SymptomScreen by ClearTriage

Implementation Guide

Key Steps

1. Register for an account and add admin users
2. Review account settings and adjust as needed
3. Customize the priorities
    - Combine or add priorities as needed
    - Customize summary instructions and add detailed instructions
    - Edit the nicknames
4. Review the guides and customize as needed
    - Generate and review a Guide List with your customized priorities
    - Edit existing guides if needed
    - Add new guides if needed
5. Training
    - SymptomScreen training video
    - SymptomScreen training guide

1. Register for an Account

To get started you will need to register for a SymptomScreen account at www.symptomscreen.com/register. Remember that all of your users will access this account with the same shared Account ID and Password, so choose something simple to make the credentials easy for your team to remember.

The person who registers for the account will automatically be set up as an admin user. Admin access is important because it allows someone to make changes to your account and to run reports. Admin access is required to complete the steps outlined below. If you need to add additional admin users to your account, please email support@symptomscreen.com with the names and email addresses of those individuals.

2. Account Settings

Account settings can be adjusted in [SymptomScreen Admin]. There are several settings you might consider changing to make SymptomScreen a more functional tool for your team. These settings include documentation options (the amount of detail in the note copied from SymptomScreen to the patient record), Spanish screening questions (great for bilingual agents!), English screening introduction, and caller acceptance options.

There are also additional account settings that can be adjusted by letting the SymptomScreen Support team know.

- Pre-Screening Questions can move stable chronic calls to a lower priority without going through the regular screening questions.
- Age filters remove guides and questions that don't pertain to your patients (e.g. for a pediatrics-only clinic).

For more information about these settings, please refer to the SymptomScreen Admin Manual.

3. Customize the Priorities

This is the most important step in achieving a successful implementation of SymptomScreen. *It's important you complete this step prior to reviewing or customizing your guides.* Time spent on this step will save time on training your staff, save time on customizing the guides themselves, and it will increase the acceptance of SymptomScreen by your non-clinical users and by your organization's medical staff.

Here are the key components:

1. Understand the intention behind the seven default SymptomScreen priorities.
2. Determine the current or desired possible outcomes for a symptom-based call taken by an unlicensed staff member in your organization.
3. Identify which of your outcomes best map to each of the priorities in SymptomScreen.
4. Combine any SymptomScreen priorities that map to the same outcome in your organization.
5. Customize the instructions for each of the priorities.
6. Edit the nicknames for each of the priorities.
7. Determine what to do with any of your outcomes that have not yet been mapped to a SymptomScreen priority. You can either add additional priorities or you can handle that outcome in the detailed instructions of an existing priority.

To learn more about each of these components in detail, please see the SymptomScreen Priorities Implementation Details document located on our resources page.

4. Review and Optionally Customize the Guides

Once your priorities are customized, generate "Your Guides and Priorities" in SymptomScreen Admin. This is a Word document that will let your Medical Director(s) or other medical team members review the questions being asked for each symptom and the resulting priorities.

If (and only if) your medical team wants to handle some of the calls in a different way, you can customize the guides. This allows you to move the questions to different priorities, edit the text of the question, add questions, or remove questions. You can also edit the properties for a guide (edit the title, add alternative titles, and add search words) and can even create your own guides if needed. For more information about how to do this, please refer to the SymptomScreen Admin Manual.

5. Training

Training materials can be accessed on our resources page and include a general overview training video and the SymptomScreen Training Guide. We recommend having your staff review these materials prior to using SymptomScreen on any real calls.

Most organizations find it easiest to their staff themselves because SymptomScreen is quite simple to use and most of the questions brought up are about internal processes that SymptomScreen staff can't help with. However, if you decide to proceed with a paid SymptomScreen account, SymptomScreen Support can record a personalized training video for your team using your customized account. This can be helpful for your staff because they are able to view the training with your customized priorities and instructions.