

## Preconference Session

Thursday, September 9 - Chicago  
Thursday, September 30 - San Diego  
Thursday, November 4 - Washington, DC

### Telephone Triage Basics: Process and Practice

Four nationally known experts will use adult and pediatric case studies to illustrate telephone triage "basics"—the theory and practice of telephone triage. An introduction to the world and work of telephone triage for the novice practitioner, this session will focus on best practices, protocols and forms. This program will also meet the needs of new managers seeking a "ready-made" training package. In order to optimize your learning experience, we strongly encourage all attendees to prepare ahead by reading *"Telephone Triage: Theory, Practice and Protocol Development"* prior to attending the Preconference. (Please see the Order Information Box, page 3, if you don't already have your copy.)

Carole A. Becker, RN, MS  
Carol Rutenberg, RN, MNsc, CEN  
Barbara Siebelt, RN, BA, FASHRM  
Sheila Quilter Wheeler, RN, MS

7:00 a.m. Preconference Registration • Check-In

8:00 **How to Conduct a Meaningful Interview: Getting to the Point** (Rutenberg)

8:30 **Creating Context: Red Flags and Rules of Thumb** (Wheeler)

9:00 **Pediatric Case Study: Data Mining the Hard Way** (Wheeler)

9:30 **Making Decisions Under Conditions of Uncertainty** (Rutenberg)

10:00 Break

10:15 **Adult Case Study: The Nitty Gritty of Data Collection**  
**How to Avoid the "Out of Protocol" Experience** (Wheeler)

10:45 **Forms: Documentation Nuts and Bolts**

**Protocols: A Word on Reinventing the Wheel** (Rutenberg)

11:30 **Questions and Discussion**

12:00 p.m. Lunch Break

1:00 **Case Study Review: How and Why Things Go Wrong** (Siebelt)

2:00 **Do You Measure Up? Orientation and Beginning Competency Measures for Novices** (Becker)

2:45 Break

3:00 **A Word About Managing Risk** (Siebelt)

3:30 **The Evolving Role of Telephone Health Management** (Becker)

4:00 **Questions and Discussion**  
Faculty Panel

4:35 Adjourn

## Main Conference

Thursday, September 9 - Chicago  
Thursday, September 30 - San Diego  
Thursday, November 4 - Washington, DC

3:30 - Early Registration • Check-In  
6:00 p.m.

Friday, September 10 - Chicago  
Friday, October 1 - San Diego  
Friday, November 5 - Washington, DC

7:00 - Registration • Check-In • Displays  
8:00 a.m.

8:00 **Program Introduction/Objectives**

8:05 **New Kid on the Block: Telephone Triage as an Emerging Specialty**

Carol Rutenberg, RN, MNsc, CEN

8:50 **From Novice to Expert: Clinical Judgement in Telephone Triage**

Christine A. Tanner, RN, PhD, FAAN

9:35 Refreshment Break • Displays

10:15 **High Stakes, High Risk: Medical-Legal Considerations in Telephone Triage**

- ◆ Robert H. Smith, JD
- Lisa A. Miller, CNM, JD
- Elizabeth E. Hogue, JD

11:00 **Advocacy: Positioning for Success in the New Millennium**

- ◆ ● Beverly L. Malone, RN, PhD, FAAN
- Virginia Trotter Betts, MSN, JD, RN, FAAN

11:45 **Questions and Discussion**  
Faculty Panel

12:15 p.m. **NETWORKING LUNCHEON** (included in tuition)

12:45 **Displays**

1:30 **"Frequent Flyers" and Other Difficult Calls**  
Linda J. Arnold, RN, MS

2:15 **Y2K: Implications for Telephone Triage Nurses**  
Laurene West, RN, BS

3:00 Refreshment Break • Displays

3:45 **Marketing Your Call Center: We are All in It Together**  
Kriss Barlow, RN, MBA

4:30 **Questions and Discussion**  
Faculty Panel

5:00 Adjourn

**EVENING TOUR** (See description for times.)

- ◆ = Speaking in Chicago only
- = Speaking in San Diego only
- = Speaking in Washington, DC only



Saturday, September 11 - Chicago  
Saturday, October 2 - San Diego  
Saturday, November 6 - Washington, DC

During each concurrent session, five topics are presented simultaneously in separate rooms. Sessions are limited in size and are assigned in the order received.

Sessions are arranged in tracks as follows:

W = Women's Health  
P = Pediatrics  
A = Adult/Emergency  
I = Implementation/Operations  
G = General Interest

#### 8:00 a.m. CONCURRENT SESSIONS #1

##### W-11 Don't Go There: Legal Minefields in Women's Health

- ◆ Robert H. Smith, JD
- Lisa A. Miller, CNM, JD
- Elizabeth E. Hogue, JD

*Experts explain how to limit risks when performing telephone triage for women — a high stakes activity with a high risk population.*

##### P-12 Mother and Child: Triage Breastfeeding Questions

- ◆ Nicki Ward, RN, BSN, IBCLC
- Rose deVigne-Jackiewicz, RN, MPH, IBCLC
- Marie A. Biancuzzo, RN, C, MS

*Breastfeeding problems, a complex call, must always be regarded with suspicion. Experts discuss common red flags, guidelines and forms.*

##### A-13 A Systematic Approach to Telephone Assessment

Carol Rutenberg, RN, MNSc, CEN  
*Learn "tricks of the trade" in advanced history-taking as you fine-tune your system for data collection.*

##### I-14 Making a Difference: Competency and Productivity Measures

Carole A. Becker, RN, MS  
*Although independent outcomes research regarding telephone triage is still in process, there are immediate steps to take to measure the competency and productivity of staff. Learn how to gauge the success of your program and ways to improve it.*

##### G-15 Telephone Turbulence: High Volume, High Stakes, High Stress

Linda J. Arnold, RN, MS  
*Change is good, but sometimes stressful. Learn techniques to manage stress in the high stakes world of telephone triage.*

9:15 Refreshment Break • Displays

*"Telephone Triage in our setting has evolved from necessity and we are practicing without written guidelines and formal protocols. This conference has given me information and tools to take back and help set up a safe and more effective triage situation."*

Pauline Patterson, RN, BSN, OCN • Dallas, TX

9:45

#### CONCURRENT SESSIONS #2

##### W-21 Women's Health: Herbs, Home Remedies and Alternative Therapies

- ◆ Shirley J. Moore, MSN, CNM
- Lisa A. Miller, CNM, JD
- Alan P. Agins, PhD

*Research demonstrates that increasing numbers of our patients are seeking alternative therapies. Experts discuss the latest trends with suggestions for protocol development.*

##### P-22 When Experiments Become Emergencies: Street Drugs and Teens

- ◆ William Banner Jr., MD, PhD
- Anthony S. Manoguerra, PharmD, ABAT
- Lisa L. Booze, BS Pharm, CSPI

*Experts discuss the latest trends, red flags and call management techniques for this potentially crisis level call.*

##### A-23 Handle with Care: Frail Elderly Callers

- ◆ Marian E. Lynn, RN
- Barbara Schulman, RN, MN, GNP
- Kathleen Fletcher, RN, MSN, CS, GNP

*The frail elderly are a special population with unique problems and symptom presentations. Experts discuss red flags, common problems and guidelines to handle these calls with finesse.*

##### I-24 System Selection: Paper or Plastic? In-House or Outsource? Choose or Lose?

- ◆ Maureen Espensen, RN, BSN
- Trudy Ferree, RN, MS, CNA
- Sandra T. Dahl, RN, C, BSN, MA

*Whether you are facing decisions about buying a new software system or maintaining your current one, jump start the process by updating your knowledge in this dynamic session.*

##### G-25 Everything You've Always Wanted to Know About Marketing But Were Afraid to Ask

Kriss Barlow, RN, MBA  
*An expert dispels mysteries and myths of marketing by proposing strategies for your call center (large or small).*

11:00 Session Change

#### 11:15 CONCURRENT SESSIONS #3

##### W-31 After the "Come and Go" Delivery: Postpartum Problems

- ◆ Linda Given Welch, CNM, MS
- Rose deVigne-Jackiewicz, RN, MPH, IBCLC
- Marie A. Biancuzzo, RN, C, MS

*Don't get caught with your protocols down! Experts discuss common red flags as well as guidelines and forms.*

##### P-32 Pediatric Ingestions: Protocols and Best Practices

- ◆ William Banner Jr., MD, PhD
- Anthony S. Manoguerra, PharmD, ABAT
- Lisa L. Booze, BS Pharm, CSPI

*Based on current trends, experts review commonly ingested substances and management techniques in relation to current guidelines.*

##### A-33 "... And By the Way:" Common Questions About Medications and Herbs

- ◆ Miriam A. Mobley-Smith, PharmD
- Lisa E. Vivero, PharmD
- Alan P. Agins, PhD

*Learn which medications are common offenders in polypharmacy, allergic reactions, or side effects. Experts share guidelines to address common questions and problems.*



**I-34 A Compass for Navigating the Accreditation Process**  
Cheryl A. May, RN, MBA  
*Is your call center considering accreditation? If so, check out this session on the essentials with an expert from the field.*

**G-35 Telephone Triage in the Office Setting: Developing a First-Class "Home Grown" System**  
Carol Rutenberg, RN, MNSc, CEN  
*Addresses key elements essential to the development of a well-run office triage program. Also identifies strategies for evaluating and improving existing office-based programs.*

12:30 p.m. Lunch Break (Lunch on your own)

1:30 **CONCURRENT SESSIONS #4**

**W-41 BCP to HRT: The Hormonal Spectrum**  
◆ Linda Given Welch, CNM, MS  
● Mary Day, CNM, MSN, FNP  
■ Vicki E. Long, RNC, CNM, MSN  
*Experts discuss the latest research, trends, treatments, protocols and forms related to these common but complex calls.*

**P-42 Calming the Caretaker: Pediatric Falls, Accidents and Injuries**  
◆ Harriet S. Hawkins, RN, CCRN  
● Chester Randle, MD  
■ Ben Gitterman, MD  
■ Carrie Goren Ingall, RN-C, MSN, PNP  
*Experts discuss childhood injuries, red flags of abuse, and protocols related to these common calls.*

**A-43 AIDS/HIV: Word from the Front**  
◆ Patrick Robinson, RN, PhD(c), ACRN  
● Lee Klosinski, PhD  
■ William Sachau, ACRN, BS  
*No one knows the world of HIV the way experts from hotlines do. They do everything from counsel and comfort to dispense information and referral. Advice nurses need to know when, where, how and if to "punt" these calls.*

**I-44 The Budget: Been There, Done That**  
◆ Maureen Espensen, RN, BSN  
● Trudy Ferree, RN, MS, CNA  
■ Maggie Tetreault, RN, MSN, PNP  
*Day to day operations, equipment and staffing to mission, population served and call volume are all tricky business. Experts walk you through the process and a sample budget, describing how to know you will break even and achieve a return on investment.*

**G-45 Whose Job is It Anyway? Controversies and Legalities**  
Barbara Siebelt, RN, BA, FASHRM  
*A risk management expert takes on this year's hottest topic — who can do what in the process of telephone triage.*

2:45 Refreshment Break

3:15 **CONCURRENT SESSIONS #5**

**W-51 GYN Bleeding: What's Normal, What's Not**  
◆ Brenda Humber, MS, CNM,  
● B. J. Snell, PhD, CNM, WHCNP  
■ Vicki E. Long, RNC, CNM, MSN  
*Remember, GYN bleeding is not always what it appears to be. Hear the experts discuss assessment, differential diagnosis and management of this familiar telephone triage problem.*

**P-52 Assessment of Pediatric Head, Respiratory and Abdominal Complaints**  
◆ Harriet S. Hawkins, RN, CCRN  
● Chester Randle, MD  
■ Ben Gitterman, MD  
■ Carrie Goren Ingall, RN-C, MSN, PNP  
*Assessing these problems in infants and children is made even more difficult by age-related communication limitations. Experts discuss useful assessment techniques unique to telephone triage and sample triage guidelines to overcome these challenges.*

**A-53 Breaking the Vicious Cycle of Adult Assault and Abuse**  
◆ Karen B. Rothstein, BS  
● Sally Thresher, RN, MSN, NP  
■ Robin S. Haskins, BA  
*Partner and elder abuse, an emotionally loaded call, requires expert assessment, emotional sensitivity and crisis intervention. Experts discuss red flags, protocols and key strategies to build trust and effectively intervene.*

**I-54 See One, Do One, Teach One: The Preceptor Program**  
Anya Jones, RN, MS, MBA  
*Telephone triage training has evolved and managers of cutting edge systems are developing preceptor programs. Managers share their experience and tools for implementation and development of these programs.*

**G-55 Telephone Triage Standards: Latest Developments**  
Cheryl A. May, RN, MBA  
*In the era of managed care, it sometimes seems as if quality is fighting a losing battle. Learn how to incorporate the essential performance standards into your telephone triage practice.*

4:30 Adjourn

*Educational support provided by  
McKessonHBOC Access Health Group.*

**To Register:**



**By Mail**  
Contemporary Forums  
11900 Silvergate Drive  
Dublin, CA 94568-2257



**By Phone**  
(925) 828-7100, Ext. 3  
8am - 5pm, Pacific Time  
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