We are currently updating the OP Help Center content for the release of OP 14.19 or OP 19. OP 19 is a member of the certified OP 14 family of products (official version is 14.19.1), which you may see in your software (such as in Help > About) and in the Help Center tabs labeled 14.19. You may also notice that the version number in content and videos may not match the version of your software, and some procedural content may not match the workflow in your software. We appreciate your patience and understanding as we make these enhancements.

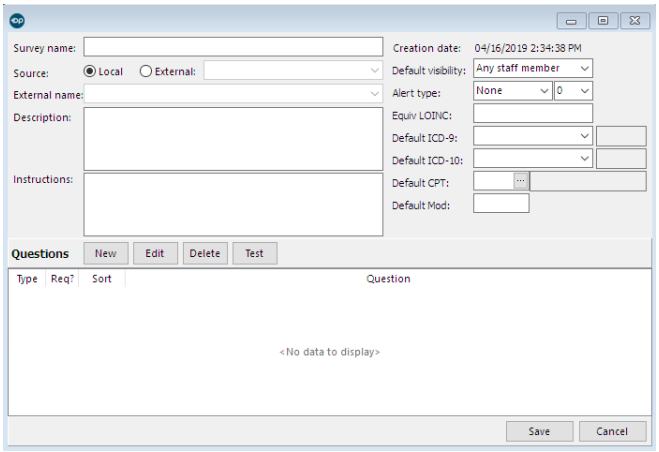
Creating New Surveys

Last Modified on 08/22/2019 12:33 pm EDT

Version 14.19

To create a new Survey:

1. From the **Clinical** tab, click the **More** button (Customize group) and select **Surveys** from the drop-down menu. The Survey Forms Explorer window is displayed.
2. Click the **+** (**New**) button in the top left corner of the window.
3. Click the **OK** button in the Confirmation pop-up box to confirm that once a survey has been administered, it can no longer be modified. A new Survey (questionnaire) window is displayed.

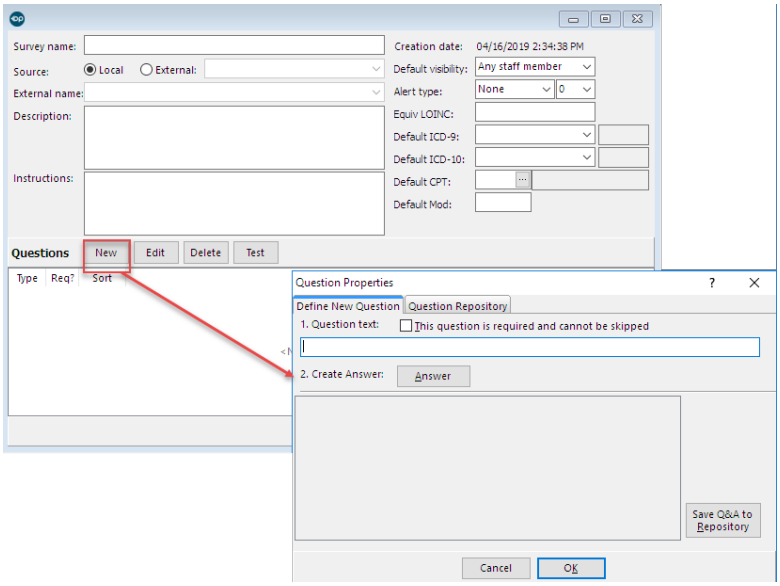


4. Enter the survey details in the following**Fields**:

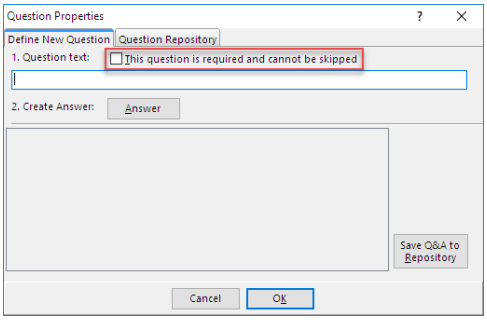
Survey Name	Name assigned to the Survey that identifies the information.
Source	Survey can be created within the database or pulled from an external source.
External Name	Auto-populates with the name of the survey pulled from the external source.

Description	For internal use.
Instructions	Visible if a parent takes the survey on the portal.
Default visibility	Make a selection to determine who will be able to see the current survey.
Alert type/Alert value	Once you have created and scored your survey questions, use these fields to have the system alert you if any scores fall above or below or certain value.
Equiv LOINC	Set a default LOINC code for any surveys that correspond to a lab with an identical LOINC code. (ie. a lead risk assessment and lead test would both have XLEAD as their LOINC code to satisfy the need for Lead on a Care Plan).
Default Dx	Diagnosis code associated with the entry of the survey. Used to automatically associate billing when the survey is complete.
Default CPT/Default Mod	CPT code and modifier associated with the entry of the survey. Used to automatically associate billing when the survey is complete.

5. Click the **New** button next to Questions to add a new survey question. The Question Properties window is displayed.



6. From the Define New Question tab, select the **This question is required and cannot be skipped** checkbox.



7. Enter the **Question** in the Question text field.
8. Click the **Answer** button.

Text	Create a Text field that can be used for comments or entry to explain.
List	Create a list of option that can be selected for the Questions. May choose to allow single or multiple choice selections.
Integers	Set a numeric answer to the question.
Chars	Answer used to set an alpha character to the question.
Boolean	Boolean answers are used to set a value to an assumed yes/no or true/false response.
Date/Time	Answer will be entered as a date.
Masked Edit	Set the answer to a preset value such as the entry of a phone number.

9. Click the **OK** button when you are finished entering your Answer(s).
10. To add a second question, click the **New** button next to Questions again and repeat the above procedure.
11. To modify you can do the following:

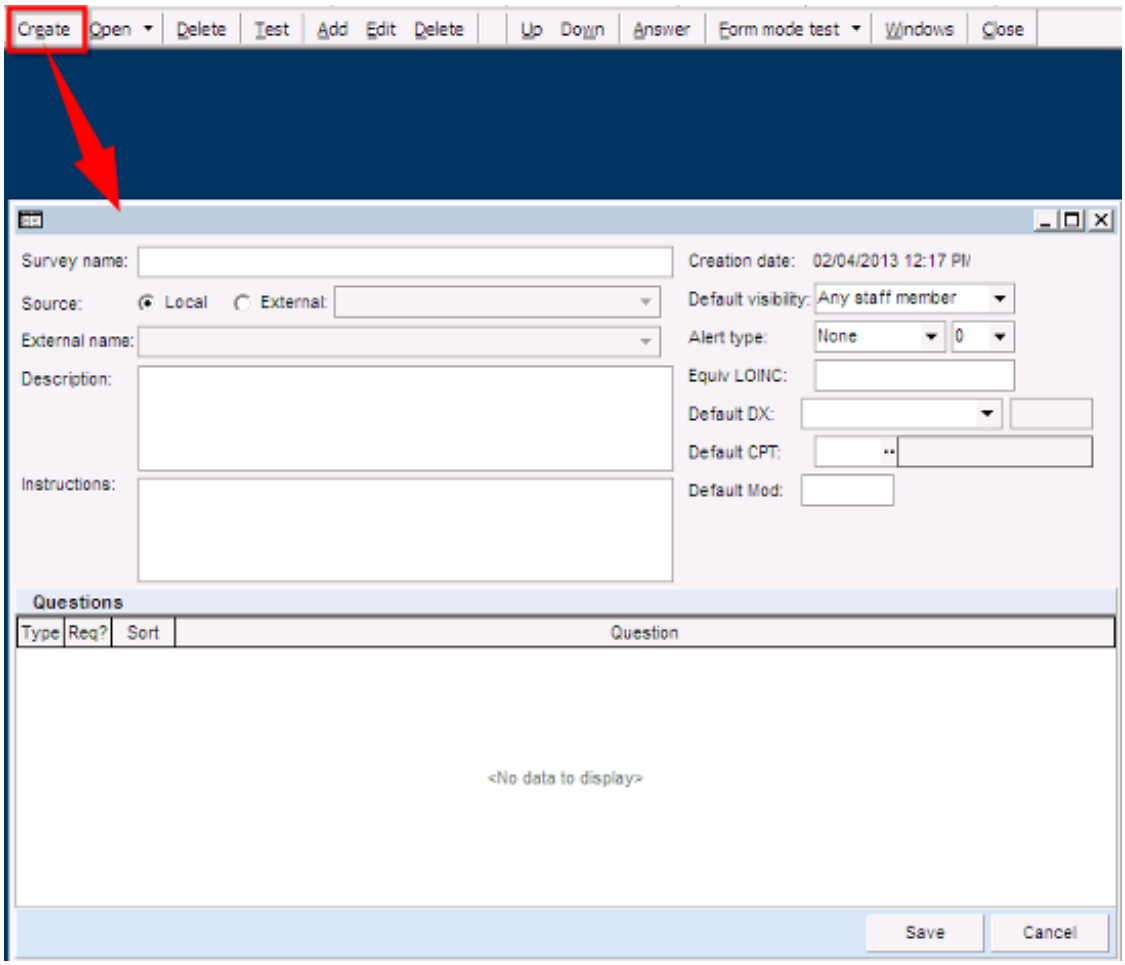
- Rearrange the position of the Questions by clicking the **Up** and **Down buttons** in the questions grid.
- Review the answer type and format. Highlight the **Question** and click the **Answer** button. The Answer window is displayed.
- Reviews the survey question by clicking the **Test** button in the questions grid.
- Review the entire Survey by clicking the **Test** button in the Survey Forms Explorer window. The Answer Wizard (test mode) window is displayed. Select form mode test or grid mode test.

Version 14.10

Note: To open the Survey Administrator Tool Bar: **Click Utilities > Manage Clinical Features >**

Survey Administrator.

1. Open the Survey Administrator Toolbar.
2. Click the **Create** button. A new Survey (questionnaire) window is displayed.



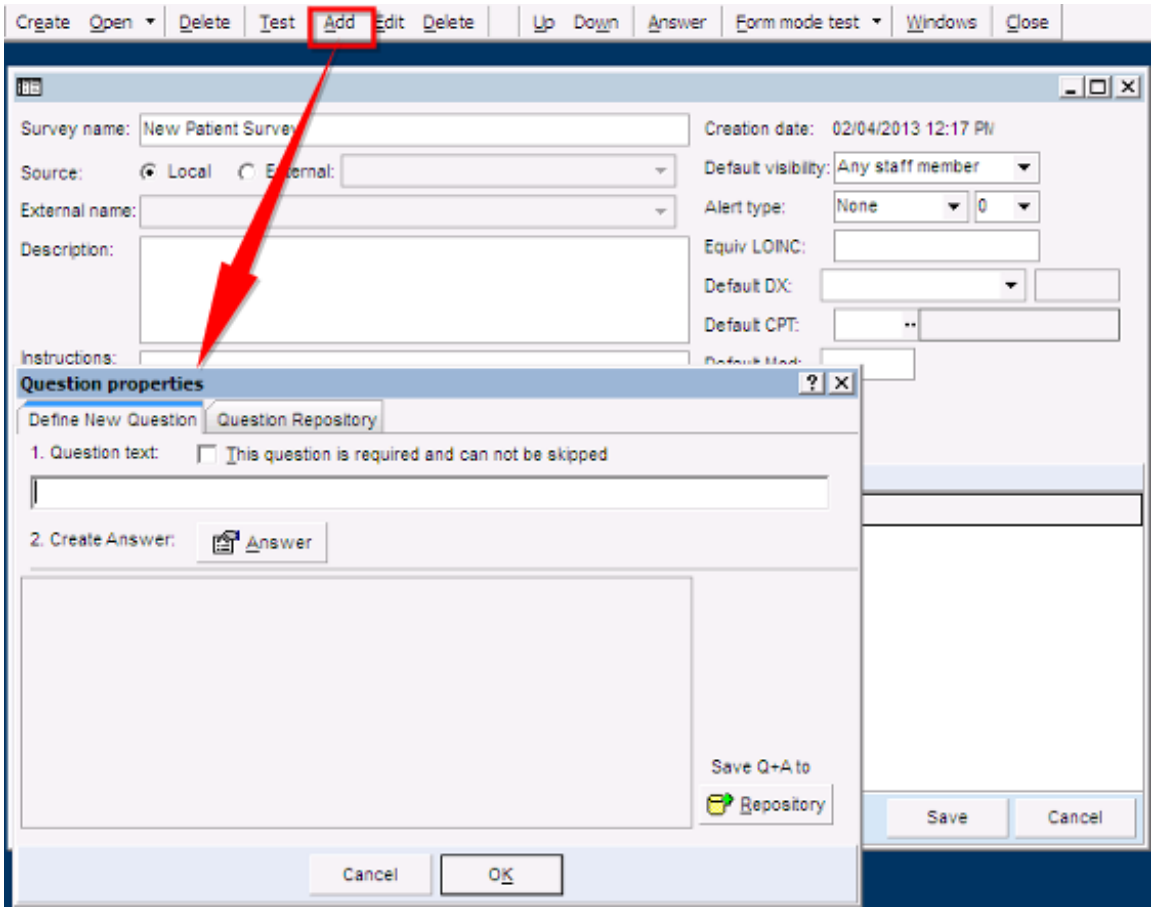
3. Enter information as follows:

Survey Name	Name assigned to the survey that identifies the information.
Source	Survey can be created within the database or pulled from an external source.
External Name	Auto-populate with the name of the survey pulled from the external source.
Description	For internal use.
Instructions	Visible if a parent takes the survey on the portal.
Default visibility	Drop-down menu to restrict who will be able to see the current survey.

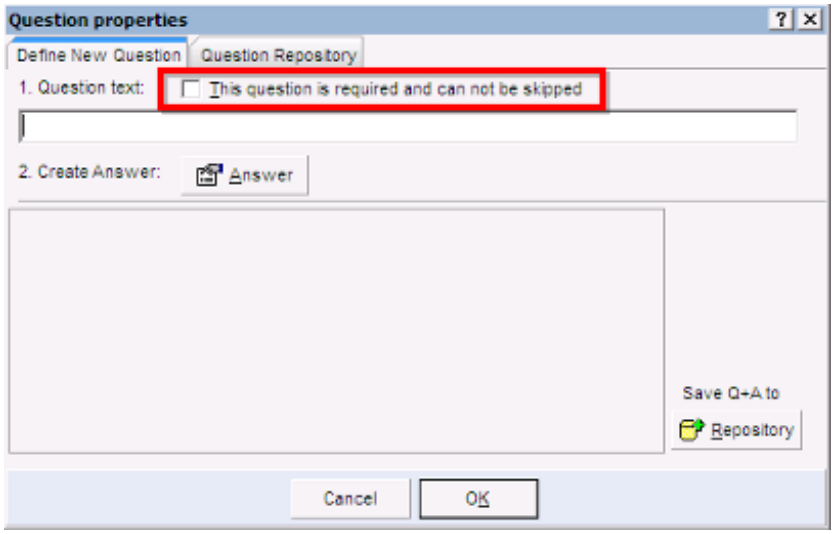
Alert type/Alert value	Once you have created and scored your survey questions, use these fields to have the system alert you if any scores fall above or below or certain value.
Equiv LOINC	Set a default LOINC code for any surveys that correspond to a lab with an identical LOINC code. (ie. a lead risk assessment and lead test would both have XLEAD as their LOINC code to satisfy the need for Lead on a Care Plan).
Default Dx	Diagnosis code to associated with the entry of the survey. Used to automatically associate billing when the survey is complete.
Default CPT/Default Mod	CPT code and modifier associated with the entry of the survey. Used to automatically associate billing when the survey is complete.

4. Click the **Add**

button on the Survey Administration toolbar. The Question Properties window is displayed.



5. From the Define New Question tab, select the T**his question is required and can not be skipped** checkbox.



6. Enter the **Question** in the question text field.
7. Click the **Answer** button.

Text	Create a text field that can be used for comments or entry to explain.
List	Create a list of choices that can be selected for the questions. May choose to allow single or multiple choice selections.
Integers	Answer used to set a numeric answer to the question.
Chars	Answer used to set an alpha character to the question.
Boolean	Boolean answers are used to set a value to an assumed yes/no or true/false response.
Date/Time	Answer will be entered as a date.
Masked Edit	Set the answer to a preset value such as the entry of a phone number.

8. Click the **OK** button when you are finished entering your Answers.
9. To add a second Question, click the**Add** button on the Survey Administrator Toolbar and repeat the above procedure.
10. To make changes you can do the following:

- Rearrange the position of the questions by clicking the**Up** and **Down buttons** on the Survey Administrator toolbar.
- Review the answer type and format highlight the question and click the**Answer button** on the Survey Administrator toolbar.
- The **Answer** window is displayed.

- Reviews the Survey by clicking the on the Survey Administrator toolbar.
- Review the Survey Test button on the **Survey Administrator** toolbar.
- The **Answer Wizard (test mode)** window displays.
- Select form mode test or grid mode test.