

PATIENT INTAKE PRIORITIZATION GUIDE

MEDICAL FACTORS	HIGH	MODERATE	ROUTINE	SOCIAL FACTORS	HIGH	MODERATE	ROUTINE
Pregnancy	High Risk, Late Term	Uncomplicated	Not Pregnant	Insurance	None	Limited	No Concerns
Cancer	Active Treatment	Follow-Up	Remission	Language	Barrier	Limited	Fluent
Mental Health	Crisis Risk	Symptomatic	Stable	Transportation	None	Unreliable	Reliable
Substance Use	High Risk	Ongoing Use	Recovery	Housing	Homeless	Unstable	Stable
Cardiovascular Disease	Unstable	Chronic Care	Controlled	Food Security	Insecure	Limited	Secure
Respiratory Disease	Exacerbation	Symptomatic	Controlled	Health Literacy	Low	Moderate	High
Diabetes	Uncontrolled	Suboptimal	Controlled	Social Support	None	Limited	Strong
Medication	High Risk	Adjusting	Stable	Income	None	Low	Stable
Disability	High Support	Moderate Support	Independent	Digital Access	None	Limited	Full
Weight/Nutrition	Severe Risk	Over/Underweight	Healthy	Home Environment	Unsafe	Unstable	Safe
Smoking	High Use	Current Use	Non-Smoker	Newcomer Status	Recent	Established	Long-Term
Age	Frail/Infant/Child	Older Adult	Adult				

HOW TO USE THIS GUIDE

Use this tool during intake to quickly assess patient complexity and determine booking priority based on social and clinical factors.

1. Review each factor during intake.
2. Assign a colour rating for each factor.
3. Identify overall level of risk.
4. Use clinical judgement for exceptions or safety concerns.

This tool supports prioritization within intake batches. Patients with higher urgency (●) are booked before lower urgency (●/●). When patients have similar priority levels, scheduling may be adjusted based on clinic capacity and referral timing.

Any ● rating indicates high priority and overrides all other factors.

Patients with any RED flag should be booked ahead of lower-risk patients.

COLOUR LEGEND

- HIGH PRIORITY**
● Book as soon as possible.
Patient has significant barriers affecting well-being and access to care.
- MODERATE PRIORITY**
● Book soon, but not urgent.
Patient has some barriers that may delay or complicate care.
- ROUTINE**
● Book for next available appointment.
Patient has a stable situation with minimal barriers to accessing care.