



Triage Procedure

Procedure Number

CHC-MHS-0074

Version Nos:

3

1. Purpose

This Procedure outlines the process to be followed by all West Coast District Health Board (WCDHB) Mental Health Service (MHS) staff to ensure a cohesive, documented and standardised system for the triage of routine referrals received by the WCDHB MHS.

2. Application/Responsibilities

This Procedure is to be followed by all WCDHB MHS staff members.

3. Definitions

For the purposes of this Procedure:

Triage is the clinical process of undertaking a preliminary assessment to establish whether a person is likely to have a mental disorder, and the nature and urgency of the response required. Triage is provided as the time of first contact (referral, telephone or face-to-face).

4. Responsibilities

For the purposes of this Procedure:

Community Mental Health (CMH) Team Manager:

- is accountable for the One Clinical Files of their Team's clients.
- are responsible for ensuring staff maintain the file in an orderly fashion.

5. Resources Required

This Procedure requires:

- WCDHB MHS Referral and Triage Form
- Computer access
- Previous clinical notes if the person has previously been a MHS client
- Copies of discharge summaries for those individuals who have previously been a MHS client

6. Process

- 1.00 When a referral received, the Triage Person checks the adequacy of the referral information.
- 1.01 If insufficient detail, contact the referrer and clarify the purpose of the referral, the referrer's expectations, safety and risk concerns, the referrer's belief about the urgency.
- 1.02 The Triage Person establishes if referral indicates that the person is likely to have a moderate to severe mental illness.
- 1.03 If the referral is clearly inappropriate contact referrer and advise as to a more appropriate agency to meet the person's needs.
- 1.04 If following triage assessment it is not clear whether the person meets acceptance criteria, treat as non-urgent / routine until a comprehensive assessment is completed.



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- 1.05 The level of required response is determined by:
- Emergency Assessments including Mental Health Act processes
 - Urgent (non-emergency) CMH within 2 working days
 - Routine – CMH to see within seven working days
- 1.06 Psychiatrist opinion re pharmacological/diagnostic issues, as indicated by the Psychiatrist.
- 1.07 Triage Person Allocated to team member for assessment, as per MDT usual allocation process

7. Precautions And Considerations

- The key aspect of routine triage is the focus on gathering enough information, to ensure that the person meets MHS acceptance criteria, and to determine the required urgency of response needed
- The person undertaking the triage role is responsible to ensure that once accepted the person referred is allocated for assessment.

8. References

Health & Disability Sector Standards NZS 8134:2008

9. Related Documents

WCDHB MHS Service Provision Framework

WCDHB MHS Policies and Procedures

WCDHB Personal Health Information Policies and Procedures

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