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## Clinect Portal 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.

Filter...

---

Surveys

BROWSE

Name (A to Z) ▼

NAME / DESCRIPTION	ACTIONS
<b>Patient Satisfaction Survey</b> <small>Survey for general visits</small>	
<b>PT 1st Visit Satisfaction Survey</b> <small>Survey for 1st/initial PT visits</small>	

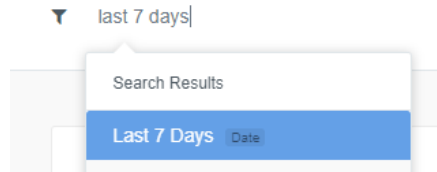
### Survey Filters

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 default date

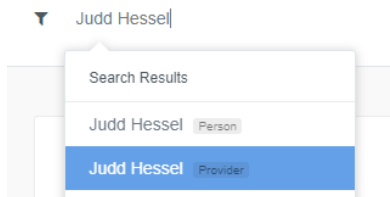


filter. Applying filters here won't impact the list of surveys displayed, but it will impact the results shown when accessing the summary of survey responses (unless the filters are removed).

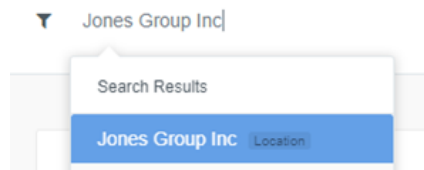
**Date Filter:** Type in any of the following date options (only one Date filter may be applied at a time): 'Today', 'Last 7 Days', 'Last 30 Days', 'Last 60 Days', 'Last 90 Days', 'Previous Quarter', 'Previous Month', 'Previous Year', 'Previous Week', 'This Quarter', 'This Month', 'This Year', 'This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



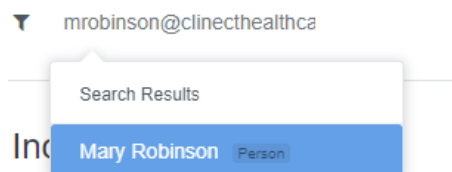
**Provider Filter:** Type in the name of the rendering provider(s). If you filter by multiple providers, it will show you data for all the providers included. In the example below, you will see that the name appears twice. If you want to filter the data by Provider, make sure to select the name that 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.



NAME / DESCRIPTION	ACTIONS
Patient Satisfaction Survey Survey for general visits	

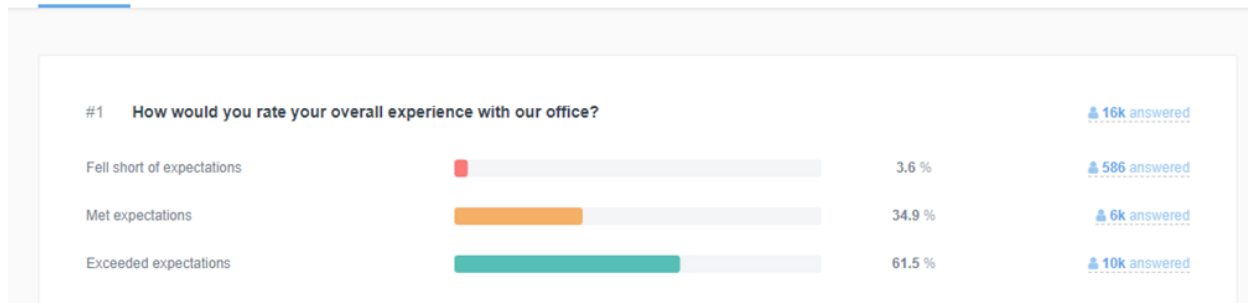
When the survey summary opens, you will see each question included on the survey and a breakdown on patient responses for those questions. Keep in mind, the information displayed will be impacted by any filters applied.

Below each question, you will see the list of available response options to the left, then a bar indicating 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.

Filter...

## Patient Satisfaction Survey

### ANALYTICS



## Clinect Portal 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.



RESPONDENT	ANSWER	ACTIONS
CK	The initial desk was rude and handed my paper work over to the other member states she had to go. <small>7 months ago</small>	<a href="#">VIEW RESPONSE</a>

## 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.

Filter...

### Answers

BROWSE

Submitted (New to Old) ▼

RESPONDENT	ANSWER	ACTIONS
GC	4-7 days <small>10 days ago</small>	<a href="#">VIEW RESPONSE</a>

**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 patient comments. Otherwise, you will see the standardized response option they 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 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

---

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

---

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.

**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.

VIEW INCIDENT

Request Sent  
7 months ago

Response Received  
7 months ago

Respondent  

LP  
Libby Patterson  
F  
libbya58@yahoo.com

Location  
Charlotte Office

Survey  
Patient Satisfaction Survey

Provider  
MHA Martin M Henegar MD

Encounter ID  
CNSA3323543

Primary Insurance  
Medicaid-NC

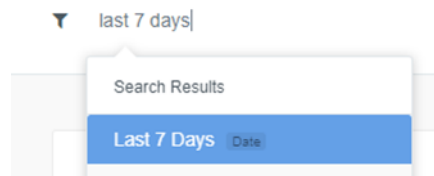


**Primary Insurance:** Primary insurance for the patient encounter associated with the survey. You may also see additional information, depending on the configurations specific to your practice. For example, Date of Birth, Appointment Type and Date of Service.

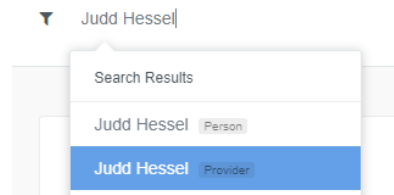
## Answer Filters

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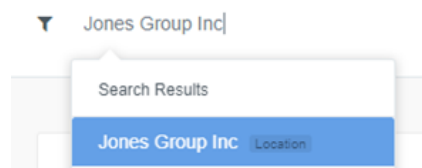
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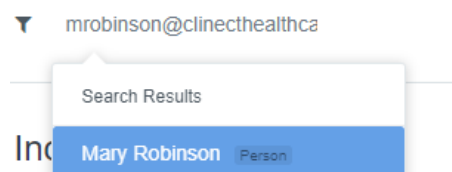
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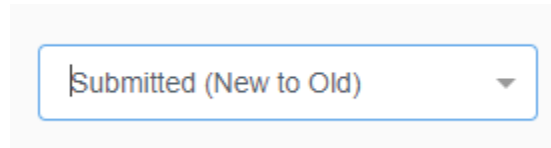
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## Answer Sorting Options

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