

CHADIS Complete a Survey without a Patient Portal Account

Last Modified on 05/18/2021 1:49 pm EDT

Version 20.11

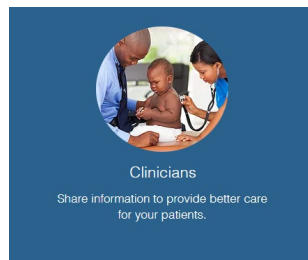
About

At times it may be necessary for a parent/patient, who does not wish to create a portal account, to complete a CHADIS survey. In addition, a practice may wish to defer the Patient Portal setup, in the office during a visit, in an effort to streamline workflow. In these instances, the parent/patient will register in CHADIS and complete the survey during the visit. There are two methods to accomplish completing a survey:

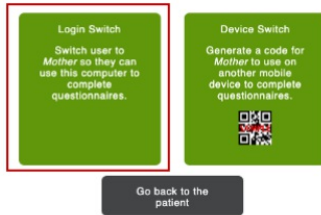
The below instructions will walk you through accessing the workflow using the **Waiting Room Login Switch** or the **Waiting Room Device Switch**. When using the Waiting Room login switch, a portable device such as a tablet or laptop is required. The device should be connected to Wifi and CHADIS should be accessible. You **would not** use this device to log in to OP and access patient data since you will be handing it to the parent or patient. The Waiting Room Device Switch would create a QR code to allow a parent/patient to use another mobile device.

Complete a CHADIS Survey from a Template Task

1. From the Tracking window, double-click on the survey task to start the process.
2. The CHADIS page will open for the Respondent, log out of CHADIS.
3. From a portable device, open a web browser window and access the CHADIS site.
4. Log into CHADIS using the practice user name and password
5. Click the **Clinicians** box.



6. Log into CHADIS using the practice user name and password.
7. Search for the patient using the **Waiting Room** feature.
8. Click the magnifying glass next to the correct patient. The Switch to a Respondent User window displays.
9. Click the **Login Switch** or **Device Switch** button next to the person completing the survey.
10. If the parent/patient is not in the respondent list, follow the steps below.
 - a. Click the **New** button on the Switch to a Respondent User window, the New Respondent window opens.
 - b. Enter the respondents' first and last names.
 - c. Click the drop-down in the Relationship field and select from the list.
 - d. Click the **Continue** button.
 - e. Select the switch option.



- **Login Switch**

- Click the **Login Switch** button.
- Click the **Continue** button.
- Hand the device to the parent/patient.

- **Device Switch**

- Click the **Device Switch** button.
- The parent/patient will scan the QR code with their mobile device.
- CHADIS will open in another window to complete the survey.



- A list of surveys will display, click the **Begin** button to start a survey.
- When complete with the survey, click the **Send** button.

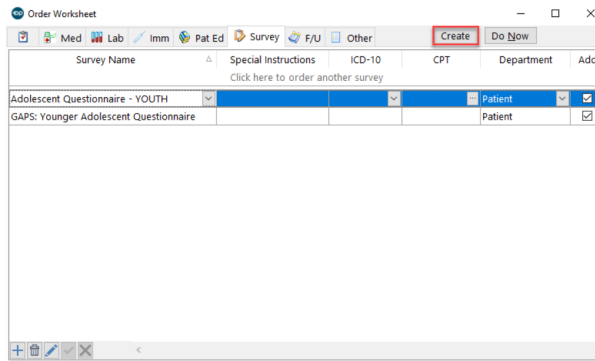


Note: If there are multiple surveys, the respondent will need to repeat the Begin and Send process for each survey.

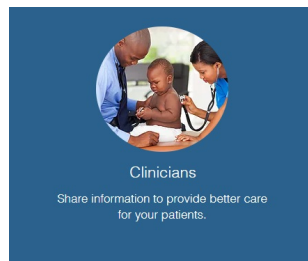
- Return to OP and click the **Patient Chart** button.
- Search for and select the patient.
- Click the **Surveys** tab, the survey will display in the survey window for review.

Complete a CHADIS Survey Creating the Task

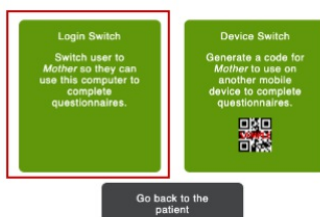
- Click the **Patient Chart** button and search for and select the patient.
- Click the **Tasks** button.
- Click the **New Order** button. The Order Worksheet window will open.
- Click the **Survey** tab.
- In the Survey Name field, click the drop-down arrow or begin typing the name of the survey and select.
- (Optional) If more than one survey, repeat the above step.
- Once all surveys have been selected, click the **Create** button to create the task for the survey order.



8. Double-click the survey name to start the process.
9. The CHADIS page will open for the Respondent, log out of CHADIS.
10. From a portable device, open a web browser window and access the CHADIS site.
11. Log into CHADIS using the practice user name and password
12. Click the **Clinicians** box.



13. Search for the patient using the **Waiting Room** feature.
14. Click the magnifying glass next to the correct patient. The Switch to a Respondent User window displays.
15. Click the **Login Switch** or **Device Switch** button next to the person completing the survey.
16. If the parent/patient is not in the respondent list, follow the steps below.
 - a. Click the **New** button on the Switch to a Respondent User window, the New Respondent window opens.
 - b. Enter the respondents' first and last names.
 - c. Click the drop-down in the Relationship field and select from the list.
 - d. Click the **Continue** button.
 - e. Select the switch option.



- **Login Switch**

- a. Click the **Login Switch** button.
- b. Click the **Continue** button.
- c. Hand the device to the parent/patient.

- **Device Switch**

- a. Click the **Device Switch** button.

- b. The parent/patient will scan the QR code with their mobile device.
- c. CHADIS will open in another window to complete the survey.



17. A list of surveys will display, click the **Begin** button to start a survey.
18. When complete with the survey, click the **Send** button.



Note: If there are multiple surveys, the respondent will need to repeat the Begin and Send process for each survey.

19. Return to OP and click the **Patient Chart** button.
20. Search for and select the patient.
21. Click the **Surveys** tab, the survey will display in the survey window for review.

Version 20.0

Overview

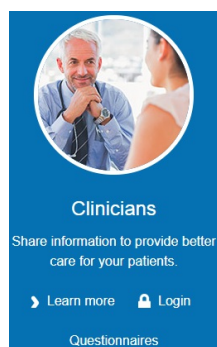
At times it may be necessary for a parent, who does not wish to create a portal account, to complete a CHADIS survey. In those instances the parent will register in CHADIS and complete the survey during the visit. There are two methods to accomplish completing a survey:

- Complete a CHADIS Survey from a Template Task
- Complete a CHADIS Survey Creating the Task

Complete a CHADIS Survey from a Template Task

To complete a CHADIS Survey from a Template Task:

1. From the Tracking window, double-click on the survey task to start the process.
2. An information window opens, click the **X** to close (**do not** click OK or Cancel).
3. Open a web browser window and access the CHADIS site. Click [here](#) to link to the CHADIS site.
4. Click the **Clinicians** box.

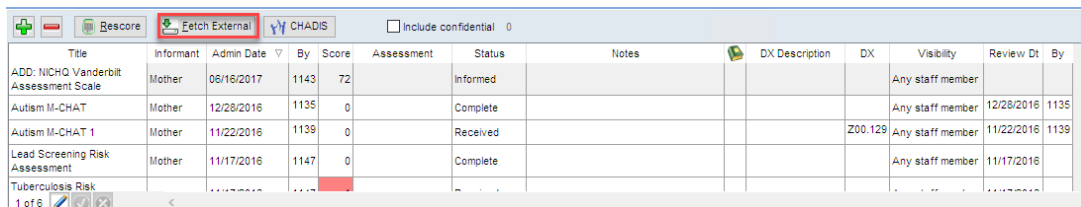


- Log into CHADIS using the practice user name and password.
- Type the patient name in the **Search Waiting Room** field and press **Enter** or **Go**.
- Click the magnifying glass next to the correct patient. The Switch to a Respondent User window displays, click the **Login Switch** button next to the parent completing the survey.



Note: If the person taking the survey is not listed as a Respondent, click **Create New** and enter the information. Once all the information is complete on the New Respondent window, click **Continue**. The Respondent will agree to the terms of CHADIS, enter their name, and click **Go**.

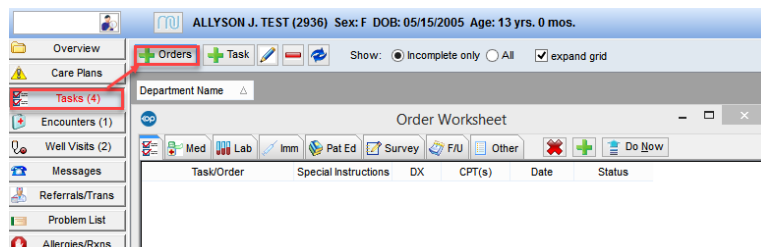
- A list of surveys will display. The parent selects a survey, completes it, and then clicks **Send it, I'm Done**.
- Return to OP and click the **Chart** button on the Smart Toolbar.
- Search for and select the patient.
- Click the **Surveys** tab.
- Click the **Fetch External** button.




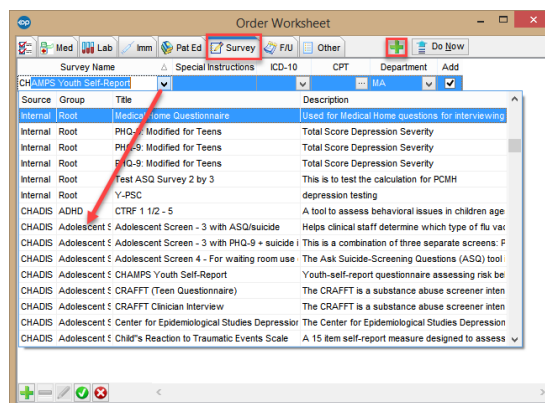
Title	Informant	Admin Date	By	Score	Assessment	Status	Notes	DX Description	DX	Visibility	Review Dt	By
ADD: NICHOLAS Vanderbilt Assessment Scale	Mother	06/16/2017	1143	72		Informed				Any staff member		
Autism M-CHAT	Mother	12/28/2016	1135	0		Complete				Any staff member	12/28/2016	1135
Autism M-CHAT 1	Mother	11/22/2016	1139	0		Received		Z00.129		Any staff member	11/22/2016	1139
Lead Screening Risk Assessment	Mother	11/17/2016	1147	0		Complete				Any staff member	11/17/2016	
Tuberculosis Risk												

Complete a CHADIS Survey Creating the Task

- Click the **Chart** button on the Smart Toolbar.
- Search for and select the patient.
- Click the **Tasks** tab.
- Click the **+ Orders** button. The Order Worksheet window will open.

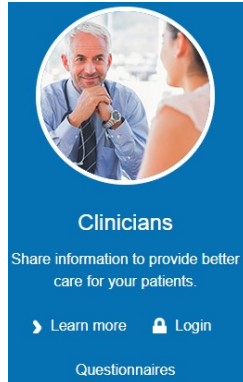


- Click the **Survey** tab.
- Under Survey Name, click where instructed to "Click here to order another survey".
- Select the Survey Name using the dropdown arrow.
- Click the **Create survey orders**  button to create the task for the survey order.



- Double-click the survey name to start the process.

10. An information window opens, click the **X** to close (**do not** click OK or Cancel).
11. Open a web browser window and access the CHADIS site. Click [here](#) to link to the CHADIS site.
12. Click the Clinicians box.



13. Log into CHADIS using the practice user name and password.
14. Type the patient name in the **Search Waiting Room** field and press **Enter** or **Go**.
15. Click the magnifying glass next to the correct patient. The Switch to a Respondent User window displays, click the **Login Switch** button next to the parent completing the survey.

Note: If the person taking the survey is not listed as a Respondent, click the **Create New** and enter the information. Once all information is complete on the New Respondent window, click **Continue**. The Respondent will agree to the terms of CHADIS and enter their name and click **Go**.

16. A list of surveys will display. The parent selects a survey, completes it, and then clicks **Send it, I'm Done**.
17. Return to OP and click the **Chart** button on the Smart Toolbar.
18. Search for and select the patient.
19. Click the **Surveys** tab.
20. Click the **Fetch External** button.

Title	Informant	Admin Date	By	Score	Assessment	Status	Notes	DX Description	DX	Visibility	Review Dt	By
ADD: NICHQ Vanderbilt Assessment Scale	Mother	06/16/2017	1143	72		Informed				Any staff member		
Autism M-CHAT	Mother	12/28/2016	1135	0		Complete				Any staff member	12/28/2016	1135
Autism M-CHAT 1	Mother	11/22/2016	1139	0		Received		200.129		Any staff member	11/22/2016	1139
Lead Screening Risk Assessment	Mother	11/17/2016	1147	0		Complete				Any staff member	11/17/2016	
Tuberculosis Risk												