Software Instructions

A brief guide to using the software features of ClearTriage

Table of Contents

▶ Watch Video   Indicates a short training video for that feature, just click to watch.

Sign In

Sign in to ClearTriage at https://app.cleartriage.com. Three fields are required to sign in:

- **Your First Name**: Just your first name is needed here, nothing fancy. (Some larger organizations may have you sign in with your username.)
- **Practice ID:** The ID for your account, picked by the person who created your account. Everyone in your organization uses this same ID, often it is a shortened version of your organization's name (without spaces).
- **Practice 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.

Check **Remember Me** to retain your name and your Practice ID for the next time you sign in. Some browsers will also offer to save your password. Feel free to use this feature to make it even easier to sign in to ClearTriage.

Our **Terms of Use** are available to review, describing your responsibilities and our responsibilities when you are using ClearTriage.

Click on the **Sign In** button when everything is correctly filled in.

Techie hint: It can be helpful to add https://app.cleartriage.com to your Favorites so that you can start ClearTriage with a single click.

Navigation, General Notes and Menu

ClearTriage provides a simple 3-step presentation of the Schmitt-Thompson protocols: select the protocol, mark the positive triage question to identify the disposition, and provide care advice. You can move between these 3 steps in one of two ways:

Next/Prev buttons – use these buttons in the bottom right of the screen to move forward and backward through the steps.

Tabs – use the three tabs along the top of the screen to jump directly to the desired step. Note that the Questions and Care Advice tabs will not work if a protocol is not yet selected.

The **General Notes** box at the top of every screen is used for capturing your initial assessment and general notes during the call. This includes information about the caller, the history of the symptoms, duration, severity, etc. Good advice is to use this to "paint a picture" of the patient for other members of the care team who will read your note.

The **Menu** is available at the top right of every screen, accessed by clicking on your name. Use the menu to switch between office hours and after hours protocols (if your organization is using both), to access **Administrative Features** or to **Sign Out**. More details on the administrative features are provided later in this document.

Protocols

The left side of the screen contains the **list of protocols** to select from. Scroll through the list to find the protocol you want and click on it to select. Or type letters in the **Search Box** to narrow down the list of protocols to select from. You can search based on the title, symptom, potential diagnosis – whatever makes sense to you. When searching the top of this list will show protocols with the words you typed in their title (in bold), the remainder of the list will be other related protocols.

Once you select a protocol, the right side of the screen displays a brief **Description** of why you would use this protocol, followed by other **Related Protocols** to consider. Simply click on the name of one of the related protocols to display that protocol instead. Some protocols have **First Aid** information, and all have **Background** information about that symptom. The background information is *optional* reading for you the nurse. It can help you prep for a call, learn about less frequent symptoms or answer specific questions for the caller.

If you are using both pediatric and adult protocols, the pediatric protocols will have a green P in front of them and the adult protocols will have a blue A.

If you are using both Office Hours and After Hours protocols, switch between them using the menu under your name in the top right corner of ClearTriage. When in Office Hours ClearTriage has a bright blue background. When in After Hours the background is a very dark blue, almost black.

Questions

This screen has a list of **triage questions** you need to consider when triaging a patient using the selected protocol. The questions are grouped by **disposition** with the most urgent dispositions listed first. The dispositions are shown in the colored bars going across the screen. Red dispositions require immediate action. Yellow dispositions require a non-urgent visit. Green dispositions indicate treatment at home.

Select the first triage question that is positive for the patient being triaged by clicking the checkbox or the Y button in front of the question. If your organization uses Yes and No buttons rather than a single checkbox, you can also select pertinent negatives. Whether you have checkboxes or Yes and No buttons is an organization-wide option because a consistent approach to triage documentation between nurses is considered best practice. This option can be changed in the Account Settings, accessed in the menu under your name in the top right corner of ClearTriage.

Once a positive triage question is selected, the matching disposition appears in the top left above the questions. If you need to override this disposition, changing it for some reason such as no appointments available today, click on the blue **Override Disposition** button near the top right. You can then select a different disposition and the reason for the override.

Position the mouse cursor over the **information icon** (a small "i" in a gray circle) or the **first aid icon** along the right edge of the questions for rule out or first aid information. The rule out information is helpful to understand why the question is being asked, perhaps letting you ask for information in a slightly different way to truly rule out the issue.

If your organization is scheduling video visits (i.e. telemedicine visits) from your telephone triage calls, some of your questions might display a **video visit eligible icon** (a small smartphone) on the right edge of the question. If you select one of these questions as positive, you will be prompted to record if you offered a video visit and if so, whether the caller accepted.

Care Advice

Headings for potential **Care Advice** display on this screen. Seeing just the headings lets you quickly scan the care advice you might discuss. Click anywhere on a heading to expand that section and review the detailed care advice. Discuss the appropriate advice with the caller. Click on **Expand All** on the right edge to expand all of the headings at once.

Record the care advice discussed by checking the appropriate checkboxes. Depending on how your organization has chosen to record care advice, you may have two checkboxes near the top of the screen, a checkbox next to each heading, or a checkbox next to each heading and care advice detail. This is an organization-wide option because a consistent approach to triage documentation between nurses is considered best practice. This option can be changed in the Account Settings, accessed in the menu under your name in the top right corner of ClearTriage.

This screen also has the **Handouts** button. Many of the protocols have one or more related handouts that can be sent to the caller to reinforce the care advice discussed, helping with compliance and to reduce callbacks. These handouts are written by Dr. Schmitt and Dr. Thompson at a 6th grade reading level. Select the desired handout from the dropdown list and click on the adjacent Preview button to review the handout prior to sending. Type in the email address or phone number of the recipient, confirm verbally that they give consent to have the informational handout sent with no encryption or password, check the box indicating consent and click on Send.

Note that the email or text that is sent contains no other information from the call, just the informational handout. It will appear to the caller as if it was sent from your organization, but if they try to respond to the message they will be notified that the address or phone number is not monitored and they should call 911 or their provider.

There is an additional option to send a handout by Link, used to create a link to the handout that can be pasted into your portal or a secure messaging system. While this likely makes the handout more difficult for the caller to access, a few organizations feel that this is the best way to send handouts. Select the desired handout, click on the Link radio button, then

click on Copy Link to copy the link to your clipboard. From there it can be pasted into a secure message to the patient or a note in the patient's portal.

Pediatric Protocols Only:
> The Care Advice screen also has a button allowing you to select pediatric **Medication Dosages** for eight common over-the-counter medications. Each medication has a table showing the different dosages by either age or weight. Move your mouse over the table to highlight a row and column in order to help you select the appropriate dosage. Click on the dosage to record it in your call note.

Copy / Paste
 Watch Video

Once you have finished the call, everything you have typed in the General Notes box and that you have selected on the three different screens is now ready to be transferred into the patient's EMR record.

Press the **Copy** button in the bottom right corner of the ClearTriage screen. This captures the information about the call in preparation for inserting it into the patient's EMR record.

Next, switch to your EMR system (or CRM or care management system). You to do this in several ways:
- Click on your EMR's button in the taskbar along the bottom of the screen
- Click on any visible portion of the EMR window
- Type Alt-Tab to cycle between open windows on your Windows computer (Command-Tab on a Macintosh)

Once in your EMR software, go to the screen where you normally record information about the triage call. In the box where you would type about the call, click once so you are prepared to type. Then paste the notes from ClearTriage using one of the following methods:
- Press control-v on a Windows computer or command-v on a Macintosh
- Right-click and choose paste
- Select Paste from the Edit menu of your EMR software
- Click on the Paste icon at the top of the text area

Not all of these methods will be available for every EMR software program, but at least one of them will work for you.

Reset
Press the **Reset** button in the bottom left corner of ClearTriage to erase everything you typed and selected in the previous call in order to start a new call.

Multiple Symptoms

 Watch Video

If the caller brings up an additional symptom that needs to be triaged, simply go back to the Protocols screen and select that additional symptom. You can triage this symptom or go straight to care advice. You can switch between the protocols you are using by clicking on the name of the protocol on the Questions or Care Advice screens. And if you decide you don't want to include one of these protocols in your call note, just go back to the Protocols screen and click on the X next to that protocol to remove it from your call.

Clinical hint: There is no need to select "Fever" as a second protocol. The appropriate questions regarding fever are included in every protocol where they are needed. The Fever protocol should only be used if Fever is the only symptom.

Techie hint: If you want to select multiple protocols when you are just starting the call, hold down the Shift key while you click on each protocol. You'll notice this adds each protocol to the list of Protocols Used at the top of the screen.

Sticky Notes

 Watch Video

You may want to record differences between the Schmitt-Thompson clinical questions/advice and the policies agreed upon by your organization. For example, you may treat lice or vomiting slightly differently, or you may want to record the antibiotic you use for pink eye, or you may simply want to record the local poison control or suicide counseling number to have it handy during a call.

To add a Sticky Note to the top of any screen, start by selecting the protocol you wish to add the note to. Then go to the appropriate screen (Protocols, Questions or Care Advice) and choose Add Sticky Note from the menu under your name in the top right corner of ClearTriage. Type in the custom information you want everyone in your organization to see every time they view that page and then press OK. If you need to make changes to the Sticky Note in the future, choose Edit Sticky Note from the same menu and either edit or delete the content that was previously entered.

Licensing

Your organization has arranged to have a certain number of people using ClearTriage at the same time. If more people than that try to use ClearTriage at the same time, the "extra" person will not be able to use ClearTriage until a subscription becomes available. Someone using ClearTriage can make their subscription available by:
- Closing their ClearTriage window
- Not using ClearTriage for 8 minutes
- Signing out (clicking on their name in the top right corner of ClearTriage and signing out)

Administrative Features

Your ClearTriage administrator(s) have access to account settings, reports and additional customization options.

Setting up your Administrator account

Watch Video

The person who signed up for your ClearTriage free trial is the default administrator of your ClearTriage account. If that is you, you can set up your administrator account by choosing Account settings from the menu under your name in the top right corner of ClearTriage. Click "Verify My Email Address" to send yourself an email. Follow the instructions in that email finish setting up your account by selecting a personal password different than the one that everyone uses to sign into your ClearTriage account.

There is no limit as to the number of people who can be administrators for your account. Contact ClearTriage Support if you would like to add additional administrators or simply change the administrator to a different person.

Signing into your Administrator account

Once your Administrator account is set up, you can access administrative features within ClearTriage by selecting the appropriate choice from the menu under your name in the top right corner of ClearTriage, then entering your email address and password. And if you forget your password, use the Forgot Password link on the administrator sign in screen.

Account Settings

Watch Video

Use Account Settings to change the Practice Name that appears when you send handouts or the Practice Password that people use when they sign into ClearTriage. If you need to change the Practice ID that is used when signing in, please contact ClearTriage Support.

You can also change the way care advice is recorded in your call notes and whether negative triage questions can be selected. It is important to realize that this changes how the call is documented in your EMR, but it doesn't change how you triage a call or the care advice you give.

For details on the documentation options, you can also watch the video training or refer to ClearTriage Documentation Options.pdf.

Watch Video

Reports

Watch Video

Reports provide insight into how your organization is using ClearTriage. They can help with managing your triage staff or deciding what training to focus on. The purpose of each individual report is listed when you click on its title in the Reports section.

Simply select the Start Date and End Date desired, then press Run Report to view your data. Some browser / Excel combinations will allow you to select the data within the table and then paste it into Excel for further analysis.

One valuable report to check out is Subscription Usage. This report gives you visibility into whether you are using all of your ClearTriage licenses. If it turns out you have too many licenses, contact ClearTriage Support and we'll help you with options. And if you regularly have Blocked Users, you probably need to consider adding subscriptions to your account.

Customizing Protocols

You can customize the triage questions or home care advice in any protocol to match the specific policies and preferences of your organization. Start by selecting the protocol you wish to customize, then click on Edit Questions or Edit Care Advice. This will take you to a screen where you can perform any of the following actions:

Triage Questions

▶ Watch Video

- **Edit a question.** Click on the pencil to edit the text in a triage question. The original text from Dr. Schmitt or Dr. Thompson is shown above your text while editing. This is also where you can mark a question as Video Visit Eligible if you want to prompt your triage staff to offer a video visit (i.e. telemedicine visit).
- **Move a question.** Use the arrow keys to move a question up or down to a different disposition. Click on one of the arrows to move that question one position up or down, or use the arrows to drag the question to the proper location. (Note: if you remove all questions from a disposition, that disposition will be removed from the protocol when you Save Changes.)
- **Add a question.** Click on the "Add a Question" bar in any of the dispositions to add your own question to the triage checklist. Once you have added a question, you can use the arrows to move it to the proper location.
- **Delete (also known as hide) a question.** Click on the trash can and that question will no longer show in the triage list for your nurses. Click again to restore that question.
- **Add a disposition.** If you want one or more questions to appear in a disposition that is not currently used in that protocol, click on the Add Disposition button in the top right corner of the screen. Select the additional disposition (or dispositions) that you want to use, then click Add Disposition. Scroll to the new disposition, then add questions or move questions into that disposition.

Care Advice

▶ Watch Video

- **Edit a topic.** Click on the pencil to edit a care advice topic. You can edit the title of a topic (the text that appears in the blue bar) or any of the individual bulleted lines of care advice. In this editing screen you can also delete a line of care advice by clicking on the trash can next to that line, or add an additional line by typing in the blank line at the bottom of the list.
- **Revert changes to a topic.** Discard your changes to a care advice topic and revert to the original care advice from Dr. Schmitt or Dr. Thompson by clicking on the pencil next to that topic, then clicking on the Revert to Original button.
- **Delete a topic.** Click on the trash can and that topic will be removed from the care advice list for your nurses. Click again to restore that topic. (Note: Once you save

your changes, the topic will be permanently deleted and will no longer be able to be restored unless you restore the entire protocol.)

- **Add a topic.** Click on the Add Topic button in the top right corner of the screen to add your own topic with a title in a blue bar and individual lines of care advice underneath the topic's title.
- **Move a topic.** Use the arrow keys to move a topic you have added up or down to a different position. Click on one of the arrows to move that topic one position up or down, or use the arrows to drag the topic to the proper location. Please note that you can only move topics that you have created, you cannot move Dr. Schmitt's or Dr. Thompson's topics.

When you are done making all of your changes to the triage questions or home care advice, 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.

If you select Save Changes, you can try the new version of the protocol by clicking Back to ClearTriage in the Admin menu on the left. Upon saving, the new version of the protocol will also be available immediately for use by all of the nurses in your organization. (If they have already looked at that protocol since they signed into ClearTriage, they will need to either press Refresh in their browser, or sign out and then sign back in to see the new version.)

When you are on the Customize Protocols screen looking at the list of protocols, any protocol that you have customized will appear at the top of the list. You can click on one of these protocols to see who last changed the protocol and when. You can also press the red Revert to Original button to discard all of your organization's changes to that protocol and resume using the original protocol from Drs. Schmitt and Thompson.

Keep in mind that Drs. Schmitt and Thompson update their protocols every year based on feedback from users, additional research, and changes in national guidelines. When these updates are released each year, you'll need to look at any protocol you've customized to make sure your changes still make sense. We will provide tools to help with this review, but we still recommend that you **make the changes that are important to your organization but not any unimportant ones.**

Customizing Dispositions

 Watch Video

You can change the dispositions used in ClearTriage in three ways:

1. **Edit the text of a standard disposition.** You can change the wording of any disposition and it will change that disposition in all protocols in which it is used. For example, is your urgent care clinic called the Walk In Clinic or WIC? You can change "Go to Urgent Care Now" to "Go to WIC Now". Simply click on the pencil next to the disposition you want to edit and change the text to meet your needs.
2. **Adjust the dispositions that always show in the override list.** When you click on the "Override Disposition" button, the list of dispositions you can choose from is a combination of all of the dispositions already used in that protocol, plus all of the

dispositions marked as "Always show in override list". For example, if you work at a Women's Health Clinic you might want "Go to L&D Now" to always be available as an override choice. Simply click on the pencil next to that disposition and check (or uncheck) the box next to "Always show in override list".

3. **Add a disposition.** Do you have your own disposition that you want to use in certain protocols or that you always want available in the override list? Maybe your organization has some calls that you want to classify as "Home Care with Nurse Follow Up in 2 Days". Simply click on "Add a Disposition" in the appropriate section and enter the text for your new disposition. Next mark the checkbox if you want your new disposition to always appear in the override list. Once saved, you can use the arrows to move it up or down so it has the right relative urgency compared to the other dispositions.

There are a few important things to keep in mind when editing dispositions:
- Each set of protocols has its own list of dispositions. If your organization uses more than one set of protocols (e.g. Office Hours Peds, Office Hours Adult, After Hours Peds, After Hours Adult), you'll need to make the desired edits to each of the protocol sets. Switch between protocols sets using the dropdown control near the top of the screen.
- Once you make changes to the dispositions, your triage staff may need to sign out of ClearTriage and then sign back in to see the changes. Or they can press "Refresh" in their browser.
- If you add a disposition, once you use add it to a protocol while customizing the triage questions in a protocol, you can no longer adjust the disposition's position relative to the other dispositions. So make sure to position it properly before adding it to a protocol.

Reviewing and Publishing Updated Protocols
As mentioned previously, Drs. Schmitt and Thompson update their protocols every year. When this happens, the updates will be made available for your review before they are used by your triage staff. It is the responsibility of your medical director and triage team to review the updates. Once this is done, you can publish the updates for use by all of your triage staff.

The basic review and update process is simple:
1. Read the update letters
2. Review the changes within ClearTriage
3. Publish the Update

Here is a more detailed description of each of these steps:
1. **Read the update letters.** Drs. Schmitt and Thompson create letters summarizing the changes to the pediatric and adult triage protocols. Any of your medical staff involved in telephone triage should read these letters so they will be familiar with the changes. The pediatric letter in particular can serve as a self-study guide for

your triage nurses. These letters are typically emailed to you and are also available on the Overview page when reviewing protocol updates in ClearTriage.

2. **Review the changes within ClearTriage.**
    - Sign into ClearTriage as you normally would, then click on "Review Updates" in the menu under your name in the top right corner of ClearTriage. Sign in as an administrator with your personal password, then read the overview instructions and click on Get Started. A list of protocols will appear.
    - Click on any protocol and ClearTriage will display whether Schmitt-Thompson has updated the Questions, the Care Advice, both, or neither. Click on the Review Questions or Review Care Advice button to bring up a screen allowing you review the detailed changes made by Schmitt-Thompson.
    - Changes Schmitt-Thompson has made will be identified with black badges. Hover over the badge with your mouse cursor for more details about the change.
    - You can make changes to the protocols at this time to match the policies and preferences of your organization. The process and tools for making these changes is described in the Customizing Protocols section above.

3. **Publish the update.** Once you have reviewed the updates and made any necessary changes, click on Publish Update to publish the new protocols for use by all of your triage nurses the next time they sign in to ClearTriage. If a nurse is currently signed in, they will continue using the previous versions of the protocols until they sign out, then sign back in.

If you have previously customized any of the Schmitt-Thompson protocols, it is possible that Schmitt-Thompson has updated one or more of the same protocols. If this is the case, before ClearTriage displays the list of all of the protocols to review, you will be asked to review and approve the specific protocols where there is a potential conflict between your changes and the updates.

When reviewing the protocols with potential conflicts:
- Changes Schmitt-Thompson has made will be identified with black badges. Hover over the badge with your mouse cursor for more details about the change.
- Changes your organization has made (if any) will be identified with blue badges. Hover over these badges for more details about your change.
- While it is most important to review the triage questions or care advice topics that were changed by both you and Schmitt-Thompson (they will have both blue and black badges), reviewing the questions or care advice as a whole is important since there may be subtle interactions between your changes and the Schmitt-Thompson changes.

Note that a potential conflict exists only if you and Schmitt-Thompson both change the same section of the protocol. For example, if you customize the triage questions and Schmitt-Thompson also has updated the questions, there is a potential conflict and you should review the triage questions section in detail before approving. However, if you customize the triage questions and Schmitt-Thompson has updated the care advice, these changes won't conflict, ClearTriage will combine the section you customized with

---

the rest of the protocol as updated by Schmitt-Thompson and you will not be required to specifically approve the combined protocol. However, you should still review your previous customizations before publishing the updated protocols.

If you review your previous customizations and decide they are no longer important, or if you would like to start fresh with the new version of the protocol and then re-create your customizations, simply select the desired protocol and choose the red Discard Changes button. This can be especially helpful if you find that you are maintaining too many customized protocols and those customizations aren't very important to your organization. It can also be helpful if a protocol is marked as customized but you don't see any badges indicating that you changed anything. (The latter scenario is possible if you do something like delete a question, then change your mind and undelete it – the overall protocol is marked as changed by you even though there are no specific changes attributable to your organization.)

Important note: While you are reviewing updates to the protocols, you will not be able to make any customizations to the versions of the protocols currently being used by your triage nurses. Nor will you be able to customize the dispositions. Both of those features will be available again immediately after you publish the updated protocols.

Telemedicine / Video Visits

If you offer nurse telephone triage and you also offer telemedicine visits with providers to those callers, you may want to formalize this by identifying specific questions in specific protocols for which your triage staff should offer a telemedicine visit (also known as a video visit). This is supported in ClearTriage when customizing triage questions.

Customization of triage questions is discussed above and is not a difficult process. Once you begin customizing the triage questions in a protocol, simply click the pencil icon next to each question for which a video visit should be offered, then click the "Video Visit Eligible" checkbox.

When your triage nurses use that customized protocol and mark one of those questions as positive, they will be prompted to offer a video visit and to record whether the caller accepts that offer. You can review reports on their answers to these prompts as you monitor your triage-to-telemedicine effort. *(Reports available by request.)*

Technical Requirements

ClearTriage requires a desktop computer, either Windows or Macintosh. It can also run on an iPad (iOS version 10 or higher) but it will not run on a mobile phone.

ClearTriage runs in almost any web browser. Here is the minimum required version for common browsers:
- Chrome: Version 42 or higher
- Edge: Version 12 or higher
- Firefox: Version 41 or higher
- Internet Explorer: Version 9 or higher, requires Adobe Flash to be installed
- Safari: Version 10 or higher

Normally you don't have to worry about the following, but if you are in a highly-secured environment please make sure Cookies and JavaScript are enabled in your browser and that you allow access to https://*.cleartriage.com.

Note: Accessing the Administrative features in ClearTriage will work on any of the above browsers except for Internet Explorer version 9.

Need More Help?

Many of the topics in this document are also covered in our Video Training series. Those topics are marked with this symbol:

 Watch Video

Just click to watch the video training. Or you can look through the entire video training series at www.cleartriage.com/training-videos.

If you have any additional questions or need help with any part of ClearTriage, please do not hesitate to contact us at 800-755-3545 or support@cleartriage.com.

Thanks for using ClearTriage!