

Survey Forms Explorer

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Version 14.19



This window map article points out some of the important aspects of the window you're working with in OP but is not intended to be instructional. To learn about topics related to using this window, see the **Related Articles** section at the bottom of this page.

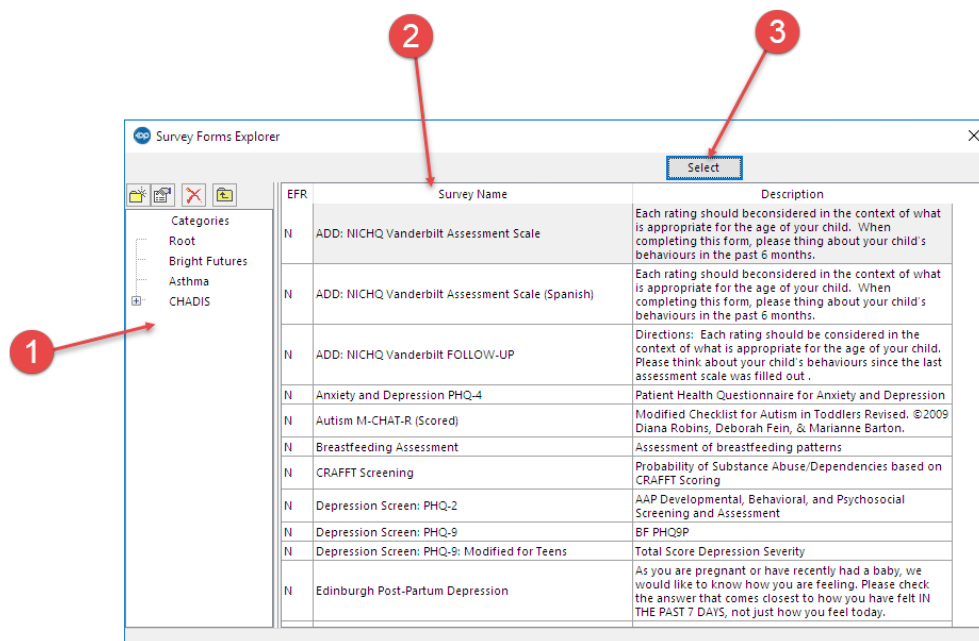
About Survey Forms Explorer

From within the Patient Chart, an Encounter, or a Well Visit, the Survey Forms Explorer window allows you to open and administer Surveys to a patient. From the Surveys option in the Clinical tab, Survey setup is completed in the same Survey Forms Explorer window where Surveys can be created, opened, modified, imported, and exported. Below are maps of the two functions of the window, depending on where you're encountering it during your workflow.

Survey Forms Explorer (when Administering a Survey)

Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Surveys > New button

Path: Clinical, Practice Management, or Billing tab > Patient Chart button > Encounters or Well Visits > Surveys > New button



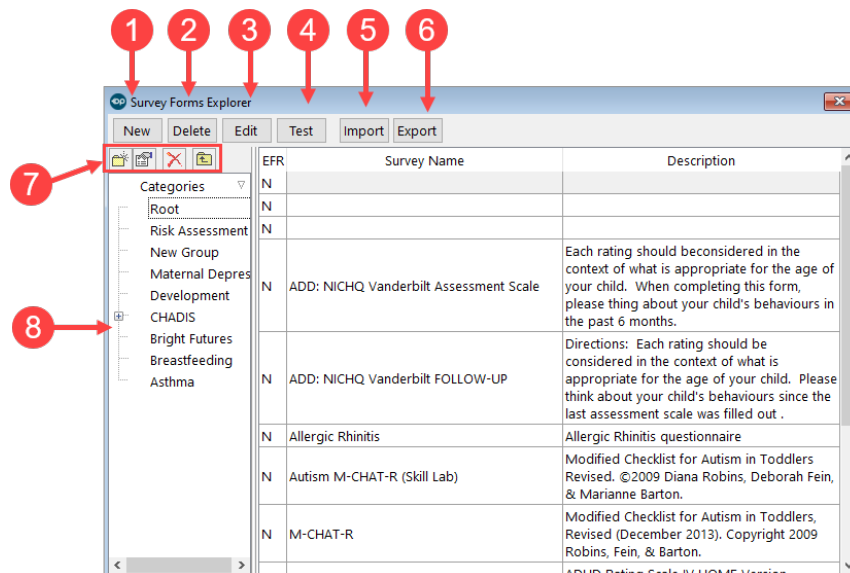
Survey Forms Explorer (when Administering a Survey) Map

Number	Section	Description
1	Categories	The Categories panel lists the categories where the Surveys are grouped. Groups can be created, modified, and deleted from this window.

2	Survey Name	Once a category is selected, the Surveys for that category appear in the Survey List. The Survey Name and description are displayed in this list.
3	Select button	The Select button opens the highlighted Survey.

Survey Forms Explorer (when Accessing for Survey Setup)

Path: Clinical tab > More button (Customize group) > Surveys



Survey Forms Explorer (when Accessing for Survey Setup) Map

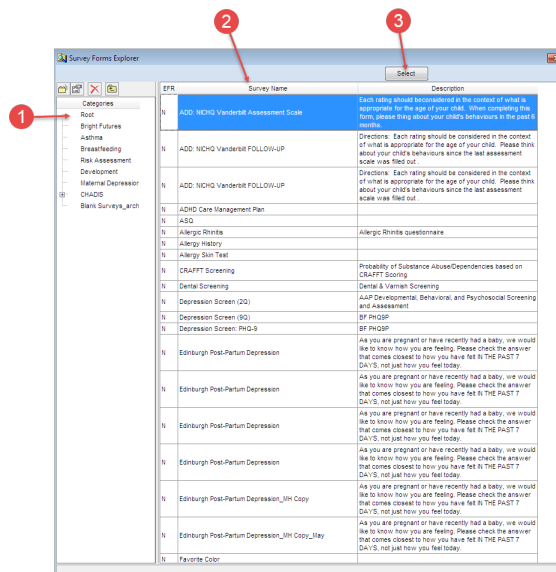
Number	Section	Description
1	New button	The New button creates a new Survey.
2	Delete button	The Delete button deletes the selected Survey from the Survey Forms Explorer. If the Survey was administered to a patient, it cannot be deleted.
3	Edit button	The Edit button is used to edit a Survey.
4	Test button	The Test button opens the Answer Wizard (Test mode) and lets you test the Survey.
5	Import button	The Import button is used to import a Survey into the Survey Forms Explorer.
6	Export button	The Export button exports a Survey out of the Survey Forms Explorer.
7	Group buttons	<ul style="list-style-type: none"> • Create new group: create a new top-level group to house Surveys. • Rename group: edit the name of a Survey group. • Delete current group: delete the selected group of Surveys. • Move up one level: if selected when you are in a sub-category, it will move you back to the main category (group).
8	Categories	The Categories panel lists the categories where the Surveys are grouped. Groups can be created, modified, and deleted from this window.

About Survey Forms Explorer

Path: Utilities Menu > Manage Clinical Features > Survey Administrator > Open button (Keyboard Shortcut keys: [Alt][U][F][S])

Path: Smart Toolbar > Chart button > Surveys tab > + button

The Survey Forms Explorer allows you to open and enter answers for surveys (questionnaires) from the patient chart, Encounters and Well Visits. These same surveys can be created, opened, modified, imported, and exported using the Survey Administrator toolbar.



Survey Forms Explorer Map

Number	Section	Description
1	Categories	The Categories panel lists the categories where the surveys are grouped. Groups can be created, modified, and deleted from this window.
2	Survey Name	Once a category is selected, the surveys for that category appear in the Survey List. The survey name and description are displayed in this list.
3	Select button	The Select button opens the highlighted survey.