

OP Patient Portal: Surveys

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OP sets **all defaults to share all information**. Any individual decisions by Practice-users to restrict information sharing (access, use, or exchange) are the responsibility of the Practice in the implementation of its 21st Century Cures Act Information Blocking policies and procedures for its Practice and patients.

Version 20.12

About

The setup and workflow instruction below is specific to sending Internal and CHADIS Surveys to the OP Patient Portal. Jump to the following sections by clicking the links below:

How Surveys Get Sent to the Portal

Respective of patient privacy, only Surveys with a visibility level of **Any Staff Member** are sent to the portal. Surveys are sent to the portal when:

- A Task is created for the Survey to the Patient Department.
- An appointment, scheduled using a Template that contains a Standing Order, is marked **Confirmed, Self-confirmed or Left message**.



Important: If you are experiencing Surveys being automatically sent to the portal 7 days prior to the appointment, you may contact support to change the submission of surveys to the portal. This change will use the Confirm Statuses of **Confirmed, Self-confirmed, and Left message** as to when a survey is sent to the portal.



Portal Note: Surveys are received in the portal as **Messages** which direct the parent/patient on how to complete the Survey. As a reminder, both the OP user sending the Survey **and** the patient receiving the Survey require an active portal account for the Survey to be successfully sent to the portal.

Survey Setup: Add Surveys as Tasks to a Template

1. Navigate to Encounter Templates or Well Visit Templates and select a template.
2. Click the **Orders/Workflow** tab.
3. Click the **Surveys** tab and modify the following for existing surveys.
 - Click the drop-down for Department and select **Patient**.
 - Click the drop-down for Usage and select **Standing**.
4. Click the **Save** button.
5. Repeat the above steps for all surveys that will be sent to the OP Patient Portal.



Note: If adding a new survey to a template, confirm **Patient** is selected as the Department and the Usage is set to **Standing**. For additional information on adding a survey to a template, click [here](#).

Workflow: Task a Survey from a Visit

1. From an open Well or Encounter visit note, select **Plan/Orders**.
2. Confirm the Survey is submitted as a task on the Order Worksheet Summary.

3. To add an additional survey, follow the steps below.
 - a. Click the **Survey** tab.
 - b. If the survey to task is available in the survey picklist window, confirm the Department is Patient and click the checkbox in the Add column.
 - c. If the survey to task is not available,
 - o Click the **Add** button.
 - o Click the drop-down and select the survey from the list.
 - o Confirm the Department is Patient, click the **Save** button.
 - d. Once all surveys are added, click the **Create** button.
 - e. Click the **OK** button, on the confirmation window, to create the survey task.

Workflow: Create a Survey Task Outside of a Visit

1. From a patient chart, click **Tasks**.
2. Click the **New Order** button to open the Order Worksheet.
3. Click the **Survey** tab then click the **Add** button.
4. Click the drop-down and select a survey from the list.
5. Confirm the Department is Patient, click the **Save** button.
6. Once all surveys are added, click the **Create** button.
7. Click the **OK** button, on the confirmation window, to create the survey task.

Workflow: Steps to Take When the Parent/Patient Didn't Complete the Survey on the Portal

If a Survey was sent to the portal but was not completed on the portal, the practice may decide to complete the Survey in the office during the patient's visit. When this is the case, the following steps should be taken to disable the Survey that was previously sent to the portal and task the Survey to be completed in-office.

1. From the patient chart, click **Tasks**.
2. Select the Task for the Queued Survey, and click the **Delete** button. Once the Survey Task is deleted, the parent will not be able to take the Survey from the Message they received in the Patient Portal. They can be instructed by the practice staff to ignore the message or mark it Read.
3. Create a new Task for the Survey, making sure to send it to a department other than Patient, or, click **New** in the Survey window and complete the survey.

Workflow: Rescore Surveys Taken on the Portal

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:

1. Navigate to and select the Survey in the Patient Chart.
2. Click the **Rescore** button. The Survey is scored according to the rules in OP and the new score is displayed.

Version 20.11

Overview

This workflow and setup instruction is specific to sending Internal and CHADIS Surveys to the OP Patient Portal. Keep in mind:

- The OP user sending the Survey to the portal must have an active Practice Portal account and be listed as an Associated User.
- The patient receiving the Survey must have an active portal account.

- Surveys are sent to the portal when:
 - An appointment, scheduled using a Template that contains a Standing Order, is marked **Confirmed, Self-confirmed or Left message**.



Important Notice: If you are a client experiencing surveys automatically sent to the Patient Portal 7 days prior to the appointment, you may contact support to change the submission of surveys to the Patient Portal. This change will use the Confirm Status' of **Confirmed, Self-confirmed and Left message** as to when a survey is sent to the Patient Portal.

- A Task is created for the Survey to the Patient Department.
- Only Surveys with a visibility level of **Any Staff Member** are sent to the portal.
- Surveys are received as **Messages in the Patient Portal** Practices who are accustomed to using the former OP Patient Portal must note that Surveys sent to the IntelliChart Patient Portal are not accessed from Forms in the portal.



Try it! Once you've completed the setup and reviewed the workflows below, practice what you've learned using your practice's Test Patients!

Survey Setup: Templates

1. Navigate to Encounter Templates or Well Visit Templates and select a template.
2. Click the **Orders/Workflow** tab.
3. Click the **Surveys** tab and modify the following for existing surveys.
 - Click the drop-down for Department and select **Patient**.
 - Click the drop-down for Usage and select **Standing**.
4. Click the **Save** button.
5. Repeat the above steps for all surveys that will be sent to the OP Patient Portal.



Note: If adding a new survey to a template, confirm **Patient** is selected as the Department and the Usage is set to **Standing**. For additional information on adding a survey to a template, click [here](#).

Workflow: Template Task

1. From an open Well or Encounter visit note, select **Plan/Orders**.
2. Confirm the Survey is submitted as a task on the Order Worksheet Summary.
3. To add an additional survey, follow the steps below.
 - a. Click the **Survey** tab.
 - b. If the survey to task is available in the survey picklist window, confirm the Department is Patient and click the checkbox in the Add column.
 - c. If the survey to task is not available,
 - Click the **Add** button.
 - Click the drop-down and select the survey from the list.
 - Confirm the Department is Patient, click the **Save** button.
 - d. Once all surveys are added, click the **Create** button.
 - e. Click the **OK** button, on the confirmation window, to create the survey task.

Workflow: Task

1. From a patient chart, click **Tasks**.
2. Click the **New Order** button to open the Order Worksheet.
3. Click the **Survey** tab then click the **Add** button.

4. Click the drop-down and select a survey from the list.
5. Confirm the Department is Patient, click the **Save** button.
6. Once all surveys are added, click the **Create** button.
7. Click the **OK** button, on the confirmation window, to create the survey task.

Workflow: Survey Not Completed by Parent/Patient on Patient Portal

If a Survey was sent to but not completed via the Patient Portal, the practice may decide to complete the Survey in the office during the patient's visit. When this is the case, the following steps should be taken to disable the Survey that was previously sent to the portal and task the Survey to be completed in-office.

1. From the patient chart, click **Tasks**.
 2. Select the Task for the Queued Survey, and click the **Delete** button. Once the Survey Task is deleted, the parent will not be able to take the Survey from the Message they received in the Patient Portal. They can be instructed by the practice staff to ignore the message or mark it Read.
 3. Create a new Task for the Survey, making sure to send it to a department other than Patient, or, click **New** in the Survey window and complete the survey.
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