



# Surveys

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## Chapter Overview

This chapter explains how to build surveys for Patient View.

The topics in this chapter include the following:

- [Surveys](#)
  - [Features of the Surveys Page](#)
  - [Add Questions to the Question Bank](#)
  - [Add a Survey](#)
  - [Manage Surveys](#)

## Surveys

Patients can provide feedback about their stay by filling out and submitting surveys in Patient View.

You will build those surveys in Admin View. After you build them, care staff will use Care Team View to assign the surveys to patients.

Consult with hospital units to identify the type of surveys needed and the questions that you should include. Surveys and questions can be created for patients within certain units. Also inquire if any response should trigger a notification to the attending care staff. For example, the attending care staff may need to be notified if the patient submits a negative rating about a service or a high pain rating. If that is necessary, you will create work flows for those cases. Refer to the [Workflow](#) section for more information.

## Features of the Surveys Page

There are three tabs in the Surveys page of Admin View:

- **Surveys tab:** This tab contains a list of all existing surveys and the **Create New Survey** button. You will build and modify surveys in this tab.
- **Questions tab:** This tab contains a question bank, where you can add questions that you will use when building surveys.
- **Option Groups tab:** This tab contains all the available answer option groups that can be used for questions.

Table 7-1 Option Groups

Option	Answer Option
1 to 5 Scale	Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree
Pain Score Rating	No pain, Mild pain, Minor pain, Noticeable pain, Moderate pain, Moderately strong pain, Strong pain, Severe pain, Intense pain, Excruciating pain, Unspeakable pain
Yes-No Option	Yes, No, Don't Know

- **Metrics tab:** This tab contains all the metrics available that can be added to the questions for the Survey Reports feature available on the Nurse Dashboard.

A feature that you will see within the Survey and Question tabs is a search field that when clicked displays a list of department IDs that are imported from EMR through the .csv file or entered manually. This field is found on the upper right corner of both tabs. Before building a survey, enter the department ID in the search field or select an ID from the list.

## Add Questions to the Question Bank

You can build a question bank to store the questions. This is particularly useful if there are questions that you will use across multiple surveys.

To add a question to the question bank:

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- Step 1** Select the **Questions** tab.
  - Step 2** Choose the department ID from the drop down list in the upper right corner of the pane. If you do not choose a department ID, the question will be available to all department surveys in the Survey tab.
  - Step 3** Click the **Create New Question** button.
  - Step 4** Select the **Auto Generated** option for Question ID, if you want to generate the question ID automatically.
-  **Note** To generate your own question ID, deselect the **Auto Generated** option. The **Enter question ID** field gets enabled. You can enter your desired question ID in this field.
- Step 5** Enter a survey question.
  - Step 6**
  - Step 7** Choose a gender. By default, all genders will see this question. Choose an option other than 'All' if you want to restrict the question to a particular gender.
  - Step 8** Choose *Above 13* if patients under 13 years old should not read the question.
  - Step 9** Choose a metrics for this question. All the metrics created as described in the [Add Metrics for the Questions](#) section are available for your selection.
  - Step 10** Choose the type of multiple choice answers best fits the question. Refer the [Option Groups](#) table to know the available options.
  - Step 11** Click the **Save Changes** button of the Create New Question dialog box to save the question.

After you add questions to the question bank, you can build a survey with those questions.

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## Add Metrics for the Questions

You can add metrics for the questions that will be used for the Survey Feedback reports on the Nurse Dashboard page.

To add metrics:

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- Step 1** Select the **Metrics** tab.  
All the available metrics will be displayed as ID, Description, and Action.
  - Step 2** Click the **Create New Metrics** button.  
A new editable row is created.
  - Step 3** Enter a description for the metric.
  - Step 4** Click the **Save** button to create the new metrics.  
The newly created metrics will be available in the **Metrics** drop-down box when you create a new question.
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## Add a Survey

To create a new survey, follow these steps:

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- Step 1** Select the **Survey** tab.
  - Step 2** If the survey is intended for patients within a specific to a unit/department, choose the department ID from the drop down list in the upper right corner of the pane. If you do not choose a unit/department, the question will be shown to all patients in the hospital if age or gender is not specified.
  - Step 3** Click the **Create New Survey** button.
  - Step 4** In the Survey Details page, enter a name for the survey. This name will appear in Care Team View.
  - Step 5** Choose a survey type. The default type is “Standard”, which can be used for all surveys.
  - Step 6** The default setting for gender is “All”. If the survey is for a particular gender, specify it.
  - Step 7** Choose an age group or keep the default “Unrestricted” for patients of all ages.
  - Step 8** Now you will add the questions to the survey. Click the **Add Questions** button.
  - Step 9** If you want to create new questions, click the **Create New Question** button in the Survey Questions screen. In the Create New Question dialog box, enter the question text and choose an option group for the answers. If age and gender should be restricted, choose those settings accordingly. Click **Save Changes** to save the new question.
  - Step 10** When you have finished adding all the questions to the survey, click the **Review & Confirm** button.
  - Step 11** Click the **Save Survey** button.



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**Note** Refer the [Configuring Survey](#) section to know how to configure a workflow for surveys.

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## Manage Surveys

In addition to creating surveys, you can do the following the Surveys page of Admin View:

- View questions used in a survey: The Show Questions button gives you a quick view of the questions used in each survey.
- Edit a survey: Click the blue button with a pencil icon in the Actions column to edit a survey.
- Delete a survey: Click the red X button in the Actions column to delete a survey from the list.
- Search the survey table: Use the search field to sort by survey names, types, gender, and age.