SymptomScreen lite

Implementation Guide

Use this Implementation Guide to assist you in setting up and rolling out your new SymptomScreen Lite account. There's a handy checklist below, then additional details on the following pages. Use only the steps that are valuable to you - you can always start using SymptomScreen Lite with minor or no customizations, then make adjustments as you learn more.

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

Implementation Checklist

- ☐ Identify project team
- ☐ Register for a free SymptomScreen Lite account
- ☐ Review the SymptomScreen Lite guides and decide what your agents should do for each priority (Red, Yellow, Green)
- ☐ Identify Pre- and Post-Screening Processes
- ☐ Review the guides and customize as needed
  - ☐ Generate and review a Guide List
  - ☐ Edit existing guides if needed
  - ☐ Add new guides if needed
- ☐ Training
  - ☐ SymptomScreen training video
  - ☐ SymptomScreen training guide

Overview of Implementation Steps

This section includes an explanation of each step in the Implementation Checklist. Use this in conjunction with the SymptomScreen Lite Admin Manual for successful implementation.

1. Identify Project Team

It's important to identify your project team prior to getting started. For some organizations, the team may consist of just one or two people, while others may need a larger team made up of people representing different departments within the organization. No matter the size of the team, the key to successful implementation is having representation from both the call center (or front desk/scheduling) AND the clinical side of operations.

This is helpful because the customization of SymptomScreen will not only impact the agents, but will also impact the calls transferred to nurses and appointments scheduled. Clinical decisions will be made as to how calls are prioritized into your different queues. It is important for your project team to have a thorough understanding of both the agents' workflow and the clinical implications of customizations made.

2. Register for an Account

To get started you will need to register for a SymptomScreen Lite account. 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.

3. Review the Guides and Decide on Actions per Priority

SymptomScreen Lite prioritizes symptom-based calls into one of three simple priorities: Red, Yellow, and Green. What each of those priorities means varies by organization. Here are some examples for you to consider:

> **Example 1** - *In this example, all calls are routed to a triage nurse and SymptomScreen is used to determine which triage queue.*
>
> Red: Warm Transfer to Nurse Triage
> Yellow: Normal Transfer to Nurse Triage
> Green: Message Nurse Triage for Return Call

Example 2 - *In this example, high and medium priority calls are routed to triage and lower priority calls are scheduled.*
Red: Warm Transfer to Nurse Triage
Yellow: Nurse Triage
Green: Schedule Appointment

Example 3 - *This is an example of an organization that doesn't have triage nurses, so SymptomScreen is used to determine which calls are escalated to a provider, sent to the walk-in clinic, or scheduled.*
Red: Get provider immediately
Yellow: Walk in clinic or talk to provider soon
Green: Schedule appointment or message clinician

It typically is helpful to review the questions in each of the priorities before deciding how your organization should handle each priority. To do so, generate the "Your Guides" guide list in SymptomScreen Admin. This is a Word document with all 146 screening guides and the questions used in each guide.

Decide how you want to document the process for your staff to follow for each priority, then communicate these decisions to your non-clinical staff that will be using SymptomScreen Lite.

Note that the Standard version of SymptomScreen lets you modify the description for each priority and includes additional text fields so your instructions can be visible on-screen for your staff at each priority level.

4. Identify Pre- and Post-Screening Processes

The Standard version of SymptomScreen contains options for various pre-screening and post-screening processes. When using SymptomScreen Lite, you can choose to implement these as manual processes and instruct your staff to follow them for each call. For example:

- Pre-screening: Identify stable chronic calls and treat them as green priorities. Typically this is done by asking a pair of questions such as "Have you been seen for this before? Is it getting worse?" or "Have you had this symptom for more than 30 days? Is it getting worse?"
- Post-screening: Identify situations that weren't covered by the short set of questions in SymptomScreen Lite. For example, ask "Are you comfortable with this outcome?"

The Standard version of SymptomScreen makes pre-screening and post-screening questions an automatic part of the screening workflow by prompting the agent to ask these questions and document the responses. If your agents aren't reliably following your manual process, you may want to consider upgrading to the Standard version for this additional feature.

5. Optionally Customize the Guides

If you haven't done so already, generate the "Your Guides" guide list in SymptomScreen Admin. Use this Word document to let your Medical Director(s) or other clinical team members review the questions being asked for each symptom and the resulting priorities.

If (and only if) your team wants to handle some of the calls in a different way, you can customize the guides. This allows you to move questions to different priorities, edit the text of any question, add questions, or remove questions. You can also edit the properties for a guide (the title, alternative titles, and 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 train their staff themselves because SymptomScreen is intentionally simple to use and most of the questions brought up during training are about internal processes that SymptomScreen staff can't help with. *However, if you decide to upgrade to a Standard SymptomScreen account, our training team 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.*

SymptomScreen Standard

Interested in learning about the additional features included in the Standard version of SymptomScreen, including our world-class support team, integration options (for Epic, Salesforce, chatbots, and more), additional screening guides, customization of priorities, 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!