

## Developing a Triage System

## Session Plan Duration: 3 hours

| Time          | Aim                                     | Method & Activity                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Resources                                                                                                                                                                                                                                                             |
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| 10 – 15 mins. | Welcome and introduction to the session | <p><b>Discuss and agree aims for the session</b></p> <p><b>Housekeeping information</b></p> <p>Introduce action templates: explain that part of the purpose of the session is to design a system of triage which will work effectively within the advice agencies in which the participants work</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | <p><b>Flip chart:</b> 2 – 3 main points – display so it is visible</p> <p><a href="#">Action plan templates</a> to complete as we go along</p>                                                                                                                        |
| 15 mins.      | What's Triage?                          | <p><b>Plenary:</b> ask participants what the word “triage” means to them and to describe contexts in which triage is used (e.g. medical assessments).</p> <p>Explain that triage is also a procedure used in advice services to assess what kind of problem(s) a client has and how urgently advice or action is needed.</p> <p><i>Refer to the guidance document – definition of triage.</i>(NB: this document is also used for the reception skills course)</p> <p>Word game: split participants into groups of 3-4 people. Each group has a set of sentences and questions and the task is to decide which ones fit the triage role. Participants could cut out the sentences etc. which apply to triage and stick them on a flip chart or just underline them on the list.</p> | <p><a href="#">Cards – choose sentences that fit triage</a> – stick on flip charts or underline</p> <p>Flip chart- record key points about triage</p> <p><a href="#">Guidance document: “Information, Triage and the Receptionist’s Role” – section on triage</a></p> |



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|          |                                                                                                                                                            | <p>Plenary discussion: aim to draw out the following points about the purpose of triage:-</p> <ul style="list-style-type: none"> <li>• find out more about the client's problem and whether there are other related problems (e.g. someone with a welfare benefits issue may also need debt advice)</li> <li>• discover if there are any dates by which some action has to be taken (e.g. court or tribunal hearing or other deadline)</li> <li>• Determine whether the problem is one which the advice agency can help with or whether the client needs information about other sources of help</li> </ul>                                                                                          |                                                                                   |
| 20 mins. | <p>Triage skills:</p> <ul style="list-style-type: none"> <li>• Listening</li> <li>• Asking the right questions</li> <li>• Summarising the query</li> </ul> | <p><b>Individual/pairs exercise: The Talkative Client: identifying relevant information.</b></p> <p>Hand out the scripts. Ask each participant to underline the important points; summarise and feed back. Then work with a partner to compare notes.</p> <p><b>Plenary:</b> go through the script asking what parts participants have underlined and why. Draw out the point that active listening is an important skill for triage (if the participants have recently attended the reception skills course, refer to the active listening exercise). Active listening may involve asking questions and techniques such as summarising the enquiry to check with the client that you have fully</p> | <p><a href="#">Scenario: Mr. Brown</a></p> <p>Flip chart: "skills for triage"</p> |



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|          |                                                                                                                                                  | <p>understood the problem.</p> <p>On the flip chart, summarise the skills needed for triage.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                    |
| 30 mins. | <p>Why triage?</p> <ul style="list-style-type: none"> <li>• Urgent matters</li> <li>• Prioritising</li> <li>• Can we help? - referral</li> </ul> | <p><b>Agree/disagree game: Is it urgent?</b></p> <p>Read out the list of scenarios. Ask participants to stand up if they think the query is urgent, sit down if they don't think it's urgent, sit on the desk if not sure. After each question, ask at least one person to explain how they reached their decision.</p> <p>Explain that one of the main purposes of triage is to identify problems which are urgent – and to ensure that the client gets advice in time for the problem to be resolved. It also prevents clients waiting for appointments when the advice service can't help them. Triage is useful if the advice agency receives a large number of requests for help and it's not possible for the client to see an adviser immediately.</p> <p><b>Role play: who gets the appointment?</b><br/>The aim of this exercise is to practise triage skills – specifically to identify problems which are genuinely urgent, whether or not the client realises their urgency.</p> <p><b>Plenary with 3 people taking the role of a client:</b><br/>(1) timid client with urgent problem</p> | <p><a href="#">Tutor's script for "Is it urgent?"</a></p> <p><a href="#">Scripts for "clients" – Who gets the appointment?</a></p> |



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|          |                                        | <p>(2) anxious client with non-urgent problem<br/> (3) client with a non-SWEL query<br/> Give the people who are to play the roles of the 3 clients their scripts and explain to the rest of the group that they are the “jury” who must decide which of the clients gets priority in seeing an adviser.<br/> Each client argues their case in turn and the “jury” then decides who is to have the appointment – based on their assessment of which is the most urgent enquiry.<br/> Brief discussion to draw out the following points:-</p> <ul style="list-style-type: none"> <li>• This exercise is designed to help identify problems that are genuinely urgent (e.g. where someone may lose their home, have no money etc. in the near future); we are not suggesting that other problems are not important</li> <li>• Clients will not always know whether or not something is urgent – so it’s part of the skill of triage to ask questions to decide how quickly an appointment needs to be made if there is a waiting time to see an adviser</li> <li>• If in doubt, never guess – always ask an advisers/manager etc. if you are not sure how urgent a problem is</li> </ul> |                                                                                                         |
| 20 mins. | What do you need to know to do triage? | <b>Plenary: tutor presents the query (Mrs. Dirir)</b><br><b>Brainstorm: what you need to know to</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <a href="#">Tutor’s script (Mrs. Dirir)</a><br>Flip chart – record main points: “what you need to know” |



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|               |                                                       | <b>conduct a triage interview.</b><br>Draw out the following points about triage:- <ul style="list-style-type: none"> <li>• A triage worker needs to know what the advice agency does and doesn't do</li> <li>• The agency should have an up-to-date list of other local suppliers/help lines</li> <li>• There should be procedures for referring and sign-posting clients to other agencies if the advice service can't help</li> </ul>                                                                                                   |                                                                                                                                                                                                                                    |
| 15 mins.      | <b>TEA/COFFEE BREAK</b>                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                    |
| <b>Time</b>   | <b>Aim</b>                                            | <b>Method &amp; Activity</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | <b>Resources</b>                                                                                                                                                                                                                   |
| 15 mins.      | Asking the right questions: using checklists          | Plenary Introduce the idea of using checklists in triage interviews. These may not be suitable for all types of enquiry but may be helpful in ensuring that the triage worker asks the right questions – and that urgent issues are not missed. The completed checklist could be given to the adviser in advance of the advice interview.<br><br>Hand out sample checklists for debt and employment. Allow a few minutes for participants to read them and discuss how they could be used within the agencies where the participants work. | Sample check lists for debt and employment advice<br><a href="#">Debt checklist</a><br><a href="#">Employment checklist</a>                                                                                                        |
| 25 – 30 mins. | Practising triage, using checklists and prompt sheets | <b>Work in pairs</b><br><b>Role play (client and triage worker)</b><br><br>Explain that in this session we will practise using the checklists to see how effective they are in conducting a triage interview.                                                                                                                                                                                                                                                                                                                              | Scenarios for role play<br><a href="#">Client with a debt problem</a><br><a href="#">Client with an employment problem</a><br><a href="#">Prompt sheet for debt queries</a><br><a href="#">Prompt sheet for employment queries</a> |



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|          |                              | <p>Split participants into pairs: one person is the client, the other the triage worker. Hand out the employment or debt script to each of the “clients” and the appropriate checklist to the triage worker. The “client” then explains his/her problem and the triage worker goes through the questions on the checklist. Allow up to 15 mins. for this exercise</p> <p><b>Plenary session.</b> Ask participants to comment on:-</p> <ul style="list-style-type: none"> <li>• How easy/difficult it was to use the checklist</li> <li>• How long it took to ask the questions and whether they helped the triage worker understand the client’s problem</li> <li>• How feasible (or not) it would be to use checklists within a triage system at the agencies in which the participants work</li> <li>• Whether a client might confuse the triage interview with an advice interview</li> </ul> <p>Summarise the pros and cons of using checklists.</p> |                                                    |
| 20 mins. | Planning your triage service | Explain that we have covered the main components of triage but that different approaches may be needed for different types of service and limitations of time and space may affect the kind of triage service an agency develops.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <b>Action Plans</b> - summarise main action points |



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|         |            | <p>Ask participants to work in pairs or groups (if there is more than one person from any advice agency, these could all work together). Create a plan to establish the triage service, considering the following points and deciding who should take any action identified as necessary:-</p> <ul style="list-style-type: none"> <li>• What further information you may need to assess emergencies (e.g. guidance from advisers about common types of emergency in their areas of law)</li> <li>• Whether the checklists could be used: if so, for which areas of law/types of query?</li> <li>• What information the agency may need to provide for clients about the work it does and doesn't do</li> <li>• What support the triage service needs from managers/advisers – and who to ask if there is a query</li> <li>• Practical arrangements: time and space for triage interviews</li> </ul> <p>Allow up to 15 mins. for this exercise<br/> <b>Plenary</b> – brief feedback focussing on common issues</p> |                                     |
| 5 mins. | What next? | Feedback and summary: each participant or one person from each agency to say what are the next steps for their agency in establishing a triage system                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <b>Flip Chart</b> – list next steps |

