CHADIS: Validate Surveys

Last Modified on 06/24/2021 3:19 pm EDT

Version 20.13
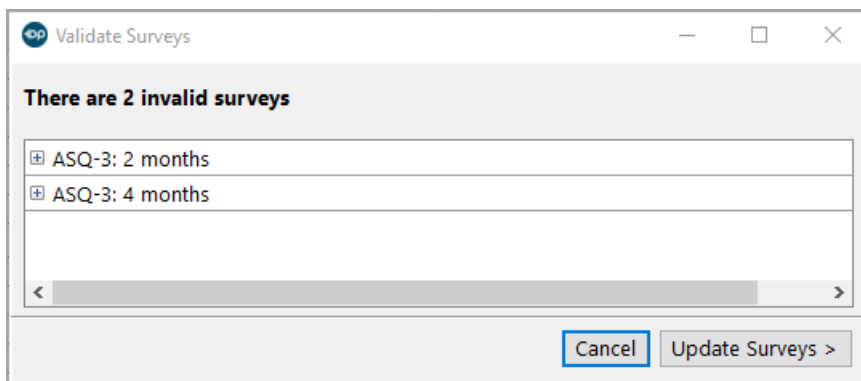
> **Path: Clinical tab > Encounter Templates or Well Visit Templates button**

About

Within the Encounter Template Editor and Well Visit Template Editor windows, Practices can perform validation on CHADIS survey tasks to ensure the tasks within a template are linked correctly by name. By validating the surveys and associated templates, a list of invalid CHADIS surveys will be produced. Practices can reconcile the list of invalid surveys in the identified templates by using the workflow below.
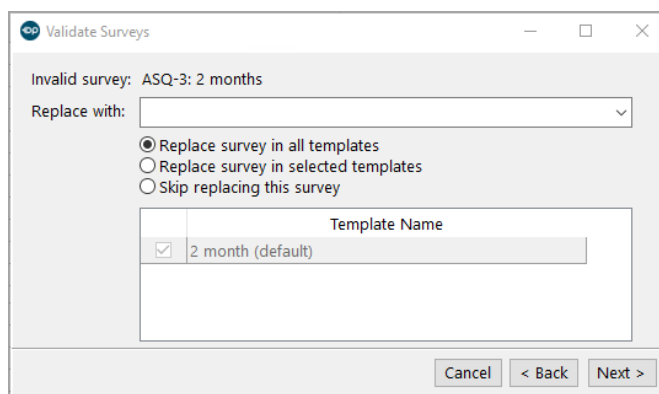
Validate CHADIS Surveys

1. Navigate to the Encounter Template Editor or Well Visit Template Editor by following the path above.
2. Click the **Validate Surveys** button.
3. The Validate Surveys window will display invalid surveys and their associated templates which can be viewed by clicking the plus sign next to a specific survey.

> 📌 **Note**: If there are no invalid CHADIS surveys, an Information window will display "All Surveys are valid."

4. Click the **Update Surveys** button. The next window will display the first invalid survey from the previous window's list.

5. From the **Replace with** field, select a survey from the drop-down you want to replace the invalid survey with or you can start typing into the field and select from the list. If you plan on not replacing the survey at this time, skip to step 6 and choose the appropriate radio button.
6. Select from one of the following radio buttons:

- **Replace survey in all templates**: This option replaces the invalid survey in all the templates listed under Template Name.
- **Replace survey in selected templates**: This option replaces the invalid survey in the templates you've selected the checkbox for under Template Name.
- **Skip replacing this survey**: This option allows you to skip replacing the currently displayed invalid survey.

7. Click the **Next** button if you have more invalid surveys to review or click the **Save** button if you come to the last invalid survey in the list.

> **Notes**:
> - If you try clicking the **Next** or **Save** buttons without a replacement survey selected or without the **Skip replacing this survey button selected**, you will get a Warning that says "Please select a replacement survey." See step 5 for choosing a replacement survey or choose the correct radio button to skip replacing the survey.
> - At any time, you can click the **Back** button to navigate to a previous window or the **Cancel** button to exit without saving any changes, which will display a Warning: "Are you sure you want to cancel survey validation? Your changes will not be saved."