



NCIS GUIDE

Telephone Triage Assessment Form

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1. Background

There is a Telephone Triage Assessment form available in NCIS.Chart. This form has been based on the UKONS 24-Hour Triage Tool Log sheet (Version 2, 2016) Available at:

https://www.ukons.org/site/assets/files/1134/oncology_haematology_24_hour_triage.pdf

The NCIS.Chart form contains each field outlined in the UKONS Triage Log Sheet. Radio buttons for each category are available with related Red, Amber, Green Scoring included. There are sections to record comments and actions taken
A Red, Amber or Green (RAG) indicator is displayed once a follow up category is selected according to the UKONS Toolkit scoring. See Appendix 1 for RAG functionality

There are a number of fields that can be completed and used to generate an Acute Oncology Nursing Metric Report. Note users require case manager permissions in NCIS Chart to access the statistics module to generate the Report

2. Steps to creating a new Telephone Triage Assessment form.

1. Log into NCIS.Chart
2. Select the patient
3. Select the Assessment tab which will bring you to a summary page of any assessment forms previously created for that patient as shown below.

The screenshot shows the 'Assessment' tab in the NCIS.Chart interface. At the top right, it displays 'Hospital ID 1000570 (GUH)'. Below the navigation tabs (General info, Diagnostics, Conference, **Assessment**, Therapy, Communication, Follow-up), there is an 'Add:' dropdown menu set to '-- Please choose --' and a 'Document upload' button. A 'Cancelled forms' button is located in the top right corner of the table area.

Date	PDF	Name	Disease	Status	Event
08.03.2023		Height and weight Report date: 08.03.2023; Height: 180 cm, Weight: 100 kg	Tumour Case Diagnosis C34.1 08.04.2020	signed	
29.08.2022		Height and weight Report date: 29.08.2022; Height: 140 cm, Weight: 56 kg	Tumour Case Diagnosis C34.1 08.04.2020	in progress	

4. From the drop down menu- select Telephone Triage to add in a new assessment.
5. A new Telephone Triage form will display and allow the user to complete. See appendix 2 for details on information that will auto populate into the form
6. There are a number of quality metrics that can be captured on the telephone triage form for reporting. All fields are highlighted in pink that can be used for generating reports. See Appendix 3 for details on the quality metrics fields. See Appendix 4 for the steps required to generate a report.
7. Once the form is complete the user can select the appropriate status: in progress (if there are any steps pending) or signed (form is complete) and click on the save button to apply. See Training guide for forms in NCIS. Chart for further information

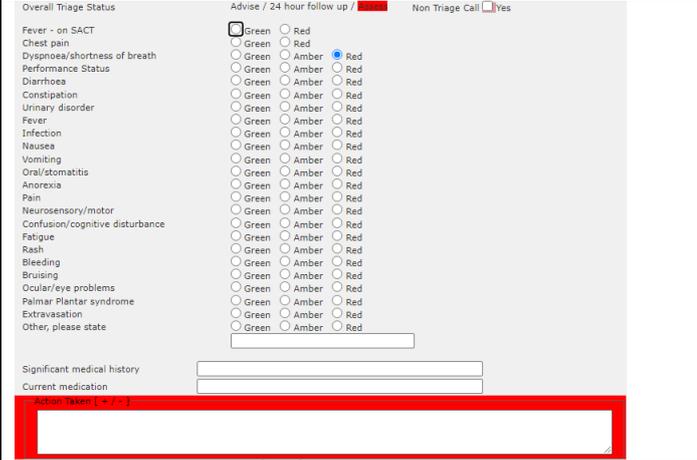
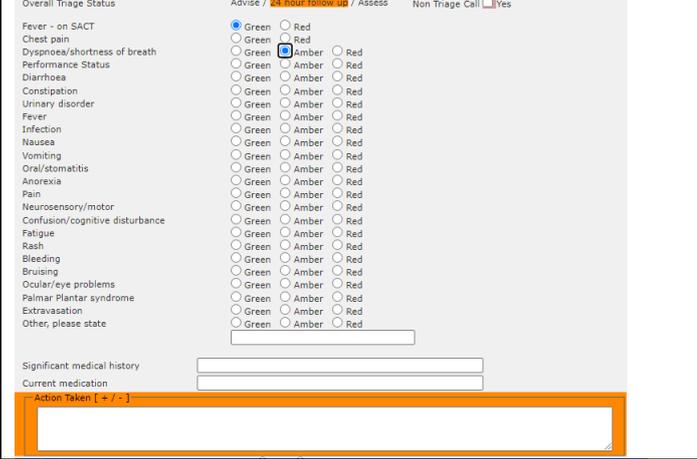
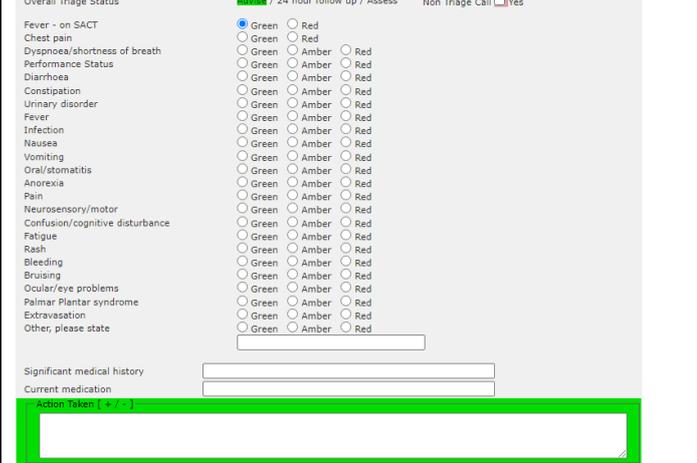
This screenshot shows a close-up of the status selection dropdown menu. The options are 'in progress' (highlighted in blue), 'signed', and 'in progress' (with a dropdown arrow). Below the menu are three buttons: 'Save', 'Back', and 'Save and add to worklist'.

8. To edit an existing telephone triage assessment, select the appropriate assessment from the list and click edit as shown below. Note only forms that are in the status 'in progress' can be edited. See Training guide for forms in NCIS. Chart for further information.

The screenshot shows the assessment form interface. At the top, it has the same navigation tabs as the previous screenshot, with 'Assessment' selected. Below the 'Add:' dropdown, there is a 'Facility:' dropdown menu set to 'Training Hospital'. Under the 'Associated disease' section, there is a dropdown menu showing 'Tumour Case Diagnosis: C50.1 from 01.03.2022'. At the bottom right, an 'Edit' button is highlighted with a black box.

Appendix 1: RAG functionality

A Red, Amber or Green (RAG) indicator is displayed once a follow up category is selected according to the UKONS Toolkit scoring

	<p>The RAG functionality will display RED where any Red (Assess) category is selected, or where 2 or more Amber (24hr-follow up) categories are selected.</p>
	<p>The RAG functionality will display AMBER where a single Amber (24hr-follow up) category is selected.</p>
	<p>The RAG functionality will display GREEN where only green (Advise) categories are selected.</p>

Appendix 2: Pre-populated fields in the Telephone Triage Assessment

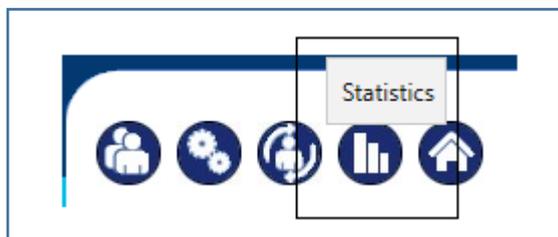
FIELD NAME	DATA ENTRY GUIDELINE	NOTE
Telephone Triage		
Date	Pre-populates with the current date	The user can select a different date using the interactive calendar
Time	Pre-populates with the current time	The user can select a different time
Assessment completed by	Pre-populates with the current user details or the user can enter surname of the user and select from Personnel file	Users must have a personnel record in NCIS
Consultant	Pre-populates with the primary consultant recorded in the tumour case for the patient	
State regimen	Pre-populates with the latest therapy plan title if available from NCIS.Med	The user can free text in the regimen name or add additional information as required

Appendix 3: Fields utilised in Acute Oncology Nursing Metric Report

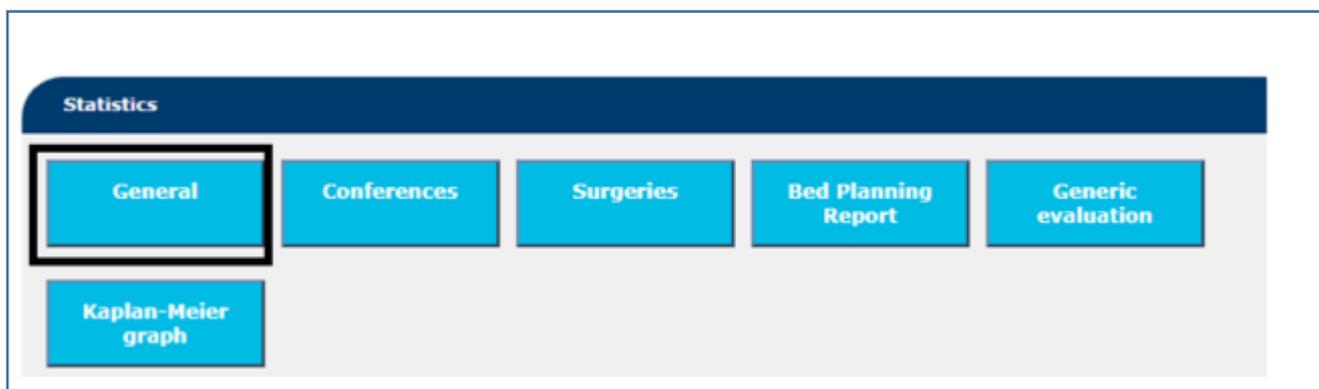
FIELD NAME	DATA ENTRY GUIDELINE	NOTE
Telephone Triage		
Enquiry details	Select date from the interactive calendar	This date will populate in the patient assessment summary view and will be used for the date range in the filter for all reported metrics
Non-Triage call	Check box if applicable	If selected this will be used in the total number of non-Triage calls received on the triage line (Metric 2)
Overall Triage status	Determined by the action taken, multiple green = green (advise), one Amber = Amber (24 hour follow up), more than one Amber or one Red = Red (Assess)	The status will populate in the patient assessment summary view and will be used for the number of patients given overall Triage Status (Metrics 3a-c)
Attending for assessment, receiving team contacted	Select the appropriate radio button option	If yes selected this will be used for the total number of patients subsequently directed to hospital for management (Metric 4)
Hospital Attendance Outcome		
Hospital Attendance Outcome	Select the appropriate option from the coded drop down list: <ul style="list-style-type: none"> • Managed and discharged same day • Admitted • Declined to attend • Referred to external hospital 	The outcome selected will be used for total number of patients per hospital attendance outcome (Metrics 5a-d)
Follow up Communications		
GP/PHN/Family member/Patient/Pharmacy/Support Centre/Treating Team/Carer/Palliative Care Services/Non-Triage/Emergency Department/Other	Select the appropriate option from the coded drop down list (options 1-10)	The value selected will be added to the total field to show the total number of follow up communications The follow up communication selected will be used for the total number of follow up communication per communication (Metrics 6a-n)
Specify service	Free text field to include details if Other is selected	This field only appears if other is selected

Appendix 4: Steps to generate an Acute Oncology Nursing Metric Report

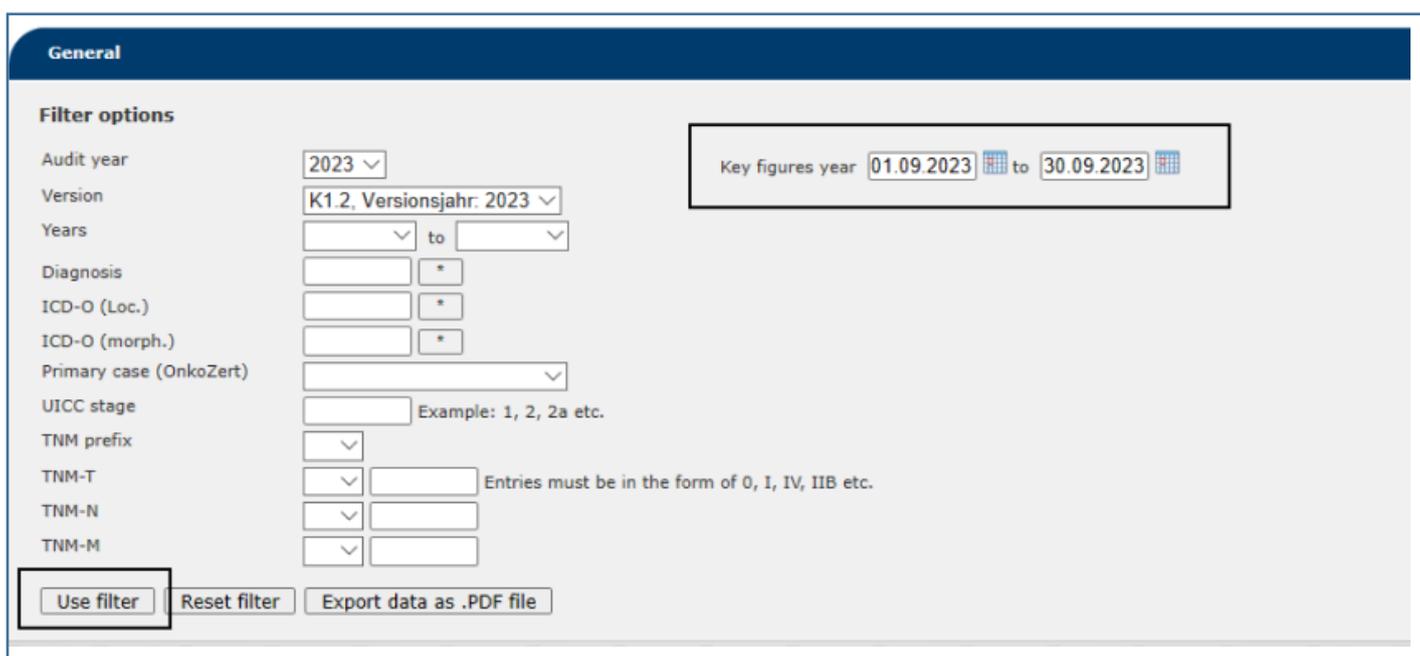
1. Select the statistics icon from the top right hand of the screen



2. Select General under statistics



3. Select the appropriate dates required for reporting and click 'use filter'

A screenshot of a 'General' filter options form. The form has a dark blue header with the word 'General'. Below the header is a section titled 'Filter options' with various input fields and dropdown menus. A white rectangular box highlights the 'Key figures year' field, which contains the date range '01.09.2023 to 30.09.2023'. At the bottom of the form, there are three buttons: 'Use filter', 'Reset filter', and 'Export data as .PDF file'. The 'Use filter' button is highlighted with a black border.

- Scroll down to the Acute Oncology Nursing Service Metrics Report, the downwards arrow will open up to show the available reports

Acute Oncology Nursing Service Metrics Report			Export as .CSV	Export data as .PDF file
No.	Key data	Found		
1.	1 Total Number of telephone triage forms <i>extend</i> <i>Enter note</i>	6	Hit overview	Patient list
2.	2 Total number of non-Triage calls received on the triage line <i>extend</i> <i>Enter note</i>	1	Hit overview	Patient list
3.	3a Total number of telephone triage forms where patients were given the overall Triage Status of Green <i>extend</i> <i>Enter note</i>	1	Hit overview	Patient list
4.	3b Total number of telephone triage forms where patients were given the overall Triage Status of Amber <i>extend</i> <i>Enter note</i>	2	Hit overview	Patient list
5.	3c Total number of telephone triage forms where patients were given the overall Triage Status Red <i>extend</i> <i>Enter note</i>	1	Hit overview	Patient list
6.	4 Total number of telephone triage forms subsequently directed to hospital for management <i>extend</i> <i>Enter note</i>	3	Hit overview	Patient list
7.	5a Total number of telephone triage forms where patients are completely managed and discharged on the same day <i>extend</i> <i>Enter note</i>	1	Hit overview	Patient list
8.	5b Total number of telephone triage forms where patients are admitted to hospital <i>extend</i> <i>Enter note</i>	2	Hit overview	Patient list
9.	5c Total number of telephone triage forms where patients have declined to attend hospital <i>extend</i> <i>Enter note</i>	1	Hit overview	Patient list
10.	5d Total number of telephone triage forms where patients are referred to external hospital <i>extend</i> <i>Enter note</i>	2	Hit overview	Patient list
11.	6a Total number of follow up communication option GP <i>extend</i> <i>Enter note</i>	20	Hit overview	Patient list
12.	6b Total number of follow up communication option CIT <i>extend</i> <i>Enter note</i>	10	Hit overview	Patient list
13.	6c Total number of follow up communication option PHN <i>extend</i> <i>Enter note</i>	10	Hit overview	Patient list
14.	6d Total number of follow up communication option Family Member <i>extend</i> <i>Enter note</i>	10	Hit overview	Patient list
15.	6e Total number of follow up communication option Patient <i>extend</i> <i>Enter note</i>	20	Hit overview	Patient list
16.	6f Total number of follow up communication option Pharmacy <i>extend</i> <i>Enter note</i>	9	Hit overview	Patient list
17.	6g Total number of follow up communication option Support Centre <i>extend</i> <i>Enter note</i>	10	Hit overview	Patient list
18.	6h Total number of follow up communication option non-Triage <i>extend</i> <i>Enter note</i>	9	Hit overview	Patient list
19.	6i Total number of follow up communication option Treating team <i>extend</i> <i>Enter note</i>	10	Hit overview	Patient list
20.	6j Total number of follow up communication option Carer <i>extend</i> <i>Enter note</i>	10	Hit overview	Patient list
21.	6k Total number of follow up communication option Palliative Care Services <i>extend</i> <i>Enter note</i>	9	Hit overview	Patient list
22.	6l Total number of follow up communication option Emergency Department <i>extend</i> <i>Enter note</i>	9	Hit overview	Patient list
23.	6m Total number of follow up communication option Other <i>extend</i> <i>Enter note</i>	10	Hit overview	Patient list
24.	6n Total number of all outgoing follow up communications <i>extend</i> <i>Enter note</i>	146	Hit overview	Patient list

5. The hit overview tab will show all of the patients (including where multiple assessments have been created) and the Patient list will show the list of patients for whom the report has been generated.



6. If you select Hit overview a counter will appear as a pop up listing a limited number of patient details, the export button can be utilised to export all the data or selected rows into a csv as shown below



7. There are the options to export all of the data in an excel file (Export as.CSV) tab or as a pdf (Export as.PDF file) in the blue banner which can be saved to a local sharefile.



Appendix 5: Acute Oncology Nursing Metrics

The following metrics are included in the report which can be filtered by date range and exported in CSV or PDF format:

Metric	Metrics Report Headings	Metrics Data Definition
1	Total Number of telephone triage forms	Total number of instances that the enquiry date is inputted within a reporting period
2	Total number of non-Triage calls received on the triage line	Total number of instances that the coded radio button Yes is inputted within a reporting period
3	Total number of telephone triage forms where patients were given the overall Triage Status of 3a) Green 3b) Amber 3c) Red	Total number of instances that Advise / 24 hour follow up / Assess are inputted within a reporting period
4	Total number of telephone triage forms subsequently directed to hospital for management	Total number of instances that the coded radio button Yes is inputted within a reporting period
5	Total number of telephone triage forms where patients are 5a) Completely managed and discharged on the same day 5b) admitted to hospital 5c) declined to attend hospital 5d) referred to external hospital	Total number of instances where patients are <ul style="list-style-type: none"> • Managed and discharged same day • Admitted • Declined to attend • Referred to external hospital are inputted within a reporting period
6	Total number of all outgoing follow up communications and total number of each individual follow up communication option 6a) GP 6b) CIT 6c) PHN 6d) Family Member 6e) Patient 6f) Pharmacy 6g) Support Centre 6h) Non-Triage 6i) Treating team 6j) Carer 6k) Palliative Care Services 6L) Emergency Department 6m) Other 6n) Total	Total number of instances that <ul style="list-style-type: none"> • GP • CIT • PHN • Family Member • Patient • Pharmacy • Support Centre • Non-Triage • Treating Team • Carer • Palliative Care Services • Emergency Department • Other • Total are inputted within a reporting period (Sum of all)