

Compass COVID-19 triage form for Orthodontics - England only

FAQs – NEW 21/08/2020

There has been a change to the advice for when to complete a triage form. The different approach reflects the recovery/restoration of services and tries to avoid duplication of effort for the profession.

I work in an Orthodontic practice should I be completing the triage forms?

Yes. A triage form should be submitted for calls from (or to) Orthodontic patients, when the patient is given remote management. This now only applies to NHS patients. If the remote management results in the patient being seen for a face to face appointment or on the case of a pre-arranged scheduled orthodontic appointment to continue active care a triage form is not required to be submitted. If the patient fails to attend their face to face appointment a triage form should be submitted.

Should the practice need to close due to a local lockdown a triage form should be submitted for both NHS and private patients when giving remote management.

A triage form does not need to be completed for the remote COVID-19 risk assessment that is required before a patient is seen in the practice

Please refer to section 1.1 on patient management in [Issue 5, Preparedness letter for primary dental care - 13 July 2020](#)

Who can provide patient advice to record on a triage form?

Advice can be given by any Performer who is registered on the [Dental Performers List for England](#) and is associated with any open NHS dental contract in Compass.

An Orthodontic Therapist or a Dental Care Professional (DCP) can give out appropriate advice to the patient as long as it is within their [scope of practice](#).

If I am an Orthodontic Therapist or a DCP providing advice within my scope of practice – how do I record this on compass?

Advice given by an Orthodontic Therapist or DCP will need to be recorded in Compass against an appropriate Dental Performer personal number for the contract, as this field is mandatory.

The performer selected should be the patient's regular dentist or the performer who will carry out their face to face appointment if required. When submitting the triage form the following wording should be included in the optional notes section '*Patient advice has been given by an Orthodontic Therapist / DCP*'

The patient record should also be amended to include notes of the call and advice.

Who has access to create a new triage form?

The new COVID-19 triage reporting form is available, and data can be entered by the following users:

- Performer
- Business Owner
- Practice Manager/Administrator
- Activity Manager

I have completed a form incorrectly what do I need to do?

Once a form has been submitted it is not possible to amend or delete the record therefore make a note on the patient's clinical record.

What data should be collected from a Triage call?

Please refer to the [Dental standard operating procedure: Transition to recovery](#) document for more information.

Details of the data to be collected to complete the Compass triage form has been included as an appendix in the updated user guidance

Do I continue to write actual clinical notes in the patient record?

Dentists are expected to maintain clinical records as per the [Dental Record Keeping Standards document](#) following remote triage. This should include information on assessment, necessary self-care advice and appropriate prescriptions for analgesics and/or antimicrobials by telephone.

Does the patient have to sign the PR form or Medical History form?

In order to avoid any risk of infection, the receptionist or dental nurse should inform the patient that the forms are being signed on their behalf. The receptionist or dental nurse must sign the form and state '*Signed on behalf of the patient due to COVID 19*'. This will ensure that if the patient records are reviewed in the future it will not be questioned why the patient did not sign the forms.