Triage Call Log

Triage Call Log Overview

The Triage Unit receives a variety of calls on evenings and weekends where staff provides telephone consultation, offers patient/family reassurance, and even deploys an on-call staff member to the patient’s home. All calls - regardless if they are inbound or outbound - are recorded and logged, and the Latis Triage Module is the vehicle used to do this.

Through the Latis Triage Module, staff can:

⇒ Search calls by any number of search criteria, (i.e. by patient, between dates, team, team group, status, and user).
⇒ Quickly access a patient’s ADT chart when adding a patient call.
⇒ Review a patient’s history of calls and quickly assess whether the call has been forwarded, resolved, or is currently open.
⇒ View a listing of all patient and non-patient calls received at any time.
⇒ Enhance patient care since staff can quickly view any calls that are still open and resolve them more efficiently.
⇒ Make management decisions based upon the analysis of the types of incoming calls.

This section illustrates the use of the Triage Module by documenting how to use the Triage Call Log.
Logging into Latis/accessing the Triage Module

Inside an HPBC Facility
⇒ From inside an HPBC facility:
   a) Either click the Latis icon on your desktop computer; open Internet Explorer, go to FAVORITES and select LATIS from the drop-down list; or if not found in the FAVORITES, open Internet Explorer, type the word LATIS in the URL Address field and click GO.

   b) Click the LOGIN AUTHORIZED USERS button.

Outside an HPBC Facility
⇒ From outside of HPBC (i.e. home computer):
   a) Click on the Internet Explorer icon on your desktop.
   b) In the Address Bar, type http://www.hpbc.com.
   c) Click GO.
   d) When the screen displays, click the LATIS button located in the bottom right side of the window.
   e) Click AUTHORIZED USERS login button.

1 If necessary, click ok to the security alert pop-up.

   NOTE These fields are case-sensitive, so be aware of capitalization.

2 Click ok.
3 Type your Latis user name and password in the respective fields.
4 Click the down arrow of the MODULE ACCESS menu on the left side of the window.
5 From the MODULE ACCESS menu, click the down arrow.

![Module Access Menu]

6 Click the TRIAGE MODULE.

Logging a patient related call

When logging a new call, it is important to note that:

⇒ When on the phone with a patient-related call, you might want to review the patient’s call history first to obtain information that may be relative to the current call (i.e. another staff member may have logged a related call).

⇒ If an outbound call regarding a patient, then it should be logged as a patient call, not a non-patient call.

⇒ At the end of your shift, you should VIEW MY CALLS to review and check to ensure that the STATUS is accurate.

1 If the TRIAGE CALL LOG screen is not already displayed, click TRIAGE CALL LOG from the TRIAGE MODULE menu located at the top left side of the screen.

![Triage Call Log Screen]
2 From the TRIAGE CALL LOG screen, do the following:
   a) Enter the first few letters of last name of the patient in the PATIENT LAST field.

   ![Triage Call Log Screen](image)

   **NOTE** By entering only the *first few* letters of the patient’s last name, eliminates any challenges in locating a patient (i.e. misspelling their last name).

   b) Click Add PT CALL button.
   c) Locate the patient from the list, and if necessary, sort the results by clicking on the header. You can sort by call #, patient, hospice ID, call date and time, team, call status, reason, I/O (inbound/outbound).
   d) Click the name of the patient, the call # or the telephone icon.

   **NOTE** If the PATIENT ALERT POPUP displays, read the prompt and click CLOSE.

3 The LATIS TRIAGE CALL DETAILS window displays. Do one of the following in the START DATE AND TIME fields.
   ⇒ If the call took place just now, do not change THE START DATE AND TIME fields.
   ⇒ If the call took place a day ago, for instance, enter the date and time the call was generated by doing the following:
      a) Click in the date field and select a date from the pop-up calendar.
      b) In the TIME box, enter the call start time (Ex. 11:15am).

   ![Start Date and Time](image)

4 Do one of the following in the END DATE AND TIME fields:
   ⇒ If entering an end date for a call that just took place, skip this step. When the call log is saved, this will autopopulate with that time.
   ⇒ If the call took place a day ago, for instance, enter the date and time the call ended by doing the following:
      a) Click in the END DATE field and select a date from the pop-up calendar.
      b) In the END TIME box, enter the time the call ended (Ex. 11:15am).

   ![End Date and Time](image)
5 If this is a patient call and if necessary, once the LATIS TRIAGE CALL screen displays, access the patient’s ADT Chart to view relative information. Just click on the ADT Chart link to the right of the screen, and the patient’s chart will display in another screen in order for you to toggle between them.

6 From the INBOUND/OUTBOUND drop-down menu, select whether the call is an inbound call or whether the call was initiated from hospice (outbound).

7 Select a call type/code from the CALL TYPE/CODE drop-down menu.

NOTE Depending upon the call type/code you selected, the next field, REASON FOR CALL, will populate with items for selection.

8 Based upon the CALL TYPE/CODE, select a reason for the call from the REASON FOR CALL from the drop-down menu.

9 If not located in the CALL TYPE/CODE field, type a reason in the OTHER REASON field.

10 In the VISIT REQUIRED fields, choose whether the patient already has a visit scheduled or if an unscheduled visit is needed (the default is NO).

11 Check the ADMIN OVERSITE check box if the call should be reviewed by an HPBC Administrator (i.e. when an incident report should be generated, the call is of an unroutine problem, when a revokation should be made, or a Customer Concern Form is to be generated).

12 In the COMMENTS field, type any comments that you feel would benefit the nature of this call (i.e. document the reason for the call and then the resolution).

NOTE When entering comments, be concise and objective since these comments will become a permanent part of the patient’s record.
NOTE If the call was forwarded or transferred, add details about this in this field as well.

13 In the CALL STATUS field, select one of the following from the drop-down menu:
   ⇒ OPEN - if the call is new, has not been forwarded, or is unresolved (OPEN is the default).
   ⇒ FORWARDED - if the call was transferred to another staff member for action to be taken.
   ⇒ RESOLVED - if the call was resolved.

   TIP! When resolving a call, ask yourself “have I done everything I can do with this call”. If so,
   then the call should be considered resolved.

NOTE If there are no further actions, followups or forwards for this call, mark the call as RESOLVED
from the drop-down.

NOTE Most calls will be marked as RESOLVED.

14 In the RECEIVED BY field, do one of the following:
   ⇒ Accept the default as yourself.
   ⇒ If the call was received by a person other than yourself, change the name by clicking the box
     to the right of the field and choosing another name through the LATIS CONTACT MANAGER page.

15 In the CALLER field, indicate where the call was originated by using the drop-down menu.

16 In the CALLER SPECIFIC field, indicate the name of the facility, patient/caregiver or staff (the patient
relationship).

17 If action was taken on this call, select the action taken in the ACTION TAKEN field.

18 If action was taken on this call, choose the staff member that took action on this call from the contact
manager by clicking in the STAFF ASSIGNED field.

19 If a physician was called for an order, choose the physician that took the action on this call from the
PHYSICIAN drop-down menu.
NOTE Since this field is patient/provider specific, you may need to add the physician on-call to the patient’s provider list. In order to do this, conduct the following steps:

a) Click the SAVE button (top right of the screen).

b) Click the patient’s ADT CHART button (top right of the screen).

c) From the PATIENT INFORMATION browser drop-down menu (top right of the screen), choose PATIENT PROVIDER.

d) Click NEW PROVIDER.
e) Click the box next to the PROVIDER field.

f) To locate the physician's name, do one of the following:

⇒ Type the last name or first few letters of the last name in the contact name field.
⇒ Type the contact code in the CONTACT CODE field.
⇒ Select a contact type from the contact type drop-down menu (such as physician contact).

**g)** Click SEARCH.

**h)** Click the box next to the name to be added.

**i)** Select the provider’s role and status from the PROVIDER ROLE and PROVIDER STATUS drop-down menus.

**j)** Click the SAVE AND CLOSE button.

**k)** Close the patient’s ADT CHART by click in the red x on the top right of the screen. You should then be returned to the CALL DETAILS screen.
1) Right-click the mouse button and choose REFRESH from the options.

m) The physician’s name should now display in the PHYSICIAN drop-down menu for selection.

20 If the call was forwarded, choose a title of who the call was forwarded to from the FORWARDED TO field drop-down.

21 If the call was forwarded, enter a name, position, or shift, etc. in the FORWARDED SPECIFIC field.

22 If resolving the call, choose a name that resolved the call from the RESOLVED BY field.

23 Click the SAVE button.

24 Read the popup that indicates the call will be saved and click OK.

### Logging a non-patient related call

When logging a new call it is important to note that:
⇒ If an outbound call regarding a patient, then it should be logged as a patient call, not a non-patient call.
⇒ At the end of your shift, you should VIEW MY CALLS to review and check to ensure that the STATUS is accurate.

1 If the TRIAGE CALL LOG screen is not already displayed, click TRIAGE CALL LOG from the TRIAGE MODULE menu located at the top left side of the screen.

2 From the TRIAGE CALL LOG screen, click ADD NON-PT button.

3 The CALL DETAILS window displays.
   TIP! It is highly recommended that you review the call log history, since there may have been a call taken recently from another staff member relative to this call. Therefore, through investigation and with insight, you may be able to assist with the call on a better level.

4 Do one of the following in the START DATE AND TIME fields.
   ⇒ If the call took place just now, do not change the START DATE AND TIME fields.
   ⇒ If the call took place a day ago, for instance, enter the date and time the call was generated by doing the following:
      a) Click in the date field and select a date from the pop-up calendar.
      b) In the TIME box, enter the call start time (Ex. 11:15am).

5 Do one of the following in the END DATE AND TIME fields:
   ⇒ If entering an end date for a call that just took place, skip this step. When the call log is saved, this will autopopulate with that time.
   ⇒ If the call took place a day ago, for instance, enter the date and time the call ended by doing the following:
      a) Click in the END DATE field and select a date from the pop-up calendar.

6 In the END TIME box, enter the time the call ended (Ex. 11:15am).
7 From the INBOUND/OUTBOUND drop-down menu, select whether the call is an inbound call or whether the call was initiated from hospice (outbound).

8 Select a call type/code from the CALL TYPE/Code drop-down menu.

**NOTE** Depending upon the call type/code you selected, the next field, REASON FOR CALL, will populate with items for selection.

9 Based upon the CALL TYPE/Code, select a reason for the call from the REASON FOR CALL from the drop-down menu.

10 If not located in the CALL TYPE/Code field, type a reason in the OTHER REASON field.

11 Check the ADMIN OVERSITE check box if the call should be reviewed by an HPBC Administrator (i.e. when an incident report should be generated, the call is of an unroutine problem, or a Customer Concern Form is to be generated).

12 In the COMMENTS field, type any comments that you feel would benefit the nature of this call.

**NOTE** When entering comments, be concise and objective.

**NOTE** If the call was forwarded or transferred, add details about this in this field as well.

13 In the CALL STATUS field, select one of the following from the drop-down menu:
   - **OPEN** - if the call is new, has not been forwarded, or is unresolved (OPEN is the default).
   - **FORWARDED** - if the call was transferred to another staff member for action to be taken.
   - **RESOLVED** - if the call was resolved.
**TIP!** When resolving a call, ask yourself “have I done everything I can do with this call”. If so, then the call should be considered resolved.

**NOTE** If the call was from a staff member calling to say they won’t be in due to illness, the call should be considered resolved.

**NOTE** If there are no further actions, followups or forwards for this call, mark the call as RESOLVED from the drop-down.

14 In the RECEIVED BY field, do one of the following:
   ⇒ Accept the default as yourself.
   ⇒ If the call was received by a person other than yourself, change the name by clicking the box to the right of the field and choosing another name through the LATIS CONTACT MANAGER page.

15 In the CALLER field, indicate where the call was originated by using the drop-down menu.

16 In the CALLER SPECIFIC field, indicate the name of the facility, patient/caregiver, staff or other (the patient relationship).

17 If action was taken on this call, select the action taken in the ACTION TAKEN field.

18 If action was taken on this call, choose the staff member that took action on this call from the contact manager by clicking in the STAFF ASSIGNED field.

19 If the call was forwarded, choose a title of who the call was forwarded to from the FORWARD TO field drop-down.

20 If the call was forwarded, enter a name, position, or shift, etc. in the FORWARD SPECIFIC field.

21 If resolving the call, choose a name that resolved the call from the RESOLVED BY field.

22 Click the SAVE button.

23 Read the popup that indicates the call will be saved and click OK.

**Locating and updating a patient or non-patient related call**

1 From the TRIAGE CALL LOG, do one of the following:
   ⇒ Enter the call number in the CALL # field.
   ⇒ Enter the last name of the patient in the PATIENT LAST field.
⇒ Change the BETWEEN/AND dates of when the call took place by clicking in each field and selecting a date.

To further narrow your search, click EXPAND and do one or more of the following:

⇒ Select a team from the LATIS TEAM drop-down menu.
⇒ Select a team group from the TEAM GROUP drop-down menu.
⇒ Select a call status from the CALL STATUS GROUP drop-down menu (you can locate all open, forwarded, or resolved calls)
⇒ Check the ADMIN OVERRIDE check box if the call should be reviewed by an HPBC Administrator (i.e. when an incident report should be generated, the call is of an unroutine problem, or a Customer Concern Form is to be generated).
⇒ Select a call category from the CALL CATEGORY drop-down menu (your options are all (the default), only patient related calls, or only calls that are non-patient related.

NOTE To delete search criteria made in all fields, click the CLEAR button on the top right side of the screen.

2 Once you have entered the search criteria, do one of the following:

⇒ To search for calls matching the above criteria, click CALL SRCH button.

⇒ To search for calls matching the above criteria that you have personally managed within the past 24 hours (you may change the date range fields if you want to see called for another specified period of time):
  a) Click MY CALLS search button.
  b) From the search results, select the call to update by clicking on the call #, the name of the patient, or the telephone icon.

NOTE Keep in mind that one or more calls may display with the same name, since there may be multiple calls per patient. If that is the case, you may want to filter your search further in order to find the appropriate call to update.
NOTE For patient-related calls, once the LATIS TRIAGE CALL screen displays, you may access the patient’s ADT Chart at any time by clicking ADT CHART.

3 Once the LATIS TRIAGE CALL screen displays, update or modify any fields you desire. The most common fields updated are as follows:

⇒ COMMENTS - type any additional comments that you feel could further enhance the understanding of this call.
⇒ CALL STATUS - indicate whether it has been forwarded or resolved.
⇒ FORWARD TO - only if call was forwarded, select the name of the person or department who the call was forwarded to in the FORWARD TO field.
⇒ FORWARD SPECIFICS - only if call was forwarded, enter any notes regarding the forwarded call in the FORWARD SPECIFICS field.
⇒ RESOLVED BY - only if call was resolved, from the RESOLVED BY field, click the box next to the field and select a title from the SEARCH FOR LATIS CONTACTS page.
⇒ FINAL RESULTS - select a final result from the drop-down menu.

4 When done, click the SAVE button.

5 Read the popup that indicates the call will be saved and click OK.

Viewing a call’s history

1 Locate and open the desired call through the TRIAGE CALL LOG. (For additional information, see “Locating and Updating a Call” in this section).
2 From the LATIS TRIAGE CALL DETAILS screen, click the CALL HISTORY tab.
3 From here, you may print the call history by clicking the PRINT CALL HISTORY hyperlink.

NOTE You may view the patient’s ADT Chart by clicking ADT CHART.

4 When done reviewing, click CLOSE.