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## Clinect Portal 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 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.

▼ Filter...

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Responses

**BROWSE** ANALYTICS

Submitted (New to Old)
< PREVIOUS PAGE
NEXT PAGE >

#	SURVEY	RESPONDENT	LOCATION	SUBMITTED
18994	Patient Satisfaction Survey	Laura Griffin	Charlotte	<u>26 minutes ago</u>

**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.

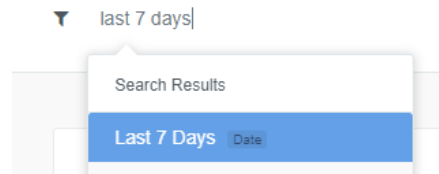
**Submitted:** Indicates when the survey was submitted by the respondent. You can hover your cursor over the underlined information to see the specific date and time of submission.



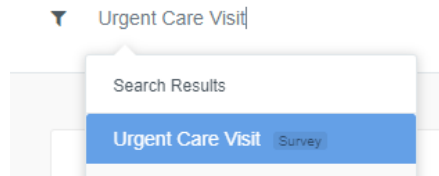
## Response Filters

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'



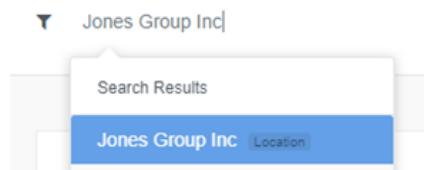
**Survey Filter:** Type in the name of the survey(s) or type 'survey' if you are unsure of the exact survey names used by your practice. It will have the name of the survey and an identifiable tag such as "the work survey".



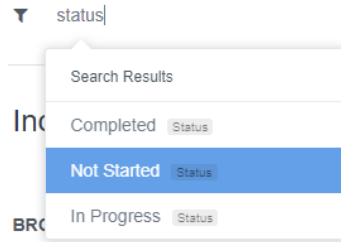
**Provider Filter:** Type in the name of the rendering provider(s). If you filter by multiple providers, it will show you data for all the providers included. In the example below, you will see that the name appears twice. If you want to filter the data by Provider, make sure to select the name that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



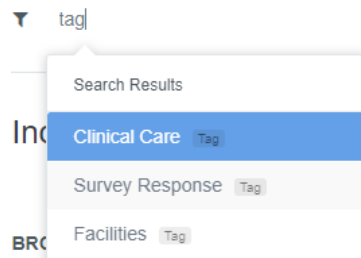
**Location Filter:** Type in the name of the service location(s). If you filter by multiple locations, it will show you data for all the locations included. We also have the ability to create location 'groups' that you can filter by.



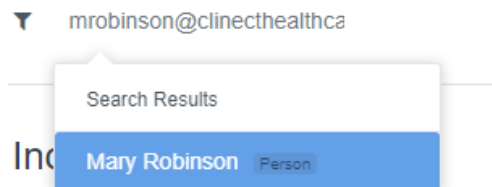
**Status:** Type in the name of the incident status you want to filter by or type the word 'Status' to display the available options. Custom statuses can be added by request. Most practices start with these three, 'Not Started', 'In Progress', and 'Completed'.



**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.

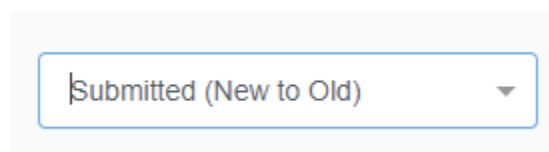


**Person:** You can filter by Person to isolate incidents specific to a patient and/or follower. Followers are users added or assigned to incidents, typically because they should be aware of the incident or possibly act to resolve it. Type in the name or email address of the patient or user/follower 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 the sorting 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.

## 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 dissatisfied with their visit.

Do you feel your appointment was scheduled in a reasonable timeframe?

☒ No ☐ Yes

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If not, why?

💬 Will explain via phone call

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Wait time includes time spent in the waiting room and exam room. During this visit, did you see the provider within 30 minutes of your appointment time?

☐ No ☒ Yes

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How do you rate the courtesy and professionalism of the front desk staff?

☐ Poor ☐ Not Good ☒ Acceptable ☐ Good ☐ Excellent

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 information 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.

[VIEW INCIDENT](#)

**Request Sent**  
7 months ago

**Response Received**  
7 months ago

**Respondent**

LP

Libby Patterson

F

libbya58@yahoo.com



**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.

Location  
Charlotte Office

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Survey  
Patient Satisfaction Survey

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Provider  
 Martin M Henegar MD

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Encounter ID  
CNSA3323543

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Primary Insurance  
Medicaid-NC

## 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.

