

Parent Steps to Complete a Survey Sent to the OP Patient Portal

Last Modified on 07/07/2021 1:38 pm EDT

Version 20.13

About

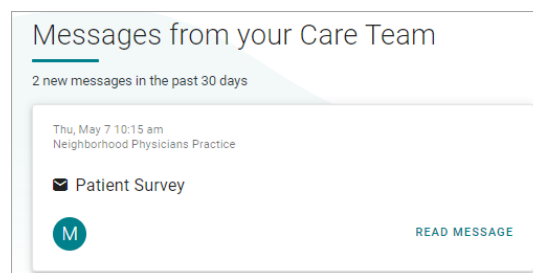
The steps in this article assume that an internal OP Survey has already been sent to the OP Patient Portal for a parent/patient to complete prior to their visit. If the parent/patient does not complete their Survey on the portal prior to the visit, the Practice may choose to have the parent/patient log into their portal from a tablet or other in-office device to complete the Survey.



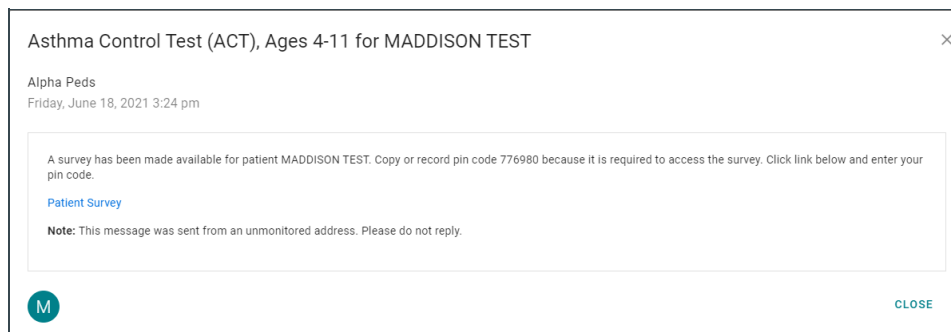
Attention: Practices who are accustomed to using the former OP Patient Portal must note that Surveys sent to the IntelliChart Patient Portal are not accessed via Forms in the portal. **They are received as Messages and should be accessed in the Message Center on the portal or from the patient's homepage.**

Parent Steps to Complete an OP Survey

When a survey is sent to the OP Patient Portal, the parent receives a message notification (if enabled). **In the Patient Portal, the Message is accessible via the Message Center or from the Messages from your Care Team section of the portal homepage** (pictured below). The parent will complete the following steps to complete the survey.



1. Click the **Message** in the Message Center or the **Read Message** link in the Message on the portal homepage. The Patient Survey window, containing a **pin code** needed to complete the survey and a **survey link**, is displayed. The pin code does not expire.



Note: The entry of a Pin here is in place to ensure the patient's protected health information security and ensure the accuracy of survey results. In addition, a **note** is included to inform the parent/patient not to reply to the survey message.

2. Click the **Patient Survey** link. The Verification window is displayed.

Kids' Asthma Check: Ages 8-14

Please enter your pin to view this survey
This pin was provided inside the message

Pin *

Verify

3. Enter the **Pin code** in the Pin field, and click the **Verify** button. The Survey is displayed.

Warning: The portal user has five attempts to enter the correct Pin code. After the fifth try, the Pin code is locked. The portal user can then return to the Patient Survey message, and click the **Reply** button to send a message to the practice staff member who sent the Survey to the portal. At that point, the Task Status must be changed to Canceled, and a new Task must be created to send the Survey back out to the portal.

4. Complete the Survey.

Note: When the portal user begins to answer the Survey questions, the Survey Task status is marked **In Progress:**

05/07/2020	In Progress	Kayla Reiter
Survey: Kids' Asthma Check: Ages 8-14		

5. Click the **Submit** button. A confirmation message is displayed.

Kids' Asthma Check: Ages 8-14

Your survey answers have been recorded
You can safely close this window.

Note: Once the **Submit** button is clicked, the Survey responses are sent to OP. The Survey task status is marked **Completed** by Web Portal User:

05/07/2020	Completed	Kayla Reiter	Web Portal User
Survey: Kids' Asthma Check: Ages 8-14			

The Survey status is marked **Received:**

Title	Informant	Admin Date ▾	By	Score	Assessment	Status	Notes	DX Description	DX	Visibility	Review Dt
Kids' Asthma Check: Ages 8-14	Mother	05/07/2020		0		Received				Any staff member	