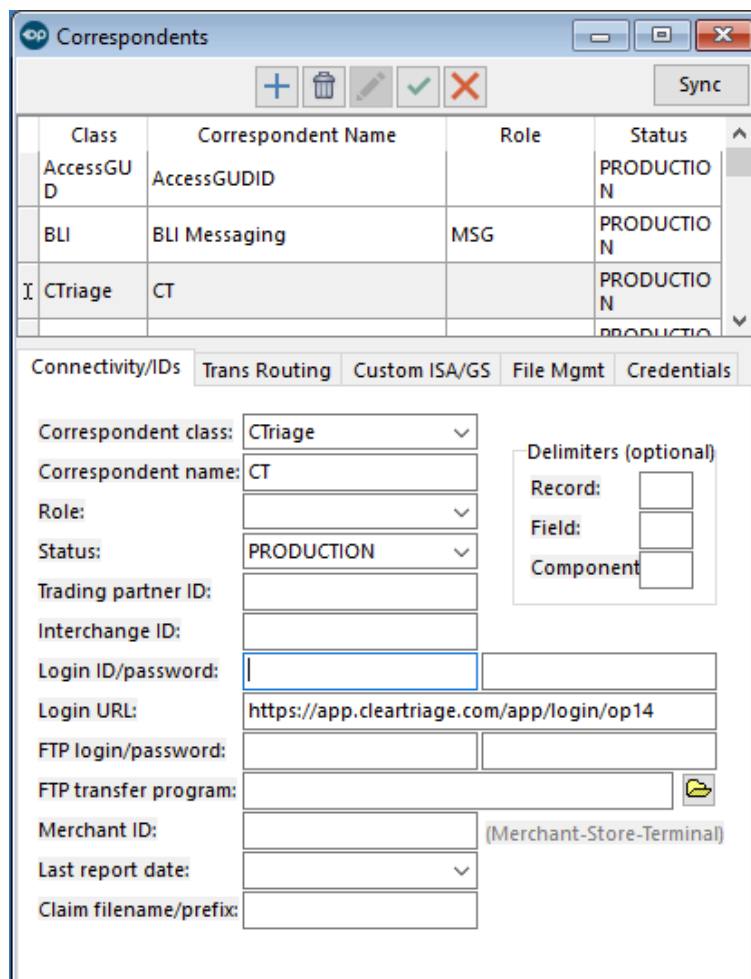# Instructions for Setting Up the ClearTriage Integration in Office Practicum

Follow the procedures detailed below to configure your installation of OP so that the ClearTriage button on the OP Message screen will automatically start ClearTriage without requiring an additional sign in.

1. **Log on** to OP.
2. Click on the **Admin** tab, then click on **Connections,** OP displays the Correspondents window.
   Note: You must have System Administrator privileges to edit Correspondent records.
3. OP includes a ClearTriage Correspondent record by default. Click on that CTriage/ClearTriage (or CTriage/CT) row. (If one does not exist, click the blue ⊞ to create one.)

4. Ensure that the record contains the required information:
   a. The Correspondent class should be: CTriage
   b. The Correspondent Name should be: ClearTriage or CT
   c. **In the paired Login ID/Password fields, enter the Account ID and Password for your ClearTriage Account.**
      i. *This document assumes you already have a ClearTriage account. If not, you can sign up for a 30-day free trial at www.cleartriage.com/register.*
      ii. *Make sure to use the Login ID/Password fields <u>above</u> the URL, not the FTP login/password fields below the URL.*
      iii. *The integration will not work if there are any special characters in the password. Please change your ClearTriage account password to include just letters and numbers (both upper and lower case letters are fine).*
   d. The Login URL field should be: https://app.cleartriage.com/app/login/op14

5. Click the **Save button** (✓). OP saves your changes.

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6. You're now ready to make sure everything works.
   a. Open a test patient
   b. Click on Messages, then click on New Message
   c. Click on the ClearTriage button in the Message window (see red arrow below)
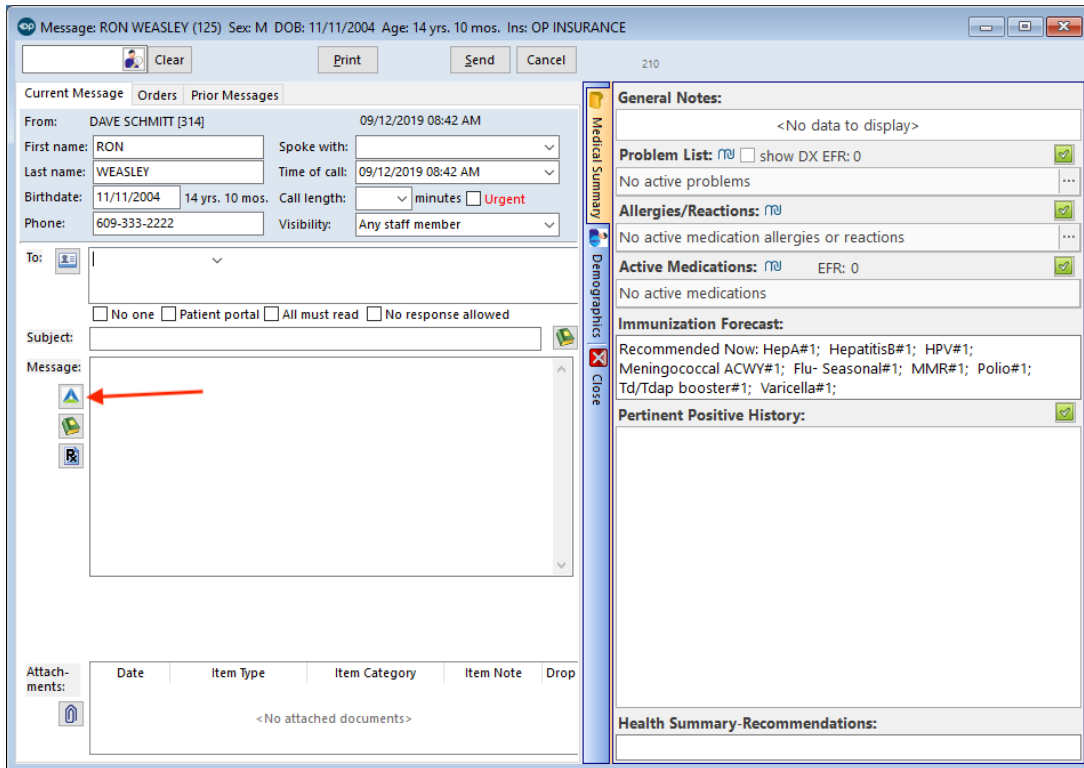
ClearTriage should open in a separate window without requiring you to enter a name, id or password. **If not, please review the settings in step 4.**

7. You're ready for your nurses to use ClearTriage!

If you have any questions or problems ,
please contact ClearTriage Support at
support@cleartriage.com or 800-755-3545.

Note: It is not necessary to shut down or restart the OP application in order for this integration to work.