



# EVIDENCE SEARCH RESULTS

<b>Question/subject of request:</b>	Best practice, guidance or SOPs for telephone-based triage and assessment (patient facing).
<b>Date requested:</b>	12 <sup>th</sup> June 2025
<b>Date completed:</b>	10 <sup>th</sup> July 2025
<b>Compiled by:</b>	Cate Newell – Knowledge & Library Services Manager

## CITING THIS SEARCH

If you reference this search in any paper, publication or presentation, please let us know.

The citation format is:

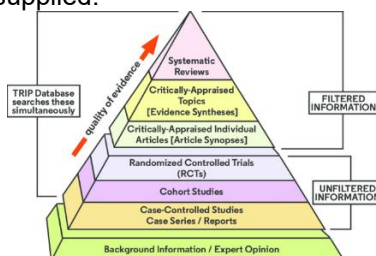
- Newell, C., (2025). *Evidence summary: best practice, guidance and standard operating procedures for telephone-based triage and assessment*. Taunton, UK: Somerset Foundation Trust Knowledge and Library Services.

## CONTACT DETAILS

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The results are presented according to the hierarchy of evidence which is used to rank the relative strength of results obtained from scientific research.

The design of the study and the endpoints measured affect the strength of the evidence.

Evidence hierarchies are often applied in evidence-based practices and are integral to evidence-based medicine.



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**Contents** (click to jump to each section):

- [Guidance](#)
- [Example standard operating procedures](#)
- [Training resources](#)
- [Books](#)
- [Articles](#)

**Summary of search results:**

A quick search was conducted for examples of best practice, guidance or SOPs for telephone-based triage and assessment (patient facing). Most of the evidence found was around triage services for maternity or Primary Care. I have included links to some training which was put together locally by the Peninsula Deanery, as well as links to some books on the topic (which are available from the region), and a few journal articles.

Please let me know if you require a deeper dive on this search topic.

I hope this is helpful. Please do let us know if you need any further information.



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## Guidance

### Royal College of General Practitioners

[The future role of remote consultations & patient 'triage'](#) RCGP, May 2021.  
Accessed 10<sup>th</sup> July 2025.

### [WPBA: Audio Consultation Observation Tool \(COT\)](#)

Tool for observing/assessing consultation techniques.  
Accessed 10<sup>th</sup> July 2025.

### General Medical Council

### [Remote consultations - ethical topic - GMC](#)

Accessed 10<sup>th</sup> July 2025.

### Royal College of Obstetrics & Gynaecology

### [Maternity Triage \(Good Practice Paper No. 17\) | RCOG](#) – Dec 2023 (see page 5)

Accessed 10<sup>th</sup> July 2025.

### Royal College of Nursing

### [Remote consultations guidance under COVID-19 restrictions | Royal College of Nursing](#) May 2020

Accessed 10<sup>th</sup> July 2025.

### Royal College of Psychiatrists

### [Practice guidelines for crisis line response and crhtt's](#)

Accessed 10<sup>th</sup> July 2025

### Chartered Society of Physiotherapists

### [Remote consultations | The Chartered Society of Physiotherapy](#)

### [CSP guidance on how to implement remote consultations](#)

Accessed 10<sup>th</sup> July 2025

## Examples of Standard Operating Procedures

### [Oncology/Haematology Telephone Triage Tool Kit for Children's Cancer Services 2<sup>nd</sup> ed 2020 The Tool Kit Manual \(RCN, CCLG, UKONS, CLIC Sargent\)](#) (click link to download PDF)

Accessed 10<sup>th</sup> July 2025

### [Royal Cornwall Hospital – Telephone Triage Clinical Guideline – Feb 2025](#) (click link to download PDF)

Accessed 10<sup>th</sup> July 2025

### [University Hospitals Leicester Maternity Telephone Triage – 2024](#) (click link to download PDF)

Accessed 10<sup>th</sup> July 2025



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## Training resources

[Telephone Triage Skills - Peninsula Primary Care](#) (videos and slides freely available)

Accessed 10<sup>th</sup> July 2025

## Books

The following books are available in the SWIMS Library Catalogue. Please contact [library@somersetft.nhs.uk](mailto:library@somersetft.nhs.uk) if you would like to request to borrow them.

[Telephone assessment in primary care: a practical guide to effective consultation and triage](#). Sally-Anee Pygall. 2023 Banbury, Scion.

[Telephone triage protocols for nurses](#). Julie K Briggs 6<sup>th</sup> ed. Wolters Kluwer, 2021. (copy available at YDH).

[Telephone triage care](#). Claire Hunter. Bridgwater, Class Professional, 2018.

## Articles

Evidence Search Results from your Knowledge & Library Service

### 1. Defining core competencies for telehealth in healthcare higher education: A Delphi study

**Authors:** Jacob, Maria Fernanda A.;Fandim, Junior V.;Reis, Felipe J. J.;Hartvigsen, Jan;Ferreira, Paulo H. and Saragiotto, Bruno T.

**Publication Date:** 2025

**Journal:** Musculoskeletal Science and Practice 75

**Abstract:** Background While technology brings many opportunities for optimizing and improving health services, the lack of professionals trained in telehealth poses an important obstacle. Despite the existence of core competency frameworks for some healthcare professions, there is currently no consensus or guidelines on the core competencies that telehealth professionals should possess within the context of a higher education curriculum. This can hinder the potential benefits of healthcare service delivery.

**Access or request full text:** <https://libkey.io/10.1016/j.msksp.2024.103244>

### 2. Clinical decision support system in emergency telephone triage: A scoping review of technical design, implementation and evaluation

**Authors:** Michel, Julie;Manns, Aurélia;Boudersa, Sofia;Jaubert, C. ôme;Dupic, Laurent;Vivien, Benoit;Burgun, Anita;Campeotto, Florence and Tsopra, Rosy

**Publication Date:** 2024

**Journal:** International Journal of Medical Informatics 184

**Access or request full text:** <https://libkey.io/10.1016/j.ijmedinf.2024.105347>



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### 3. Telephone Triage Simulation in an Asynchronous Advanced Practice Nursing Course

**Authors:** Neuman, Michelle E.

**Publication Date:** 2024

**Journal:** Nursing Education Perspectives 45(6), pp. 377–378

**Access or request full text:** <https://libkey.io/10.1097/01.NEP.0000000000001150>

### 4. Evaluating the Use of Video Modeling With Voiceover Instructions to Train Therapists to Deliver Caregiver Training Through Telehealth

**Authors:** Preas, Elizabeth;Carroll, Regina A.;Van Den Elzen, Gabriella;Halbur, Mary and Harper, Megan

**Publication Date:** 2023

**Journal:** Behavior Modification 47(2), pp. 402–431

**Abstract:** Caregiver training is an important component of behavioral intervention; however, many barriers exist for in-person training. Alternatively, behavioral therapists may use telehealth as a service delivery method. To effectively train caregivers through telehealth, therapists should receive explicit training, but there has been limited research on effective methods for teaching this skill. The purpose of the current study was to evaluate video modeling with voice-over instruction (VMVO) to train therapists to implement 11 component skills of caregiver training through telehealth to teach confederate caregivers to implement a guided compliance procedure. We measured the therapist's implementation of the component skills during a scripted role-play before and after video-model training within a multiple baseline design across participants. We also conducted maintenance and generalization probes to a novel skill. All seven therapists learned the skill, but three therapists required a feedback component in addition to the VMVO. The results suggest that VMVO may be an efficient and effective method for training therapists to conduct caregiver training via telehealth. Furthermore, results indicate that component skill analyses may be valuable to monitor skills that require remediation.

**Access or request full text:** <https://libkey.io/10.1177/01454455221111988>

### 5. Oncology Nursing Telephone Triage Workshop: Impact on Nurses' Knowledge, Confidence, and Skill

**Author:** Ciccolini, Kathryn, Spaulding, Erin M., Boyde, Tiffini, Berizzi, Donna and Hansen, Bryan R.

**Publication Date:** 2022

**Publication Details:** Cancer nursing, 45, (2) pp.E463–E470.

**Abstract:** BACKGROUND: Outpatient oncology nurses are responsible for symptom assessment/management and care coordination during telephone triage. Nursing telephone triage interventions can improve patient outcomes and clinical efficiency. Therefore, the lack of education and training in telephone triage can greatly impact patient care. OBJECTIVE: Using a prospective pretest/posttest design, we sought to determine if a telephone triage educational workshop would improve oncology nurses' knowledge, confidence, and skill over 12 weeks.

INTERVENTION/METHODS: The educational intervention incorporated an online didactic lecture,



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group case scenario, and feedback on a virtual triage simulation. Evaluation was conducted before and after the intervention through an online, 13-item survey (knowledge and confidence) and simulation utilizing a 56-item checklist (skills). **RESULTS:** Thirteen oncology nurses were enrolled; 54% did not have telephone triage experience before this job. A total of 12 participants completed the workshop. From pretest to posttest, there was a median 1.0 out of 5.0 (interquartile range, 2.8) improvement in confidence ( $P = .008$ ) and a 26.3% (interquartile range, 15.2) improvement in skills ( $P = .002$ ). There was no difference in knowledge scores from pretest to posttest ( $P = .11$ ). **CONCLUSIONS:** This workshop was associated with an improvement in oncology nurse confidence and skill, using telephone triage models. It benefits an existing process within the outpatient center and it highlights a new educational strategy that may optimize nursing practice and improve patient care and experience. **IMPLICATIONS FOR PRACTICE:** This workshop contributes to existing evidence of telephone triage models and nursing education. The findings can guide future research, nursing orientation, and educational activities within the field of nursing and telehealth.

**Source:** Journals@OVID; EBSCOhost,

**Access or request full text:** <https://libkey.io/10.1097/NCC.0000000000000978>

## 6. Telephone Triage Simulation Activity for Prelicensure Nursing Students

**Authors:** Ehly, Erin and Fitzwater, Julie

**Publication Date:** 2021

**Journal:** The Journal of Nursing Education 60(6), pp. 352–355

**Abstract:** To meet the demands of a complex health care environment, nursing students need education that includes telephone triage in outpatient settings. Developing telephone triage communication skills requires the use of a different set of senses than in-person assessments. The purpose of this pilot study was to measure the effect of a telephone triage classroom simulation on prelicensure nursing students' knowledge and skills.

**Access or request full text:** <https://libkey.io/10.3928/01484834-20210520-10>

## 7. Call Me Maybe... A Simulation Based Curriculum for Telephone Triage Education in a Pediatric Residency

**Author:** Blumberg, Joel S., Barajaz, Michelle, Roberts, Danielle, Clary, Cody and Kumar, Shelley

**Publication Date:** 2020

**Publication Details:** Frontiers in Pediatrics, 8, Frontiers Media S.A.

**Abstract:** Pediatrician communication with caregivers by phone has traditionally made a significant impact on patient care but remains a source of medical liability. Despite its importance, few publications exist regarding the education of pediatric residents on telephone triage. Our study involved the development of an educational curriculum aimed at expanding the pediatric resident skill set in telephone triage. Our method of curriculum development is based on Kolb's experiential learning theory. We utilized a combination of resource familiarization, didactic education, and simulation in the building of knowledge through reflection upon concrete experience, generalization of knowledge gained, and application of this new knowledge. We developed a 30-min PowerPoint presentation in which instructors reviewed the basic tenets of telephone triage. In the pilot study,



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residents were divided into two groups—a didactic-first group and a simulation-first group. Their performance was monitored during two scripted, symptom based “parent” phone call simulations. The didactic-first group received the PowerPoint didactic prior to the simulation, and the simulation-first group received the didactic after the simulation. A comparison of resident evaluations by faculty and self-documented confidence level revealed statistically significant higher evaluation scores in the didactic-first group, and an overall improvement in resident confidence with telephone triage. We conclude that this educational curriculum may improve pediatric resident performance in telephone triage.

**Access or request full text:** <https://libkey.io/10.3389/fped.2020.00283>

## 8. A Curriculum to Improve Pediatric Residents' Telephone Triage Skills

**Author:** Roth, Lauren T., Lane, Mariellen and Friedman, Suzanne

**Publication Date:** 2020

**Publication Details:** MedEdPORTAL, 16, Association of American Medical Colleges.

**Abstract:** Introduction Telephone triage systems are frequently used due to their success in decreasing emergency department utilization, reduction of health care costs, and high levels of satisfaction among patients and providers. Despite phone triage's prevalence, few residency programs have designated curricula for residents to learn this vital skill. Methods We designed a phone triage curriculum initially piloted with senior residents at one of our continuity clinics. The curriculum consisted of a didactic session, a just-in-time simulation training session, and an experiential component of being on call during the ambulatory rotation. Retrospective pre-post self-assessments evaluated resident perceptions of their skills in taking histories and triaging care over the phone in addition to obtaining qualitative feedback from faculty and residents immediately after the curriculum and 1–2 years postgraduation. Results Of 11 eligible residents, 10 (91%) chose to participate in the pilot curriculum. Residents reported that their skills in history taking over the phone improved from 20% to 90% and their ability to triage patients over the phone improved from 0% to 80%. This led to a quality improvement initiative to increase patient calls and has continued for 5 years, with continued positive feedback from residents and attendings. Discussion Phone triage skills are a necessity for pediatric providers, but few residency programs have training curricula in place. Through an experience-based phone triage program, residents significantly improved their self-reported skills at history taking and triaging. Similar curricula could easily be adopted at other institutions.

**Access or request full text:** [https://libkey.io/10.15766/mep\\_2374-8265.10993](https://libkey.io/10.15766/mep_2374-8265.10993)

## 9. Ambulatory Oncology Nurses Making the Right Call: Assessment and Education in Telephone Triage Practices

**Author:** Gleason, Karen, O'Neill, Eileen Brennan, Goldschmitt, Jennifer, Horigan, Jennifer and Moriarty, Linda

**Publication Date:** 2013

**Publication Details:** Clinical journal of oncology nursing, 17, (3) pp.335–336.



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**Abstract:** Nurses in a hematology/oncology practice are responsible for the triage and management of phone calls from a diverse oncology population. An initiative was developed at the authors' institution to identify the educational needs of RNs while designing strategies to educate and improve telephone triage skills. The goal was to standardize triage practice and ultimately improve the effectiveness of telephone triage management. It was felt that these improvements could enhance the nurse-patient relationship, resulting in continuity of care to the patient, as well as reducing inappropriate appointments and hospitalizations, enhancing education, and lessening the risk of medical complications related to delays in care.

**Access or request full text:** <https://libkey.io/10.1188/13.CJON.335-336>

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	Pubmed		HMIC		BMJ Best Practice
	Medline		Social Policy and Practice		Cochrane Library
	Emcare		CINAHL	X	TRIP
	Embase		PsycINFO	X	Grey Literature
	AMED		UpToDate	X	Other – Knowledge & Library Hub

PURPOSE OF SEARCH			
	Patient info/health & well being		Clinical decision making (inc. patient care)
	Executive Team support	X	Research/Education/Professional development
	Quality Improvement		Primary Care & Neighbourhoods Directorate support
X	KM/Management decision making	X	Other – Training

USER CATEGORY OF REQUESTOR			
	Medical students		Patients/public
	Nursing/midwifery students		Physician Associates
	Doctor/Psychiatrist		Public Health (Somerset CC)
	Nurses/Midwives	X	Other
	Allied Health professionals		

HAS PERMISSION TO SHARE THE RESULTS BEEN OBTAINED FROM THE REQUESTOR?			
X	YES - share		NO – do not share





<b>KEY WORDS/SEARCH STRATEGY INCLUDING MESH HEADINGS</b>	<b>LIMITS USED</b>
Telephone or telehealth (Triage or assessment or consultation)  Guideline or guidance Standard operating procedure or SOP	

