

COVID-19 Online triage form completion

A guide to help you with COVID-19 reporting in Compass

This guide will help you use the new COVID-19 Online form reporting function in Compass. Please note that any data shown in the screenshots has been simulated.

From 1 December 2020 COVID-19 triage forms can be transmitted directly from your practice management system (PMS). There has also been an update on when to complete a COVID-19 triage form and these changes can be found in the latest FAQ documents published alongside this guidance.

Statement/declaration to patient

When conducting a telephone dental triage, the patient should be informed as to why the following data is being gathered. This is part of the transparency principle of data protection and ensures you are being open and honest about the reason and lawful basis for processing this data. The patient should therefore be told the following information before proceeding:

“Due to the current Coronavirus outbreak, as part of your dental triage we need to gather additional personal data from you in relation to COVID-19. We use this information to:

- help Public Health England to monitor and manage the response to COVID-19 in relation to dental activity
- plan our response in relation to COVID-19

The Coronavirus Act 2020 and special regulations from the Secretary of State for Health and Social Care legally allows us to gather this data. If you would like more information about this you can visit the NHS Business Services Authority website, click on the ‘Privacy’ link at the bottom of the page, and then select ‘NHS Dental Services Privacy Notice’ from the list on the left-hand side of the page.”

Accessing the COVID-19 reporting menu option

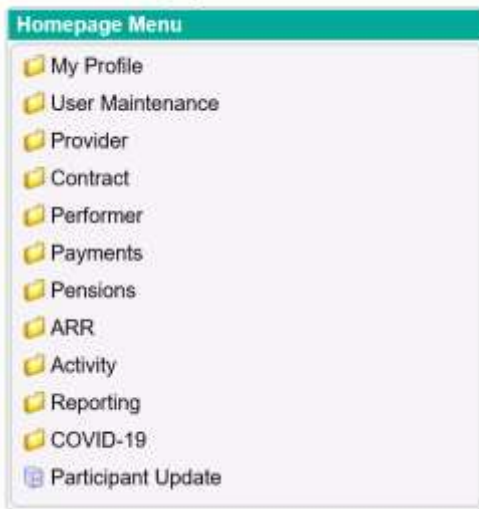
The COVID-19 triage reporting facility is available to the following users:

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

Simply log in to [Compass](#) in the normal way.

Select Activity from the Homepage Menu:

Providers Homepage



Performers Homepage



Select Activity Creation to display the Activity Claim Creation launch screen:

You can either enter Contract ID manually or click on the magnifying glass to display all the contracts you work on and choose the appropriate contract.

Use the drop down to choose the form type (Triage) and select “next” button.

PLEASE NOTE: The boxes displayed as green are all mandatory fields.

The screenshot shows the 'Activity Claim Creation (Provider)' interface. At the top right, there are links for 'Logout', 'Accessibility', 'Print', and 'Help'. The NHS Business Services Authority logo is prominently displayed. Below the header, a breadcrumb trail shows 'Home » Activity Creation Launch'. A green notice bar states: 'NOTE: The claims created in this session (unless they are Triage claims) will require prior independent authorisation by a dentist before they can be released for processing.' The main form area contains several input fields: 'Contract ID', 'Performer ID', and 'Location ID' are all highlighted in green, indicating they are mandatory. Below these is a 'Form Type' dropdown menu with options 'FP17/FP17W', 'FP17O/FP17OW', and 'Triage'. The 'Triage' option is currently selected. At the bottom right of the form, there are 'Next' and 'Cancel' buttons. The footer contains copyright information for NHSBSA and a statement of support for the NHS.

Select Patient Information tab and complete relevant patient information – DOB format can be either DDMMCCYY or DD/MM/CCYY.

If it is a new patient, you must enter their details manually, however, you can search for their address by entering their post code in the Post Code field and clicking on the magnifying glass next to the ‘Postal address Selector’.

Then select the correct address from the list displayed

The screenshot shows the 'Patient Information' tab selected. The form contains several fields: 'Patient ID', 'NHS Number', 'Surname', 'Forename', 'Address', 'Post Code', 'Sex', and 'Date of Birth'. The 'Surname', 'Forename', and 'Address' fields are highlighted in green. There is a 'Previous Surname (If changed since last visit)' field. A 'Postal address Selector' dropdown is located below the 'Address' field, with a magnifying glass icon next to it. At the bottom of the form, there are several buttons: 'Save as Draft and Create Another Claim', 'Save as Draft and Return to Launch Screen', 'Save and Create Another Claim', 'Save and Return to Launch Screen', and 'Cancel and Return to Launch Screen'.

Select the Triage Data tab to enter details of the Triage that has taken place.

The screenshot shows a software interface for entering triage data. It features a header with two tabs: 'Patient Information' and 'Triage Data'. The 'Triage Data' tab is selected. Below the tabs, there are several input fields and checkboxes. On the left side, there are checkboxes for 'Dental Care Professional', 'Triage Performed by Video Link', 'Advice Given', 'Advised appropriate analgesics', 'Remote prescription issued for analgesics', 'Remote prescription issued for antibiotics', 'Follow-up call required', 'Patient advised to call back if symptoms worsen', and 'Face to Face Appointment arranged within Practice but Patient failed to attend'. On the right side, there are dropdown menus for 'Patient Group' and 'Primary Reason', and a dropdown menu for 'Referred to Local UDC Reason'. At the bottom of the form, there are five buttons: 'Save as Draft and Create Another Claim', 'Save as Draft and Return to Launch Screen', 'Save and Create Another Claim', 'Save and Return to Launch Screen', and 'Cancel and Return to Launch Screen'.

The **'Date of Contact'** is mandatory. Enter the date in the format dd/mm/yyyy or can be selected from the calendar box immediately to the right of the date field. Only dates since 1st March 2020 will be accepted.

The **'Time of Contact'** is also mandatory and should be entered in the format hh:mm.

'Dental Care Professional' – This optional tick box should be ticked if the advice given to the patient has been provided by either a Dental Care Professional or an Orthodontic Therapist.

'Triage by Video link' - This optional tick box is to be used if you complete the triage assessment using a video link to contact a patient and provide further advice.

Below this there are a series of outcome tick boxes, at least one of which must be ticked. It is acceptable to tick more than one box but at least one of the tick boxes or the reason for

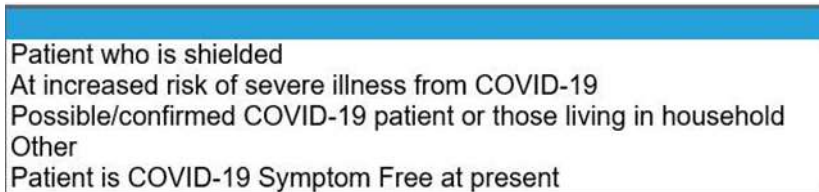
- Advice Given
- Advised Appropriate Analgesics
- Remote Prescription Issued for Analgesics
- Remote Prescription Issued for Antibiotics
- Follow-up Call Required
- Patient Advised to Call Back if Symptoms Worsen
- Face to Face appointment made within practice but patient failed to attend

Referred to Local UDC – This should be used to record why the patient has been referred to a UDC and has a drop-down box with a list of options to choose from e.g. Post extraction bleeding can't be controlled by local measures.

The screenshot shows a dropdown menu for 'Referred to Local UDC Reason'. The menu is open and displays a list of reasons for referral. The options are: 'Life-threatening emergencies', 'Trauma inc. facial/oral laceration and/or dentoalveolar injuries', 'Oro-facial swelling that is significant and worsening', 'Post extraction bleeding which can't be controlled by local measures', 'Dental conditions resulting in acute and severe systemic illness', 'Severe dental and facial pain. Not controlled by self help advice', 'Fractured teeth or tooth with pulpal exposure', 'Dental and soft tissue infections without a systemic effect', 'Suspected oral cancer', and 'Oro-dental conditions that can worsen systemic medical conditions'.

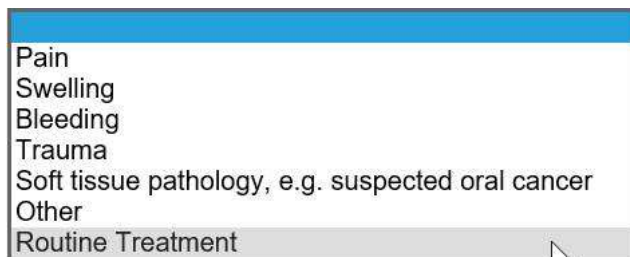
The following fields must still be completed, even if the patient is not being referred to a UDC. This data is being used to understand the group of the patient that are being treated outside of the UDC's.

Patient Group – This is mandatory and should be used to record the patient COVID-19 status at the time of the triage call. 'Patient who is shielded' should be selected if the patient falls into the high risk clinically extremely vulnerable category.



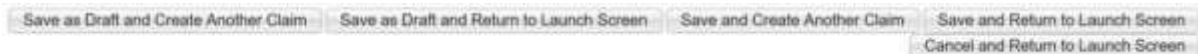
Patient who is shielded
At increased risk of severe illness from COVID-19
Possible/confirmed COVID-19 patient or those living in household
Other
Patient is COVID-19 Symptom Free at present

Primary Reason – This is mandatory and should be selected from the drop-down list to indicate the cause of the triage incident e.g. Pain. If the cause is not displayed select 'Other'.



Pain
Swelling
Bleeding
Trauma
Soft tissue pathology, e.g. suspected oral cancer
Other
Routine Treatment

When all the data for the Triage submission has been completed, select one of the below boxes to save as a draft and create another entry, to save as a draft and return to launch screen, to save and create another entry, to save and return to launch screen or to cancel the entry and return to the launch screen



Save as Draft and Create Another Claim Save as Draft and Return to Launch Screen Save and Create Another Claim Save and Return to Launch Screen Cancel and Return to Launch Screen

Essential data to be collected from a triage call

Below is a full list of all information that should be taken from a patient when they are telephoning a dental practice for dental advice. This information will be used to complete the Compass Online Triage forms.

Patient data - mandatory

Patient Surname
Patient Forename
Date of birth
Sex
The first two lines of the patient address.

Date of contact
Time of contact (being the time that the call was answered)
Optional Field: 'Dental Care Professional' to be ticked if the remote advice is given by a DCP or Orthodontic Therapist

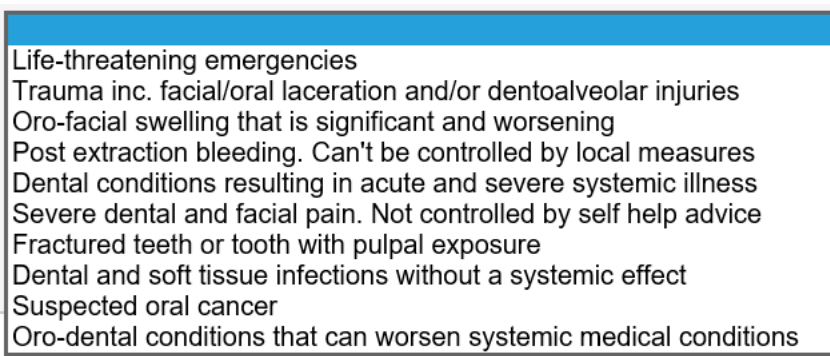
Optional Field: 'Triage by Video link' to be ticked if the triage consultation was completed using video technology.

Triage outcome data

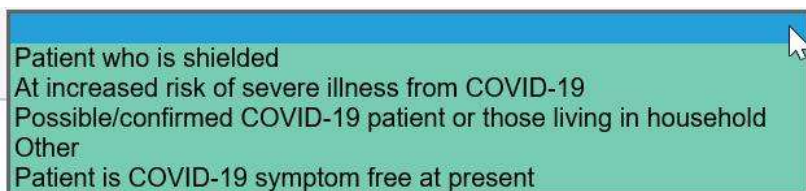
At least one of tick boxes listed must be ticked. It is acceptable to tick more than one box but at least one of the tick boxes or the reason for referral to a Local UDC must be entered.

- Advice Given
- Advised Appropriate Analgesics
- Remote Prescription Issued for Analgesics
- Remote Prescription Issued for Antibiotics
- Follow-up Call Required
- Patient Advised to Call Back if Symptoms Worsen
- Face to Face Appointment Made Within Practice But Patient Failed to attend

Referred to Local UDC – If the patient is to be referred to a UDC this should be used to record why the patient has been referred and has the below options from which to choose.



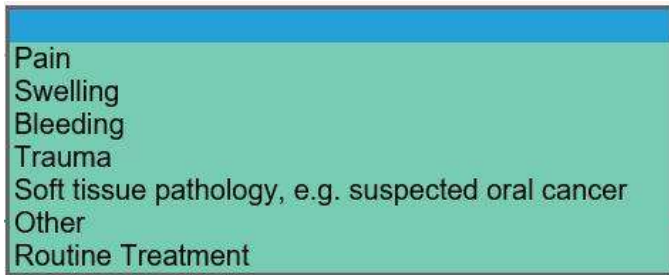
Patient Group – This is mandatory and should be used to record whether the patient is in one of the at-risk groups shown in the drop-down list below. If the patient does not fit into any of the defined groups, please select 'Other'



Patient who is shielded – Select this category if a patient is now high risk and considered clinically extremely vulnerable.

At increased risk of severe illness from COVID-19 – Moderate risk (clinically vulnerable) for example patients over 70, pregnant, asthma and diabetes. A full list of patients in this category is available on the [NHS website](#)

Primary Reason – This is mandatory and should be selected from the drop-down list below to indicate the cause of the triage incident. If the cause is not displayed select 'Other'.



- Pain
- Swelling
- Bleeding
- Trauma
- Soft tissue pathology, e.g. suspected oral cancer
- Other
- Routine Treatment

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