



## Admin Manual

SymptomScreen Admin is used to make changes in your SymptomScreen account, to review customizations you have made to the SymptomScreen priorities and guides, and to run reports on your organization's usage of SymptomScreen. While SymptomScreen Admin is designed to be easy to use without instructions, this manual provides a great overview and also touches on some details that can be easy to overlook.

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### Table of Contents

- Sign In
  - Account Settings
  - Additional Account Settings
  - Customization - Priorities
  - Customization - Guides
    - Guide Selection
    - Guide Customization (Edit Questions, Edit Properties)
    - Other Actions
  - Guide Lists
  - Reports
  - Need More Help?
- 

### Sign In

Sign into SymptomScreen Admin at <https://admin.symptomscreen.com>. You will sign in with your own email address and with the personal password you set up for your admin account.

If you can't remember your password or if you are signing in for the first time, click on Forgot Password and enter your email address. You will receive an email which will let you set your admin password.



By using SymptomScreen, I acknowledge and accept the [Terms of Use](#).

**Sign In**

[Forgot Password?](#)

If your email address is not yet registered as an administrator for your SymptomScreen account, a current administrator for your account can request to have you added by emailing [support@symptomscreen.com](mailto:support@symptomscreen.com). You can also email us directly if you have any questions.

## Account Settings

Use this section to change settings for your account. Any changes you make will be applied to your account immediately.

A screenshot of the SymptomScreen Admin interface. The top navigation bar is green with the SymptomScreen logo and "Admin" text. A sidebar on the left contains menu items: "Account Settings" (highlighted), "Customization", "Guide Lists", and "Reports". The main content area is titled "Account Settings" and contains three sections: "Documentation Options" with four radio button choices (Standard, Concise, Denied One Line, and Denied Multiple Lines, which is selected); "Spanish Screening Questions" with two radio button choices (Use and Don't Use, which is selected); and "Spanish Screening Introduction" and "English Screening Introduction" with text input fields containing introductory text for callers.

## Documentation Options

Select the information to be included in the note copied to the patient's record when your agent presses "Copy Note", as well as the formatting of that information. There are five options available:

### Standard

*Symptom: Abdominal Pain - Male*

*Outcome: Normal triage queue*

*Reason: Fever*

### Concise

*Abdominal Pain - Male. Normal triage queue because Fever*

### Denied One Line Symptom

*Abdominal Pain - Male*

*Outcome: Normal triage queue*

*Reason: Fever*

*Caller denied: Walks bent over. Blood in the stool (poop) or vomit. Pain in the scrotum.  
Severe pain now.*

### Denied Multiple Lines

*Symptom: Abdominal Pain - Male*

*Outcome: Normal triage queue*

*Reason: Fever*

*Caller denied:*

*\* Walks bent over*

*\* Blood in the stool (poop) or vomit*

*\* Pain in the scrotum*

*\* Severe pain now*

### Dual

This option provides two copy buttons in SymptomScreen rather than just one. The first copies the note in the "Concise" format, the second copies in the "Denied Multiple Lines" format. This option works well if you sometimes need to paste the note into a short field in the EMR (like an appointment note) and sometimes into a field with more space (like a telephone note).

## Screening Questions

### Spanish Screening Questions

Do you have Spanish-speaking callers and bilingual Spanish-speaking agents? If so, this feature gives your bilingual agents the option to see Spanish translations of the screening introduction and questions in the SymptomScreen guides so they don't have to translate in their head during the call. The priority instructions and the note copied from SymptomScreen will still be in English, so the documentation in the patient's medical record will remain in English.

### **Spanish Screening Introduction**

The screening introduction is the script that displays before the agent asks the caller any screening questions. This introduction is important because it allows your agents to explain the screening process to your callers and also tells the caller why it's important. Use this setting to customize the introduction in Spanish, displayed only if Spanish Screening questions are turned on for your account.

### **English Screening Introduction**

The screening introduction is the script that displays before the agent asks the caller any screening questions. This introduction is important because it allows your agents to explain the screening process to your callers and also tells the caller why it's important. Use this setting to customize the English version of the introduction. The default introduction is:

*To handle your call properly, I'm going to read a short list of symptoms. Stop me right away if any of these are true or may be true.*

## ***Caller Acceptance Options***

### **Caller Acceptance Recording**

This setting allows you to choose whether or not you wish to display the caller acceptance question at the end of the call. This question provides a place for the caller to request a different outcome (for example, if the guide didn't ask about a particular worrisome complication). Some organizations choose not to use this question but instead count on the caller to interject anyway.

### **Caller Acceptance Question**

This is the question for your agents to ask at the end of the screening process if you are using this feature. The default question is:

*Is the caller comfortable with this outcome?*

### **Text to show/copy if caller affirms caller outcome question**

If the caller answers yes to the Caller Acceptance Question, this is the text that will be displayed to your agents and copied into the note.

### **Text to show/copy if caller rejects caller outcome question**

If the caller answers no to the Caller Acceptance Question, this is the text that will be displayed to your agents and copied into the note.

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# Additional Account Settings

The following settings are not accessible in the Admin. They can only be changed by contacting SymptomScreen Support at [support@symptomscreen.com](mailto:support@symptomscreen.com).

## *Pre-Screening Questions*

If turned on for your account, pre-screening questions can move stable chronic calls to a lower acuity level. For example, without pre-screening questions someone with chronic leg pain might always wind up at a high priority because they answer yes to "severe pain now", even though they always have severe pain now. Pre-screening questions can prevent this.

Choose two questions to ask at the start of every call to identify these stable chronic symptoms, then choose the priority for the callers. Common choices are:

1. Is this symptom new within the past 30 days?
2. Is it getting worse?

Or

1. Have you been seen for this already?
2. Is it getting worse since your last medical visit?

## *Age Limits*

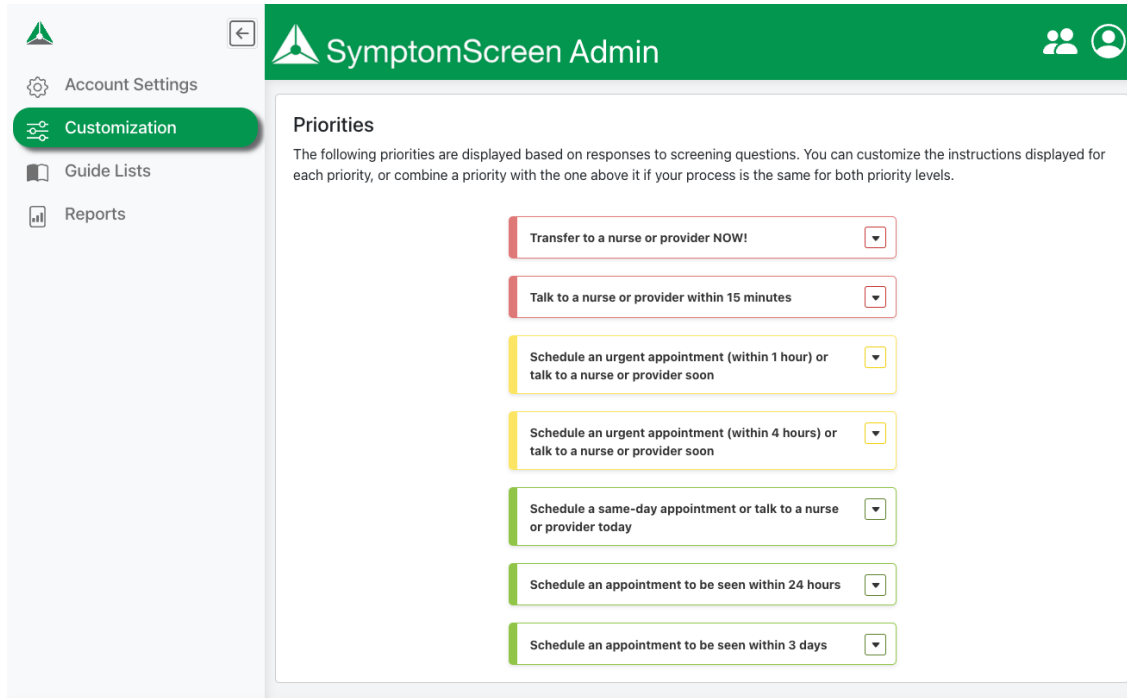
Do you only see pediatric patients? Or only adult patients? Your account can have age limits so that guides and questions that don't pertain to your population don't appear. Contact SymptomScreen support at [support@symptomscreen.com](mailto:support@symptomscreen.com) to set age parameters for your account.

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# Customization - Priorities

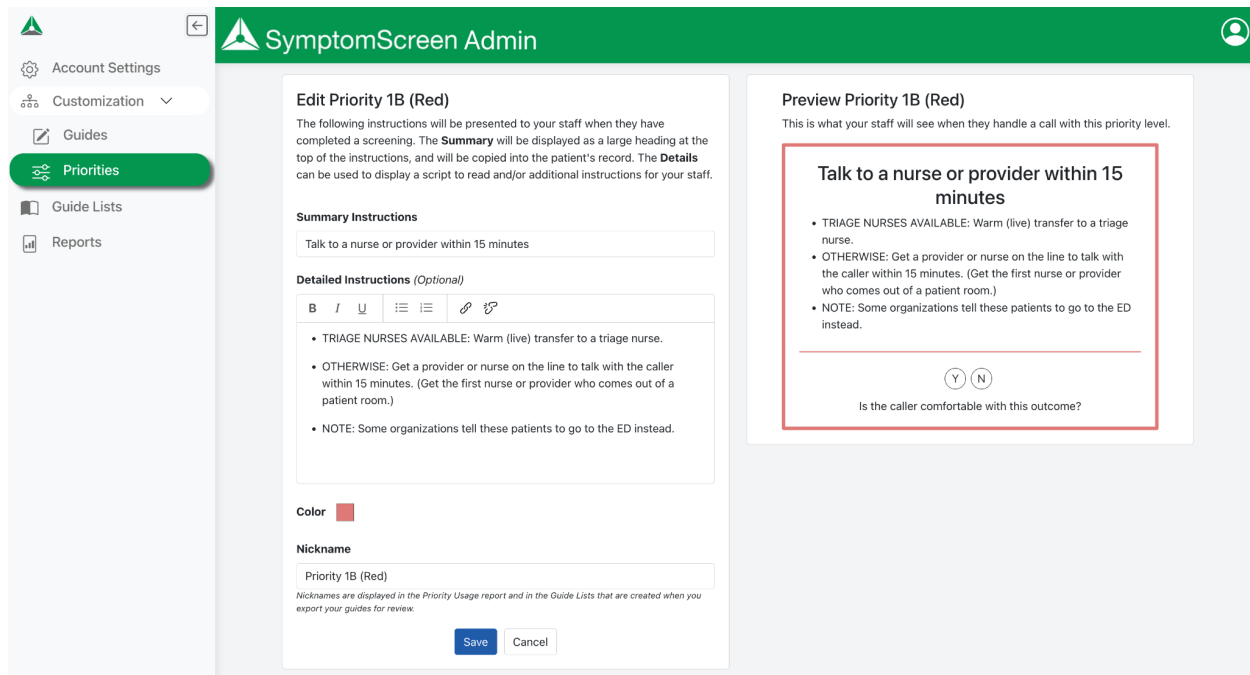
Your account will be created with the standard priorities from the SymptomScreen guide authors. However, the different instructions that appear when you select a positive screening question are meant to be changed to match your organization's workflow. SymptomScreen will be much more useful after you complete this simple step.

Within customization, you can customize the instructions displayed for each priority, or combine a priority with the one above it if your process is the same for both priority levels. To customize instructions or combine priorities, click on the caret icon located to the right of the priority you wish to change. Select "Edit" to customize the instructions or "Combine with above" to combine that priority with the priority above.



## Editing Priority Instructions

There are four different features of priority instructions that you will have the ability to edit. As you are editing, you will be able to see a preview of your priority instructions to the right of the editor.



1. **Summary Instructions:** The Summary will be displayed as a large heading at the top of the instructions, and will be copied into the patient's record. It is recommended to keep this instruction concise for readability and documentation purposes.
  2. **Detailed Instructions:** The Details can be used to display a script to read and/or additional instructions for your staff. Options for formatting include bold, italicized, or underlined text, bulleted or numbered lists, and hyperlinks. **Link to EXAMPLES**
  3. **Color:** Change the color of the priority instruction that displays for your users. This can be helpful to assist your users quickly differentiate between priority levels.
  4. **Nickname:** Nicknames are displayed in the Guide Lists (Word documents) that are created when you export your guides for review. Use the nickname feature to give your priorities an internal name for quick and easy reference. The nicknames are also used in the Priority Usage report.
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## Customization - Guides

You can customize the screening questions in the screening guides to match the specific policies and preferences of your organization. You can even create your own screening guides!

### Guide Selection

The left side of this screen presents a list of all of the screening guides. You can find the guide you want to work with by typing in the search box or by using filters (the funnel icon next to the search box).

Guides may have letters next to them indicating their customization status. These are the letters that may appear:

- C: Customized - A guide written by the authors that you have changed
- A: Account-Specific - A guide you have created for your organization
- D: Draft - A guide with changes that have not yet been published

Note that you can filter by the guide types listed above. You can also filter by guide categories which can be useful if you want to make similar changes in all of the guides in a category. To filter, click on the funnel icon next to the search box.

### Guide Customization

Start by selecting the screening guide you wish to customize, then click on Edit Questions or Edit Properties. This will take you to a screen where you can perform any of the following actions:

Edit Questions

- Edit a question. Click on the pencil to edit the text in a screening question. The original text from the authors is shown above your text while editing. Note: If the question is used in more than one guide, you will be asked if you want to edit the question in just the guide you're working on or in all of the guides.
- Move a question. Click on one of the arrows to move that question one position up or down, or just drag the question to the desired priority.
- Add a question. Click on the Plus Sign in any of the priorities to add a question to that priority. SymptomScreen works best if you reuse existing questions (this reduces the number of questions when the user chooses more than one symptom), but you can add your own questions if the existing questions don't meet your needs.
- Delete a question. Click on the trash can to remove the question from the screening guide.
- **All other calls.** This is a special item in the screening guide. It indicates the priority for a call in which the caller says no to all of the other questions. There are two special rules for this item:
  - No other questions can be in the same priority as All other calls. This is because those questions would not change the priority of the call so they don't need to be asked.
  - Only one question can be in a priority lower than All other calls. This rule keeps guides simple. Those questions are known as "exception questions" since all other calls would wind up at the "all other calls" priority except if they say yes to the question below.

When you are done making all of your changes, press Save Changes. You can press Discard Changes instead if you are not comfortable with the changes you have made and wish to start over again.

#### Edit Properties

- Edit the title. Make changes to the title of the guide. This title is displayed in the search list and in the note copied to the patient's record.
- Alternative Titles. Type in an alternative title and press Add. These titles are synonyms for the main title and will show up if the user searches for that text. Examples include "Pelvic Pain" for the "Abdominal Pain" guides and "Lightheaded" for the "Dizziness" guide. Prior to having this property, SymptomScreen users were searching for "lightheaded" and "Dizziness" would appear in the results, but the users didn't think they'd found the right guide. Alternative titles give them reassurance that yes, this is the guide we intend that you use. (Press the x next to an Alternative Title to remove it.)
- Search Words. Type in a search word (or words) and press Add. When the user searches for these words the guide will appear. Note that search words need to be at least 3 letters long. (Press the x next to a search word to remove it.)
- Guide Category. For account-specific guides you have created, you can change the category of the guide. This affects where the guide shows up in the Word version of the Guide List that you can generate.



When you are done making all of your changes, press Save Changes. You can press Discard Changes instead if you are not comfortable with the changes you have made and wish to start over again.

### Other Actions

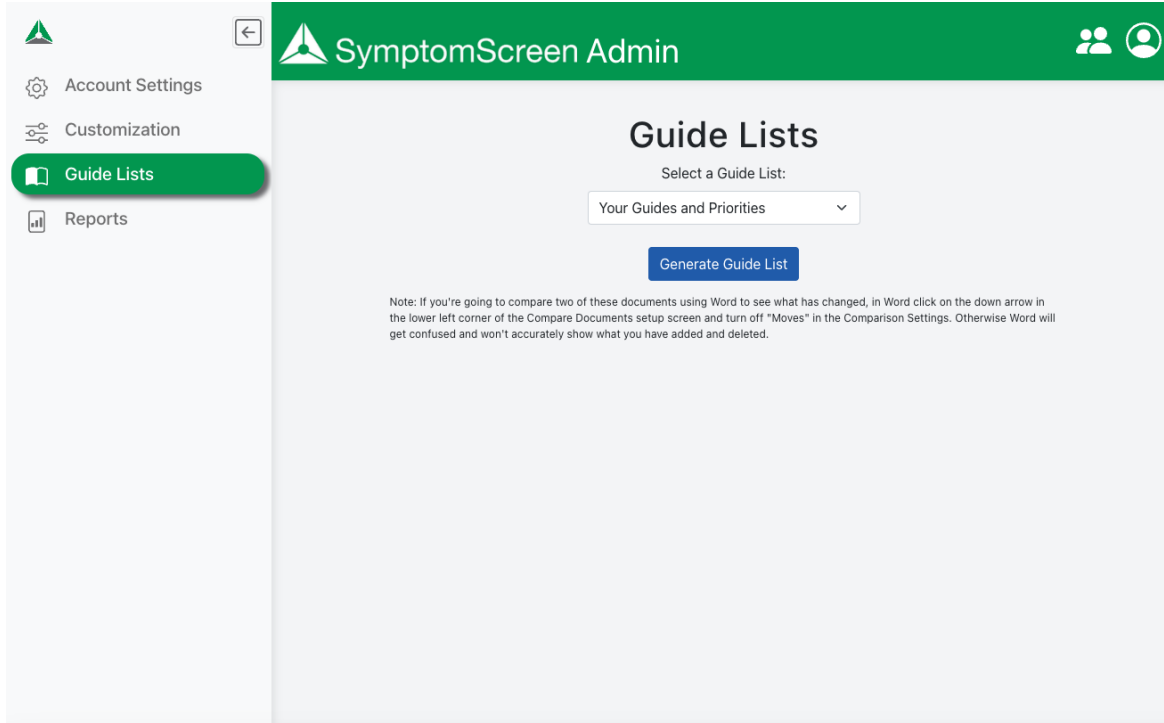
- New Guide
  - This allows you to create a new guide, first by entering the properties, then by editing the questions.
- General Actions (available once at least one guide has been customized)
  - Publish. Once you are comfortable with all of the changes you have made to all of the guides, press this button to publish the changes so that your agents will be using the new versions of the guides. Until you do this, the changes remain as drafts that you can continue to review and edit.
  - Generate Draft Guide List. This will create a Word version of the guides with the changes you have made but not yet published. Review this to make sure everything is the way you want it to be. You can also use Microsoft Word to compare this with "Your Guides and Priorities" generated from the Guide Lists section in Admin. The comparison results will show you exactly what you've changed in your drafts.
- Actions for individual guides
  - Hide. This will remove the guide from the list of guides your users see. This choice is available only if there are no draft changes pending for that guide. Tip: if you want to know which guides you have previously hidden or to unhide a guide, contact SymptomScreen Support at [support@symptomscreen.com](mailto:support@symptomscreen.com).
  - Delete Draft. This deletes all of your changes to that guide that have not yet been published.
  - Revert to Original. Only available if a guide has been customized and published, this will remove your customizations and return you to the authors' original guide.

**Important Note: Until you publish your drafts, your agents will not see any of the changes you have made.**

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## Guide Lists

Complete lists of the screening guides can be downloaded as Word documents and are useful for review and editing purposes.

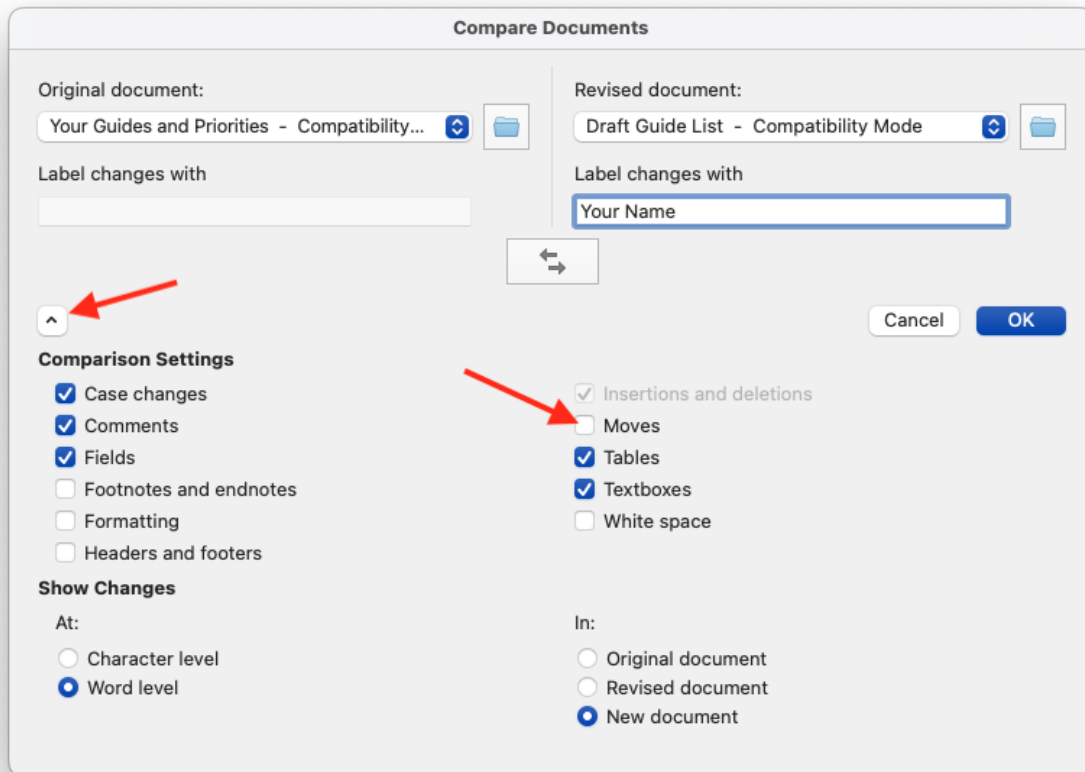


There are three different versions of guides that can be generated:

1. **Your Guides and Priorities:** These are the guides as your staff see them. This document captures any changes you have made to the priorities (including combining priorities), changes you have made to the guides, and age filters on your account.
2. **Authors Guides with Your Priorities:** These are the authors' guides but with your priorities. This guide list will reflect your nicknames for the priorities and also any combinations of priorities that you have made.
3. **Authors Guides and Priorities:** These are the standard guides (questions and priorities) before you started making changes. This document is useful to see the authors' original intent.

*Note: If you're going to compare two of these documents using Word to see what has changed, in Word click on the down arrow in the lower left corner of the Compare Documents setup screen and turn off "Moves" in the Comparison Settings. Otherwise Word will get confused and won't accurately show what you have added and deleted.*

*This screenshot shows how you would compare your existing guides with draft guides. The resulting document would show what had been changed in your drafts before you publish them.*



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## Reports

There are three reports available in SymptomScreen Admin:

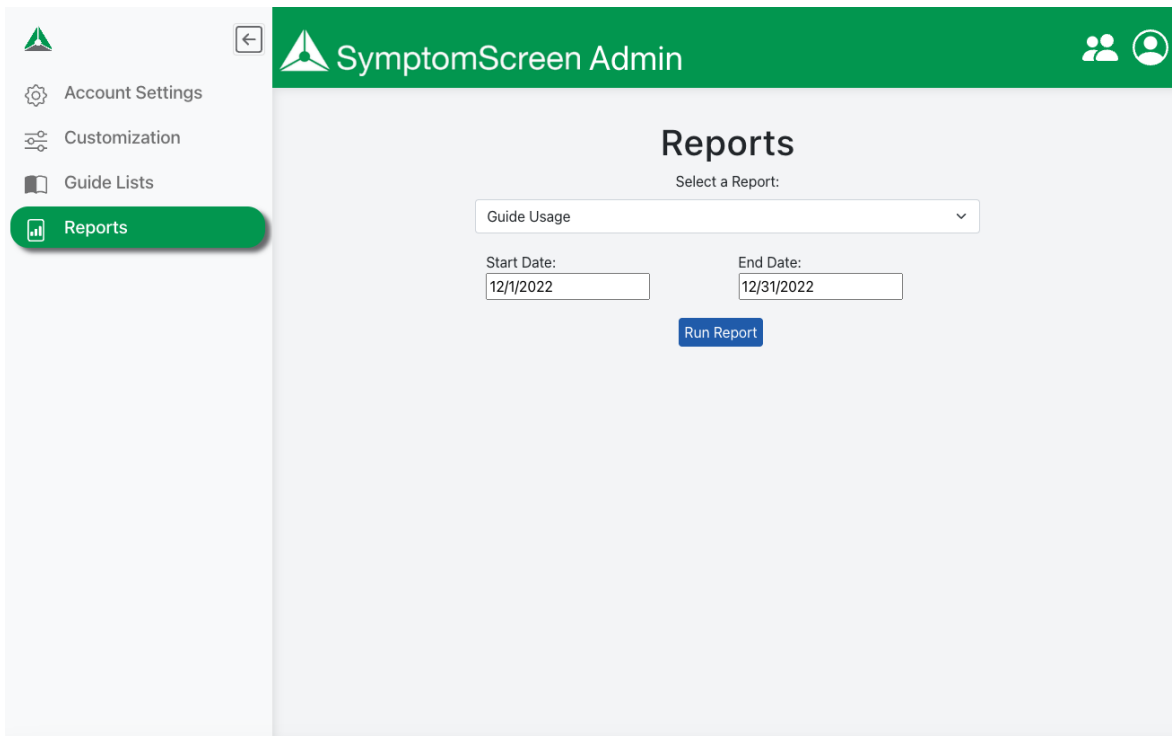
1. **Guide Usage:** The number of times each guide (each symptom) was used in a call. Note that agents frequently use more than one guide in a call, so there will be more guides used than calls taken.
2. **Priority Usage:** The number of times your agents arrived at each priority, arranged from the highest to the lowest priority.
3. **User Actions:** The number of times each agent viewed guides and copied call notes.

Simply choose your desired report and date range, then select Run Report. These reports can be downloaded and saved by selecting the Download Report button.

Some definitions that might be useful for reporting:

- **Guide** - a set of screening questions for a particular symptom, grouped by priority

- **Priority** - an outcome for a call. Priorities have nicknames (shown in the report, customizable in the Priority Customization section).
- **Times Used** or **Guides Viewed** - a guide or outcome is considered "used" if it is added to a call and the agent arrives at a priority (by selecting a positive question, saying no to all of the questions, or selecting a guide that only has one priority available).
- **Times Copied** or **Call Notes Copied** - the number of times a guide or a priority was used in a call during which the agent pressed Copy Notes. (If your agents aren't copying notes, either because it's not necessary such as in a warm transfer, or if they're just skipping that step, this number will be low.)



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## Need More Help?

If you have any additional questions or need help with any part of SymptomScreen, please do not hesitate to contact us at 800-755-3545 or [support@symptomscreen.com](mailto:support@symptomscreen.com).