

Complete a Survey

Last Modified on 11/05/2021 3:36 pm EDT

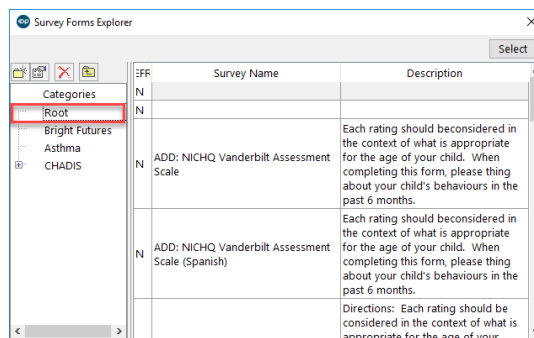
Version 20.14

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.



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: JACKIE B. CHAN (7222)

Surveys New Delete Rescore Include confidential CHADIS Refresh CHADIS

Title	Informant	Admin Date	By	Score	Assessment	Status	Notes	DX Description	DX	Visibility	Review Dt	By
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	2035

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Question	Answer
1. (CHILD) How is your asthma today?	Very bad
2. (CHILD) How much of a problem is your asthma when you	Very bad
3. (CHILD) Do you cough because of your asthma?	Bad
4. (CHILD) Do you wake up during the night because of your	Good
5. (PARENT) During the last 4 weeks, how many days did you	Very good
6. (PARENT) During the last 4 weeks, how many days did you	11-18 days
7. (PARENT) During the last 4 weeks, how many days did you	11-18 days

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.

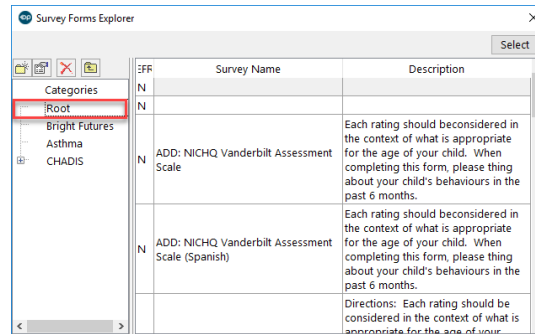
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Overview

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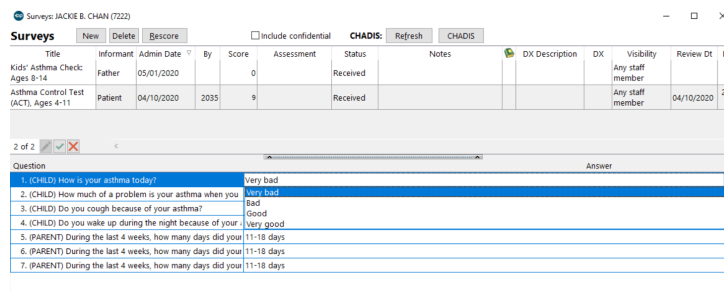


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2. To modify answers, select the survey and click the **Edit** button.
3. Select the question and use the Answer drop-down to choose an answer. Repeat the step for additional changes.



4. Click the **Save** button.
5. If the survey is scored, click the **Rescore** button.

Complete a Survey



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