



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.