Complete a Survey

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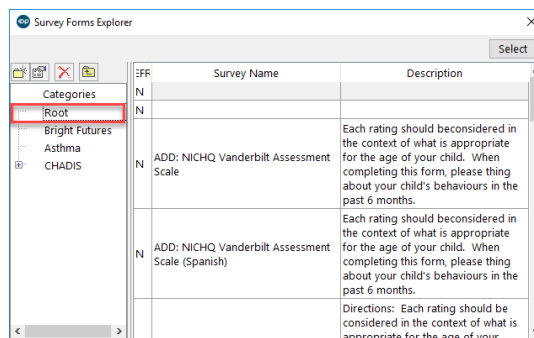
Version 20.14

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.

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.
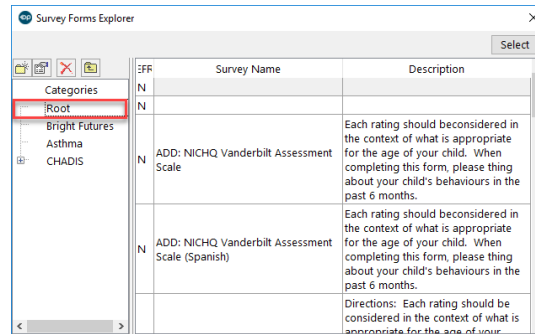
7. Click the **Save** button.

Version 20.13

Overview

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.
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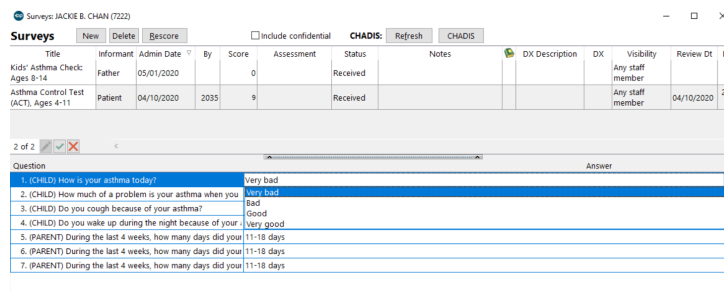
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6. Answer the questions associated with the selected survey.
7. Click the **Save** button.

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.

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.

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   - **Visibility**: Click the drop-down menu and select from the list to change the current visibility level.

7. Click the **Save** button.