



SymptomScreen

Training and Usage Guide

SymptomScreen allows unlicensed or non-clinical staff in a healthcare organization to quickly prioritize symptom-based calls. It provides a series of questions about the caller-reported symptom (or symptoms) that enable quick identification of common high-risk concerns.

This guide provides instructions for people who use SymptomScreen.

Purpose

SymptomScreen allows you to quickly gather data and prioritize acute (not chronic or long-term) symptoms such as arm pain, sore throat, or a head injury.

The screening guides provided in SymptomScreen have been reviewed by your medical leadership, so you can be confident that they will allow you to direct callers the way your organization wants them to be handled based on their symptoms. And you can also be confident that the rest of your team is handling these calls in the same way. With that in mind, if you are ever unsure how to handle a particular call, ask your supervisor or a nurse or provider.

Overview

These steps should be followed each time you use SymptomScreen:

1. Select the guide(s) matching the symptom or symptoms reported by the caller.
2. Ask the screening questions listed, starting with the first question and moving down one question at a time. Select the first question to which the caller says yes or maybe, then stop asking the questions.
3. Review the action that appears with the caller and confirm they believe it is a safe outcome for the patient. If not, escalate the call.
4. Take the action displayed (for example, transfer the call or schedule an appointment).
5. If your organization is using SymptomScreen to document your screening, press Copy Screening Summary and paste the note into the patient's record, message, or appointment.
6. When done with the call, press New Call.

Let's look at each of those steps in more detail.

1. Select the Screening Guide(s)

In the search box at the top of SymptomScreen, type the first symptom the caller is reporting. Screening guides with that symptom appearing in the title of the guide are listed first, guides that are possibly related appear next. If you don't see the guide that you want, check your spelling or try describing the symptom in a different way.

If the caller is describing more than one symptom, after selecting the first symptom simply click on the Add Another Symptom button and repeat the process to select the second symptom. You can add as many symptoms as you need to in order to match what the caller is reporting.

Your organization will tell you how they want you to handle calls when the patient's symptom is not covered by a guide in SymptomScreen. And if you find that there's a common symptom that doesn't have a guide, please let us know by clicking on the three-line menu in the top right corner of SymptomScreen and choosing Feedback.

2. Ask the Screening Questions

You will now have a list of the screening questions for the symptom or symptoms that you selected. Notice that they are grouped in distinct categories and presented one category at a time.

Before asking the questions, you should let the caller know what you are about to do. Your organization should decide on the exact phrasing to use, but it will be something like:

“Before I transfer you to a nurse or schedule your appointment, I'm going to ask you a few questions to make sure your call is handled safely. Please stop me right away if any of the questions I read describe your symptom or how you are feeling.”

Or more simply:

“Stop me right away if any of the things I read are true.”

If the caller is calling about someone else's symptom (a child or someone they are caring for), the statement would be slightly different:

“...Please stop me right away if any of the questions I read describe [patient's name]'s symptom or how they are feeling.”

If the caller says yes to any question, or even if they say maybe or they're not sure, click on the box in front of that question and don't read any additional questions.

If the question is about the patient's age or sex and you can determine the answer based on information in their record, you do not need to ask that question but instead can answer it based on the information that you already know.

3. Read the Action Displayed and Confirm Safety with Caller

When you click on the box in front of a question, a new screen will appear with instructions on how to proceed. Describe what you are about to do to the caller (for example, transfer to a triage nurse or schedule an appointment) and make sure they feel this is a safe outcome. If not, escalate the call per your organization's policy.

Note that if it is a red question and it says the caller needs to talk to a nurse or provider now, it does mean now. This is potentially a life-threatening situation and the caller should speak with a licensed healthcare professional without delay.

4. Take the Action Displayed

Once the caller confirms they are comfortable with the outcome you have reached during screening, go ahead and follow the instructions.

5. Copy Screening Notes

If your organization wants you to record a summary of your screening into your EMR, scheduling system, or some other software, simply press the Copy Screening Summary button in the bottom right corner of SymptomScreen. Then go to the desired field in that other system, right-click and choose Paste. You can also press Control-V if you're using Windows or Command-V if you're using a Mac.

6. Get Ready for the Next Call

When you're done with the call, press New Call in the bottom left corner of SymptomScreen to clear out the symptom(s) you have selected and any positive screening questions. SymptomScreen is now ready for your next call!

Safety

SymptomScreen is designed to let you quickly identify the most common high-risk complications of symptoms. But it doesn't screen for all potentially dangerous situations. In many cases, these situations are addressed by the question in which you ask if the caller thinks this is serious and they need to be seen now/very soon. But if something doesn't feel right to you with the outcome you have arrived at or you are unsure how to handle a particular situation, you should talk to your supervisor or to a nurse or provider.

Signing In

Some organizations will create a link or button in the software you normally use that will start SymptomScreen without requiring you to sign in. If this is how SymptomScreen works for you, congratulations!

If not, at the start of your shift you will need to sign into SymptomScreen. Using your web browser, go to <https://app.symptomscreen.com>. Then fill in:

- **Your First Name:** Typically just your first name unless instructed by your organization to use your full name or user id.
- **Account ID:** The ID for your account, picked by the person who created your account. Everyone in your organization uses this same Account ID, often it is a shortened version of your organization's name (without spaces). It can be all lowercase.
- **Password:** The password for your account. Everyone in your organization uses this same password and it too was selected by the person who created your account. It may be a mix of upper and lowercase.

Techie hint: It can be helpful to add <https://app.symptomscreen.com> to your Favorites or Bookmarks so that you can start SymptomScreen with a single click.

Feedback or Support

If you have suggestions to make SymptomScreen better (new screening guides, something else it could help with), feel free to contact us by email or phone by going to www.symptomscreen.com/contact. You can also send simple feedback directly within SymptomScreen by clicking on the three-line menu in the top right corner of SymptomScreen and choosing Feedback.

Terms of Use

The details of your responsibilities and our responsibilities when you're using SymptomScreen are listed in our Terms of Use. That agreement can be reviewed when you sign into SymptomScreen, or you can read it here: <https://www.symptomscreen.com/wp-content/uploads/SymptomScreen-Terms-of-Use.pdf>