

Clinic Inbox Triage Matrix

Create consistent ownership, response targets, and escalation rules for administrative messages.

IMPORTANT	Do not record patient names, symptoms, diagnoses, medical records, passwords, or protected health information in this worksheet.
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Message categories

CHECK	NOTES / DECISION
☐ Routine administrative	Owner, response target, approved template, and logging rule.
☐ Scheduling and access	Route, urgency definition, follow-up owner, and closure rule.
☐ Billing or documentation	Authorized team, required verification, and escalation path.
☐ Sensitive or uncertain	Stop automation and route to an authorized reviewer.
☐ Urgent or clinical	Do not use this matrix as emergency or clinical triage; follow the practice's approved protocol.

Control points

CHECK	NOTES / DECISION
☐ Identity and channel	How is the sender and communication channel verified?
☐ Classification review	Which classifications require confirmation?
☐ Response approval	Who approves customer-facing or sensitive communications?
☐ Audit trail	Where are assignment, review, escalation, and completion recorded?
☐ Service measure	Track time to assignment, time to closure, rework, and missed handoffs.

Human review checkpoint

Name the person responsible for approving the workflow, reviewing exceptions, and deciding when professional, legal, privacy, security, or clinical escalation is required.

This resource provides general administrative guidance. It is not medical, legal, privacy, cybersecurity, financial, or regulatory advice.