



Admin Manual

SymptomScreen Admin is used to make changes to your SymptomScreen account, to customize your 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.

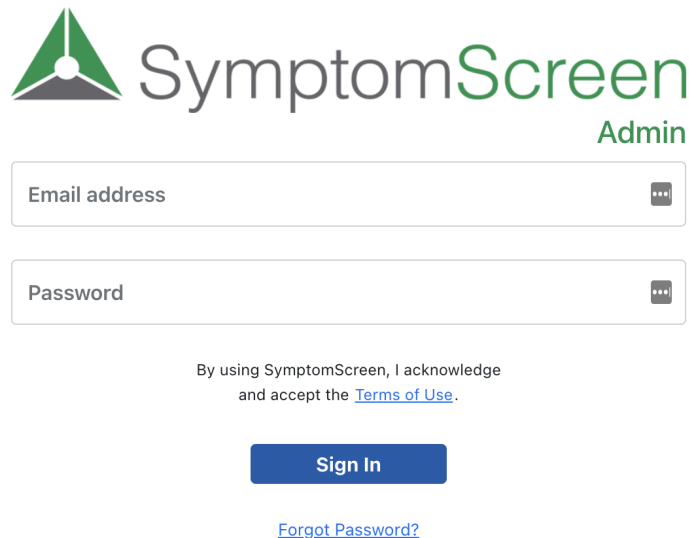
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Sign In

Sign into SymptomScreen Admin at <https://admin.symptomscreen.com>. You will sign in with your 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 prompting you to set or reset your admin password.



The login form for SymptomScreen Admin. It features the SymptomScreen logo (a green triangle with a white circle inside) and the text "SymptomScreen Admin" in green. Below the logo are two input fields: "Email address" and "Password", each with a three-dot menu icon to its right. Below the password field is a checkbox with the text "By using SymptomScreen, I acknowledge and accept the [Terms of Use](#)." Below the checkbox is a blue "Sign In" button. Below the button is a blue link "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. You can also email us directly if you have any questions.

Account Settings

Use the three Account Settings sections to change settings for your account. *Note that changes saved in these three sections will take effect when a user signs into SymptomScreen.* If a user is already signed in, they will continue using the previous settings until they sign out and sign back in. This typically happens the next day when they sign in, though they can also sign out manually by clicking on the three-line menu in the top right corner of SymptomScreen and choosing Sign Out.

General Account Settings

The screenshot shows the SymptomScreen Admin interface. On the left is a sidebar with a navigation menu containing: Welcome, Account Settings (with a dropdown arrow), General (highlighted in green), Pre-Screening, Post-Screening, Customization (with a dropdown arrow), Reports (with a dropdown arrow), and Guide Lists. The main content area has a green header bar with the SymptomScreen Admin logo and a user profile icon. Below the header, the title 'General Account Settings' is centered. The settings are organized into two sections: 'Documentation Options' and 'Spanish Screening Questions'. The 'Documentation Options' section includes five radio button choices: 'Standard' (symptom, outcome, and reason on 3 separate lines), 'Concise' (symptom, outcome, and reason all on 1 line), 'Denied One Line' (Standard plus the questions the caller denied listed on 1 line), 'Denied Multiple Lines' (Standard plus the questions the caller denied listed on individual lines), and 'Dual' (two copy buttons, one Concise and one Denied Multiple Lines). The 'Denied Multiple Lines' option is selected. The 'Spanish Screening Questions' section includes two radio button choices: 'Use' (selected) and 'Don't Use'.

Documentation Options

Select the information to be included in the note generated by SymptomScreen when your agent presses "Copy Note", as well as the formatting of that information. There are five options available, here are samples of a note generated with each option:

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).

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 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.

Screening Introduction Text

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 screening introduction text. The default introduction is:

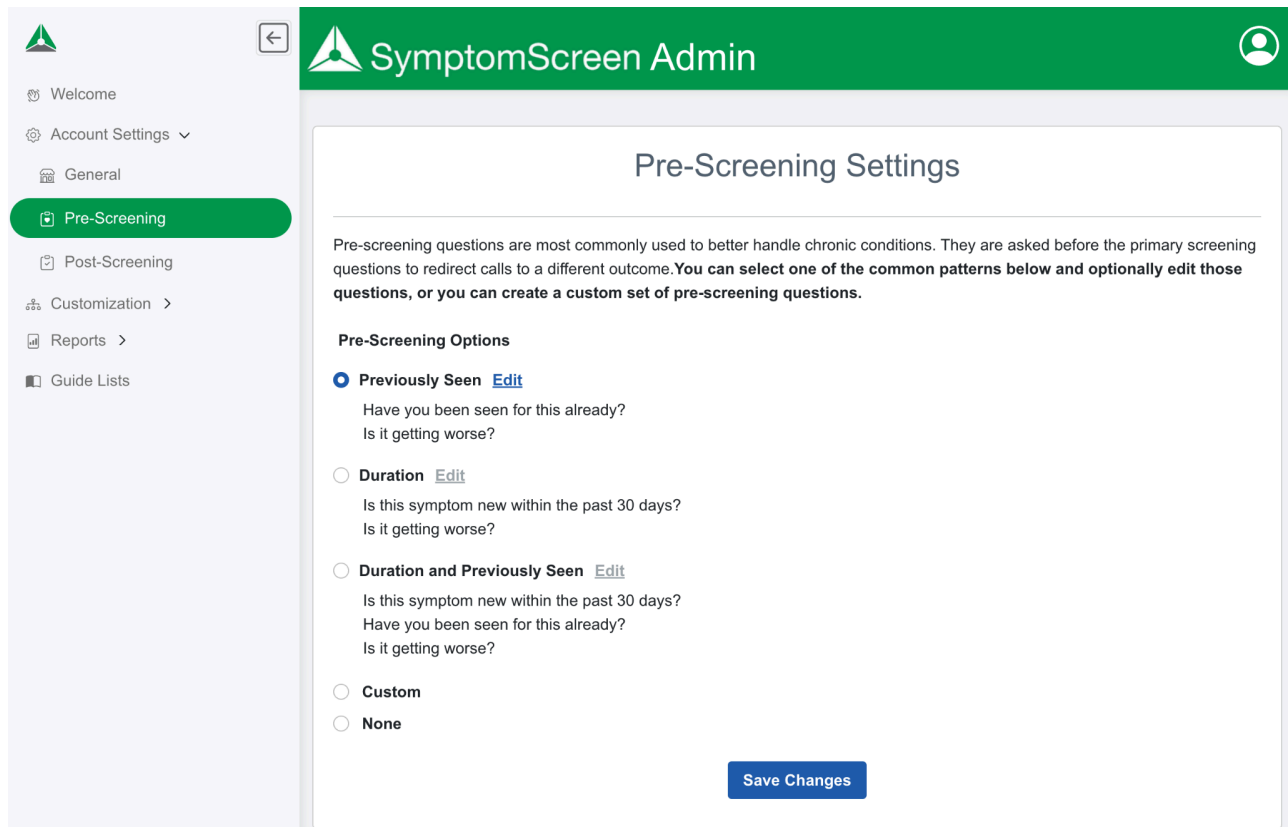
To handle your call properly, I'm going to read a short list of symptoms. Stop me right away if any of these are true or may be true.

Spanish Screening Introduction

Only available if Spanish Screening questions are turned on for your account, use this setting to customize the introduction text displayed when Spanish questions are selected.

Pre-Screening Settings

Pre-screening questions are questions you want your staff to ask before the regular screening of the symptom. Most commonly, pre-screening questions are used to move stable chronic calls to a lower priority 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 avoid this.



The screenshot shows the SymptomScreen Admin interface. On the left is a sidebar with navigation links: Welcome, Account Settings (with a dropdown arrow), General, Pre-Screening (highlighted in green), Post-Screening, Customization (with a right arrow), Reports (with a right arrow), and Guide Lists. The main content area has a green header bar with the SymptomScreen Admin logo and a user profile icon. Below the header, the title "Pre-Screening Settings" is centered. A paragraph explains that pre-screening questions are used to better handle chronic conditions and are asked before primary screening questions to redirect calls. It states: "You can select one of the common patterns below and optionally edit those questions, or you can create a custom set of pre-screening questions." Under "Pre-Screening Options", there are four radio button options: "Previously Seen" (selected), "Duration", "Duration and Previously Seen", and "Custom". Each option has an "Edit" link. The "Previously Seen" option includes the questions "Have you been seen for this already?" and "Is it getting worse?". The "Duration" option includes "Is this symptom new within the past 30 days?" and "Is it getting worse?". The "Duration and Previously Seen" option includes "Is this symptom new within the past 30 days?", "Have you been seen for this already?", and "Is it getting worse?". The "Custom" and "None" options are currently unselected. A blue "Save Changes" button is at the bottom right.

Pre-Screening Settings

Pre-screening questions are most commonly used to better handle chronic conditions. They are asked before the primary screening questions to redirect calls to a different outcome. **You can select one of the common patterns below and optionally edit those questions, or you can create a custom set of pre-screening questions.**

Pre-Screening Options

☒ **Previously Seen** [Edit](#)

Have you been seen for this already?
Is it getting worse?

☐ **Duration** [Edit](#)

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

☐ **Duration and Previously Seen** [Edit](#)

Is this symptom new within the past 30 days?
Have you been seen for this already?
Is it getting worse?

☐ **Custom**

☐ **None**

[Save Changes](#)

Choose from three standard options and optionally edit those questions, or create a custom set of pre-screening questions for your organization's specific needs. Standard options include:

Previously Seen

1. Have you been seen for this already?
2. Is it getting worse?

Duration

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

Duration and Previously Seen

1. Is this symptom new within the past 30 days?
2. Have you been seen for this already?
3. Is it getting worse?

To edit the questions in one of the standard options, select the desired standard option and click on the Edit button next to the option you have selected. You will then be able to edit the text of the questions and/or the priority assigned to the stable chronic call.

To set up custom pre-screening questions, contact [SymptomScreen Support](#). Examples of possible custom pre-screening questions include eligibility for your organization's services, whether the symptom is work-related, or age questions for special handling of very young patients.

Post-Screening Settings

This section allows you to choose whether or not you wish to display a post-screening question at the end of the call. The post-screening question provides an opportunity for the screener to ask a yes/no followup question. The answer becomes part of the documentation that can be copied to the medical record and is also data available in the Complete Data for Export report.

Most commonly the post-screening question is used to ensure the caller is comfortable with the outcome of the call and for the caller to request a different outcome if necessary (for example, if the guide didn't ask about a particular worrisome complication). However, it can also be used to capture additional data.

For example, you may wish to collect data regarding appointment availability. In this case, you could use the post-screening question to ask the screener if they were able to book an available appointment if an appointment was indicated.

The screenshot shows the SymptomScreen Admin interface. On the left is a sidebar with a navigation menu containing: Welcome, Account Settings (with a dropdown arrow), General, Pre-Screening, Post-Screening (highlighted in green), Customization (with a dropdown arrow), Reports (with a dropdown arrow), and Guide Lists. The main content area has a green header bar with the SymptomScreen Admin logo and a user profile icon. Below the header, the title 'Post-Screening Settings' is centered. The settings are organized into three sections: 1. 'Post-Screening Options' with two radio buttons: 'Use' (selected) and 'Don't Use'. 2. 'Post-Screening Question Text' with a text input field containing the default question: 'Is the caller comfortable with this outcome?'. 3. Two text input fields for conditional messages: 'Text to show/copy if caller affirms post-screening question' (containing 'The caller accepted this outcome') and 'Text to show/copy if caller rejects post-screening question' (containing 'The caller rejected this outcome'). A blue 'Save Changes' button is located at the bottom right of the settings area.

Post-Screening Question Text

This is the question displayed 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 post-screening question

If the screener selects Yes in response to the post-screening question, this is the text that will be displayed to your agents and copied into the note.

Text to show/copy if caller rejects post-screening question

If the caller answers No in response to the post-screening question, this is the text that will be displayed to your agents and copied into the note.

Additional Account Settings

The following settings are currently not accessible in the Admin. They can only be changed by requesting the change from support@symptomscreen.com.

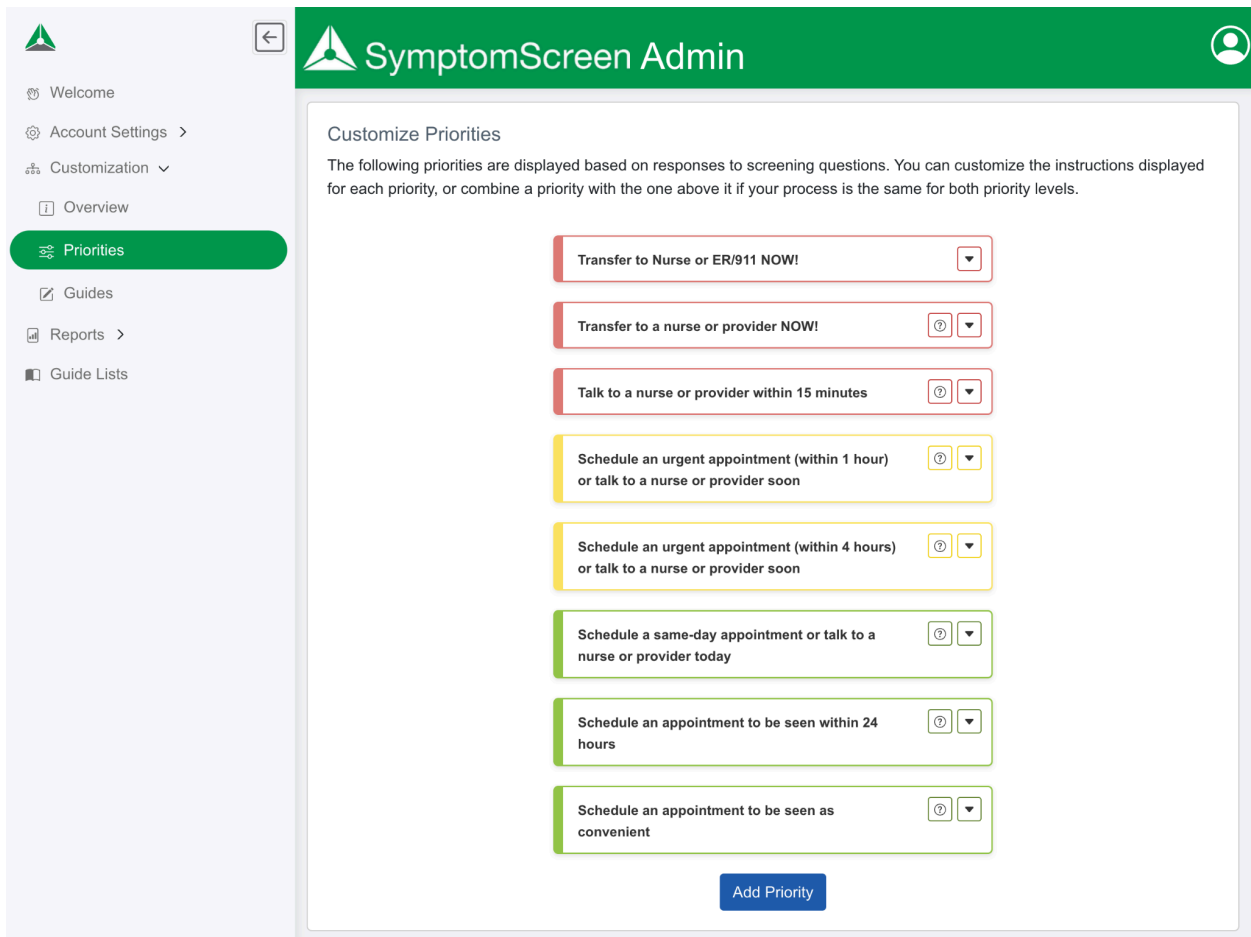
- **Skip Pre-Screening** - guides for which pre-screening questions will not be asked (for example, maybe you don't want to ask pre-screening questions if the symptom is "Unconscious Now" or another guide that can only result in the Red STAT priority).
- **Age Filtering** - removes guides and questions associated with particular ages (for example, removes pediatric guides and questions for an organization only taking calls for adult patients).
- **Copy for Chat** - adds an extra button that allows your staff to quickly copy a group of questions and paste them into a chat conversation with a patient.

The screenshot displays the SymptomScreen web application interface. At the top, the SymptomScreen logo is visible. Below it, a search bar contains the text "Knee Pain - Not From Injury". To the right of the search bar is a blue circular button with a plus sign and the text "Add Symptom". Below the search bar is a blue bar with the text "Previously answered questions" and a right-pointing arrow. Below this bar are three radio button options, each preceded by a yellow vertical bar: "Y Trouble walking", "Y Severe pain now", and "Y Age less than 1 year old". Below these options is a button labeled "None of These". To the right of the radio button options is a black tooltip with the text "Copy for chat" and a blue square button with a white copy icon. At the bottom of the interface is a blue button labeled "New Call".

Customization - Priorities

Your account is initially 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 adjusted to match your organization's workflow. SymptomScreen will be much more useful after you complete this simple step. The ideal process for deciding which customizations to make is described in detail in Section 3 of the [SymptomScreen Implementation Guide](#).

Within Priority Customization, you can customize the instructions displayed for any 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.



The screenshot displays the SymptomScreen Admin interface. On the left is a sidebar with navigation links: Welcome, Account Settings, Customization, Overview, **Priorities** (highlighted), Guides, Reports, and Guide Lists. The main content area is titled 'SymptomScreen Admin' and 'Customize Priorities'. It contains a list of priority instructions, each with a dropdown menu for customization. The instructions are:

- Transfer to Nurse or ER/911 NOW!
- Transfer to a nurse or provider NOW!
- Talk to a nurse or provider within 15 minutes
- Schedule an urgent appointment (within 1 hour) or talk to a nurse or provider soon
- Schedule an urgent appointment (within 4 hours) or talk to a nurse or provider soon
- Schedule a same-day appointment or talk to a nurse or provider today
- Schedule an appointment to be seen within 24 hours
- Schedule an appointment to be seen as convenient

At the bottom of the list is an 'Add Priority' button.

Editing Priorities

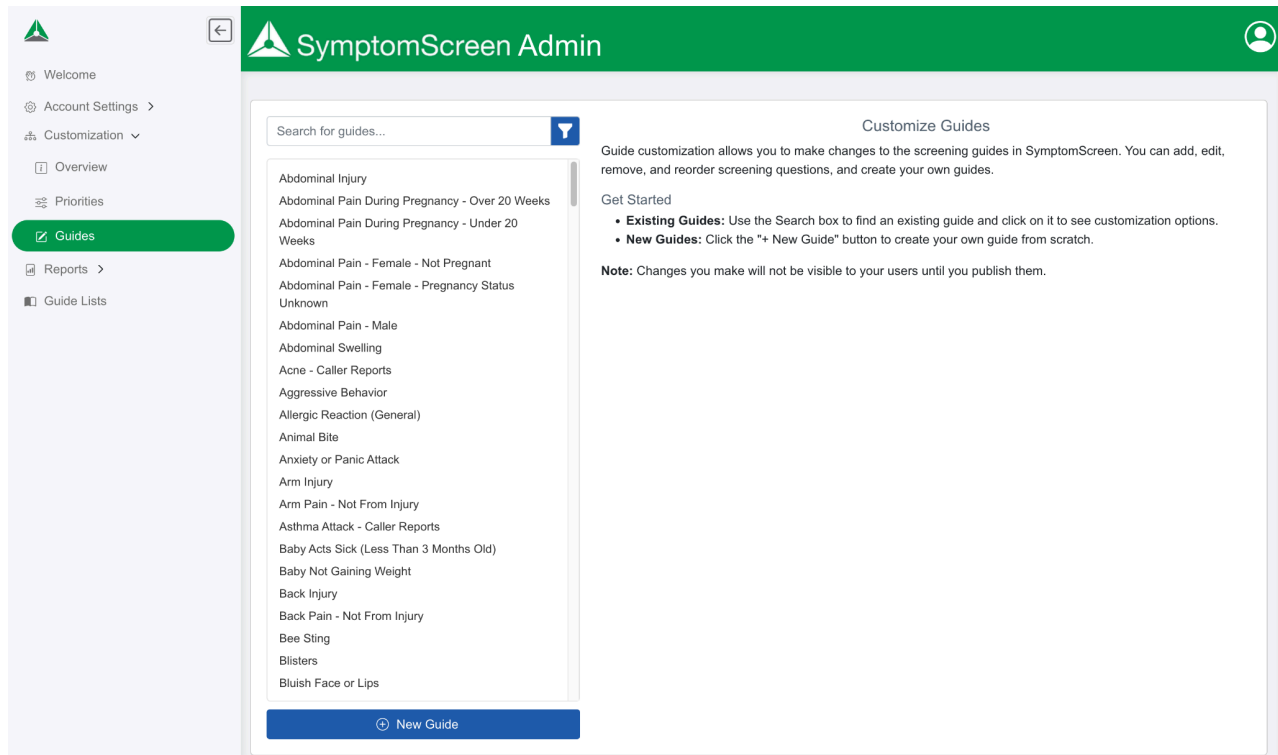
There are four different features of priorities that you can edit. As you are editing, you will be able to see a preview of your priority instructions to the right of the editor.

The screenshot shows the SymptomScreen Admin interface. On the left is a sidebar with navigation links: Account Settings, Customization, Guides, Priorities (highlighted), Guide Lists, and Reports. The main content area is titled 'SymptomScreen Admin' and contains two panels. The left panel, 'Edit Priority 1B (Red)', has a description of the priority and four editable fields: 'Summary Instructions' (containing 'Talk to a nurse or provider within 15 minutes'), 'Detailed Instructions (Optional)' (containing three bullet points about triage nurse availability and transfer instructions), 'Color' (set to red), and 'Nickname' (set to 'Priority 1B (Red)'). The right panel, 'Preview Priority 1B (Red)', shows how the priority will appear to staff, including the heading 'Talk to a nurse or provider within 15 minutes', the same three bullet points, and a confirmation question 'Is the caller comfortable with this outcome?' with 'Y' and 'N' buttons.

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 the summary 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.
3. **Color:** Change the color of the priority that displays for your users. This can be helpful to help 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 a short meaningful name to make the Guide Lists easier for your team to review. The nicknames are also used in the Priority Usage and other reports.

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 one or more 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 work through guide customizations by 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 to complete the following actions:

Edit Questions

- **Edit a question's text.** Click on the pencil to edit the text of 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 an existing or new 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. This is generally the lowest possible priority for the symptom. *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 they are exceptions that keep that call from being a higher priority.

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. You cannot change the category of a guide created by the SymptomScreen authors.

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 adding 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.*
 - **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.

Reports

The reports outlined below are available to all SymptomScreen users with Administrator privileges and can be downloaded from SymptomScreen and saved to your local computer if needed for historical records or further analysis in Excel or Google Sheets.

Common Reports

Title	Description	How it Can Help
Guides Used	The number of times each guide was used in a call.	Understand what your patients are calling about. Identify opportunities for staff training to improve guide selection. Possibly identify opportunities for patient education (e.g., too many calls about fever could prompt education that low grade fevers are generally beneficial and not a cause for concern).
Priorities Used	The number of times each priority was the final priority in a call.	Understand how your staff are routing patients. Monitor the use of your highest priority categories and the impact on your nurse triage staffing. If your staff are scheduling lower priority appointments, monitor the impact of appointment availability on their ability to schedule appointments.
Guides Used with Priorities	A breakdown of priorities used for each guide.	Use for QI projects on high call volume guides. Identify symptoms that need additional staff education or adjustments in the screening guides, then monitor the impact of those changes. *Technical Note: Since more than one guide can be used on a call, occasionally the priority for the call may not be a priority used in that particular guide but instead it may come from the other guide used in the call.
Priorities Used with Guides	A breakdown of which guides resulted in each priority.	Use for QI projects on high-cost priorities or priorities involving healthcare resources with low availability. Identify opportunities for staff education or adjustments in the screening guides, then monitor the impact of those changes.

Calls by User	The number of times each of your staff used SymptomScreen for a call and the number of times they copied a call note.	Understand how much each of your staff is using SymptomScreen. Use it to establish benchmarks and identify coaching opportunities by comparing individual usage to your organization's average.
Guides by User	A breakdown of which staff used each guide.	Compare usage of guides by staff and identify any staff who might be overusing certain guides, perhaps because they are not aware of their options or the meaning of certain words.
Priorities by User	A breakdown of which staff used each priority.	Compare usage of priorities by staff and identify any staff who might be overusing certain priorities.
Question Selections	The number of times each screening question was selected within each protocol.	Use for QI projects on high call volume guides and questions. Identify symptoms and questions that need additional staff education, adjustments in policy, or customizations to the screening guides or priority instructions. Then monitor the impact of those changes.

Administrative Reports

Title	Description	How it Can Help
Guide Customization History	A list of the guides that your organization has customized, along with a record of who made the customizations and when.	Use to track which guides your organization has customized and as a historical record of changes made. Periodically review to determine if the customizations are still needed.
Guide Status	A list of your guides with the customization status of each and when the last change was published.	

Question Customization History	A list of the questions that your organization has customized, along with a record of who made the customizations and when.	Use to track which questions your organization has customized and as a historical record of changes made. Periodically review to determine if the customizations are still needed.
Question Export	A complete list of your screening questions, the Spanish translation for each question, and an example of a guide in which the question is used.	Use to make sure your question text is clear and consistent between questions, both the English and the Spanish text. The example guide lets you know a guide to start with if you want to edit the question text.
Questions Likely Needing Spanish Translations	A list of screening questions you have added, as well as questions for which you customized the English text but not the Spanish text.	If you have bilingual staff and they are using the Spanish screening questions, this is a list of questions that you have created or edited in English but most likely still need to translate into Spanish. *Note: If you have edited the English text of a question more than once and edited the Spanish text of a question just once, that question will not show up on this report. In that case, a complete review of the Spanish translations can be done using the Question Export report.

Other Reports

Title	Description	How it Can Help
Calls Per Day and Per Hour	The number of calls taken each day of the week using SymptomScreen with a breakdown by hour and a further breakdown by user. The specific hour is based on when the "Copy" button was pressed in SymptomScreen, not when the call was started.	Understand the busiest and least busy times for your screening staff.
Guides Used by Department	If your organization is capturing the user's department through one of our single sign on options, this is the standard Guides Used report with a breakdown by department. Click here for more information on single sign on (SSO)	

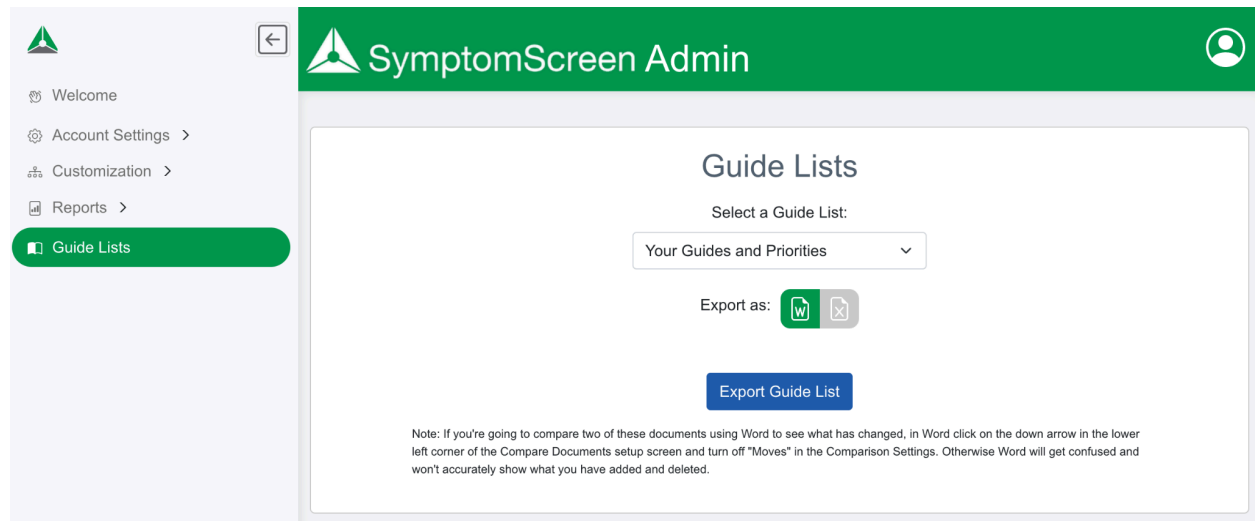
	options.	
Priorities Used by Department	If your organization is capturing the user's department through one of our single sign on options, this is the standard Priorities Used report with a breakdown by department. Click here for more information on single sign on (SSO) options.	
Calls by User by Department	If your organization is capturing the user's department through one of our single sign on options, this is the standard Calls by User report with a breakdown by department. Click here for more information on single sign on (SSO) options.	
Complete Data for Export	All of the data recorded by SymptomScreen for each call. This file is designed to be used for analysis in Excel or an alternative reporting / business intelligence solution.	Analyze your SymptomScreen data in ways not supported by the standard SymptomScreen reports.

Helpful Definitions for Reporting

- **User** - agent identifier that is typed into the sign in form or entered automatically if using SSO.
- **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 Summary. (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 may be lower than you expected.)
- **Department** - identifies the department attached to the user at sign in when using an SSO method or Quick Link.

Guide Lists

A complete list of the screening guides can be downloaded as a Word document or Excel spreadsheet for review by your clinical or operational team. This is helpful as the document can then be emailed or shared on screen during a meeting, enabling a simpler and faster review.



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 and changing nicknames), changes you have made to the guides, and age filters on your account. *Tip: use this guide list when you or your team are reviewing the guides to identify edits or guide changes.*
2. **Authors' Guides with Your Priorities:** These are the authors' questions and 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, but not changes to the questions or the "All other calls" priorities.
3. **Authors' Guides and Priorities:** These are the standard guides (questions and priorities) before you made any changes. This document is useful to see the authors' original intent.

When should you download Guide Lists in Word vs. Excel?

You can export the guide list in either Word or Excel format. Word is ideal for review by your medical or operational team. It can be emailed to participants or displayed on a screen during a meeting. Excel is ideal for analysis of where particular questions are used or helping you ensure consistency between related guides. *Note: export to Excel is only available for paid SymptomScreen users, it is not available in a trial account.*

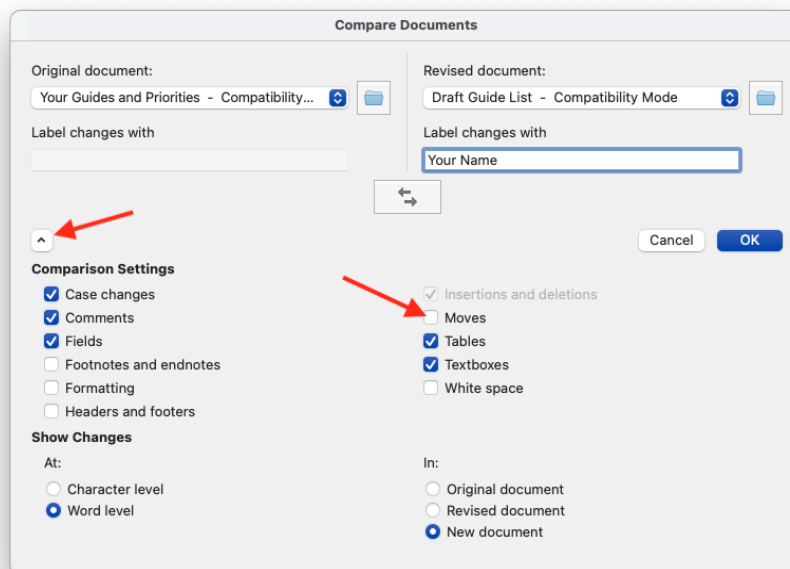
Comparing Guide Lists in Microsoft Word

Using Microsoft Word to compare two guide lists can be valuable in several situations:

- Compare "Authors' Guides and Priorities" with "Your Guides and Priorities" to see all of the changes your organization made from the standard guides you started with.
- Compare "Authors' Guides with Your Priorities" with "Your Guides and Priorities" to see the changes your organization made to the authors' questions in each guide, within the context of your customized priorities.
- Compare "Your Guides and Priorities" with the "Pending Guide List" from the Customizing Guides section of SymptomScreen Admin to see the changes you will be publishing.
- If you save versions of "Your Guides and Priorities" each time you publish your changes, you can compare two versions to see the detailed changes you made at that time.

To compare two guide lists using Microsoft Word, in Word select "Compare Documents..." from the Tools | Track Changes menu in Microsoft Word. Then 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.



New Guide Sets

Periodically the SymptomScreen clinical authors make updates to the SymptomScreen guides and create new guides. These changes are released as a new "guide set". That new guide set is applied to your account as a "pending" guide set for your review. The old (or "current") guide set will still be used by your staff until you publish the new pending guide set.

Making Changes and Publishing the New Guide Set

To publish the new guide set, you will need to use Guide Customization in SymptomScreen Admin.. When you publish, this removes the pending status from the new guide set, so it becomes the current guide set that your staff are using.

If you do not publish the guides on your own, the pending guide set will be automatically published to your account on a certain date. You will be notified of this date ahead of time by SymptomScreen Support and the date will also be listed in the Guide Set Release Notes. This provides the convenience of having the current guides available to your staff without any action on your part. However, you can always contact us if you need extra time beyond that date to review the updates.

If you would like to make changes to any of the new (or existing) guides before you publish the new guide set, you can do so using the standard Guide Customization functionality described on page 12 of this manual. *All changes made in that section are pending until you press the Publish button.*

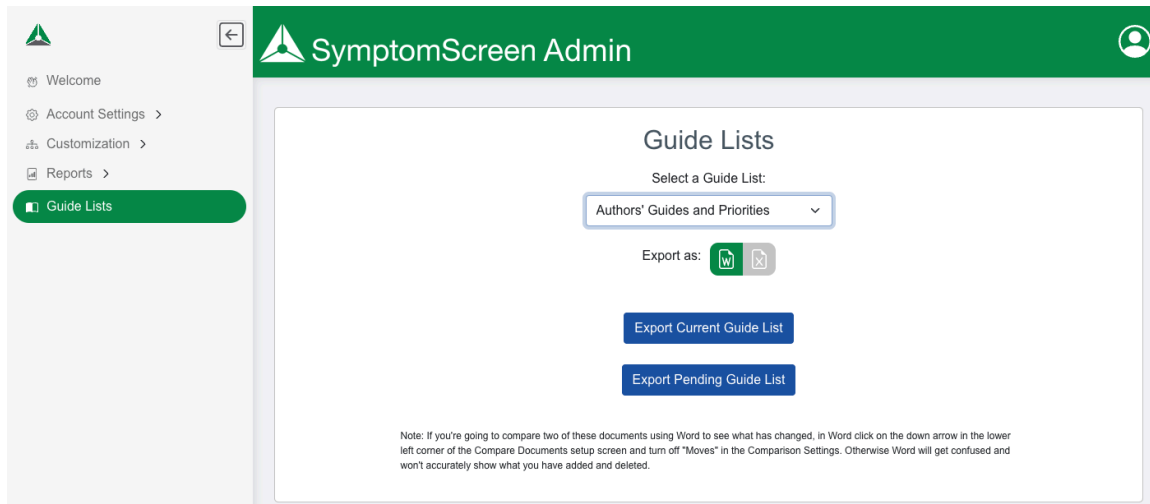
General Rules

When you publish the new guide set, your previous customizations will remain in your account and they will take priority over any changes from the authors. More specifically:

1. If you have customized your priorities, the new guide set will have no impact on those customizations. Your customized priorities will still be there, and they will be applied to all new and updated guides.
2. If you have edited the text of any question, your version of the text will still be there even if the authors also updated the text of that question.
3. If you have customized any guides (e.g., added or removed questions, moved questions to different priorities), your customizations will remain and you will not get any changes the authors may have made to those guides. In this case, you may want to review the changes the authors made and decide if you want to make similar changes to your guides.

Generating Pending and Current Guide Lists

When your account has a pending guide set, you have the choice to export either your current guides or the pending guides. These selections can be helpful in reviewing the impact of the upcoming changes on your account.



Comparing Pending and Current Guide Lists

Use the instructions on page 19 to compare two guide lists using Microsoft Word. Here are three types of comparisons you may find helpful when reviewing the changes in a new guide set:

- Compare the current and pending "Your Guides and Priorities" to see what will be changing in your account.
- Compare the current and pending "Authors' Guides and Priorities" to clearly see what the authors changed in the release and the intent of those changes.
- If you have changed the priority nicknames and/or combined priorities, comparing the current and pending "Authors' Guides with Your Priorities" may be more valuable than comparing the two "Authors' Guides and Priorities".

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.