Clinect Healthcare

User Guide

WELCOME TO CLINECT HEALTHCARE

Clinect Healthcare is an innovative healthcare company dedicated to helping physician practices get a handle on one of the most challenging – but important – aspects of their business: truly understanding patient satisfaction and the patient experience. Clinect Healthcare is the innovator behind Clinect Patient Survey, the industry's first patient experience platform designed specifically for medical practices and the unique provider-patient relationship.

We are pleased to welcome you as part of the Clinect family. We feel honored that you have chosen Clinect to fulfill your patient experience needs, and we are eager to be of service. Our clients are our number 1 priority! We are delighted that you are part of the Clinect network and look forward to helping you to reach your goals. Please feel free to reach out to the Clinect team directly if you have any questions. We are here to help!

Clinect Healthcare's Core Values

- **Easier is better:** Clinect Patient Survey is designed with your patients in mind so it is easy to access and simple to use, ensuring rapid and ongoing adoption
- **Empowerment through innovation:** our first-in-market solutions deliver actionable intelligence to your organization, enabling you to make critical, timely decisions
- **Commitment to excellence:** this is all we do, this is our 100% focus, and we are committed to exceeding our clients' expectations
- **Ethics and integrity:** honesty and transparency are of ultimate importance to us, and you can see it in everything we do

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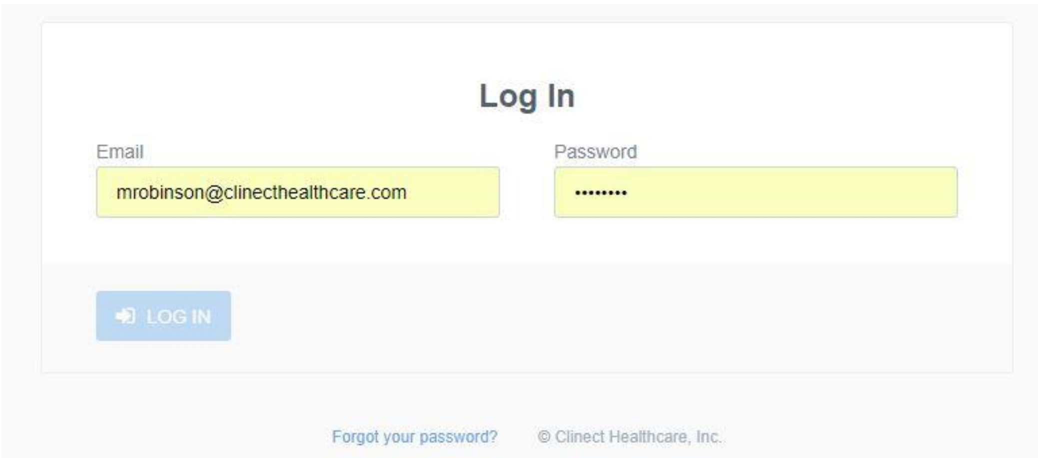
Logging In

Please note that Chrome is the preferred browser for the Clinect Portal.
Each practice has a unique URL to access their Clinect Portal. If you do not know the URL for your practice, contact the Clinect Admin in your organization or send an email to support@clinecthealthcare.com. It is recommended that you save the URL as a favorite website or as a shortcut on your Desktop to make it easy to find.

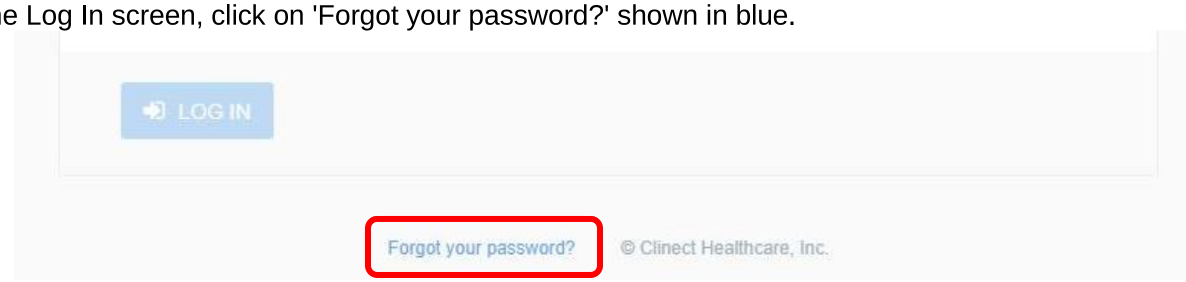
If you know your password

On the Log In screen, enter your email address (all lowercase) and password (case sensitive) and click the blue LOG IN button.

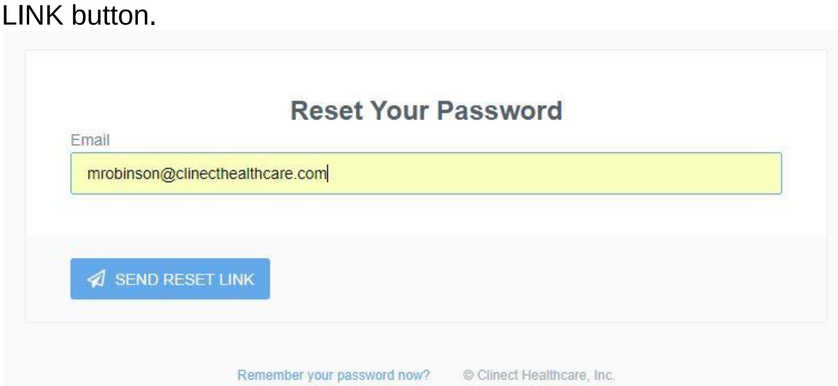


If you don't know your password

On the Log In screen, click on 'Forgot your password?' shown in blue.

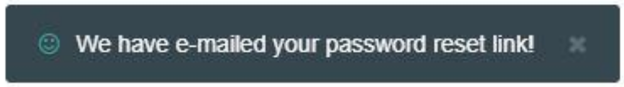


On the Reset Your Password screen, enter your email address (using all lowercase letters) and click on the blue SEND RESET LINK button.



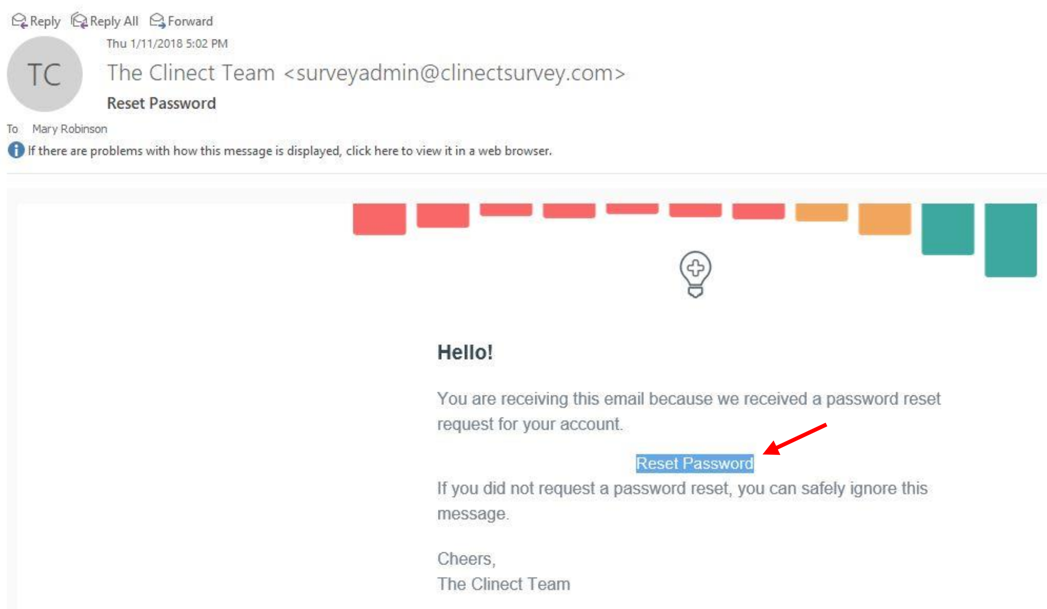
If you get an error stating that ‘We can't find a user with that e-mail address.’, please contact the Clinect Admin for your practice or send an email with the details to support@clinecthealthcare.com.

If the email was successfully sent, you should see a message stating 'We have e-mailed your password reset link!’.

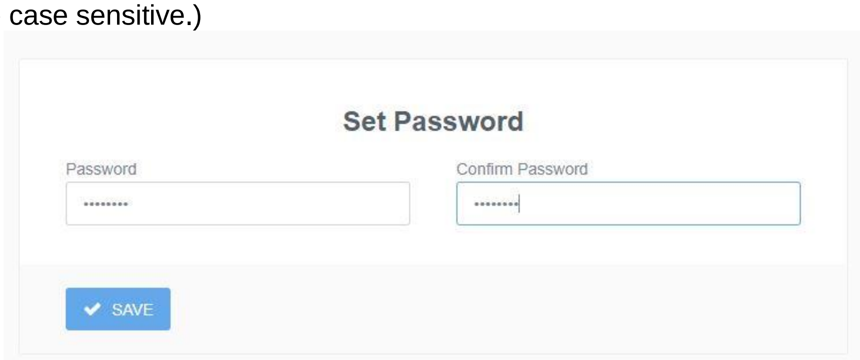


You should see an email from ‘The Clinect Team’ within a few minutes. If you do not see the email within a few moments, please check your Spam, Junk and/or Clutter folders. Contact support at support@clinecthealthcare.com if you don’t receive the email.

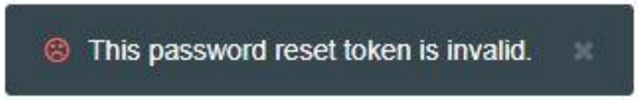
Once you receive the Reset Password email from The Clinect Team, click on the Reset Password button in blue.



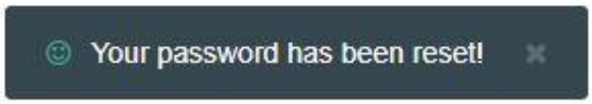
You will be directed to the Reset Your Password screen. Enter the password you want to use moving forward, confirm it by entering the exact password again, then click on the blue SAVE button. (Keep in mind that passwords are case sensitive.)



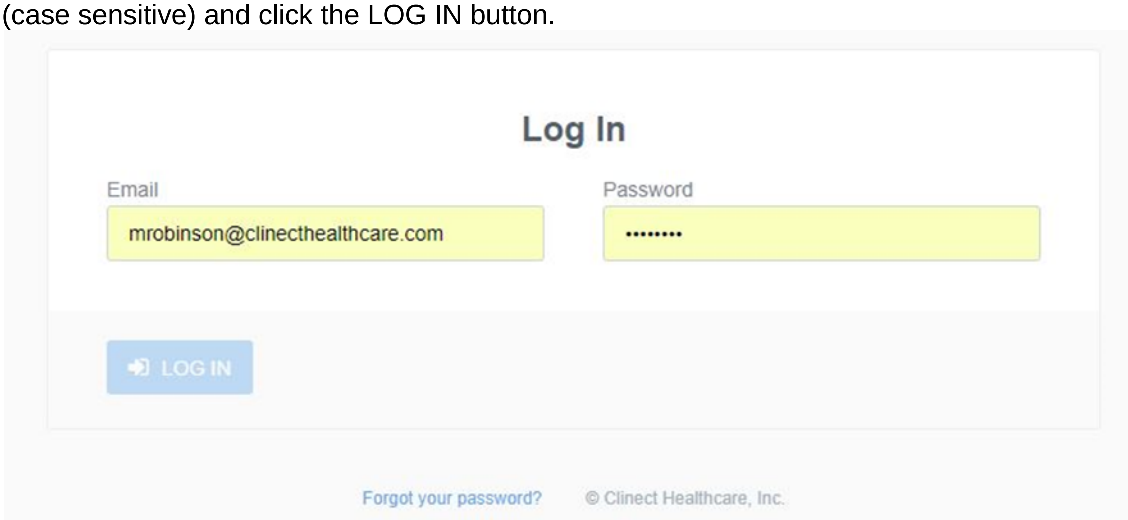
If you see a message stating that 'This password reset token is invalid.' it may be due to the reset token expiring. Go through the above password reset steps again and use the Reset Password button within the most recent email. If the issue persists, please send an email with the details to support@clinecthealthcare.com.



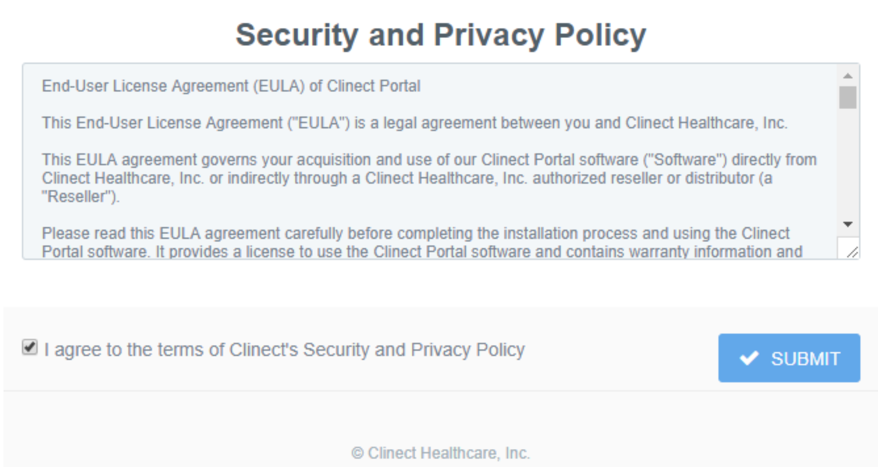
If you see the message that 'Your password has been reset!', you are ready to log in!



Once you are back at the Log In screen, enter your email address (all lowercase) and the password you just created (case sensitive) and click the LOG IN button.

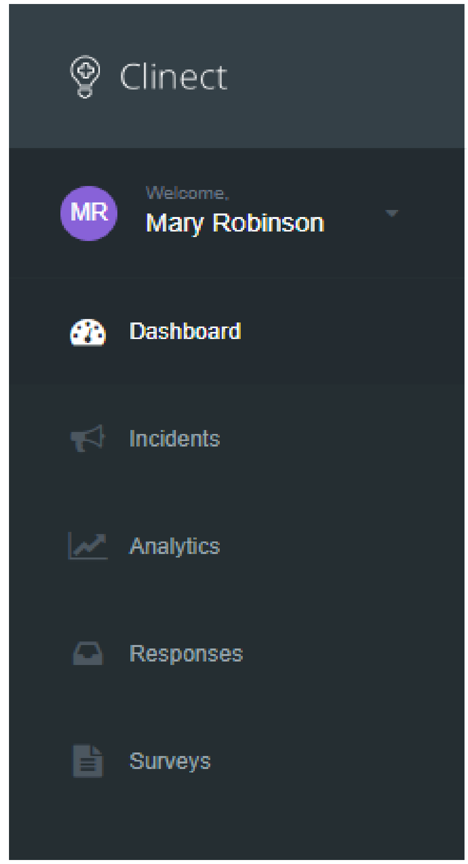


The first time you log in, you will be asked to review and agree to the Security and Privacy Policy. After reviewing, please check the box to acknowledge agreement and click the blue SUBMIT button.



Navigation Menu

On the left of the screen you will find the Navigation section. It will remain present and accessible as you access the various sections of the portal.



Clicking on the Clinect logo at the top will refresh the portal data and return you to the Dashboard section.

You are able to log out of the portal by clicking on the down arrow next to your name.

You can navigate to the various sections of the portal by clicking on the section name within the Navigation Menu.

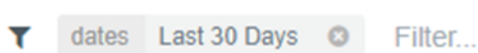
There are six primary sections of the portal:

1. Dashboard
2. Incidents
3. Analytics
4. Responses
5. Surveys
6. Answers (accessed through Surveys)

We cover the function and features of each section in this user guide.

Filters

You will find the filter field at the top of the Dashboard page. This same filter field is present throughout the various sections of the portal. We typically have a default date filter set to show results for the ‘Last 30 days’. If you remove that filter, by clicking on the small ‘x’ to the right, the data will be updated to reflect results for all time. To add a filter, you will click on the word ‘Filter…’ and begin typing the filter you wish to add.



Dashboard

After logging in, you will be automatically brought to the Dashboard page. The Dashboard is the default homepage and offers a high-level overview of the survey data that has been collected.

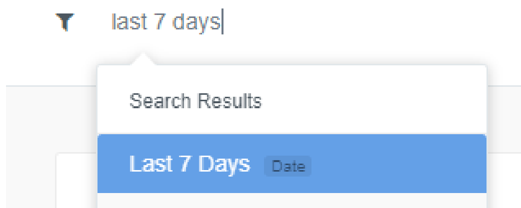
Dashboard Filters

There are several filter options for the Dashboard; Date, Survey Name, Provider and/or Location. You may apply a single filter or any combination of filters. For example, you can filter by Date, Survey, Provider and Location at the same time. You may also filter by multiple Surveys, Providers and Locations at the same time.

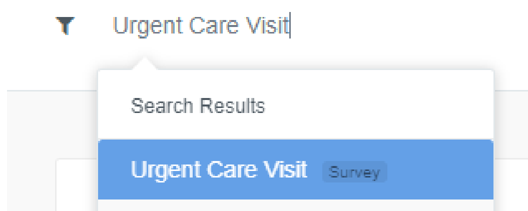
When a filter is added or removed, you will see the data dynamically refresh. Depending on the volume of responses, it may take a few minutes for the updated data to appear.

Filters are ‘sticky’ and will remain applied throughout the various sections of the portal, until removed by the user or until the portal data is manually refreshed.

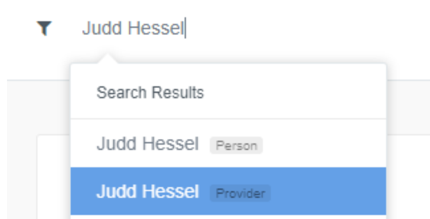
Date Filter: Type in any of the following date options (only one Date filter may be applied at a time): 'Today', 'Last 7 Days', 'Last 30 Days', 'Last 60 Days', 'Last 90 Days', 'Previous Quarter', 'Previous Month', 'Previous Year', 'Previous Week'; 'This Quarter', 'This Month', 'This Year', 'This Week'



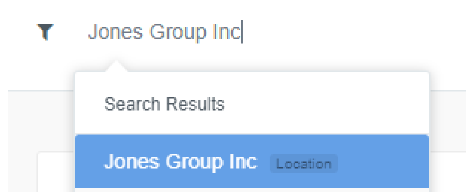
Survey Filter: Type in the name of the survey(s) or type '*survey'* if you are unsure of the exact survey names used by your practice. It will have the name of the survey and an identifiable tag such as "the work survey".



Provider Filter: Type in the name of the rendering provider(s). If you filter by multiple providers, it will show you data for all the providers included. In the example below, you will see that the name appears twice. If you want to filter the data by Provider, make sure to select the name that shows 'Provider' (and not 'Person') to the right. We also have the ability to create provider 'groups' that you can filter by.



Location Filter: Type in the name of the service location(s). If you filter by multiple locations, it will show you data for all the locations included. We also have the ability to create location 'groups' that you can filter by.



Dashboard Totals

This toolbar includes a summary of the totals for Surveys Requested, Responses Received, Unresolved Incidents, Resolved Incidents, and the "?" in the grey box. Please note that the totals are impacted by any filters that are set.

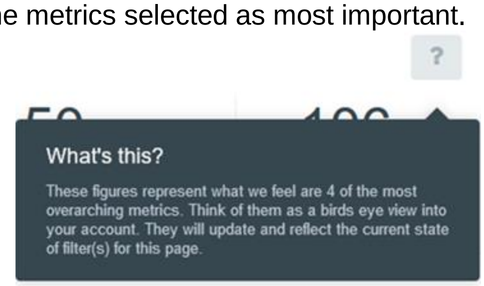
Surveys Requested: The total number of survey invitations that we attempted to send, based on any applied filters.

Responses Received: The total number of surveys submitted by patients, based on any applied filters.

Unresolved Incidents*: The total number of incidents that do not have a status of 'Completed', based on any applied filters.

Resolved Incidents*: The total number of incidents that have a status of 'Completed', based on any applied filters.
**Incidents will be covered in more detail in the 'Incidents' section of this user guide.*

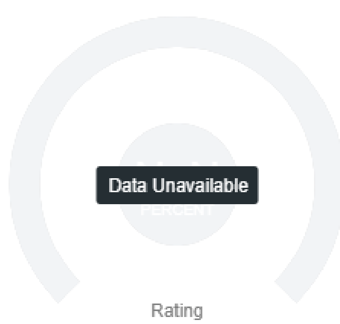
The "?"in the grey box: Users will see this tool throughout the Clinect platform. You can click on the grey box to view an explanation or additional details regarding the section. In this example, this is what the client's data looks like based on the metrics selected as most important.



Dashboard Graphs/Gauges

The graphs and gauges on the Dashboard can be customized based on customer preferences. We typically like to you get started with graphs like those listed below, but data represented can be changed at request. Your Clinect Admin for the practice will be provided with a worksheet showing the configurations we set to get you started.

Please note that the data displayed by the graphs and gauges is impacted by any filters that are set. If there is no qualified data to display, you will see 'Data Unavailable' on the graph or gauge.



Net Promoter Score (NPS)

If one or more of your surveys include a NPS question, your Dashboard will likely include the below Net Promoter Score display.

NPS is a metric used to gauge patient loyalty and is typically based on a single question like the below: *“How likely is it that you would recommend our practice to a friend or colleague?”*
The question offers the patient the ability to select on a ‘0’ to ‘10’ scale, with 10 being ‘Very Likely to Recommend’. Based on their response, they will fall into one of the following 3 categories:

Promoters: (Response of 9 or 10) These patients are considered loyal enthusiasts who will keep returning to the practice and will likely refer others.

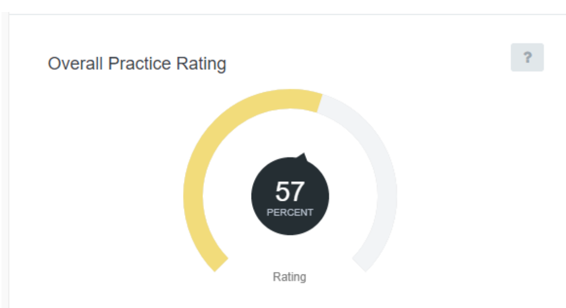
Passives: (Response of 7 or 8) These patients are typically satisfied, but unenthusiastic. They may be vulnerable to competitive offerings.

Detractors: (Response of 0-6) These are unhappy patients who can damage your reputation and impede growth through negative word-of-mouth.

The Net Promoter Score is calculated by subtracting the percentage of Detractors from the percentage of Promoters. NPS can range from a low of -100 (if every customer is a Detractor) to a high of 100 (if every customer is a Promoter). A score above ‘0’ indicates that you have more happy patients than unhappy. Average NPS varies by specialty, but most practices aim for a score of 75 or higher.

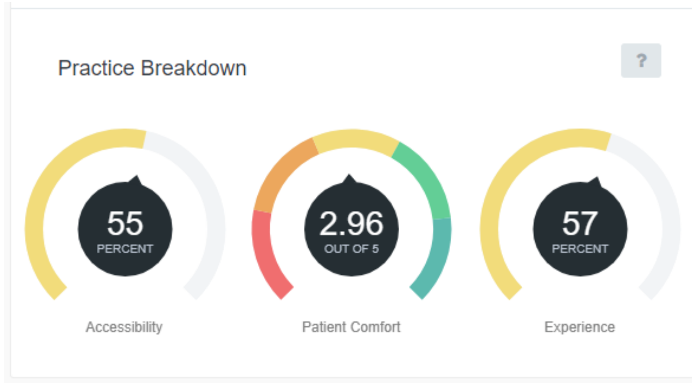
Overall Practice Rating

This graph typically represents how well the practice is doing in non-clinical areas of the practice. The questions and responses included in this score can be customized based on practice preference. You can view the score as a grade, based on a 0-100 scale. The closer to 100 the better.



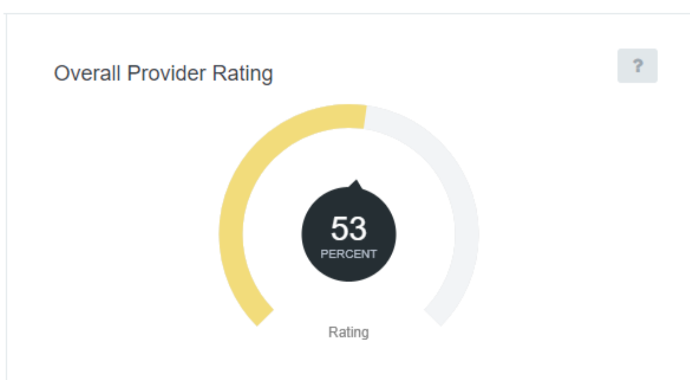
Practice Breakdown

These gauges typically provide a further breakdown of the key areas included in the Overall Practice Rating. The data measured in the breakdown section can also be customized based on practice preference.



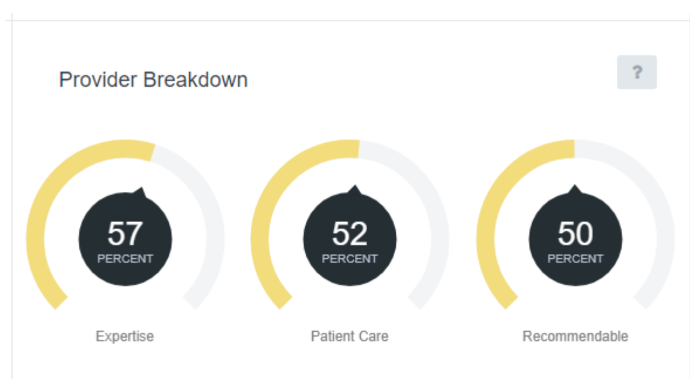
Overall Clinical/Provider Rating

This graph typically represents how well the practice is doing in clinical areas of the practice. The questions and responses included in this score can be customized based on practice preference. You can view the score as a grade, based on a 0-100 scale. The closer to 100 the better.



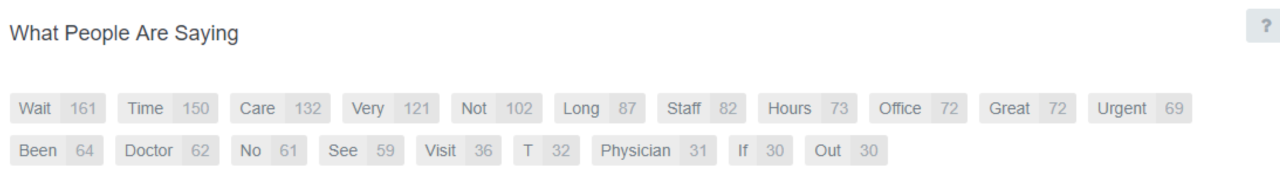
Clinical Breakdown

These gauges typically provide a further breakdown of the key areas included in the Overall Practice Rating. The data measured in the breakdown section can also be customized based on practice preference.



What People are Saying

This section displays the most commonly used words, and number of times each was used, based on patient comments included within the submitted surveys.



If you have questions or wish to make changes to the Dashboard graphs/gauges, please contact us via email support@clinecthealthcare.com.

Incidents

The incidents section of the portal is where you can view and manage all incident activity. There are two types of incidents, Triggered and Manual.

Triggered Incidents: Incidents created automatically when specific responses to select survey questions are submitted.

Manual Incidents: Incidents created manually by a user via the incident form.

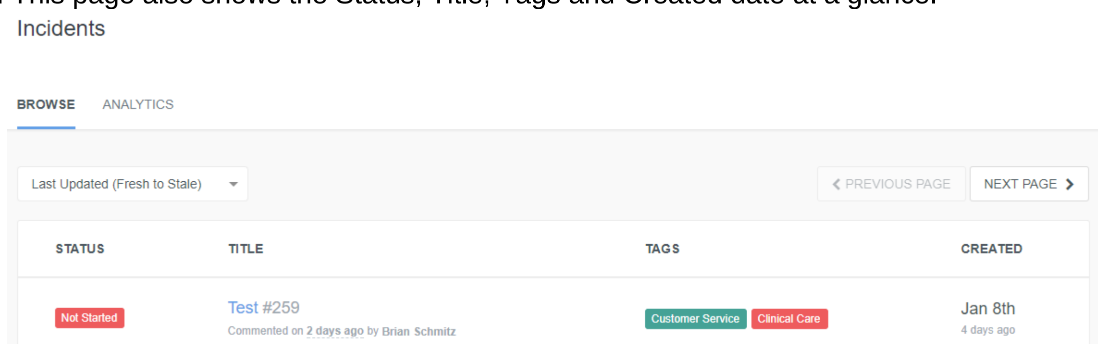
When an incident is created, there is the option to include select portal users as 'Followers'. The practice can assign automatic Followers for triggered incidents based on location, provider, and/or survey question/response.

Followers receive an automated email notification to make them aware of the creation of the incident. The email contains a link to the specific incident, where they can view details and take necessary action.

Clinect's incident management tool is intended for staff documentation. Details related to the incident, including any comments added by staff, will not populate in the patient's EHR record or PM account.

Browse Incidents

Incidents open to the Browse section. Here you can view, sort and filter the list of all incidents that have been created. The 'Previous Page' and 'Next Page' buttons can be used to navigate through the list of incidents. This page also shows the Status, Title, Tags and Created date at a glance.



Status: The status indicates the progression of the incident resolution. All incidents default to a status of 'Not Started'. To edit the status, you must first 'open' the incident by clicking on the title (in blue).

Title: The Title for triggered incidents will reference the name of the survey and the first question that triggered the incident. For manual incidents, the title is entered by the user creating the incident. In both cases, a system generated Incident ID will populate at the end of the title. Clicking on the blue title will open the incident management section.

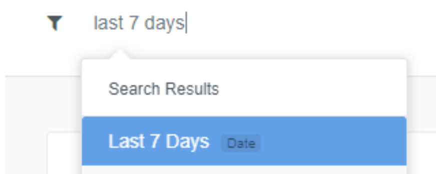
Tags: Any tags added to the incident will be displayed in this column. To add or edit tags, you must first ‘open’ the incident by clicking on the title.

Created: The date of when the incident was created will appear in this column.

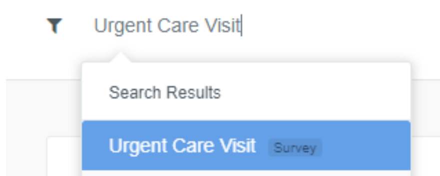
Incident Filters

You will find the filter field at the top of the Incidents page, just like the Dashboard page. Any filters that were added on the Dashboard (or other section of the portal) will populate here unless removed. This includes the default date filter. In addition to filtering by Date, Survey, Provider and Location, there are a few additional filter options available for Incidents. You can also filter by Incident Status, Tag and Person.

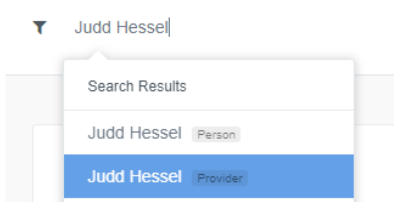
Date Filter: Type in any of the following date options (only one Date filter may be applied at a time): ‘Today’, ‘Last 7 Days’, ‘Last 30 Days’, ‘Last 60 Days’, ‘Last 90 Days’, ‘Previous Quarter’, ‘Previous Month’, ‘Previous Year’, ‘Previous Week’; ‘This Quarter’, ‘This Month’, ‘This Year’, ‘This Week’



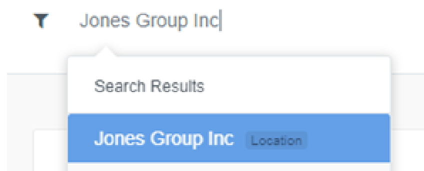
Survey Filter: Type in the name of the survey(s) or type ‘*survey*’ if you are unsure of the exact survey names used by your practice. It will have the name of the survey and an identifiable tag such as “the work survey”.



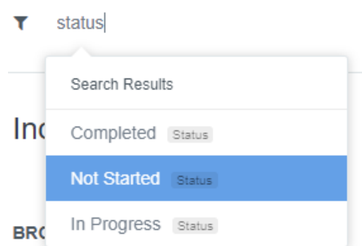
Provider Filter: Type in the name of the rendering provider(s). If you filter by multiple providers, it will show you data for all the providers included. In the example below, you will see that the name appears twice. If you want to filter the data by Provider, make sure to select the name that shows ‘Provider’ (and not ‘Person’) to the right. We also have the ability to create provider ‘groups’ that you can filter by.



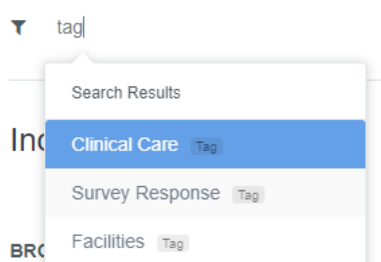
Location Filter: Type in the name of the service location(s). If you filter by multiple locations, it will show you data for all the locations included. We also have the ability to create location ‘groups’ that you can filter by.



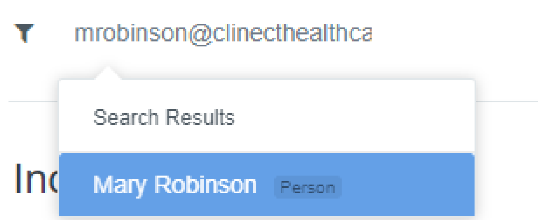
Status: Type in the name of the incident status you want to filter by or type the word ‘Status’ to display the available options. Custom statuses can be added by request. Most practices start with these three, ‘Not Started’, ‘In Progress’, and ‘Completed’.



Tag: Tags are used to categorize incidents. Type in the name of the tag you want to filter by or type the word ‘Tag’ to display the available options. We start you off with a list of suggested tags, but custom tags may also be added.

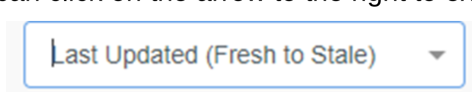


Person: You can filter by Person to isolate incidents specific to a patient and/or follower. Followers are users added or assigned to incidents, typically because they should be aware of the incident or possibly act to resolve it. Type in the name or email address of the patient or user/follower to see all the incidents they are included on. For patients, you can also type their Patient ID into the filter field.



Incident Sorting Options

In addition to filtering, you can also change the order of how the incidents are listed by using the sort options. This is a great tool to help monitor and work the queue of incidents. The default order is ‘Last Updated (Fresh to Stale). You can click on the arrow to the right to expand the full menu of sort options.



Date Created (New to Old): Lists most recently created incidents on top.

Date Created (Old to New): Lists oldest incidents on top.

Last Updated (Fresh to Stale): Lists incidents with the most recent action on top.

Last Updated (Stale to Fresh): Lists incidents that have not had recent action on top.

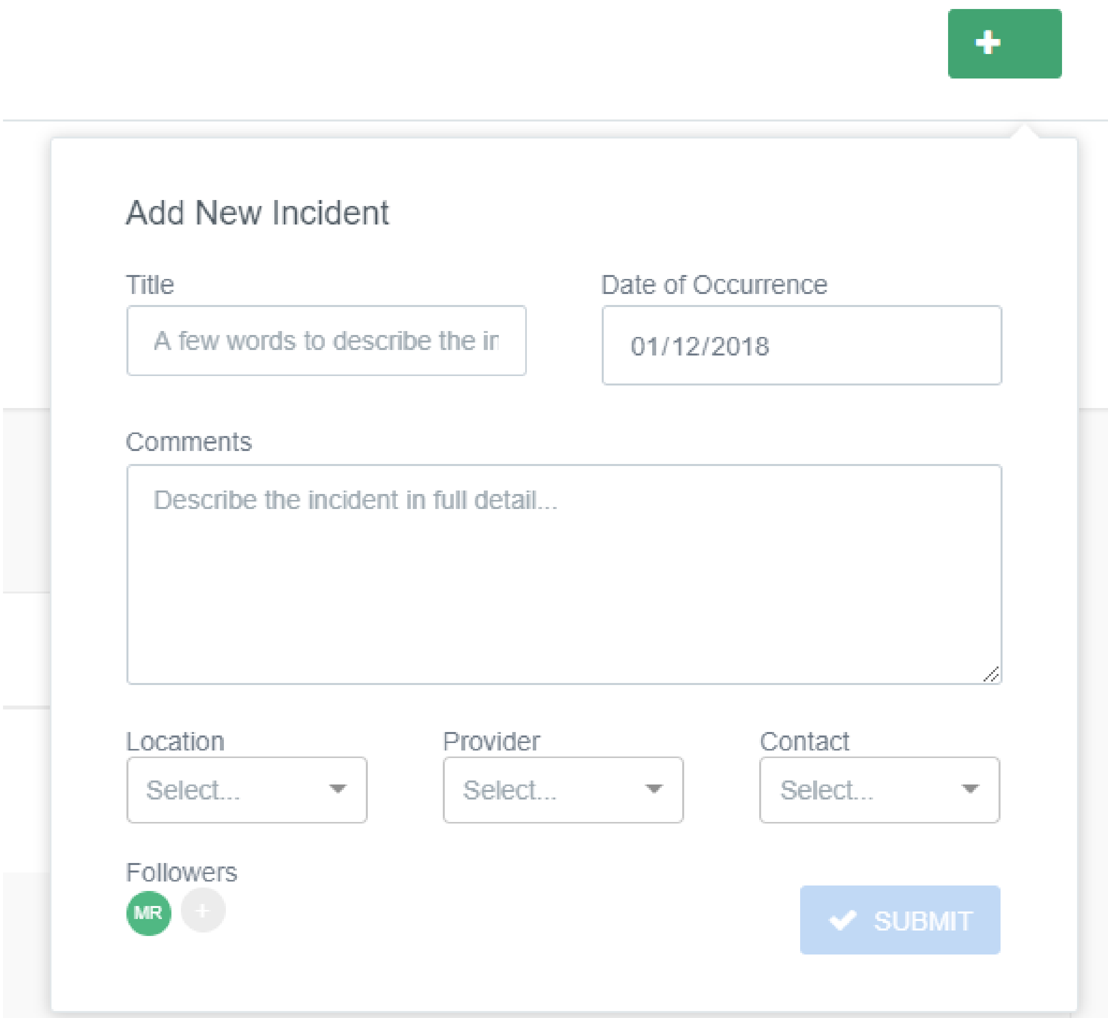
Status: Groups incidents with the same status together, listed in alphabetical order of the status name.

Title (A to Z): Lists incidents in alphabetical order by title.

Title (Z to A): Lists incidents in reverse alphabetical order by title.

Creating Manual Incidents

To create a manual incident, click on the green box with the white plus symbol. The incident form will populate.



Title: The title that you enter will appear in the title column on the Browse page. You can sort by title name, so standardization may be helpful.

Date of Occurrence: The current date will automatically populate here, but you can edit it to reflect any past date.

Comments: This is where you will provide the details of the incident you are documenting.

Location: If the incident is specific to a service location, you can choose from a list of active locations by clicking on the drop-down arrow.

Provider: If the incident is specific to a provider, you can choose from a list of active providers by clicking on the drop-down arrow.

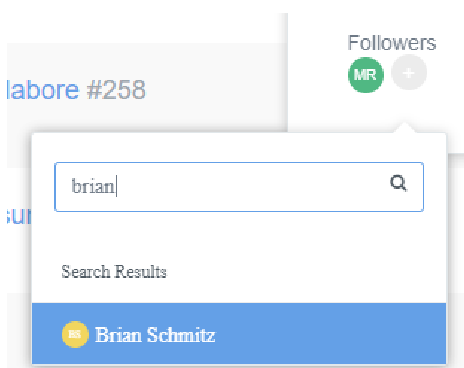
Contact: If the incident is specific to a patient, you can search by their name or email address by typing in the contact field. Please note that only patients who we have attempted to send a survey to will appear in the search. You can enter the patient details into the Comment section for any patients who are not accessible in the search.

Followers: Followers are users who should be aware of specific incidents and possibly involved in the resolution. For manual incidents, the user who creates the incident is automatically added as a follower. In both cases additional followers can be manually added.

All added followers receive an email notification when they are added to an incident. The email will contain a link directly to the incident management page.

To add a follower, click on the grey circle with the '+' symbol. A search menu will display. Type in the first and last name of the portal user you want to add. Click on their name when it appears in the list below the search box. They will be added as a follower and the email notification will automatically be sent to them. Please note that only portal users can be added as followers, as they will need to have login credentials for the portal to access the incident management screen. This is for security and HIPAA reasons, due to the nature of the incident information.

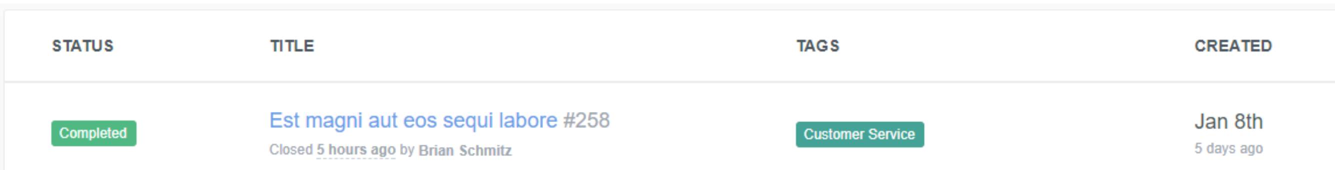
If you are unable to add a portal user to an incident, it may be that they have conflicting permissions. If they are not authorized to view information for the survey, provider and/or provider associated with the incident, the system will not allow them to be added as a follower.



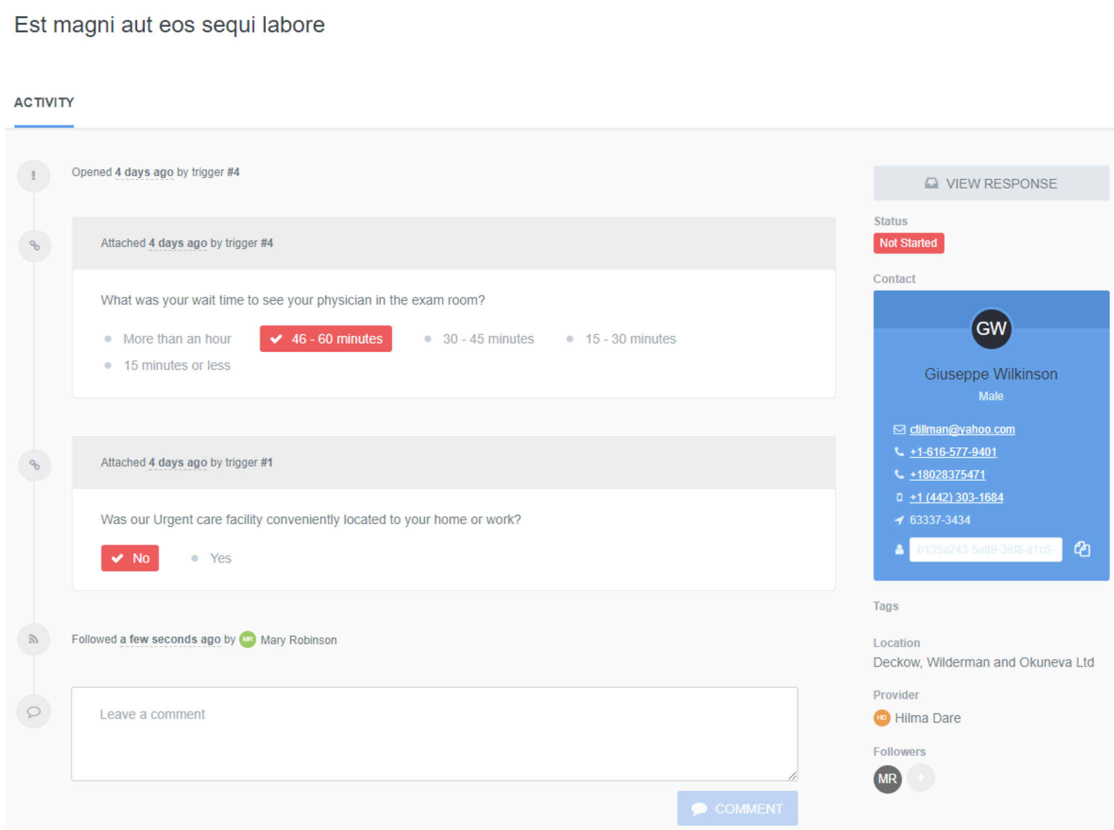
Submit: Once all the fields have been completed, click on the blue 'SUBMIT' button to create the incident. You can add Tags and additional comments as well as edit the Provider, Location and Followers after the incident is created.

Managing Triggered and Manually Created Incidents

While on the main Incidents page, click on the title in blue to open the incident.



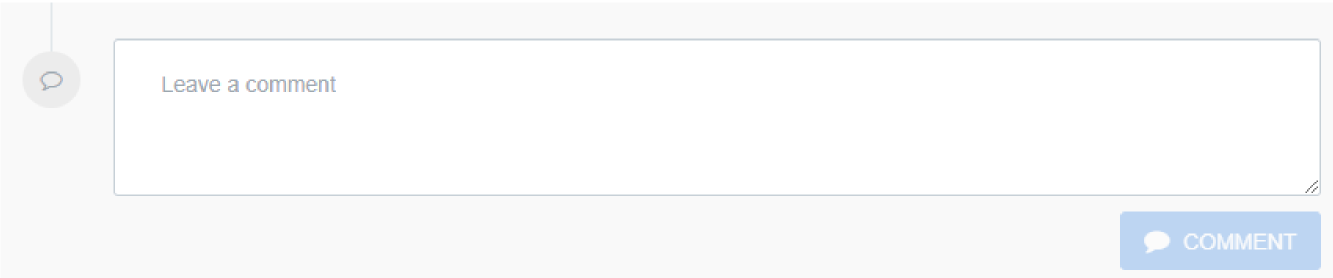
The incident management screen will open. This is where you can view additional details related to the incident and apply documentation. From the incident management screen, you can view the activity timeline, add comments, apply tags, edit the incident status, add followers and even edit the associated provider and location. If the incident is triggered by a survey response, you will see the question(s) and response(s) that triggered the incident. You also can view the entire survey as submitted by the patient.



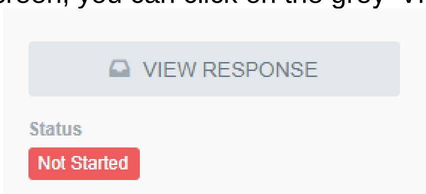
Incident Title: The title of the incident is shown at the top. If it is a triggered incident, the title will contain the name of the survey and the first question that set the trigger. Titles for manual incidents will appear as what was typed into the Title field when the incident was created.

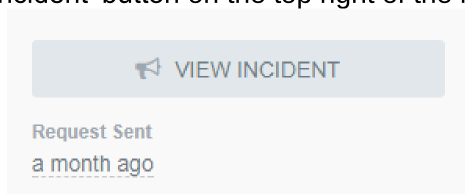
Activity Thread: The activity thread shows a timeline of all notable activity that has taken place on the incident. This includes when the incident was opened, the question(s) and response(s) that triggered the incident, added followers, status updates, and comments that have been documented. Each activity is automatically time/date stamped and includes the name of the user who associated with the activity.

Comments: Comments can be documented by typing into the white text box and clicking on the blue ‘Comment’ button to save. There is no limit to how many comments can be added. A new text box will appear each time a comment is saved. (Please Note: Once a comment has been saved it cannot be edited.) The comments added to the incident management screen may only be accessed via the Clinect portal or from reports generated within the portal. The information is not shared with the patient nor does it populate in the patient’s PM or EHR account.

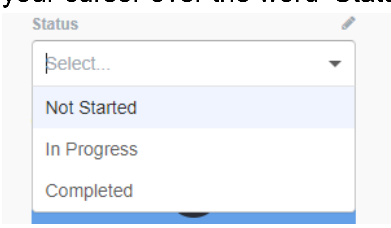


View Response: If the incident was triggered by one or more responses to survey questions, there will be a grey ‘View Response’ button on the top right of the incident management screen. Clicking on ‘View Response’ will allow you to view the entire survey as submitted by the patient. To return to the incident management screen, you can click on the grey ‘View Incident’ button on the top right of the responses page.



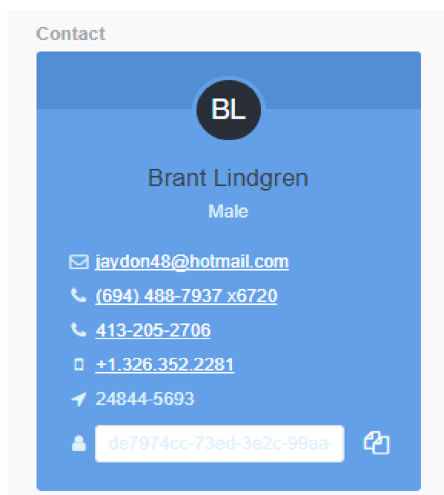


Status: The status identifies the progress of an incident. The default status is ‘Not Started’. If you hover your cursor over the word ‘Status’ you will see that the cursor changes from an arrow to a pointing finger.



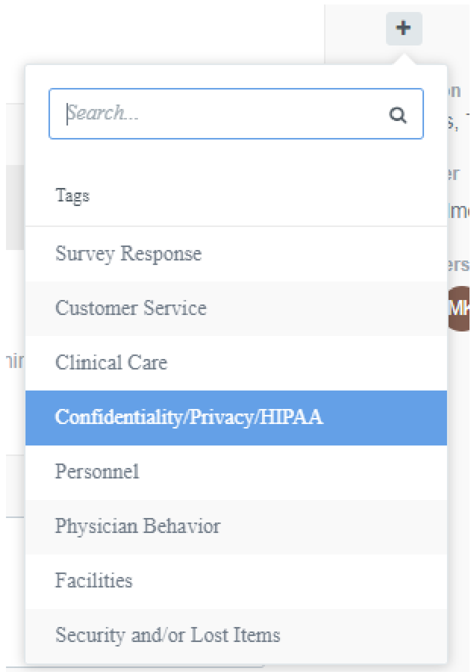
This indicates that you can click there to act. When you click on the word ‘Status’, you will see a drop-down menu appear. You can choose from the options to update the status. The status options typically include Not Started, In Progress and Complete. Custom statuses can be added by submitting a support ticket to support@clinecthealthcare.com.

Contact: The blue box on the right, below status, is the Contact section. This is where you will find details for the patient associated with the survey that triggered the incident or added to the manual incident.

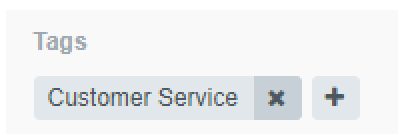


Details typically include the patient’s name, gender, email address and/or phone number and Patient ID. The ID shown in the white box can be used to look the patient up in the practice’s PM and/or EHR system. You can use the icon to the far right of the box to copy the ID to your computer’s clipboard. Then just paste into the associated search field within the PM or EHR system.

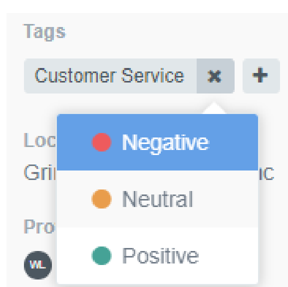
Tags: Tags can be applied to categorize the nature of an incident. If you hover your cursor over the word ‘Tags’, you will see that the cursor changes from an arrow to a pointing finger. Again, this indicates that you can click there to act. When you click on ‘Tags’ you will see a grey box with a ‘+’ symbol appear. Clicking on that box will open the tag selection menu. You can use the search box to find a specific tag or you can click on a tag from the list that appears.



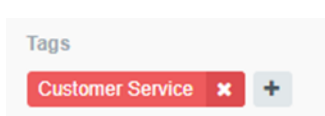
When a tag is selected, it will appear on a grey background. That indicates that a sentiment has not yet been applied.



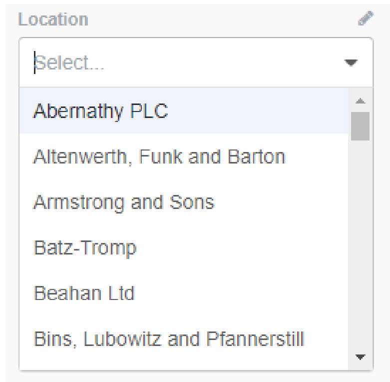
To apply a sentiment, click on the tag and a drop-down sentiment selection menu will appear. You can choose from Negative, Positive or Neutral sentiments. The color of the tag background will change based on the sentiment selected.



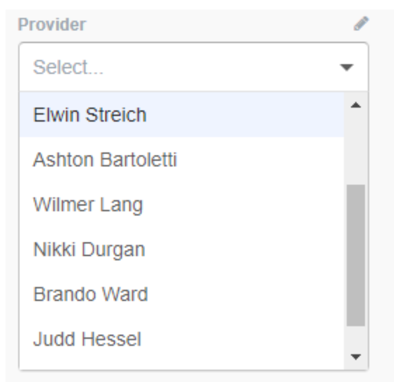
There is no limit to the number of tags that can be applied to a single incident. Just follow the steps above to apply additional tags. To remove a tag, you can click on the small ‘x’ to the right of the tag name. If you are unable to apply a sentiment or remove a tag, it is likely that you are no longer in edit mode.
Click on the word ‘Tags’ to open edit mode.



Location: For triggered incidents, the location displayed is the service location of the patient encounter associated with the survey. For manual incidents, the location can be manually added during the creation of the incident. In most cases, you will not need to edit the location listed. However, if needed, you can change the location by clicking on the word 'Location' and select from the drop-down menu that appears.

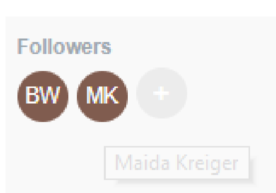


Provider: For triggered incidents, the provider displayed is the rendering provider of the patient encounter associated with the survey. For manual incidents, the provider can be manually added during the creation of the incident. In most cases, you will not need to edit the provider listed. However, if needed, you can change the provider by clicking on the word 'Provider' and select from the drop-down menu that appears.

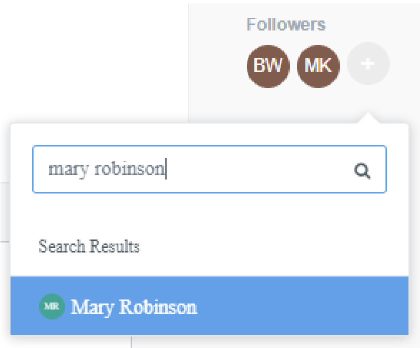


Followers: Followers are users who should be aware of specific incidents and possibly involved in the resolution. For triggered incidents, you may have followers automatically added based on specific questions, responses, providers and/or locations. For manual incidents, the user who creates the incident is automatically added as a follower. In both cases additional followers can be manually added.

All followers receive an email notification when they are added to an incident, whether they are added automatically or manually. The email will contain a link directly to the incident management page.
The initials of each follower are shown in the circles in the follower section. If you hover your cursor over the circle, you will see the full name of the follower.



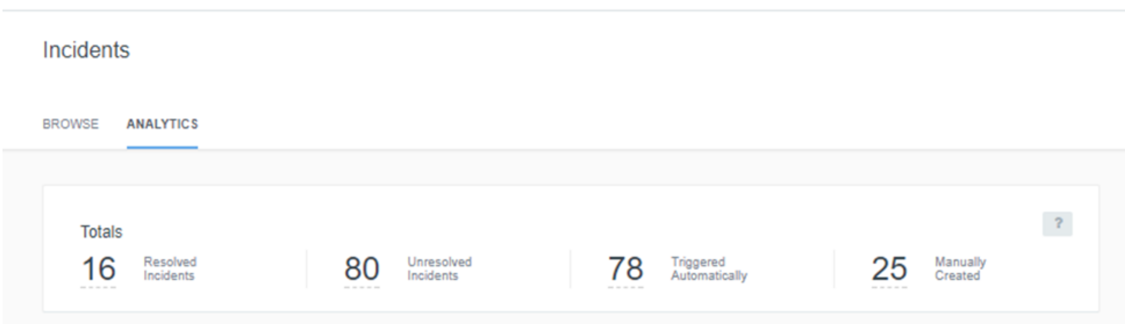
To add a follower, click on the grey circle with the '+' symbol. A search menu will display. Type in the first and last name of the portal user you want to add. Click on their name when it appears in the list below the search box. They will be added as a follower and the email notification will automatically be sent to them. Please note that only portal users can be added as followers, as they will need to have login credentials for the portal to access the incident management screen. This is for security and HIPAA reasons, due to the nature of the incident information.



If you are unable to add a portal user to an incident, it may be that they have conflicting permissions. If they are not authorized to view information for the survey, provider and/or provider associated with the incident, the system will not allow them to be added as a follower.

Incident Analytics

To access the incident analytics, click on the word 'Analytics' at the top of the page (next to 'Browse'). Here you can view totals associated with the incidents. All the totals are calculated with consideration of any filters that are applied.



Resolved Incidents: The total number of incidents that have been resolved and completed, based on the assigned incident status.

Unresolved Incidents: The total number of incidents that have not been resolved and have possibly not yet been started, based on the assigned incident status.

Triggered Automatically: The total number of incidents created automatically, based on the patient's submission of specific responses to select survey questions.

Manually created: The total number of incidents created manually by users.

Analytics

The analytics section of the portal is where you can view, export and print reports related to your survey data. There are two types of reports, Standard and Custom.

Standard Reports: These are the reports that are designed to satisfy basic reporting needs.

Custom Reports: These are reports that are customer specific. They may be created by a user applying specific filters and saving as a new report or created by Clinect based on a customer request.

Standard Reports

Below is a list of the standard reports you will likely see included. Additional custom reports may also be included.

Survey Summary: Overall summary of responses and average score by question (excluding comments). This report may be filtered by provider, location and/or question in the report viewer.

Comments by Provider: Patient comments are grouped by provider. The comments for each provider are shown on a separate page when viewed in the portal and exported to PDF. Each provider's comments will appear on a separate tab when exported to Excel. This report may be filtered by provider, location and/or question in the report viewer.

Comments by Location: Patient comments are grouped by location. The comments for each location are shown on a separate page when viewed in the portal and exported to PDF. Each location's comments will appear on a separate tab when exported to Excel. This report may be filtered by provider, location and/or question in the report viewer.

Comments by Question: Patient comments are grouped by question. This report may be filtered by provider, location and/or question in the report viewer.

Questions by Provider: Comparison of multiple providers, showing a breakdown of responses and average scores. This report may be filtered by provider, location and/or question in the report viewer.

Questions by Location: Comparison of multiple locations, showing a breakdown of responses and average scores. This report may be filtered by provider, location and/or question in the report viewer.

Trending: Comparison of multiple months, showing a breakdown of responses and average scores. This report may be filtered by provider, location and/or question in the report viewer.

Active Provider List: Shows the list of providers we currently have active within the survey program. It can be used to audit and ensure that surveys are being sent for the appropriate providers.

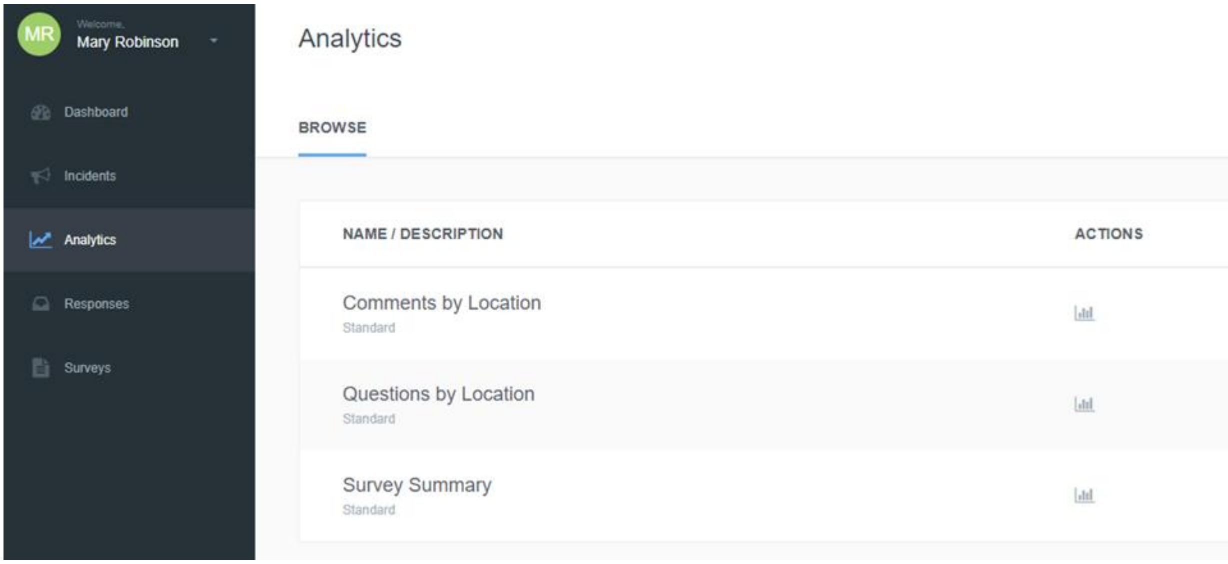
NPS by Provider: This is a standard report for customers who incorporate Net Promoter Scores with their surveys. It shows a breakdown of the NPS by individual provider.

NPS by Location: This is a standard report for customers who incorporate Net Promoter Scores with their surveys. It shows a breakdown of the NPS by individual location.

NPS by Month: This is a standard report for customers who incorporate Net Promoter Scores with their surveys. It shows a trending of NPS by month.

Viewing Reports

To export or print a report, you first must generate it in the report viewer. Select the report you want to run and click on the chart icon in the Actions column to the right of the report name. For the data to display, you must set the initial filters.



Report Filters

There are two different places where report filters are applied. One set of filters are applied before the report is generated and the second set of filters is accessible once the report is displayed in the portal.

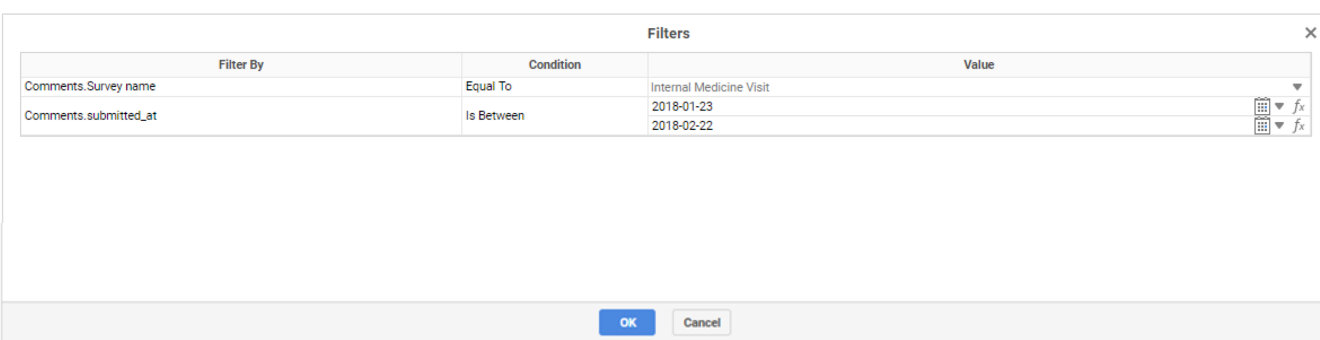
Filters Before Report Generates

You will have the ability to apply select filters prior to running the report.

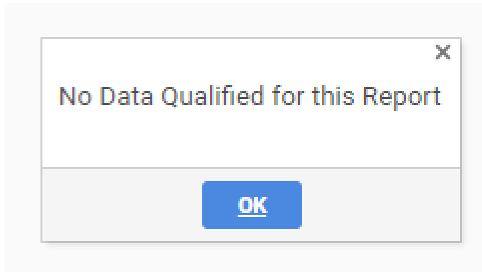
Survey Name: Name of the survey you want to view results for.

Date Submitted: Date range you want to view results for. Please note that the dates reflect when the surveys were submitted by the patient. This may differ from the encounter date and/or date when the survey invitation was sent to the patient.

When you click on the 'View Report' icon, a filter window will appear (see below). Before the report generates you will need to provide the name of the survey you want to view and the date range (the dates are based on when the survey was submitted by the patient). You can change the default date range by clicking on the calendar icon to the right. The *fx* icon to the right of the calendar icon are preset date filters that a user may also utilize. Once the filters are set, click blue OK button.

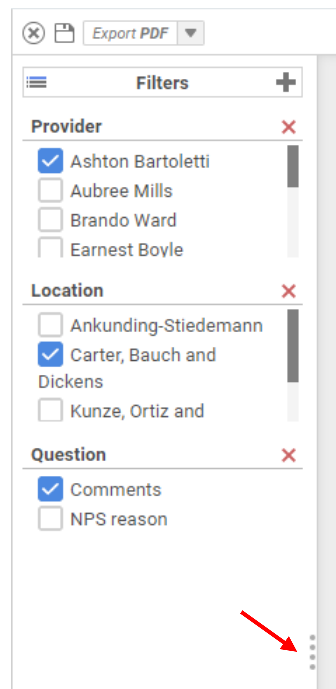


If you see a message stating ‘No Data Qualified for the Report’ it may mean that there is a filter field missing a value (most commonly the survey name), or it could be that there are no responses for the selected survey based on the date range and/or other filters entered:



Filters After Report Generates

You will have the ability to apply additional filters after generating the report.



Provider: Name of provider(s) you want to view results for.

Location: Name of location(s) you want to view results for.

Question: Question(s) you want to view results for.

By default, the report will display information for all providers, all locations and all questions with responses for the selected survey and date range. However, you can filter the data further.

Once the report is generated, the user can click on the four dots to the left to expand the menu and view additional filter options.

These filters are interactive, and the user will see the report actively change on the screen when selections are made (or unmade). Most of the standard reports will include interactive filters for Provider, Location and Question. The user can select any combination of filters. To select a filter, click in the checkbox to the left of the option (a check mark will appear). To remove a filter, click in that same checkbox a second time (the check mark will be removed).

The selection in the top filter selection will drive the options that appear in the sections below. For example, if you select a provider in the top section, the location options in the section below may change to reflect the locations that have data for the provider selected.

Report Tool Bar

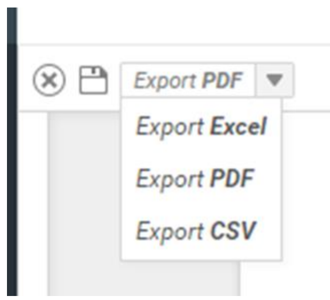
The tool bar at the top of the report will display the number of pages included. You can use the arrows to navigate to the various pages. You can also use the Find tool to search the report for specific information. The tool bar is also where you will find the options to save and export the reports. To print a report, you must first export it.

Report Page Navigation

The numbers indicate which page of the report you are currently on, and the total number of pages included in the report. In the below example, the numbers indicate that you are viewing page 1 out of 27 pages. The double arrows will take you to the first or last page of the report, the single arrows will take you to the next page. You can also type specific words into the Find… section next to be directed to pages within the reports that contains the words you searched for.

Exporting Reports

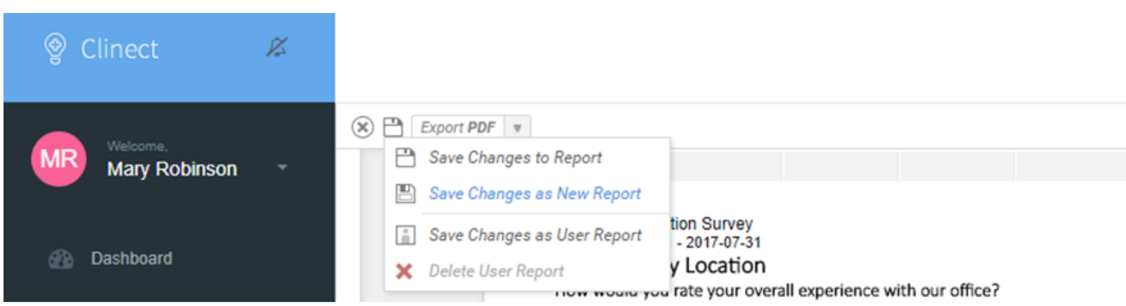
You can export the report, retaining any selected filters, by clicking on the Export dropdown. The default export option will be displayed, but you can choose a different export option by clicking on the drop-down arrow to the right. The available export options will display in the drop-down. Click on your preferred option. Exporting allows you to save a copy of the report to your files. You will need to export the reports to print them.



Saving Reports

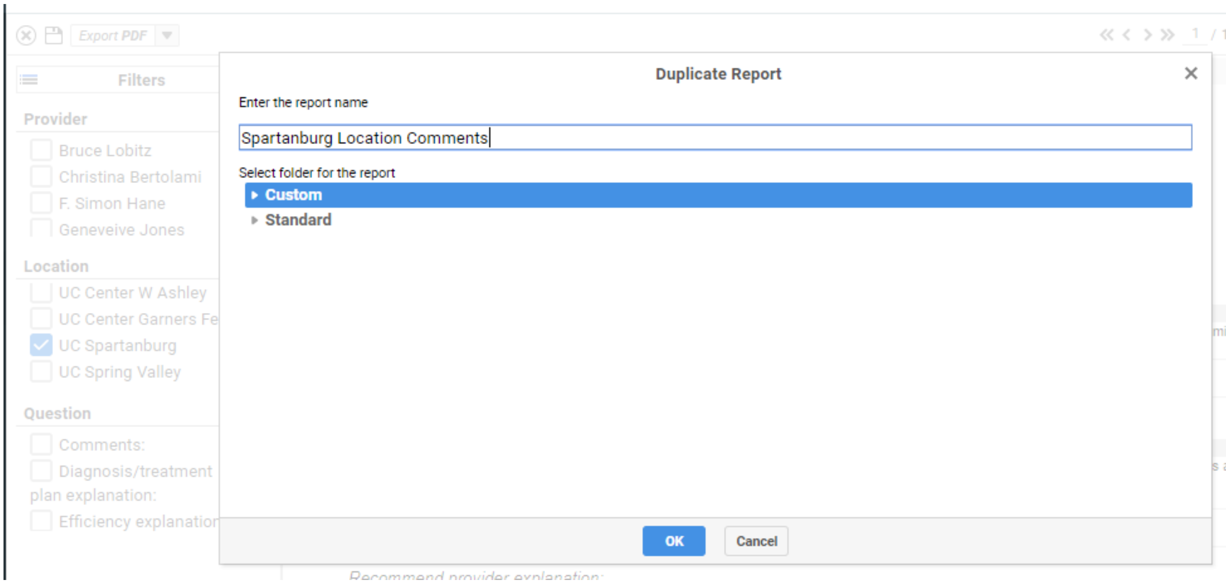
If you would like to save the report with the interactive filters you've applied, click on the floppy disk icon and make the appropriate selection (see below). When saving a report, keep in mind that only the filters applied after the report runs will remain selected; the survey name and date range selected prior to the report generation will not be saved.

Please Note: Saved changes to existing reports and the creation of new reports will impact the reports for all users who have access to the analytics section of the Clinect portal.

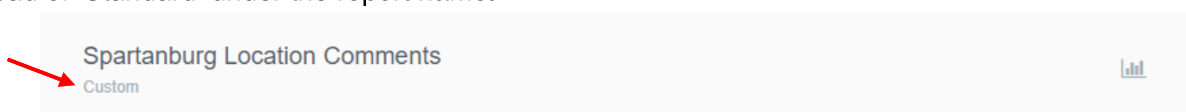


Save Changes to Report: This option will overwrite the existing report to reflect any filter changes that have been applied.

Save Changes as New Report (Recommended Option): This option allows you to create a new report that will reflect any filter changes that have been applied. You will enter a name for the new report, select the 'Custom' folder, then click the blue OK button.



Your report will appear along with the standard reports in the list of options displayed, but will show ‘Custom’ instead of ‘Standard’ under the report name.

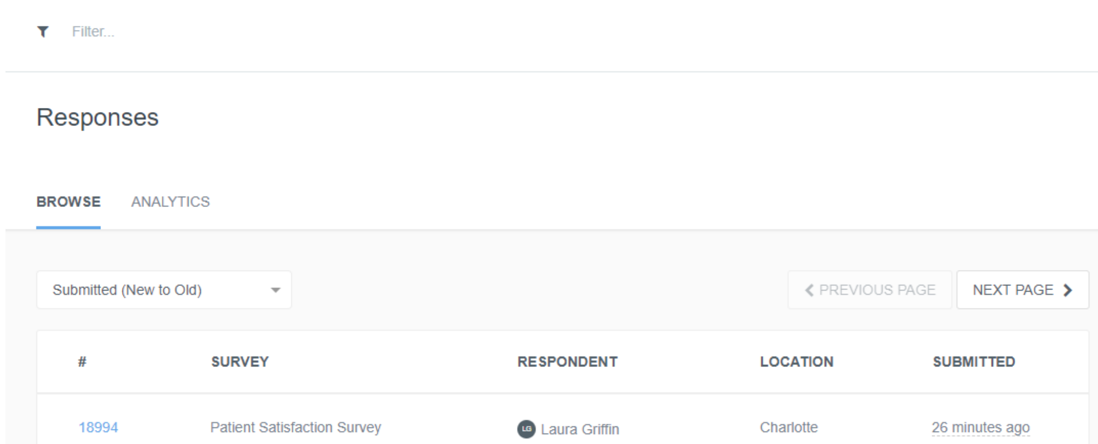


Responses

The responses section of the portal is where you can view the details for all submitted surveys. This is the section of the portal that can be used to to see an overview of all surveys submitted for a specific date range, provider, location and/or survey type. You can also use the responses section to find details for any submitted surveys associated with specific patients. Clicking on the Response ID will open the entire survey as submitted by the patient and will show additional information regarding their encounter.

Browse Responses

Responses open to the Browse section. Here you can view, sort and filter the list of all responses that have been submitted. The ‘Previous Page’ and ‘Next Page’ buttons can be used to navigate through the list of responses. This page also shows the Response ID #, Survey, Respondent, Location and Submitted date at a glance.



Response ID #: The number shown in the # column represents the Response ID. Each survey that is submitted is assigned a Response ID. This number is unique to Clinect and cannot be used to identify patients or encounters in the PM or EHR system.

Survey: The name of the survey submitted.

Respondent: The name of the patient associated with the submitted survey.

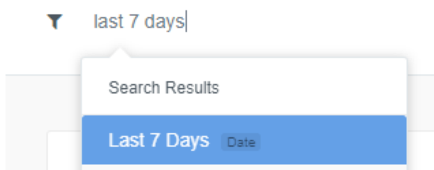
Location: The display name of the service location associated with the submitted survey.

Submitted: Indicates when the survey was submitted by the respondent. You can hover your cursor over the underlined information to see the specific date and time of submission.

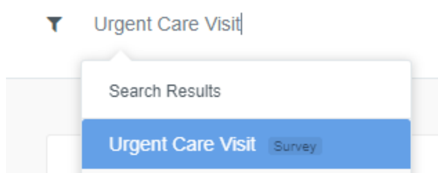
Response Filters

You will find the filter field at the top of the Response page, just like the Dashboard page. Any filters that were added on the Dashboard (or other section of the portal) will populate here unless removed. This includes the date default filter. In addition to filtering by Date, Survey, Provider and Location, there are a few additional filter options available. You can also filter by Incident Status, Tag and Person.

Date Filter: Type in any of the following date options (only one Date filter may be applied at a time): 'Today', 'Last 7 Days', 'Last 30 Days', 'Last 60 Days', 'Last 90 Days', 'Previous Quarter', 'Previous Month', 'Previous Year', 'Previous Week'; 'This Quarter', 'This Month', 'This Year', 'This Week'

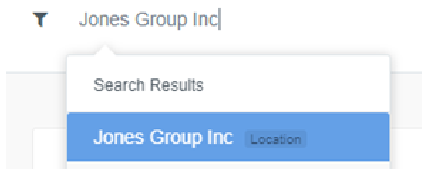


Survey Filter: Type in the name of the survey(s) or type '*survey'* if you are unsure of the exact survey names used by your practice. It will have the name of the survey and an identifiable tag such as "the work survey".

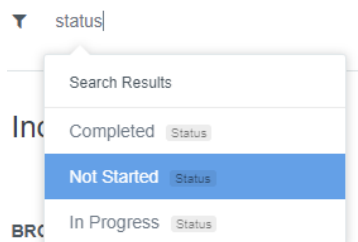


Provider Filter: Type in the name of the rendering provider(s). If you filter by multiple providers, it will show you data for all the providers included. In the example below, you will see that the name appears twice. If you want to filter the data by Provider, make sure to select the name that shows 'Provider' (and not 'Person') to the right. We also have the ability to create provider 'groups' that you can filter by.

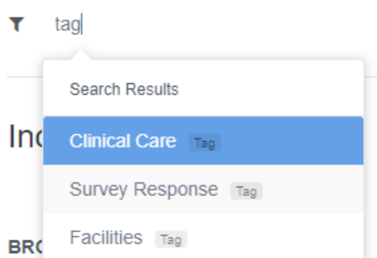
Location Filter: Type in the name of the service location(s). If you filter by multiple locations, it will show you data for all the locations included. We also have the ability to create location ‘groups’ that you can filter by.



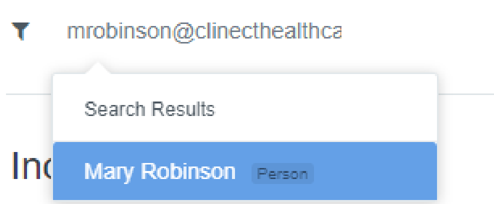
Status: Type in the name of the incident status you want to filter by or type the word ‘Status’ to display the available options. Custom statuses can be added by request. Most practices start with these three, ‘Not Started’, ‘In Progress’, and ‘Completed’.



Tag: Tags are used to categorize incidents. Type in the name of the tag you want to filter by or type the word ‘Tag’ to display the available options. We start you off with a list of suggested tags, but custom tags may also be added.

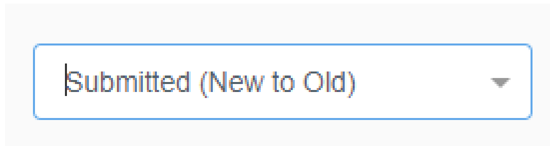


Person: You can filter by Person to isolate incidents specific to a patient and/or follower. Followers are users added or assigned to incidents, typically because they should be aware of the incident or possibly act to resolve it. Type in the name or email address of the patient or user/follower to see all the incidents they are included on. For patients, you can also type their Patient ID into the filter field.



Response Sorting Options

In addition to filtering, you can also change the order of how the responses are listed by using sort options. The default order is 'Submitted' (New to Old). You can click on the drop-down arrow to the right to expand the full menu of sorting options.



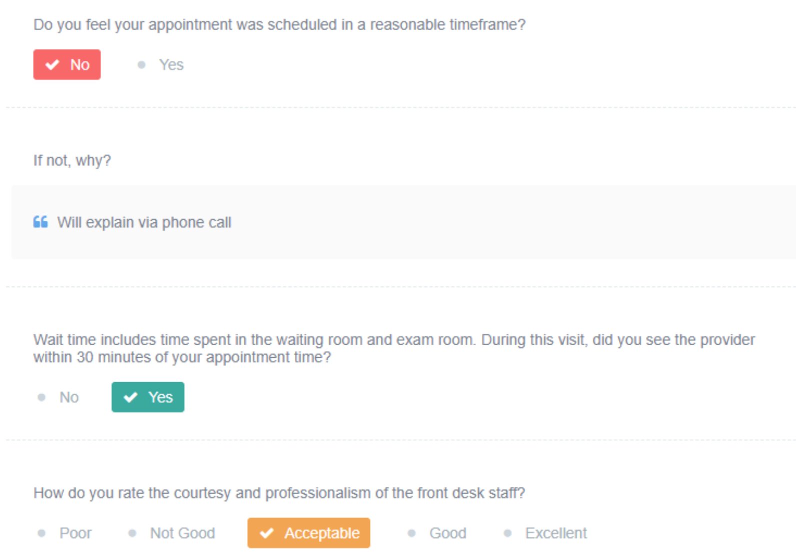
Submitted (New to Old): Lists most recently submitted responses on top.

Submitted (Old to New): Lists oldest responses on top.

View Response

Clicking on the Response ID number in blue (in the # column) will allow you to view the entire survey, as submitted by the patient, including details regarding their encounter.

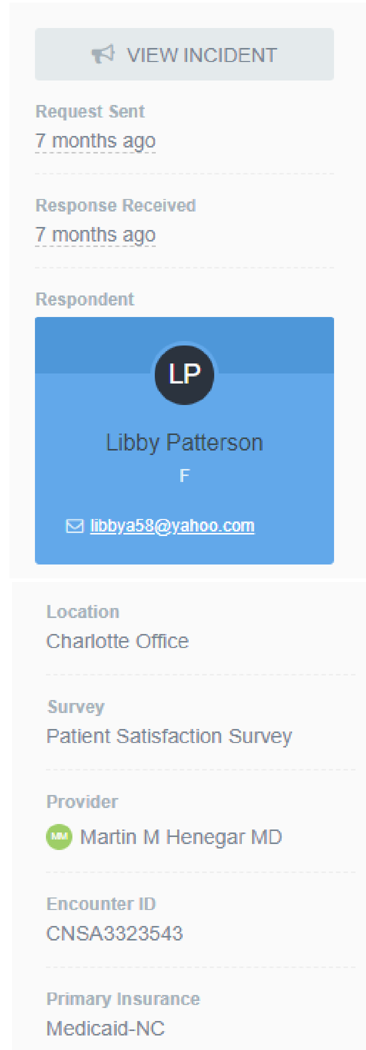
When the response is opened, you will see the survey questions, and responses as submitted by the patient, on the left of the screen. The responses are color-coded to display the associated sentiment. In general, responses that are considered negative are shown in red, responses of a neutral nature are shown in mustard yellow and positive responses are green. This allows you to quickly scan the responses to determine the general sentiment of the survey. If you see a lot of red, it could be an indication that the patient is dissatified with their visit.



To the right of the screen, you will find additional details about the survey and the patient's encounter.

View Incident: If there is an incident associated with the survey, you will see a 'View Incident' button at the top of the right-side section. Clicking that button will take you to the incident management section.

Request Sent: When the survey invitation was sent to the patient. You can hover your cursor over the underlined information to see the specific date and time.



Response Received: When the survey was submitted by the patient. You can hover your cursor over the underlined infiormation to see the specific date and time.

Respondent: This is where you will find details for the patient who submitted the survey. Details typically include the patient's name, gender, email address and/or phone number and Patient ID. The ID shown in the white box can be used to look the patient up in your practice's PM and/or EHR system. You can use the icon to the far right of the box to copy the ID to your computer's clipboard. Then just paste ir into the associated search field within the PM or EHR system.

Location: The service location of the patient encounter associated with the survey. In most cases, you will not need to edit the location listed. However, if needed, you can change the location by clicking on the word 'Location' and select from the drop-down menu that appears.

Survey: The name of the survey type submitted by the patient.

Provider: The rendering provider of the patient encounter associated with the survey. In most cases, you will not need to edit the provider listed. However, if needed, you can change the provider by clicking on the word 'Provider' and select from the drop-down menu that appears.

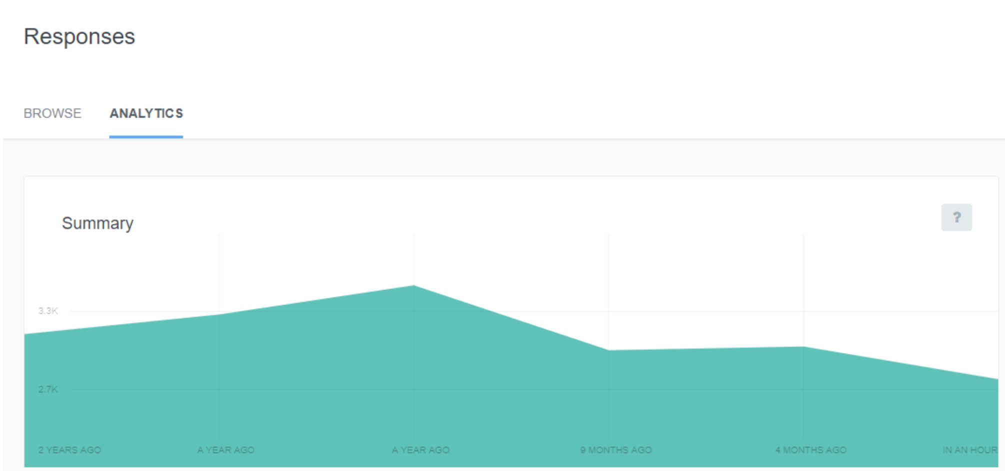
Encounter ID: The PM/EHR Encounter ID associated with the survey.

Primary Insurance: Primary insurance for the patient encounter associated with the survey.

You may also see additional information, depending on the configurations specific to your practice. For example, Date of Birth, Appointment Type and Date of Service.

Response Analytics

To access the response analytics, click on the word 'Analytics' at the top of the page (next to 'Browse'). This section displays a graph showing the sum of responses received over time. The sums are calculated with consideration of any filters that are applied.



Surveys

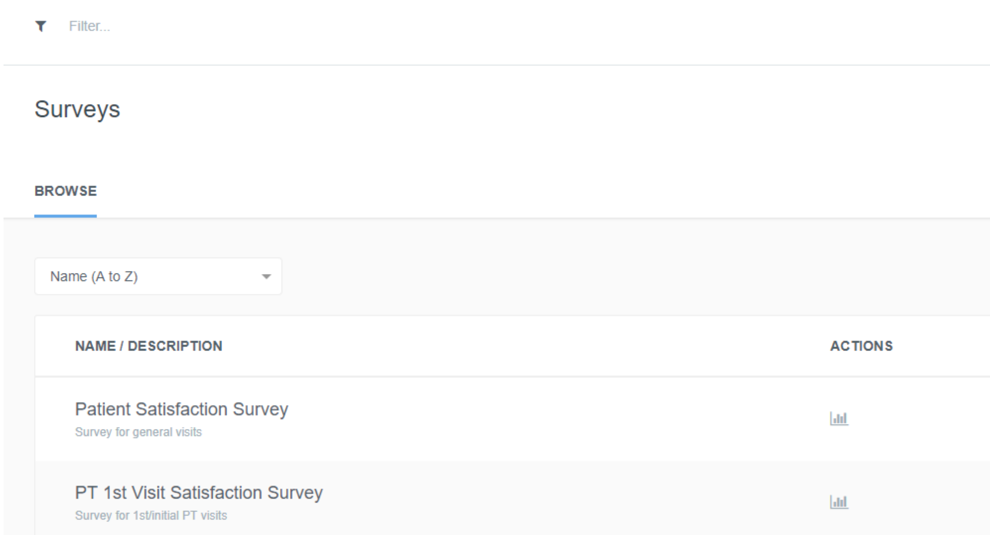
The surveys section is where you can view a list of all surveys used by the practice (the list displayed will depend of the permissions set for the portal user). This section is also where the survey summaries can be accessed, including the ability to drill down on specific responses.

Browse Surveys

Surveys open to the Browse section. Here you can view the list of available surveys and access the survey summaries.

Name/Description: The name and description of the survey.

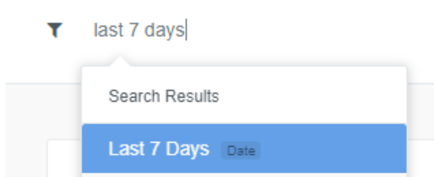
Actions: Clicking on the chart icon will open the summary of responses for the associated survey.



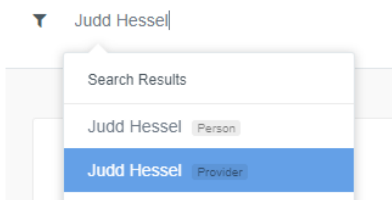
Survey Filters

You will find the filter field at the top of the Surveys page, just like the Dashboard page. Any filters that were added on the Dashboard (or other section of the portal) will populate here unless removed. This includes the date default filter. Applying filters here won't impact the list of surveys displayed, but it will impact the results shown when accessing the summary of survey responses (unless the filters are removed).

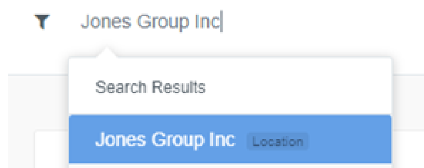
Date Filter: Type in any of the following date options (only one Date filter may be applied at a time): 'Today', 'Last 7 Days', 'Last 30 Days', 'Last 60 Days', 'Last 90 Days', 'Previous Quarter', 'Previous Month', 'Previous Year', 'Previous Week'; 'This Quarter', 'This Month', 'This Year', 'This Week'



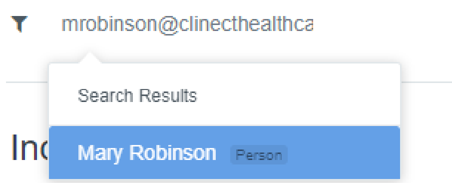
Provider Filter: Type in the name of the rendering provider(s). If you filter by multiple providers, it will show you data for all the providers included. In the example below, you will see that the name appears twice. If you want to filter the data by Provider, make sure to select the name that shows 'Provider' (and not 'Person') to the right. We also have the ability to create provider 'groups' that you can filter by.



Location Filter: Type in the name of the service location(s). If you filter by multiple locations, it will show you data for all the locations included. We also have the ability to create location 'groups' that you can filter by.

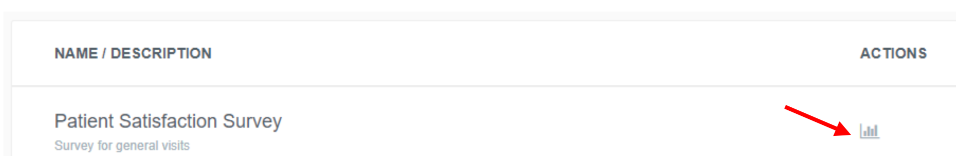


Person: You can filter by Person to isolate incidents specific to a patient and/or follower. Followers are users added or assigned to incidents, typically because they should be aware of the incident or possibly act to resolve it. Type in the name or email address of the patient or user/follower to see all the incidents they are included on. For patients, you can also type their Patient ID into the filter field.



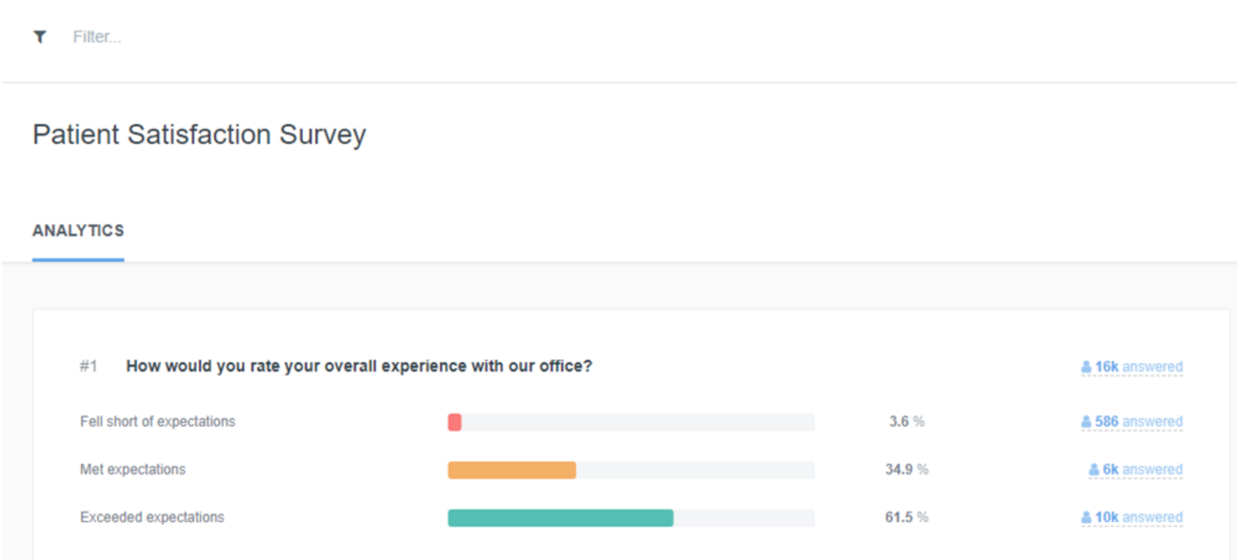
Survey Summary

To open the summary of responses for a survey, click on the chart icon in the actions column.



When the survey summary opens, you will see each question included on the survey and a breakdown on patient responses for those questions. Keep in mind, the information displayed will be impacted by any filters applied.

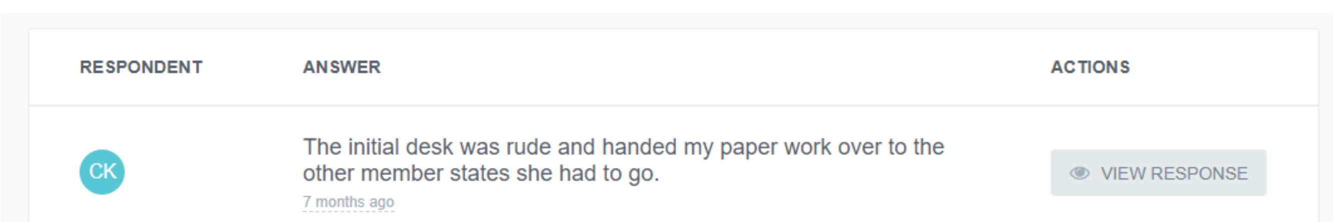
Below each question, you will see the list of avalaible response options to the left, then a bar indiciating the count of how many times that option was selected, followed by the percentage and finally (to the far right, shown in blue) you will see the specific count of times that response was submitted. If you hover your cursor over that count, you will notice that it changes from an arrow to a pointing finger. As with other sections in the portal, this is an indication that you can click there to take additional action. Clicking on the count will open a detailed Answer page.



Answers

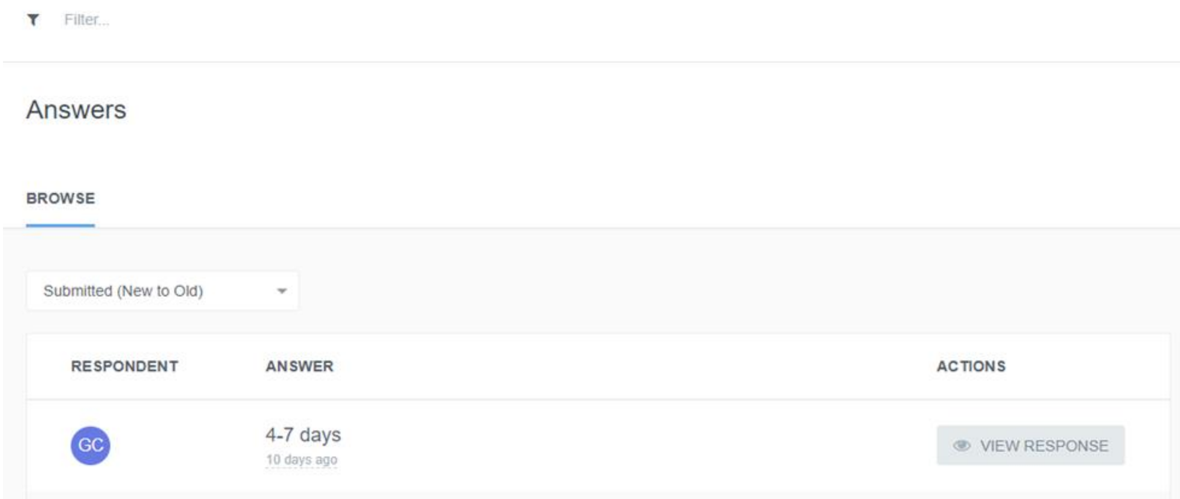
The answers section is accessed by drilling down on responses from the survey summary. This is done by clicking on the count of responses shown in blue to the right of each response option. For example, looking at the question below, 206 patients submitted comments explaining why they would not recommend the office. If you wanted to view those comments, you would click on '206 answered' shown in blue to the right.

You have now accessed the answer section. In this case, you are seeing all of the comments submitted by patients for that specific question.



Browse Answers

Answers open to the Browse section. Here you can view, sort and filter the list of all answers that have been submitted. You can also access the full survey for a given respondent. The ‘Previous Page’ and ‘Next Page’ buttons can be used to navigate through the list of responses.



Respondent: The initials of the respondent who submitted the response. You can see their full name by hovering the cursor over the circle.

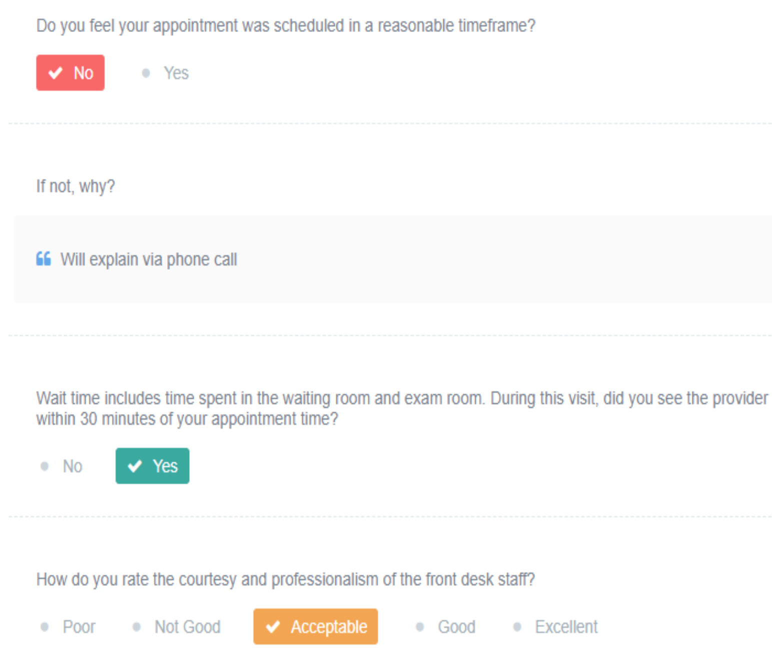
Answer: The response submitted by the respondent. If it is a free-text response, you will see the patients’ comments. Otherwise, you will see the standardized response option they have selected.

Actions: Clicking on the View Response button in grey will take you to the full survey submitted by the respondent. (See the section in this guide called ‘Viewing Responses’ for additional information.)

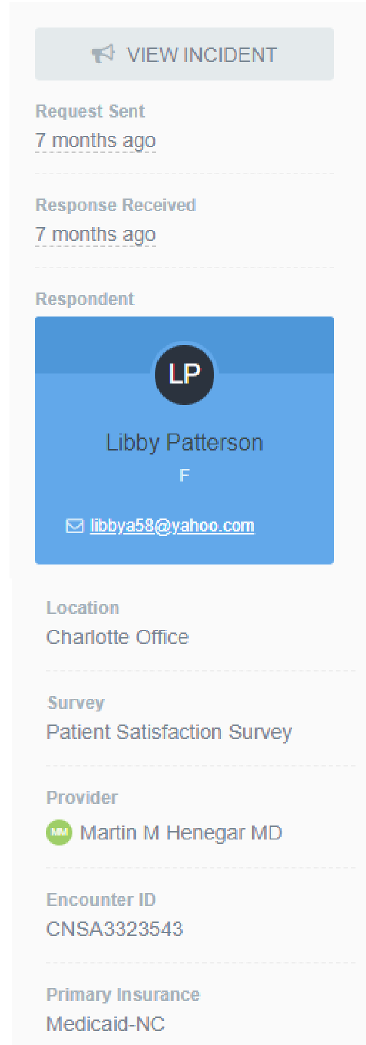
View Response

Clicking on the View Response button in the Actions column will open the entire survey, as submitted by the patient, including details regarding their encounter.

When the response is opened, you will see the survey questions, and responses as submitted by the patient, on the left of the screen. The responses are color-coded to display the associated sentiment. In general, responses that are considered negative are shown in red, responses of a neutral nature are shown in mustard yellow and positive responses are green. This allows you to quickly scan the responses to determine the general sentiment of the survey. If you see a lot of red, it could be an indication that the patient is dissatified with their visit.



To the right of the screen, you will find additional details about the survey and the patient's encounter.



View Incident: If there is an incident associated with the survey, you will see a 'View Incident' button at the top of the right-side section. Clicking that button will take you to the incident management section.

Request Sent: When the survey invitation was sent to the patient. You can hover your cursor over the underlined infiormation to see the specific date and time.

Response Received: When the survey was submitted by the patient. You can hover your cursor over the underlined infiormation to see the specific date and time.

Respondent: This is where you will find details for the patient who submitted the survey. Details typically include the patient's name, gender, email address and/or phone number and Patient ID. The ID shown in the white box can be used to look the patient up in the practice's PM and/or EHR system. You can use the icon to the far right of the box to copy the ID to your computer's clipboard. Then just paste into the associated search field within the PM or EHR system.

Location: The service location of the patient encounter associated with the survey. In most cases, you will not need to edit the location listed. However, if needed, you can change the location by clicking on the word 'Location' and select from the drop-down menu that appears.

Survey: The name of the survey type submitted by the patient.

Provider: The rendering provider of the patient encounter associated with the survey. In most cases, you will not need to edit the provider listed. However, if needed, you can change the provider by clicking on the word 'Provider' and select from the drop-down menu that appears.

Encounter ID: The PM/EHR Encounter ID associated with the survey.

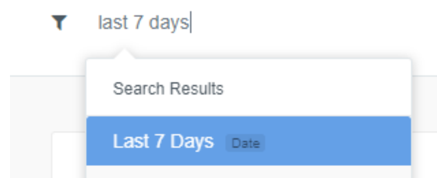
Primary Insurance: Primary insurance for the patient encounter associated with the survey.

You may also see additional information, depending on the configurations specific to your practice. For example, Date of Birth, Appointment Type and Date of Service.

Answer Filters

You will find the filter field at the top of the Answers page, just like the Dashboard page. Any filters that were added on the Dashboard (or other section of the portal) will populate here unless removed. This includes the date default filter.

Date Filter: Type in any of the following date options (only one Date filter may be applied at a time): ‘Today’, ‘Last 7 Days’, ‘Last 30 Days’, ‘Last 60 Days’, ‘Last 90 Days’, ‘Previous Quarter’, ‘Previous Month’, ‘Previous Year’, ‘Previous Week’; ‘This Quarter’, ‘This Month’, ‘This Year’, ‘This Week’



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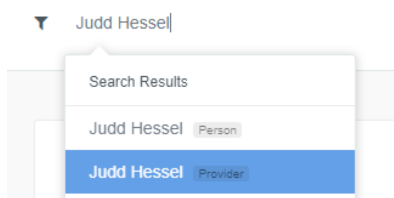
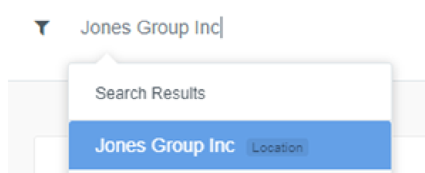
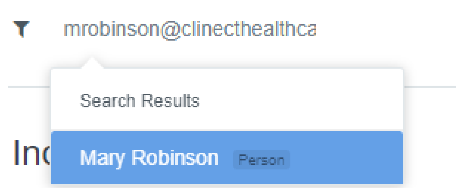


Location Filter: Type in the name of the service location(s). If you filter by multiple locations, it will show you data for all the locations included. We also have the ability to create location ‘groups’ that you can filter by.

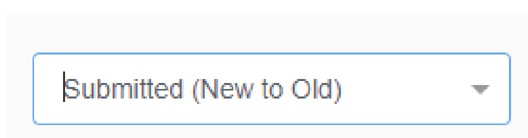


Person: You can filter by Person to isolate incidents specific to a patient and/or follower. Followers are users added to incidents, typically because they should be aware of the incident or possibly act to resolve it. Type in the name or email address of the patient or user/follower to see all the incidents they are included on. For patients, you can also type their Patient ID into the filter field.



Answer Sorting Options

In addition to filtering, you can also change the order of how the responses are listed by using the sort options. The default order is ‘Submitted’ (New to Old). You can click on the arrow to the right to expand the full menu of sort options.



Submitted (New to Old): Lists most recently submitted responses on top.

Submitted (Old to New): Lists oldest responses on top.

User Guide Resource

You can reach Clinect Support by sending emails to support@clinecthealthcare.com or by calling 877.400.0243.

A. **Navigation Bar**: Always present and accessible for navigating throughout the platform.
   a. *Dashboard*: default homepage displaying a high-level overview of the data collected
   b. *Incidents*: central location for documentation and management of patient issues
   c. *Analytics*: standard and custom reports
   d. *Responses*: details of survey responses submitted by patients
   e. *Surveys*: displays the list of surveys used by practice, including summary of responses

B. **Provider**: Refers to the professional who rendered service to the patient for the encounter that generated the survey.

C. **Location:** Refers to the location where the service was rendered for the encounter that generated the survey.

D. **Date:** When a date is used with filters and reports it is referring to the date that the survey responses were received, and not the date of service or the date the survey was sent to the patient.

E. **Surveys Requested**: The number of survey invitations sent.

F. **Responses Received**: The number of survey responses that were submitted.

G. **Contact**: The respondent/patient who submitted the survey.

H. **View Response** (grey button on Incidents and Answers sections): Displays the patient's survey in its entirety.

I. **View Incident** (grey button on Responses): Only appears when there is an incident associated with a response. Displays the incident management screen for the incident associated with the response.

J. **Response ID**: The unique Clinect ID number associated with a specific survey submitted by a contact.

K. **Incident ID**: The unique Clinect ID number associated with a specific incident.

L. **Incident Status:** This filter option is very helpful if you are monitoring a specific team or department on resolving the incidents that trigger responses needing their specific attention. There are typically three status options to filter incidents: Not Started, In Progress, Complete. The status can be changed at any time.

M. **Trigger #:** The unique Clinect ID number associated with a specific trigger, which caused an incident to be automatically created based on a survey response.

N. **Follower:** Followers are users who should be aware of specific incidents and possibly involved in the resolution. For manual incidents, the user who creates the incident is automatically added as a follower. In both cases additional followers can be manually added.

O. **Sticky Filters:** Filters are 'sticky' and remain applied, even as the user navigates to other sections of the portal, until the filters are removed, or the user logs out of the portal. To remove a filter, click on the small x to the right of the filter. Each filter needs to be removed individually.