

Complete a Survey

Version 20.14

About

Surveys can be added, edited, and completed from within a visit note or from the Survey section in the Patient Chart.

Add a Survey

- 1. From an open Well or Encounter note or Patient Chart, click Surveys.
- 2. Click the New button to open the Survey Forms Explorer window.
- 3. Select a folder located in the Categories panel. A list of surveys is displayed.

Survey Forms Explore	er			×
			Select	
🖆 😭 🔀 🖻	EFF	Survey Name	Description	^
Categories	N			
Root	N			
Bright Futures Asthma CHADIS	м	ADD: NICHQ Vanderbilt Assessment Scale	Each rating should beconsidered in the context of what is appropriate for the age of your child. When completing this form, please thing about your child's behaviours in the past 6 months.	
	И	ADD: NICHQ Vanderbilt Assessment Scale (Spanish)	Each rating should beconsidered in the context of what is appropriate for the age of your child. When completing this form, please thing about your child's behaviours in the past 6 months.	
< >			Directions: Each rating should be considered in the context of what is	~

- 4. To open a survey, double-click it or select it and click the Select button.
- 5. Complete the below information.
 - a. Click the drop-down in the Informant field and select from the list.
 - b. (Optional) To change the status, click the drop-down in the **Status** field and select from the list. The default status is Received.
 - c. To restrict who can view the survey, click the drop-down in the **Visibility** field and select from the list. The default is Any staff member.
 - d. (Optional) To add an assessment, click the drop-down in the Assessment field and select from the list.
 - e. (Optional) To add a diagnosis to the survey, click the drop-down in the DX field to open the Diagnosis search window.

Note: Some surveys may have the diagnosis code, used for billing, associated with the survey. If the survey contains a diagnosis code, it will display in the DX field when completing the survey.

- f. The Admin by field defaults to the user completing the survey. To update it, click the drop-down menu and select from the list.
- g. (*Required*) The **Ordered by** field defaults to the provider ordering the survey. To update it, click the drop-down menu and select from the list.
- 6. Answer the questions associated with the selected survey.
- 7. Click the Save button.

Edit Survey Answers

- 1. From an open Well or Encounter note or Patient Chart, click Surveys
- 2. To modify answers, select the survey and click the Edit button.
- 3. Select the question and use the Answer drop-down to choose an answer. Repeat the step for additional changes.





Surveys Ne	ew Delete	e <u>R</u> escore			Include confidentia	CHADIS	Refresh CH	ADIS						
Title	Informant	Admin Date 🛛	By	Score	Assessment	Status	Notes	1	> 1	DX Description	DX	Visibility	Review Dt	Бу
Kids' Asthma Check: Ages 8-14	Father	05/01/2020		0		Received						Any staff member		
Asthma Control Test (ACT), Ages 4-11	Patient	04/10/2020	2035	9		Received						Any staff member	04/10/2020	20
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Question	<					****					Answe	r		
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2 of 2 V V V Question 1. (CHILD) How is yo 2. (CHILD) How muc			ma whe	n you Ver	y bad y bad						Answe	લ		
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Question 1. (CHILD) How is ye 2. (CHILD) How muc 3. (CHILD) Do you c	ch of a prob cough becau	lem is your asth ise of your asthr	na?	n you Bar Go	y bad y bad d od			and a constant			Answe	sf		
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- 4. Click the Save button.
- 5. If the survey is scored, click the **Rescore** button.

Complete a Survey



Portal Note: Internal OP Surveys completed on the portal are received in OP with a score of -1. This indicates to the provider that the Survey needs to be rescored. To rescore the Survey, select the Survey and click the **Rescore** button. The Survey is scored according to the rules in OP and the new score is displayed.

- 1. From an open Well or Encounter note or Patient Chart, click Surveys.
- 2. Select a survey and click the Edit button.
- 3. Complete the following fields:
 - Assessment: Click the drop-down and select from the list. Once the assessment is selected, the Review Dt and By fields are updated.
 - Status: Click the drop-down and select from the list. To finalize the survey, select Informed or Complete.

Note: If a CPT code is attached to the survey for billing, the status must be set to **Informed** or **Complete** to pass to the electronic superbill.

- 6. (Optional) Enter additional information, such as:
 - Notes: Click into the Notes field or use Phrase Construction to add additional information.
 - Dx: The diagnosis code populates the field if entered when completing the survey, or if it is attached to the survey.
 - Visibility: Click the drop-down menu and select from the list to change the current visibility level.
- 7. Click the Save button.

Version 20.13

Overview

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- f. The Admin by field defaults to the user completing the survey. To update it, click the drop-down menu and select from the list.
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Title	Inf	ormant	Admin Date 🛛	By	Score	Assessment	Status	N	otes	DX Description	DX	Visibility	Review Dt	B
Kids' Asthma Check: Ages 8-14	Fat	her	05/01/2020		0		Received					Any staff member		
Asthma Control Test (ACT), Ages 4-11	Pa	tient	04/10/2020	2035	9		Received					Any staff member	04/10/2020	2
		¢					*********************		*		Answe	r		
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Question 1. (CHILD) How is 2. (CHILD) How mu	uch of	a probl	em is your asthr		you Ver	y bad y bad		*****			Answe	r		
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Question 1. (CHILD) How is 2. (CHILD) How mu	uch of cough	a probl n becau:	em is your asthr e of your asthm	ia?	n you Ver Bac Go	y bad y bad i od					Answe	r		
2. (CHILD) How mu 3. (CHILD) Do you	uch of cough wake	a probl n becau: up durii	em is your asthr e of your asthm ig the night bec	ia? ause of	you Ver Bac Goo your i Ver	y bad y bad i od y good					Answe	r		
Question 1. (CHILD) How is 2. (CHILD) How mu 3. (CHILD) Do you 4. (CHILD) Do you	uch of cough wake ig the l	a probl becau: up durii last 4 w	em is your asthr e of your asthr ig the night bec eeks, how many	ia? ause of days di	your i Ver goo your i Ver d your 11-	y bad y bad d od y good 18 days			*		Answe	ſ		

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