Phreesia: Survey Workflow

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About

In the current OP/Phreesia integration, surveys completed during the Phreesia Intake come into OP as a PDF. The Phreesia surveys will not pull results into the Survey window of a Patient Chart. Below, are instructions on how to streamline the workflow for reconciling inbound Phreesia surveys. It is important the practice completes the following:

- Create Phreesia placeholder surveys, include the CPT code used for billing
- Add the Phreesia placeholder surveys to the appropriate Well Visit and Encounter templates assigned as Standing orders to the Nurse department
- If CHADIS surveys were previously assigned to templates, it is recommended those surveys be changed to Alternate in the Usage field or removed from the templates

> **Important**: It is up to the practice to decide on their workflow for inbound Phreesia surveys. Take note of the following:
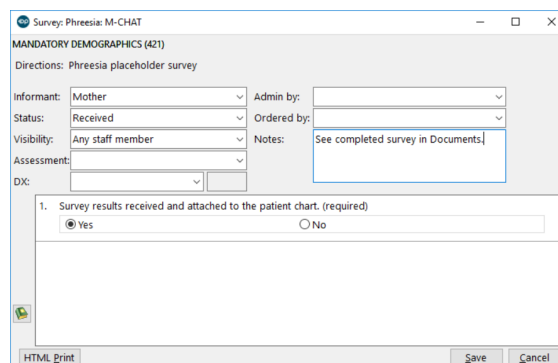> - The default appointment reminder will be sent 3 days prior to a patient appointment
> - When confirming a patient appointment, the Intake process will start. Any intake forms, including surveys, will be available to complete at this time.
> - All surveys completed during Intake will be available from the Unread Portal tab of the Message Center and Document Management.
> - The survey will be assigned an Item type and Item category which was determined during your implementation with Phreesia.
> - The survey will not be marked as reviewed and will not be assigned to a staff user. A procedure will need to be documented on the responsibility of marking a document reviewed.

Phreesia Only Survey Workflow (Recommended)

The below steps are to be completed when the Visit Note has been opened, and the task has been assigned for the Phreesia placeholder survey.

Clinical Survey Workflow

1. From the Tracking window, click the **Tasks** button.
2. Double-click the Phreesia placeholder survey task to open the Survey window.
3. Complete the following information:

   - **Informant**: Click the drop-down and select from the list.
   - **Ordered by**: Click the drop-down and select the ordering provider.
   - **Notes**: Example text to insert into the Notes field:*See completed survey in Documents*
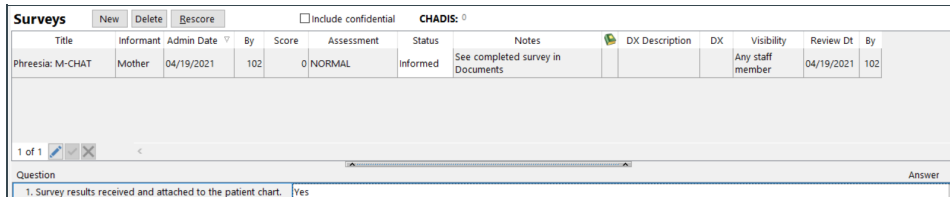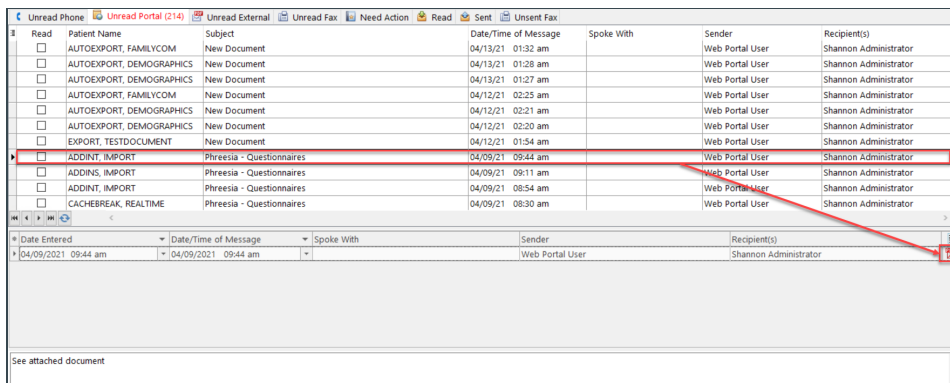
4. Click the **Save** button.

Provider Survey Workflow

Option 1:

1. From an open Visit Note, click **Surveys.** The Phreesia survey placeholder is available.
2. Navigate to the Phreesia survey document: **Clinical tab > Document Mgmt**
3. Select the survey from the Document List panel and review the responses.
4. Once reviewed, select the **Mark Reviewed** button, then click the **OK + Close** button.
5. You are returned to the Survey window within the Visit Note. Click the **Edit** button and complete the survey.

Option 2:

1. View completed surveys by navigating to the **Unread Portal** tab in the Message Center.
2. Click to select a message that contains a completed Phreesia survey.
3. Click the **PDF** icon in the Message Details grid. The Manage Documents window displays the document for the completed survey.

4. Once reviewed, select the **Mark Reviewed** button, then click the **OK + Close** button. You are returned to the Unread Portal tab in the Message Center.
5. *(Optional)* Complete the message.

   a. Select the message and click the **Comment** button.
   b. Click into the **Response** field and enter that the document has been reviewed.
   c. Select the **Completed: remove from all inboxes** radio button.
   d. Click the **Save** button.

6. Navigate to the Patient Chart, open the Visit Note, and click **Surveys**.
7. Click the **Edit** button and complete the survey.

Phreesia and Portal/CHADIS Survey Workflow (Alternate)

The information below will be used by practices that choose to have surveys available to complete from Phreesia and the Patient Portal/CHADIS. Phreesia placeholder templates must be created and attached to the appropriate template as a Standing order to the Nurse department. In addition, the CHADIS survey will remain on the templates as a Standing order to the Patient

department.

When a patient appointment is confirmed:

- Review the **Unread Portal** tab or **Documents** to determine if the parent completed the survey during the Intake in Phreesia.
  - If the Phreesia survey exists, delete the CHADIS survey task. This is to ensure the parent does not complete the survey in the Patient Portal/CHADIS.
  - Follow the Phreesia workflow in the above section or the workflow agreed upon by the practice.

When the patient arrives and the Encounter has been opened:

- Review the Surveys tab within the open note, review if a CHADIS survey exists.
  - If the CHADIS survey exists, delete the task for the Phreesia placeholder template.
  - If the CHADIS survey does not exist, review the **Unread Portal** tab or **Documents** to determine if the parent complete the survey during the Intake in Phreesia.

If the survey was not completed in CHADIS or Phreesia, consider the following:

- Have the parent log into their Patient Portal account, click the survey link, and complete the survey in CHADIS.
- Use the CHADIS **Waiting Room workflow** to complete the survey from a device in the office.