unpark Email (Move to your queue) **Unpark Email (Work Now)**

E nrayta@landmarkhealth.org
Chattanooga Triage: LM1RTriage@Landmarkhealth.org
Stephanie Cress, 2222222, Chattanooga

Reply **Reply All** **Forward** **Park Email**

Transfer **Requeue** **Launch** **End Email**

Message For (4212.2342342) 2023-10-13 12:00 PM

Caller's Name: Stephanie Cress
Relationship to Patient: Self
Phone Number: (423) 481-6517
Patient Full Name: Stephanie Cress
Date of Birth: 3/18/1970
Patient Address: 265 Tealeaf Court, Chattanooga, TN, 37350
Reason for Calling: Patient has been getting hives along her arms and cheeks. What medicine can she take with current medication?
Did the patient request to cancel an appointment? No
If "Yes", did you offer a telephonic visit? N/A
Action Taken: Patient agreeable to callback. Emailed LM1 Triage

Agent Reports

Call

Address Book

(423) 481-6517

(423) 481-6517
External
Call

Agents **Provider** **Skills**

Agent Reports

Reply **Reply All** **Forward** **Park Email**

Transfer **Requeue** **Launch** **End Email**

Message For (4212.2342342) 2023-10-13 12:00 PM

Caller's Name: Stephanie Cress
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Action Taken: Patient agreeable to callback. Emailed LM1 Triage

Agent Reports

Call

Address Book

Search: (423) 481-6517

(423) 481-6517
External

Call

Choose a Skill:

- APP Patient Call
- APP Provider Call

Agents

Providers

Skills

Message For (4212.2342342) 2023-10-13 12:00 PM

Caller's Name: Stephanie Cress
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6. Manage the Call:

Use the clinical call flows provided in the Reference Documents, as well as your best judgement, to properly manage the call. Additional support is offered in Teams and via InContact's "LM1 Support" list on the dashboard.

7. Complete Call Disposition:

- Set your Call Status to "Documenting".
- The "Documenting" status will be automatically shown once you complete your Disposition.
- Select the disposition that best matches your actions taken to resolve the caller's concern.

Unknown
(423) 481-6517
APP Patient Call

+ New Commitment

Disposition (required)

Search

- LM1 Clinical
- LM1 Telemedicine
- LM1 Admin

Notes

Unpark Email (Move to your queue) **Unpark Email (Work Now)**

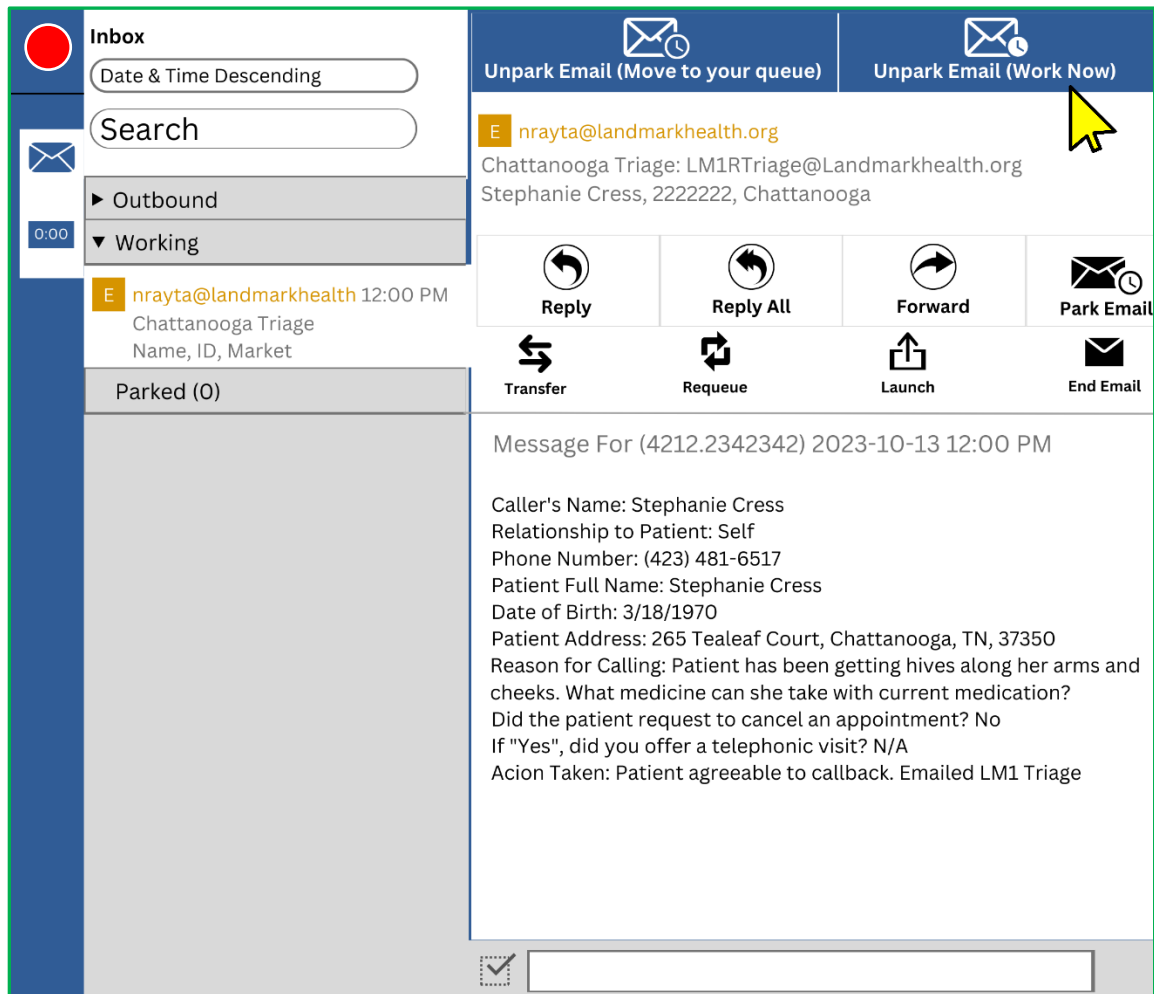
nrayta@landmarkhealth.org
 Chattanooga Triage: LM1RTriage@Landmarkhealth.org
 Stephanie Cress, 222222, Chattanooga

Message For (4212.2342342) 2023-10-13 12:00 PM

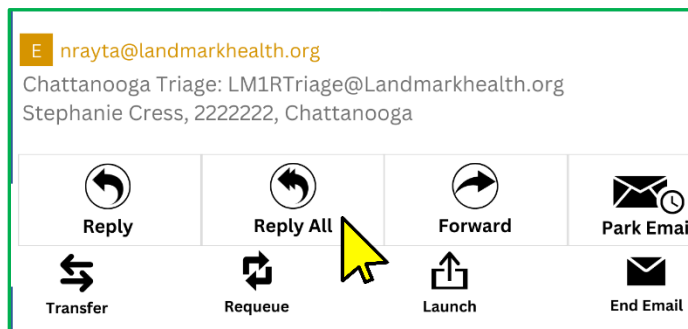
Caller's Name: Stephanie Cress
 Relationship to Patient: Self
 Phone Number: (423) 481-6517
 Patient Full Name: Stephanie Cress
 Date of Birth: 3/18/1970
 Patient Address: 265 Tealeaf Court, Chattanooga, TN, 37350
 Reason for Calling: Patient has been getting hives along her arms and cheeks. What medicine can she take with current medication?
 Did the patient request to cancel an appointment? No
 If "Yes", did you offer a telephonic visit? N/A
 Action Taken: Patient agreeable to callback. Emailed LM1 Triage

8. Unpark The Triage Email

- Select the “Unpark (Work Now)” option found at the top of the window.



9. Select “Reply All” to respond to the Triage Mailbox and original sender:



10. Complete Your Email Reply:

- Your emailed reply should follow this format:

Patient's Name, Plan of Care, Your First Name + Last Name

The screenshot displays an email client interface with a sidebar on the left and a main content area on the right.

Sidebar:

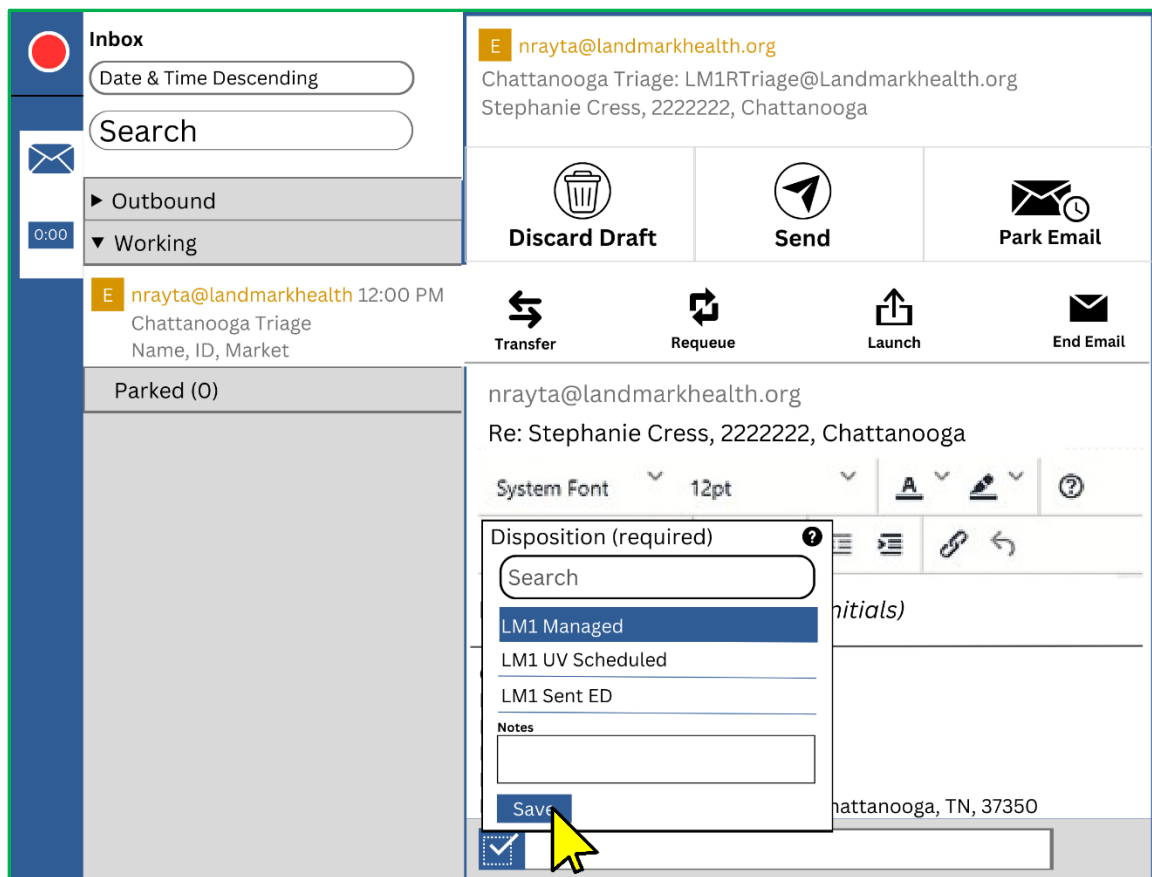
- Inbox:** Includes a "Date & Time Descending" dropdown and a "Search" input field.
- Outbound:** A button with a right-pointing arrow.
- Working:** A button with a downward arrow and a timer showing "0:00".
- Parked (0):** A button with a right-pointing arrow.

Main Content Area:

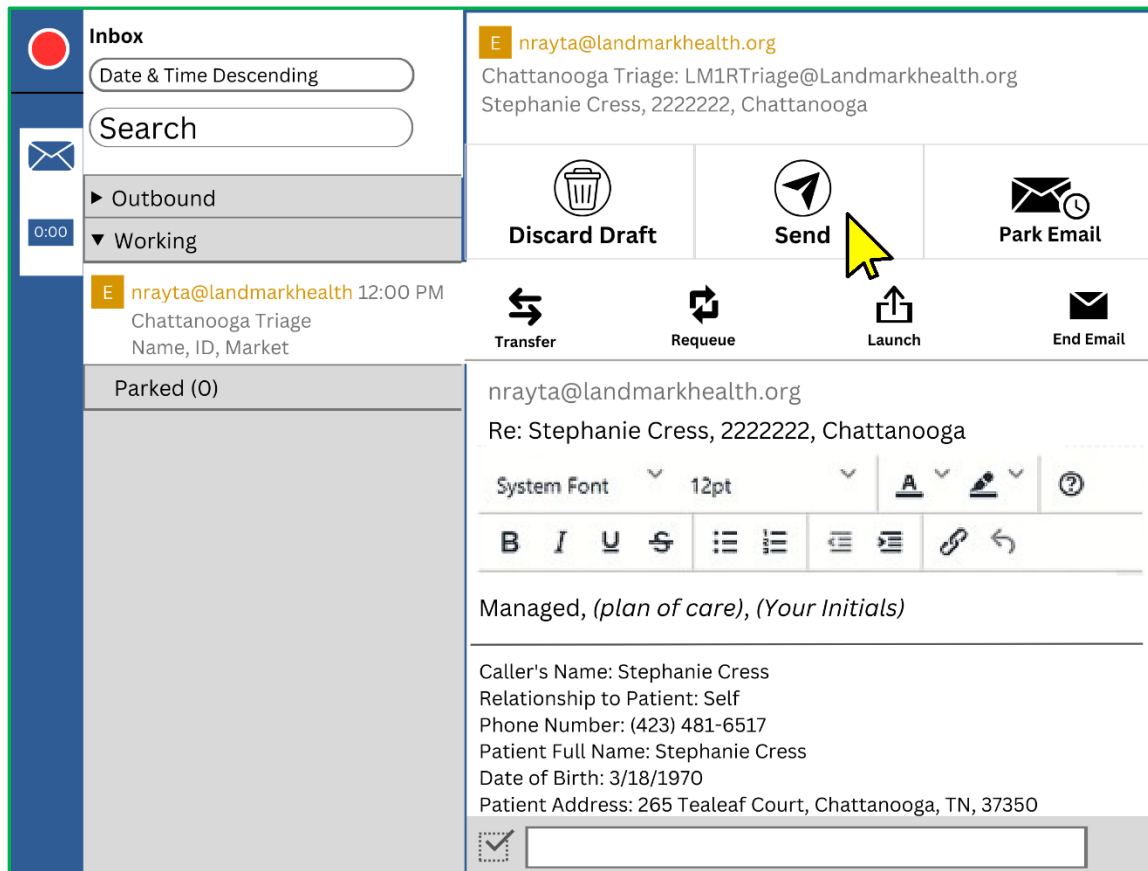
- Header:** Shows the email address "nrayta@landmarkhealth.org" and the text "Chattanooga Triage: LM1RTriage@Landmarkhealth.org" and "Stephanie Cress, 2222222, Chattanooga".
- Actions:** A row of icons for "Discard Draft" (trash can), "Send" (paper plane), and "Park Email" (envelope with clock).
- Buttons:** A row of buttons for "Transfer" (double arrows), "Requeue" (refresh), "Launch" (upward arrow), and "End Email" (envelope).
- Text:** The email address "nrayta@landmarkhealth.org" and the subject line "Re: Stephanie Cress, 2222222, Chattanooga".
- Formatting:** A toolbar with options for "System Font", "12pt", bold (B), italic (I), underline (U), strikethrough (ABC), bulleted list, numbered list, indent, outdent, link, and unlink.
- Body:** The text "Managed, (plan of care), Sunni Kneeland".
- Footer:** A section containing contact information: "Caller's Name: Stephanie Cress", "Relationship to Patient: Self", "Phone Number: (423) 481-6517", "Patient Full Name: Stephanie Cress", "Date of Birth: 3/18/1970", and "Patient Address: 265 Tealeaf Court, Chattanooga, TN, 37350". Below this is a checkbox and an input field.

11. Set Your Email Disposition:

- Similar to calls, any emails received in the MAX panel will require a Disposition to complete.
- Select the check mark located below the email at the bottom of the window.
- From the list of options, choose the best one that matches the patient's plan of care.
- When finished, "Save" the disposition.



12. Send Your Email



13. Complete Any Remaining Documentation As Needed:

- If you set your call statuses correctly, you will be placed automatically in the “UNAVAILABLE Documenting” status after sending your email.
- Document Ubiquity with a note detailing any follow-up actions taken on the patient’s behalf.
 - If necessary, follow the correct steps to schedule a UEUV for the patient.
- When finished, change your call status to “AVAILABLE”.

