SymptomScreen lite

Admin Manual

SymptomScreen Admin can be used to customize your SymptomScreen Lite guides and to run reports on your organization's usage of SymptomScreen Lite. 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.

Note: SymptomScreen Lite is the free but limited version of SymptomScreen. Click here to see the Admin Manual for the Standard version of SymptomScreen.

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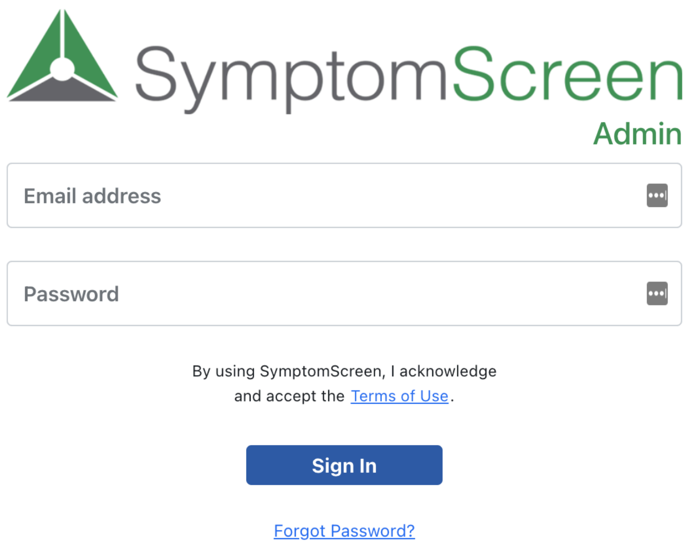
Sign In

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.

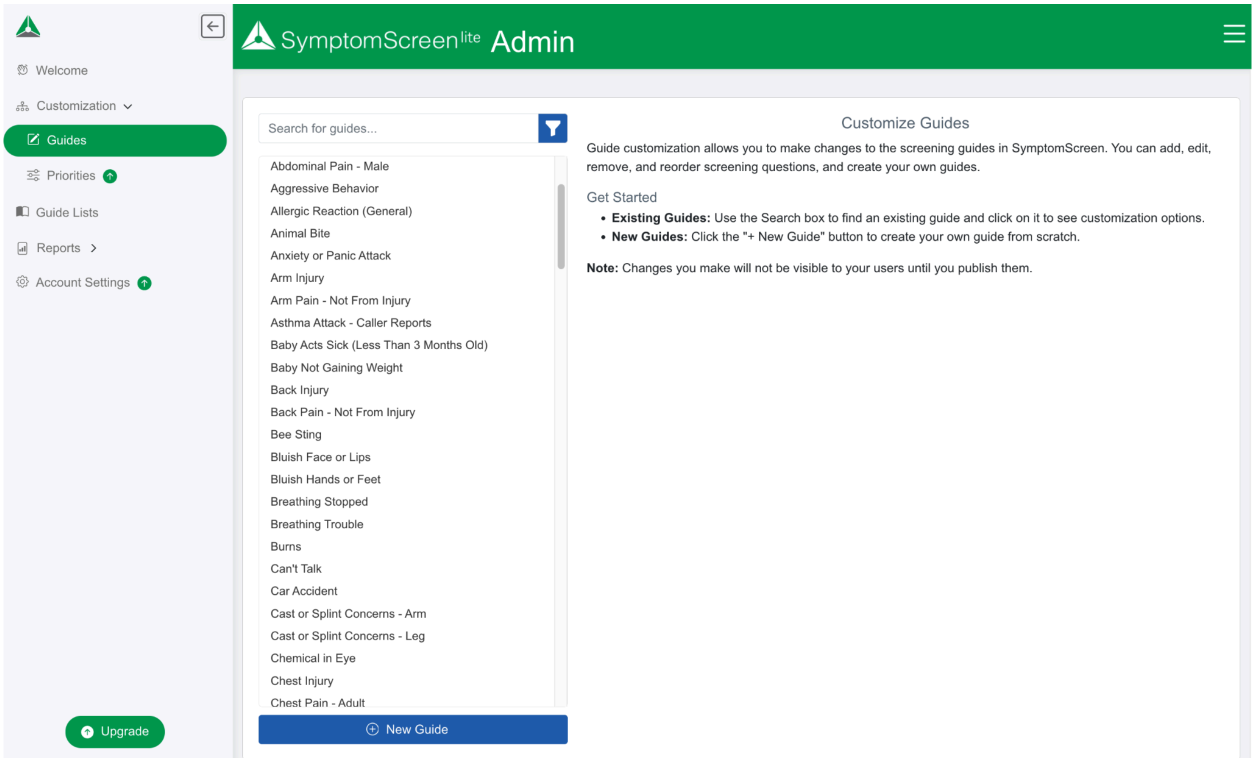
If you can't remember your password or if you are signing in for the first time, click on Forgot Password and enter your email address. You will receive an email prompting you to set or reset your admin password.



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.

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!



SymptomScreen Lite includes just over a half of the screening guides that are in the Standard version of SymptomScreen. Click here to see indexes listing the guides in each version.

Guide Selection

The left side of this screen presents a list of all of the screening guides included in your account. 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.

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" 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.

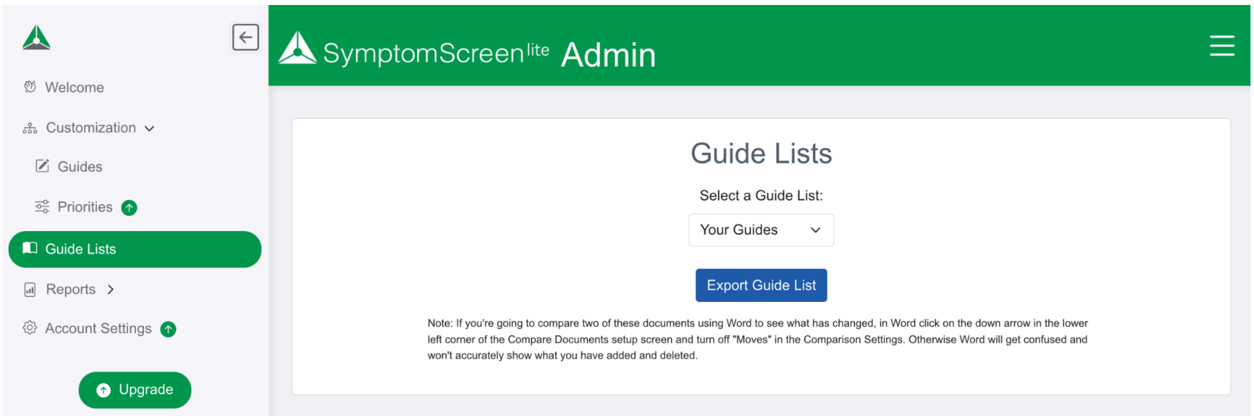
Customization - Priorities

Subscribe to the Standard version of SymptomScreen for additional priorities supporting detailed call routing options. Start with 8 priorities instead of being limited to the 3 simple red/yellow/green priorities used in SymptomScreen Lite, plus combine or add extra priorities as needed.

Subscribers to the Standard version of SymptomScreen can also write detailed onscreen instructions for their agents to follow as well as customize additional elements of the priority like the priority color and nickname. Read more in the Standard Admin Manual.

Guide Lists

A complete list of the screening guides can be downloaded as a Word document for review by your medical or operational team. This is helpful as the document can then be emailed to participants or displayed on a screen during a meeting, making the review process simpler and faster.



Note: Standard SymptomScreen users can also download the guide list as an Excel document for analysis of where particular questions are used or for helping you ensure consistency between related guides.

There are two different versions of guide lists that can be generated:

1. **Your Guides:** These are the guides as your staff see them. This document captures any changes you have made to the guides, and any 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:** These are the standard guides before you made any changes. This document is useful for comparison to see the authors' original intent.

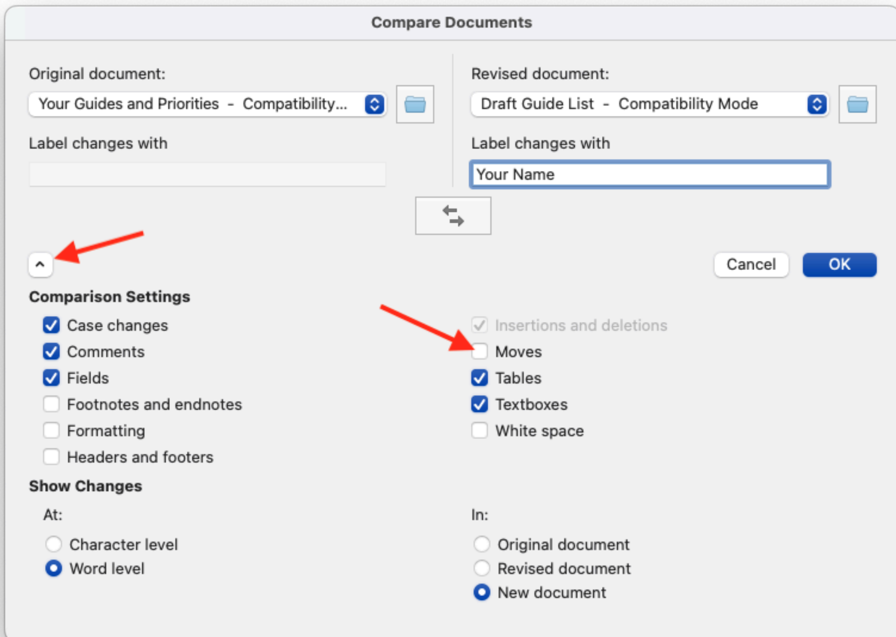
Comparing Guide Lists in Microsoft Word

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

- Compare "Authors' Guides" with "Your Guides" to see all of the changes your organization made from the standard guides you started with.
- Compare "Your Guides" 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" 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.



Reports

The 3 reports outlined below are available to all SymptomScreen Lite 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.

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.
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.

There are 15 additional reports included with the Standard version of SymptomScreen, including a complete data export. Click here for a complete list of these additional reports.

Helpful Definitions for Reporting

- **User** - agent identifier that is typed into the sign in form.
- **Guide** - a set of screening questions for a particular symptom, grouped by priority.
- **Priority** - an outcome for a call.
- **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.)

Account Settings

Subscribe to the Standard version of SymptomScreen to be able to change a variety of account settings including:

- ***Prescreening Questions*** *to ensure stable chronic calls are always routed to a lower priority*
- ***Documentation Options*** *to change the amount of detail in the call note including the questions that are denied by the caller*
- ***Spanish Screening Questions*** *to enable your bilingual agents to easily screen calls from Spanish speaking callers*
- ***Copy for Chat*** *to allow your agents to quickly copy each set of screening questions into a chat message*
- ***Introductory Screening Text*** *to adjust the scripting your agents read to the caller before asking the screening questions*

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.

SymptomScreen Lite users will receive all changes made by the authors to their existing guides but they will not receive new guides created by the authors. New guides are available only to users of the Standard version of SymptomScreen.

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 3 of this manual. *All changes made in that section are pending until you press the Publish button.*

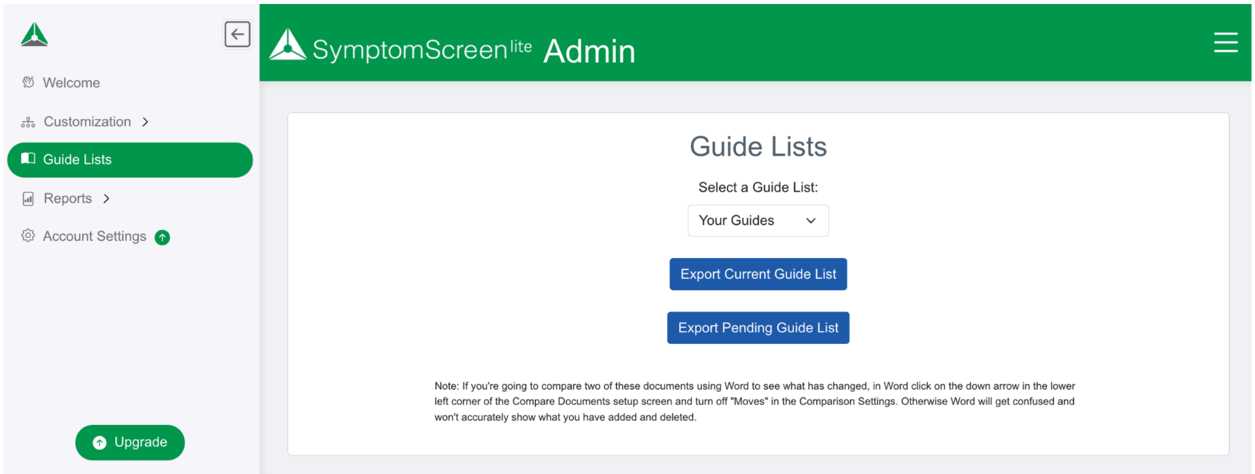
General Rules

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 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.
2. 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 7 to compare two guide lists using Microsoft Word. Here are two types of comparisons you may find helpful when reviewing the changes in a new guide set:

- Compare the current and pending "Your Guides" to see what will be changing in your account.
- Compare the current and pending "Authors' Guides" to clearly see what the authors changed in the release and the intent of those changes.

SymptomScreen Standard

Interested in learning about the additional features included in the Standard version of SymptomScreen, including integration options (for Epic, Salesforce, chatbots, and more), additional screening guides, priority customization, account settings, additional reports, and single sign on support? Read more on our website, schedule a demo, or just ask us a question. We're happy to help!