

**Important Content Update Message**  
 We are currently updating the OP Help Center content for the release of OP 20. We appreciate your patience as we continue to update all of our content. To locate the version of your software, navigate to: **Help tab > About**.

# Surveys Review

Last Modified on 06/26/2020 3:10 pm EDT

Version 20.4

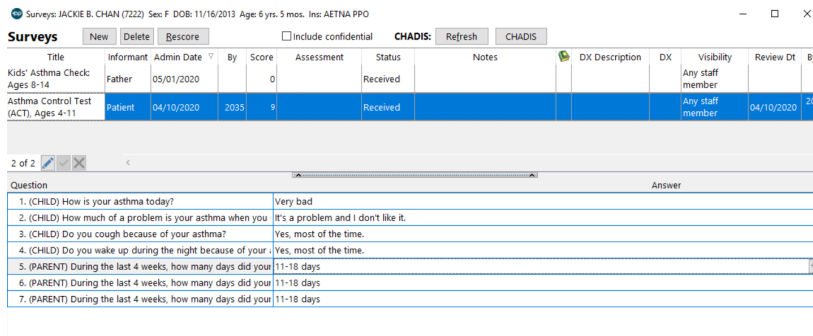
## Overview

This section will go over how to review and complete open surveys. The user will be shown optional settings to ensure all open surveys are addressed.

1. Navigate to Surveys from **Main Navigation Panel > Surveys**.

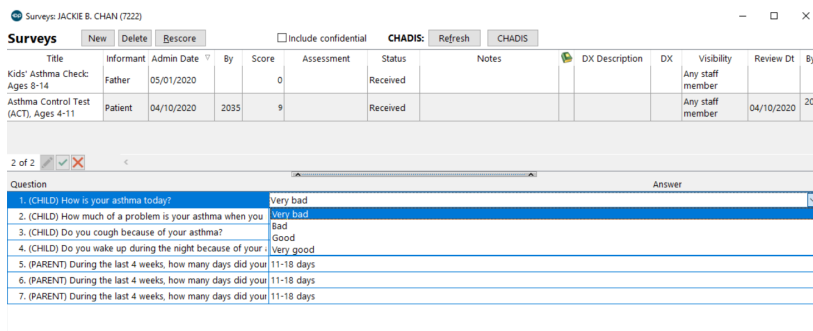
**Note:** To view Surveys for other users, click the **Scope** drop-down menu and select a user or select the **Everyone** radio button. The radio buttons for the dates are not used in this window, all surveys will display.

2. Select a survey and click the **Review/Edit** button, the Survey window displays.



**Note:** Surveys with a score of (-1) are surveys from the Patient Portal that are scored. To calculate the score, click the **Rescore** button.

3. To change answers, select the survey and click the **Edit** button.
4. Select the question, click the the drop-down and choose an answer. Repeat the step for additional changes.



5. Click the **Save** button.
6. If the survey is scored, click the **Rescore** button.
7. Complete the below fields.

- **Assessment:** Click the drop-down and select from the list. Once the assessment is selected the Review Dt and By fields will update.
- **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.

8. (Optional) Additional information that may be added to the survey.

- **Notes:** Click into the Notes field or use Phrase Construction to add additional information.
- **Dx:** The diagnosis code will populate the field if entered when completing the survey or attached to the survey.
- **Visibility:** Click the drop-down menu and select from the list to change the current visibility level.

9. Click the **Save** button.

Version 20.3

## Overview

This section will go over how to review and complete open surveys. The user will be shown optional settings to ensure all open surveys are addressed.

1. Navigate to Surveys: **Main Navigation Panel > Surveys.**



**Note:** To view Surveys for other users, click the **Scope** drop-down menu and select the **Everyone** radio button. The radio buttons for the dates are not used in this window, all surveys will display.

2. Select a survey, and click the **Review/Edit** button, the Survey window displays.

Surveys: JACOB ABHBFUS (1662) Sex: M DOB: 11/19/2005 Age: 13 yrs. 10 mos. Ins: AETNA PPO

Surveys     Include confidential

Title	Informant	Admin Date	By	Score	Assessment	Status	Notes	DX Description	DX	Visibility	Review Dt	By
Asthma Control Test (ACT), Ages 12 and over	Mother	10/08/2019	305	20	NORMAL	Received		Encounter for therapeutic drug level monitoring	Z51.81	Any staff member	10/08/2019	305
Tuberculosis Risk Assessment	Mother	01/05/2012	305	0	NORMAL	Informed	Low risk by survey, PPD not indicated	ROUTINE INFANT/CHLD HEALTH CHECK	V20.2	Any staff member	01/05/2012	305

1 of 2

Question	Answer
1. In the past 4 weeks, how much of the time did your asthma ke	A little of the time
2. During the past 4 weeks, how often have you had shortness of	Once or twice a week
3. During the past 4 weeks, how often did your asthma symptom	Once or twice
4. During the past 4 weeks, how often have you used your rescue	Once a week or less
5. How would you rate your asthma control during the past 4 we	Well controlled



**Note:** Surveys with a score of (-1) are coming from the patient portal and need to be rescored by clicking the **Rescore** button.

3. To change answers, click the **Edit** button.

4. Click into the question, select the drop-down and choose an answer. Repeat the step for additional changes.

Surveys: JACOB ABHFUS (1662) Sex: M DOB: 11/19/2005 Age: 13 yrs. 10 mos. Ins: AETNA PPO

Surveys     Include confidential

Title	Informant	Admin Date	By	Score	Assessment	Status	Notes	DX Description	DX	Visibility	Review Dt	By
Asthma Control Test (ACT), Ages 12 and over	Mother	10/08/2019	305	20	NORMAL	Received		Encounter for therapeutic drug level monitoring	Z51.81	Any staff member	10/08/2019	305
Tuberculosis Risk Assessment	Mother	01/05/2012	305	0	NORMAL	Informed	Low risk by survey, PPD not indicated	ROUTINE INFANT/CHILD HEALTH CHECK	V20.2	Any staff member	01/05/2012	305

1 of 2

Question	Answer
1. In the past 4 weeks, how much of the time did your asthma ke	A little of the time
2. During the past 4 weeks, how often have you had shortness of	All of the time
3. During the past 4 weeks, how often did your asthma symptom	Most of the time
4. During the past 4 weeks, how often have you used your rescue	A little of the time
5. How would you rate your asthma control during the past 4 we	None of the time

5. Click the **Save** button.
6. If the survey is scored, click the **Rescore** button.
7. Complete the below fields.
  - **Assessment:** Click the drop-down and select from the list. Once the assessment is selected the Review Dt and By fields will update.
  - **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.

8. (Optional) Additional information that may be added to the survey.
  - **Notes:** Click into the Notes field or use Phrase Construction to add additional information.
  - **Dx:** The diagnosis code will populate the field if entered when completing the survey or attached to the survey.
9. Click the **Save** button.