

Send OP Surveys to the Portal

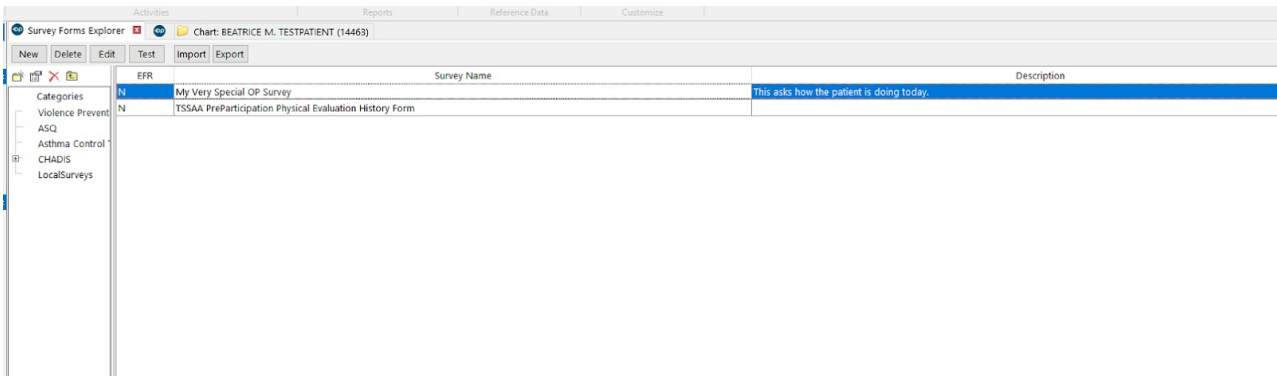
Last Modified on 07/12/2024 10:36 am EDT

Here you can find a step by step guide to send an OP Survey to a patient or parent, and how it returns to OP after it is completed.

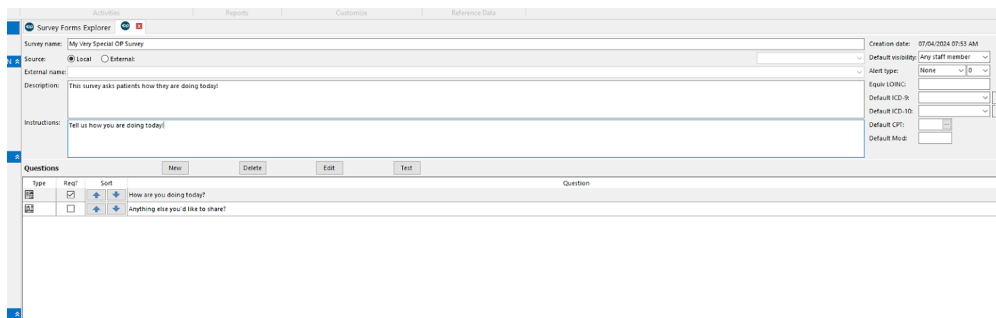


Note: The patient must have an active **Intelichart Patient Portal** account

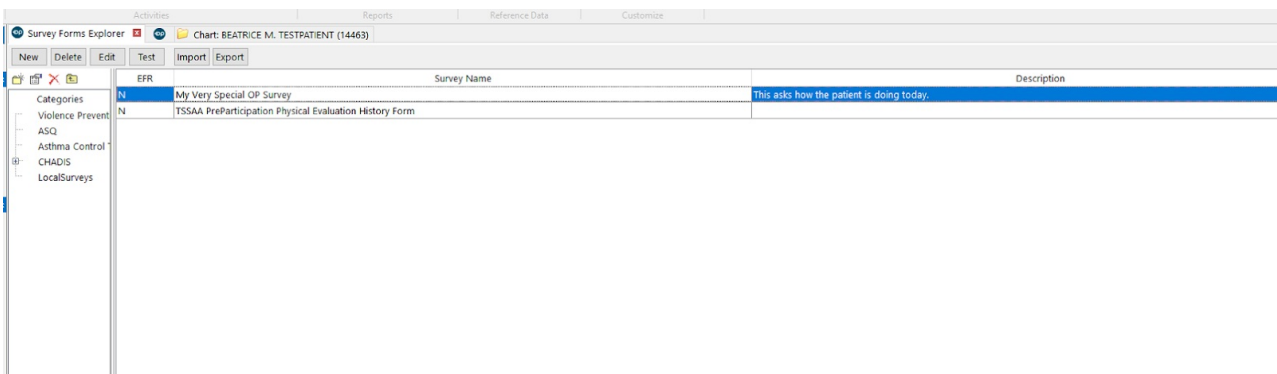
Here is an example of an OP Survey that a practice has created. It is called "My Very Special OP Survey" and has no privacy restrictions (EFR = N):



Highlight the survey and click the **Edit** button. This example is a two-question survey:



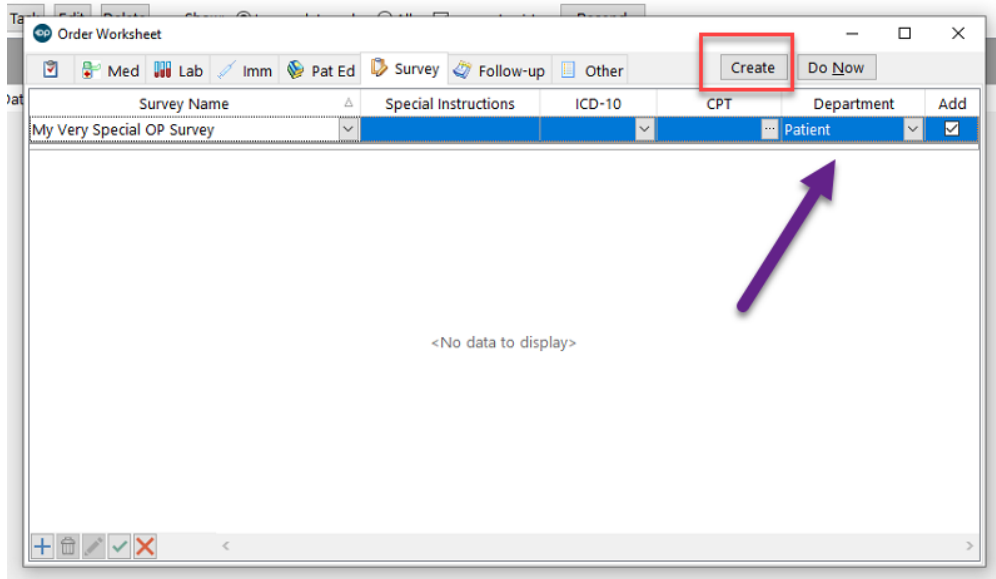
To test the survey and to make sure that all the questions have connected answers, click the **Test** button:



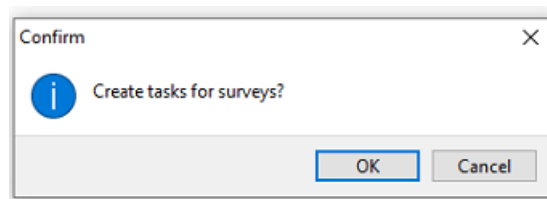
Once you have established that this survey is complete and ready for use, assign it to a patient. This involves calling up the **Order Worksheet** for a patient. In this case, Beatrice Testpatient:

1. Click the **Survey** tab.

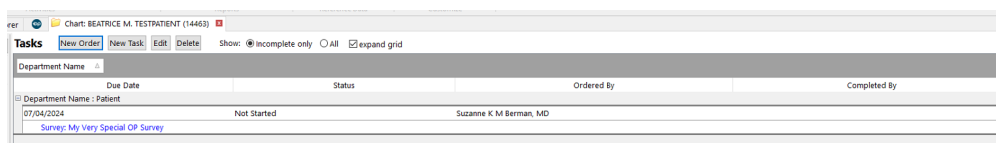
2. Choose **My Very Special OP Survey** in the **Survey Name** dropdown.
3. Set the **Department** dropdown to **Patient**:
4. Click the **Create** button (not the **Do Now** button, which will launch the survey on the user's workstation.)



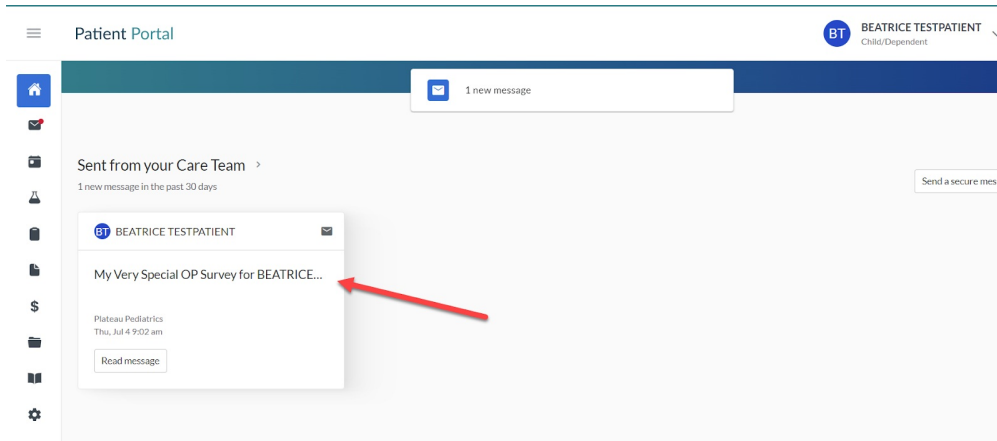
Confirm the popup message by clicking the **OK** button:



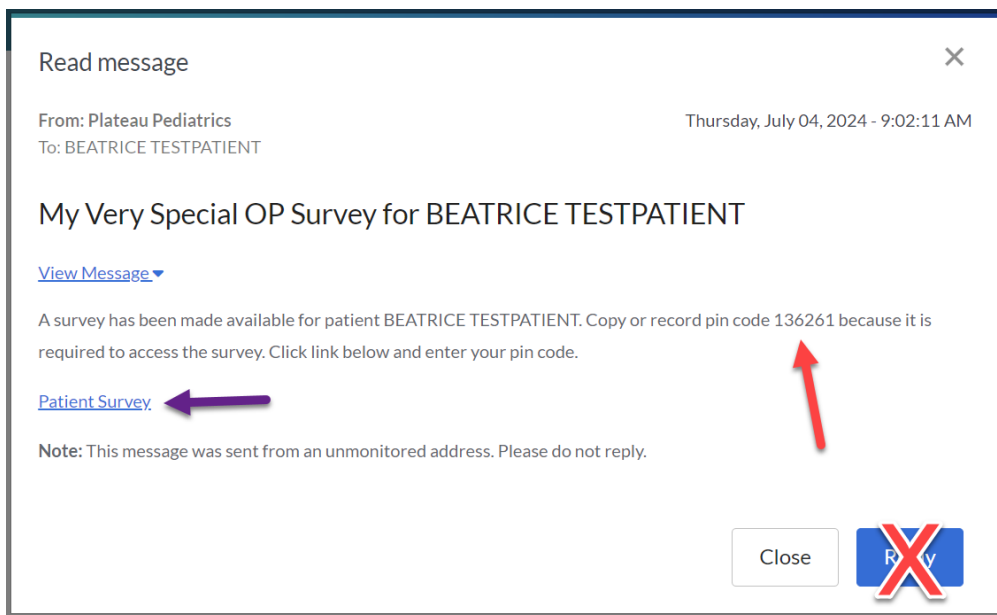
Now the survey is sent to the patient's portal account. The Task has **Not Started** status until the patient begins the survey (at which point the status will change to **In Progress**.)



The patient or parent receives a notification in their portal account that there is a new survey for them to complete:



The patient or parent clicks on the message to open it, then expands it to see more details:



The patient or parent should make a note of the **PIN** code that is listed, then should click the **Patient Survey** link.

The patient/parent enters the **PIN** code from the previous step:

My Very Special OP Survey

Please enter your pin to view this survey

This pin was provided inside the message

Pin *
136261

Verify

Then the patient or parent clicks the **Verify** button to move into the survey itself. The patient or parent completes the survey as prescribed:

My Very Special OP Survey

Tell us how you're doing!

BEATRICE TESTPATIENT
F · DOB: 9/9/2013

How are you doing today? *

Awesome
▼

Anything else you'd like to share?

everything is awesome!

Who filled out this survey? *

Mother

Father

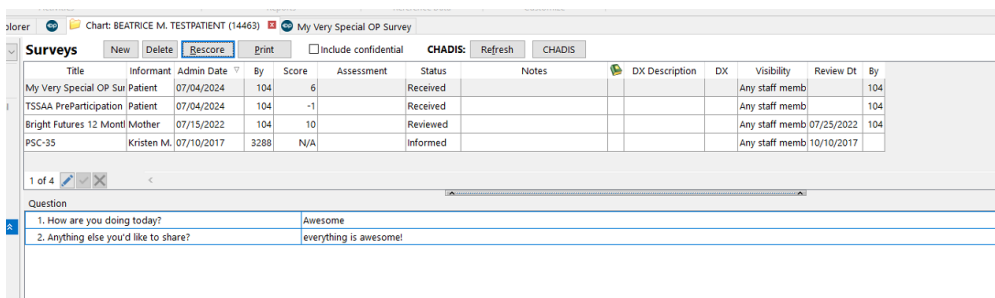
Both Parents

Patient

Other

Submit

After the patient clicks the **Submit** button, the completed survey returns to OP:



Title	Informant	Admin Date	By	Score	Assessment	Status	Notes	DX Description	DX	Visibility	Review Dt	By
My Very Special OP Sur	Patient	07/04/2024	104	6		Received				Any staff memb		104
TSSAA PreParticipation	Patient	07/04/2024	104	-1		Received				Any staff memb		104
Bright Futures 12 Month	Mother	07/15/2022	104	10		Reviewed				Any staff memb	07/25/2022	104
PSC-35	Kristen M.	07/10/2017	3288	N/A		Informed				Any staff memb	10/10/2017	

Question	Answer
1. How are you doing today?	Awesome
2. Anything else you'd like to share?	everything is awesome!

The original Task sent to the Patient department is now **Completed**:

Activities | Reports | Reference Data | Customize

store | Chart: BEATRICE M. TESTRANT (14463) | Show: incomplete only All expand grid

Tasks | New Order | New Task | Edit | Delete

Due Date	Department Name	Status	Ordered By	Completed By
Due Date : 07/04/2024	Patient	Completed	Suzanne K M Berman, MD	Web Portal User
Due Date : 01/05/2023				
Due Date : 07/15/2022				
Due Date : 11/19/2019				