Admin Manual

ClearTriage is a decision support tool designed to assist telephone triage nurses by providing access to the Schmitt-Thompson protocols in user-friendly software. This Admin Manual offers step-by-step instructions for using ClearTriage Admin. Admin users have access to account settings, customization, and reporting.

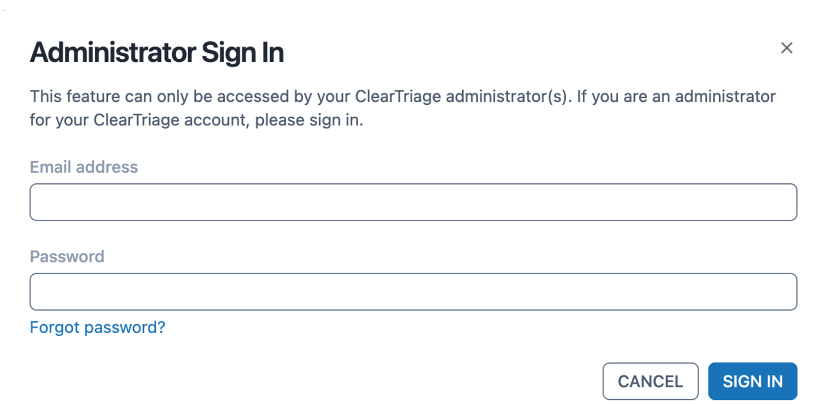
Setting Up Administrator Access

The individual who created the ClearTriage free trial account is automatically designated as the initial administrator. To complete administrator setup, select **Account Settings** from the **Menu Icon (☰)** in the upper-right corner of ClearTriage and choose Verify My Email Address to receive a verification message. Follow the instructions in that email to create a personal administrator password that is separate from the shared login password used by your organization.

There is no limit to the number of administrators an account may have. If you need to add additional administrators or transfer administrator responsibilities to someone else, please contact [ClearTriage Support](#).

Signing In to ClearTriage Admin

Once an administrator account is set up, Admin features can be accessed by first signing into ClearTriage as a nurse user, then selecting any Admin option from the menu icon in the upper-right corner of ClearTriage and completing the administrator sign-in process.



💡 If an administrator password is forgotten, the **Forgot Password** link on the administrator sign-in screen can be used to reset it.

Account Settings

The **Account Settings** section is used to manage key account-level configuration options. The Account Name that appears on sent handouts and the Shared Account Password used for general sign-in can be updated here. To change the shared Account ID associated with sign-in, contact ClearTriage Support.

Other settings can also be adjusted in Account Settings:

- **Documentation Options**
  Choose how the triage questions and care advice appear in the documentation for your account. These options affect documentation only; they do not change how calls are triaged or how care advice is presented during the call. Click here for more information.
- **Disposition Guidance**
  Disposition Guidance appears on the Triage tab and Plan tab after a disposition has been determined, offering the user additional guidance related to that disposition. You can enable or disable the display of disposition guidance in Account Settings.
- **Telemedicine Defaults**
  Telemedicine tagging prompts your users to offer a video visit for specific positive triage questions. Choose Selected to use the authors' recommendations as a starting point (additional questions can be tagged using Protocol Customization), or None to start with no questions tagged and only prompt your users for questions you tag yourself.
- **Reminder Editing**
  Reminders can be added to any section of a ClearTriage protocol to alert users to important information specific to that protocol. Select Anyone signed into your account to allow all users to add, edit, or remove reminders. Select Administrators only to limit this capability to administrators.
- **Notes Field Visibility**
  Hide the narrative notes box at the top of ClearTriage if those notes are entered directly in the patient record rather than in ClearTriage. (This is common when ClearTriage is embedded in custom software.)

Make sure to select Save Changes at the bottom of Account Settings to save your changes.

Billing Details

The Billing Details section lists the protocols licensed by your organization, the number of subscriptions purchased (click here for details about what this means), the subscription expiration date, and the current payment method (annual or monthly, by check or credit card). If payment is made by credit card, you can update the card information directly within this section.

Protocol Customization

Protocols can be customized to match the policies and preferences of an organization. To begin, select the protocol to be customized, then choose Edit Questions or Edit Care Advice.

Triage Questions

- **Edit a question**
  Select the pencil icon to edit the text of a triage question. The original text from Schmitt-Thompson appears above the editable field. This is also where a question may be marked as Video Visit Eligible if the triage staff should be prompted to offer a video (telemedicine) visit.
- **Move a question**
  Use the arrow keys to move a question up or down within a disposition or to a different disposition. Clicking an arrow moves the question one position; dragging the arrows moves it directly to the desired location. *Note: If all questions are removed from a disposition, that disposition will be removed when changes are saved.*
- **Add a question**
  Use the Add a Question button within any disposition to insert a new question. Newly added questions can then be moved to their appropriate location.
- **Delete (hide) a question**
  Select the trash can icon to remove a question from the triage checklist. Select the icon again to restore it.
- **Link care advice (After Hours protocols only)**
  After Hours protocols display only the care advice associated with the selected positive triage question(s). Use the link icon to determine which care advice should appear when that question is selected.
- **Add a disposition**
  To include questions in a disposition not currently used in that protocol, select Add Disposition in the upper-right corner, choose the needed disposition(s), and then add or move questions into it.

Care Advice

- **Edit a topic**

Select the pencil icon to edit a care advice topic. The topic title (blue bar text) and individual bulleted items can be modified. Within this screen, bulleted items may be deleted using the trash can icon or new bulleted lines may be added by using the blank field at the bottom.

- **Revert changes to a topic**
  Discard your customizations and restore a topic to the original wording from Schmitt-Thompson by opening the edit screen and selecting Revert to Original.
- **Delete a topic**
  Select the trash can icon to remove a topic from the care advice list. Select it again to restore it.
- **Add a topic**
  Use the Add Topic button to create a new topic with a title and bulleted care advice lines.
- **Move a topic**
  Use the arrow keys to adjust the position of topics that were created by the organization. (Topics authored by Schmitt-Thompson cannot be moved.)
- **Link triage questions (After Hours protocols only)**
  After Hours protocols display only the care advice associated with the selected positive triage question(s). Use the link icon to specify which triage questions should trigger display of that care advice topic.

Saving and Reviewing Changes

When all edits are complete, select **Save Changes**. To discard edits and start over, select **Discard Changes** instead.

After saving, the updated protocol can be tested by selecting Back to ClearTriage in the left Admin menu. The new version is immediately available to all nurses. If the protocol was previously opened during the current session, a browser refresh or sign-out/sign-in may be required for the updated version to appear.

Managing Customized Protocols

On the Customize Protocols screen, customized protocols will appear at the top of the list. Selecting a protocol displays the date and user associated with the most recent change. The red Revert to Original button can be used to discard all organizational changes and return to the original version from Schmitt-Thompson.

You can also reference the **Customized Protocols Report** in the Reporting section of Admin to see a list of the protocols that your organization has customized, along with a record of who made the customizations and when.

Protocol Title and Search Words

Contact ClearTriage Support if you would like to be able to edit the titles and/or search words for the protocols.

Custom Protocols

If your organization would like to create your own custom protocol from scratch, contact ClearTriage Support for a form to start the process. We can also make a copy of an existing protocol for you to modify for a specific department or other dedicated use case.

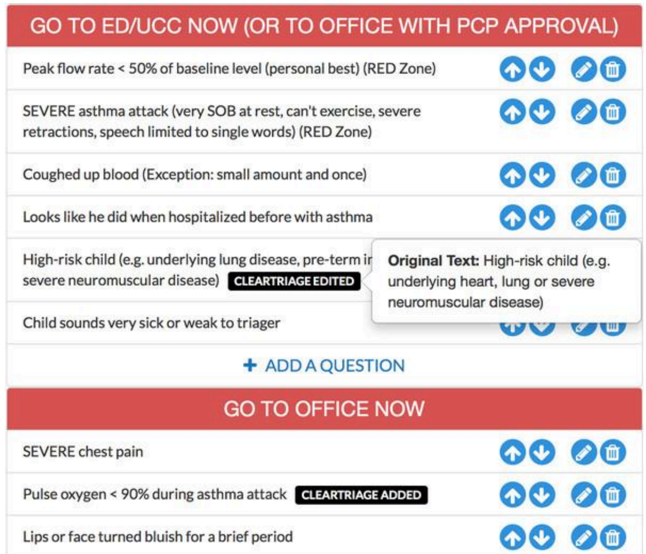
Annual Protocol Updates

Schmitt-Thompson updates their protocols annually based on user feedback, new research, and changes in national guidelines. When yearly updates are released, ClearTriage merges the authors' changes with your customizations. Because this merge is an automated process, **each customized protocol should be reviewed** to ensure organizational changes are still appropriate. Tools are provided to support this review process.

> 💡 While protocol updates are being reviewed, customization features are temporarily unavailable. During this time, the versions of the protocols currently in use by triage nurses cannot be edited, and dispositions cannot be customized. These features become available again immediately after the updated protocols are published.

To review and **Publish** the annual updates, follow this three step process:

1. **Review the update letters.** The protocol authors write letters summarizing the changes made in the protocols. Share these letters with all of your triage nurses and your medical director.
    - *Office Hours Update Letters*
      Adult Office Hours Update Letter
      Pediatric Office Hours Update Letter
    - *After Hours Update Letters*
      Adult After Hours Update Letter
      Pediatric After Hours Update Letter
2. **Review protocol changes within ClearTriage.** Choose “Review Updates” in the menu under your name in the top-right corner of ClearTriage to see a list of the protocols. Click on a protocol to see if any changes were made, and if there were changes you can review the details. Keep in mind that if your organization wants to handle anything differently than recommended in the standard protocols, you can make changes during the review.



3. **Publish the new protocols.** Click the "Publish Update" button within ClearTriage. (This button is available after you choose "Review Updates" as described in Step 2 above.) Your nurses will now be using the latest version of the protocols.

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.

Reviewing Protocols with Potential Conflicts

- Updates from Schmitt-Thompson appear with black badges. Hovering over a badge displays additional details about the update.
- Customizations made by your organization appear with blue badges, each with hover-text explaining the change.
- Protocol sections containing both black and blue badges deserve particular attention, as these indicate areas affected by both your organization's updates and Schmitt-Thompson's updates. However, reviewing the entire set of triage questions or care advice is recommended, as interactions between changes are sometimes subtle.

A potential conflict exists only when both Schmitt-Thompson and the organization have modified the same section of a protocol. For example, if triage questions were customized by you and Schmitt-Thompson also updated the triage questions, that section must be reviewed and approved. If triage questions were customized by you but Schmitt-Thompson updated only the care advice, the changes do not conflict. ClearTriage will automatically combine the organization's customized questions with the updated Schmitt-Thompson care advice, and no special approval is required—though reviewing all existing customizations before publishing is still recommended. Doing this once a year is just good clinical practice.

If during review previous customizations are determined to be unnecessary—or if starting fresh from the new version of a protocol would be easier—select the protocol and use the red **Discard Changes** button. This resets the protocol to the latest Schmitt-Thompson version and can be especially helpful when:

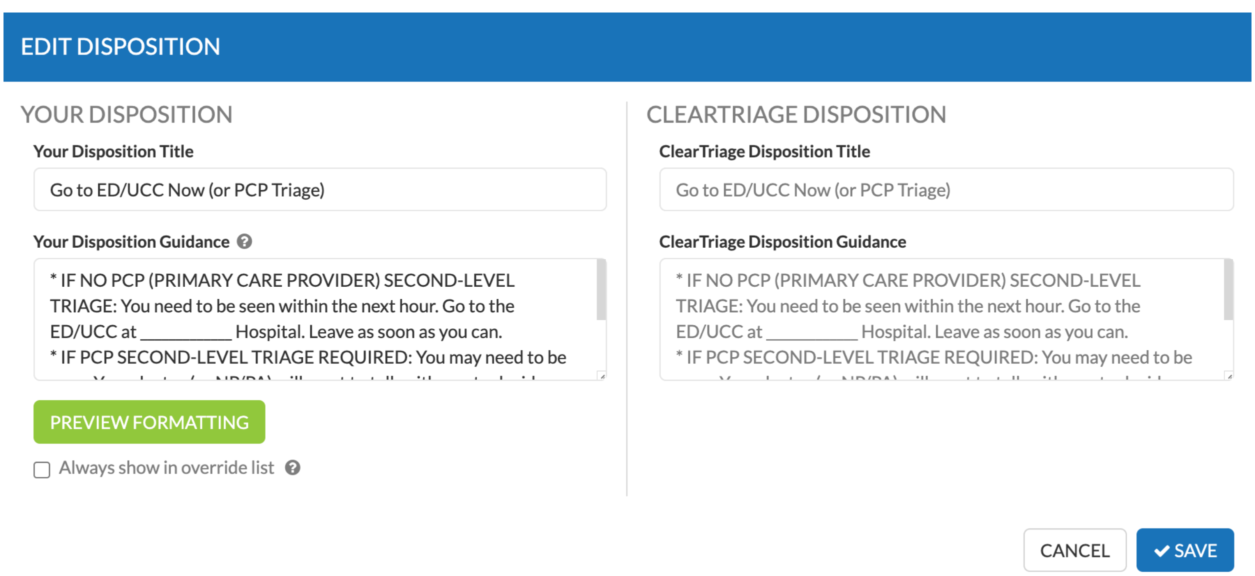
- A large number of customized protocols has become difficult to maintain.
- A protocol is marked as customized but no change badges appear. (This can occur, for example, when a question is deleted and then restored; the protocol remains marked as customized even though no visible changes remain.)

💡 These articles provide further guidance on publishing the annual protocol updates when you need to review customized protocols: [Annual Updates – Your Customizations](#).

Disposition Customization

Dispositions

To customize a disposition, select the pencil icon next to any disposition:



Dispositions in ClearTriage can be customized in four primary ways:

1. **Edit the text of a standard disposition**
   The wording of any disposition can be modified, and that change will apply to every protocol in which the disposition appears. For example, an organization that refers to its urgent care clinic as the Walk-In Clinic (WIC) may wish to change "Go to Urgent Care Now" to "Go to WIC Now." Select the pencil icon next to the disposition to adjust its text.
2. **Edit the guidance of a standard disposition**
   Disposition Guidance provides the nurse with quick access to disposition-specific information during a call. On the Triage tab, it appears below the positive triage question and can be expanded by clicking the down arrow. It is also available on the Plan tab under Education, with the same expand option. This guidance can be edited to match how you want your nurses to manage that disposition. The guidance can be formatted (bold, italics, lists) and it can contain hyperlinks.
3. **Adjust which dispositions always appear in the override list**
   When the Override Disposition button is selected, the list displayed includes all dispositions already used in that protocol plus those marked *Always show in override list*. For instance, a Women's Health Clinic might want "Go to L&D Now" to always appear as an override option. Use the pencil icon to open the disposition and select or clear the checkbox as needed.
4. **Add a disposition**
   Organizations may add custom dispositions that apply to specific protocols or that should always be available in the override list. For example, a group may want a disposition such as "Home Care with Nurse Follow-Up in 2 Days." Use Add a Disposition in the appropriate section, enter the desired text, and optionally select the checkbox to include it in the override list. After saving, the arrows should be used to position the new disposition according to its relative urgency.

Important Notes:

- **Position before use**
  After a disposition is added to a protocol during customization of triage questions, its position relative to other dispositions can no longer be adjusted. Positioning should be finalized before it is incorporated into any protocol.
- **Each protocol set has its own disposition list**
  Organizations using both Adult and Pediatric protocol sets must make disposition changes separately in each protocol set. The protocol set can be changed using the dropdown near the top of the screen.
- **Visibility for staff**
  After disposition changes are made, triage staff may need to sign out and back in—or simply refresh their browser—to see the updates.

Reports

Reports give you meaningful insight into how your organization is using ClearTriage. Choose the desired Start Date and End Date, then click **Run Report** to view your data. If you want to take your analysis further, you can select Export to download an Excel file.

Here is a list of the reports available in ClearTriage (click here for a blog article with examples of each report and ideas on how you can use the data):

Common Reports:

- **Protocols Used**
  The number of times each protocol was used in a call note.
- **Dispositions Used**
  The number of times each disposition was the final disposition in a call note. If the disposition was overridden by the nurse, only the override disposition is counted. If multiple protocols were used on the call, only the highest-acuity disposition (including any override dispositions) is counted.
- **Protocols Used with Dispositions**
  A breakdown of dispositions used within each protocol.
- **Dispositions Used with Protocols**
  A breakdown of which protocols resulted in each disposition.
- **Calls by User**
  The number of times each of your nurses viewed a protocol and copied a call note.
- **Protocols by User**
  A breakdown of which nurses used each protocol.
- **Dispositions by User**
  A breakdown of which nurses used each disposition.
- **Overrides by User**
  The number of times each of your nurses overrode a disposition (changed the disposition) and their documented reason for the override. It includes the direction of the override, either “up” to a higher disposition or “down” to a lower disposition.

Administrative Reports:

- **Subscriptions Used**
  Maximum Users is the maximum number of people who used ClearTriage concurrently (at the same time) each day. Limit Exceeded is whether anyone was blocked from signing in and if so, the number of incidents during the day in which people were blocked. Subscriptions Needed is the number of additional subscriptions that would have prevented anyone from being blocked.

- **Customized Protocols**

A list of the protocols that your organization has customized, along with a record of who made the customizations and when.

- **Customized Reminders**
  A list of the reminders that your staff have added to your protocols.
- **Protocol Export for Backup Use**
  An Excel file containing all of your protocols, the dispositions for each protocol, and the triage questions in each disposition. This includes your customizations to the dispositions and triage questions, and any custom protocols. (Note: This report is not available for free trial users.)

Other Reports:

- **Calls Per Day and Per Hour**
  The number of calls taken each day of the week with a breakdown by hour and a further breakdown by user. The specific hour is based on when the “Copy” button was pressed in ClearTriage, not when the call was started.
- **Handouts Sent**
  The number of times each handout was sent by email, text, or link.
- **Question Selections**
  The number of times each triage question was selected within each protocol.
- **Video Visit Selections**
  The number of times per protocol that your nurses were prompted to offer a video visit, the number times they actually offered a video visit, and the number of times the video visit was accepted.
- **Protocols Used by Department**
  If your organization is capturing the user’s department through one of our single sign on options, this is the standard Protocols Used report with a breakdown by department.
- **Dispositions Used by Department**
  If your organization is capturing the user’s department through one of our single sign on options, this is the standard Dispositions Used report with a breakdown by department.
- **Calls by User by Department**
  If your organization is capturing the user’s department through one of our single sign on options, this is the standard Calls by User report with a breakdown by department.
- **Complete Data for Export**
  All of the data recorded by ClearTriage for each call note copied. This file is designed to be used for analysis in Excel or an alternative reporting / business intelligence solution.

Licensing

Organizations purchase a specific number of ClearTriage concurrent user subscriptions, which determine how many users can be signed in simultaneously. If the number of users exceeds the available subscriptions, additional users will be unable to access ClearTriage until a subscription becomes available.

A subscription becomes available when a currently active user:

- Closes the ClearTriage window
- Remains inactive in ClearTriage for five minutes
- Signs out by selecting their name in the upper-right corner and choosing Sign Out

To access your subscription usage data, review the **Subscriptions Used Report** which shows the maximum number of people who used ClearTriage concurrently (at the same time) each day as well as whether any users were prevented from accessing ClearTriage because subscriptions were not available ("Blocked Users"). If it appears there are more licenses than needed, ClearTriage Support can assist with available options. Consistently seeing blocked users can indicate that additional subscriptions may be required.

💡Additional details on subscription usage are available in this blog article.

Technical Requirements

ClearTriage runs best on a desktop computer, either Windows or Macintosh. It can also run on an iPad or a mobile phone, but because of the large volumes of text it can be more difficult to use on the smaller screen of a phone.

ClearTriage runs in almost any currently supported web browser including Chrome, Firefox, Edge, and Safari.

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.

User Sign In Options

SSO

Single Sign-On (commonly referred to as “SSO”) is functionality that allows users to access ClearTriage without having to sign in with an Account ID and Account Password. This makes it easier for users to open ClearTriage and can provide centralized IT control over who has access to ClearTriage.

ClearTriage offers four SSO options:

1. EMR Integration (athena or Office Practicum)
2. Simple SSO (you create simple links for your team to use)
3. SAML 2.0
4. Embedding in Salesforce or other custom software

EMR Integration

ClearTriage partners with athenaHealth and Office Practicum to embed ClearTriage into their EMR software. Once users are signed into the EMR, they can click on the link for ClearTriage and will automatically be signed in. *Note that ClearTriage can also be launched from Cerner, though this will require your IT team to implement ClearTriage’s SMART on FHIR integration.*

Simple SSO

Upon request, an Access Key is provided for your account (a long string of letters and numbers). Users can then launch ClearTriage by clicking on a URL (a hyperlink) with that Access Key, no account ID or password is required. Depending on your organization, the URL can be placed in your EMR, in Citrix, in SharePoint or another web page accessible to your users, or simply saved as a bookmark or favorite in the user’s browser.

Your IT team will need to add the user’s name or other identifier to the URL. They can also add the user’s department or location for detailed reporting.

OAuth 2.0 / OpenID Connect (OIDC)

ClearTriage supports Single Sign-On using OAuth 2.0 with OpenID Connect (often referred to as “OIDC”). Users can open ClearTriage without signing in manually, while giving your IT team centralized control over access.

OAuth-based SSO is commonly used with identity providers such as Microsoft Azure AD and Okta, and it also powers ClearTriage’s EMR integrations using SMART on FHIR. When launched from an EMR, ClearTriage can open directly within the clinical workflow and securely receive the appropriate user context. There are no extra clicks or logins required.

This approach works especially well for browser-based applications and embedded workflows, and your IT teams should be very familiar with the setup.

Embedding in Salesforce or other custom software
ClearTriage's UI can be embedded in an organization's custom application, whether the application is based on Salesforce, Microsoft Dynamics, or custom code. Users will then be able to access ClearTriage from within that system. When embedding ClearTriage, Simple SSO is typically used so the nurse doesn't need to sign into ClearTriage separately.

Quick Links

ClearTriage Quick Links are another option for easier sign in without having to involve your IT department. A ClearTriage Quick Link is a URL (a hyperlink) that launches your ClearTriage account. The user only needs to enter their name to start using ClearTriage. A list of departments (or clinics or locations) can also be presented for the user to choose from prior to sign in.

The ClearTriage Quick Link is most commonly saved as a bookmark or favorite in the nurse's browser. Depending on your organization, it might also be able to be placed in your EMR, in SharePoint, in Citrix, or on another web page available to your nurses.

> 💡 Another variation is to create a different ClearTriage Quick Link for each of your departments. You share the appropriate Quick Link with each department, providing additional reporting detail without requiring the user to select a department.

Need Additional Support?

ClearTriage is designed to be intuitive and easy to use, with the goal of helping nurses focus on the patient and provide excellent care. For questions or additional assistance, reach out to ClearTriage directly at **800-755-3545** or **support@cleartriage.com**.