Point of Care Tool

Getting Started Guide

1. Purpose and Description
2. Setup and Access
3. Using the Tool
   a. Sending Surveys
   b. Sent Log
   c. Alerts Log
4. Additional Features
   a. Assigning Managers
   b. Search Patient Alerts and Sent Log Beyond 48 Hours
   c. Basic Reporting
5. Frequently Asked Questions
6. How to Provide SurveyVitals Feedback
Purpose & Description

It is no secret that when patients are satisfied with their experience of care, they are more likely to speak positively about your organization in the community or even use your services again. Which is why service recovery efforts remain critical to an organization’s reputation and bottom line. However, many unique challenges can accompany these efforts, such as:

- Not all patients and their families value the same things when it comes to their experience of care
- A lack of information and data to identify gaps in care or x a particular patient.
- Providers and employees already have large workloads and are too busy for an additional burdensome process.

The Point of Care Tool (POCT) was designed to help healthcare organizations and facilities overcome these challenges by providing a real-time survey delivery and alert system to guide service recovery efforts. The POCT interface requires very minimal input to administer patient surveys on the spot, giving administrators and providers the ability to address patient concerns immediately.

Features of POCT

- **Surveys**: Delivered to patients in real-time via SMS and email.
- **Sent Log**: Displays successful survey deliveries and/or sending failures with error messages.
- **Alerts Log**: Captures when a patient provides a low score which can be viewed and addressed by your team.
- **Alert Emails**: Sent to assigned managers within seconds of a patient providing a low-score response
- **Role Management**: Actively manage

The POCT was built to be used in a variety of settings. We understand that each facility is unique, so we designed the POCT to be flexible enough to adapt to most workflows. For example, the POCT can be setup so that while one provider is entering patient information into the tool, another will be receiving alert emails to manage patient issues. This workflow can easily be adjusted to fit your needs. At a minimum, the two tasks required to run the POCT are inputting basic survey data and reviewing the alerts interface to address patient concerns.
Point of Care Tool Basic Workflow:

- Input basic patient information to administer survey
- Patient receives and takes survey
- Alert created (If patient provides a low-score response)
  - Alert email sent to assigned manager or provider
  - Alert created on POCT interface
- Patient Concern (Alert) addressed with patient before they leave.
  - Optional: POCT user updates the alert status to show that the concern is being addressed to deconflict with other POCT users.
- Rinse and Repeat!

Setup & Access

The Point of Care Tool can be used on any device with modern web-browser capability. This includes desktop computers, smart-phones, and tablets. The tool does not require additional installations or apps from the patient or staff members to properly function.

Access

1. Ensure you have been granted POCT login access via your Client Account Manager. Not sure who your client account manager is? Email us at support@surveyvitals.com or send us a message using the chat feature on www.surveyvitals.com

2. The initial release of the Point of Care Tool BETA can be accessed by logging into: https://beta.surveyvitals.com/login or https://beta.surveyvitals.com

*Please note that the Point of Care Tool is not accessible on SurveyVitals.com during beta phase.

3. When logging-in as a POCT user-type, you will be automatically be directed to the Point of Care interface. However, if you have additional user-type accounts (i.e. organization, provider etc.), please access the POCT interface using the dropdown at the top-right of the screen.

Setup
Settings

Assigning Managers
To begin administering surveys and using the POCT interface, you must assign "manager(s)".

Sending Surveys

3. Assign Todays Manager(s). The POCT allows for alert emails to be sent to providers and managers. Depending on your needs you can assign other users to receive alert emails and address patient concerns. The POCT will default to the last used settings.

4. Start sending surveys.

*First time logging-in, please set timezone and other settings. You will be prompted.

Usage
The screenshots below may vary slightly depending on the device you’re using but all functionality is very similar.

Sending a survey
To send a patient survey you will need the following information:
- Associated provider on the case (Providers must be pre-entered into the system to be selected)
- A patient contact mode (either an SMS-capable phone number or an email address, although both may be entered)
- Patient First Name, Last Name and Date of Birth (these are not required, however, if they are not entered on the POCT the patient will be asked to enter this information upon starting the survey. This information is used to track the patient’s survey requests during their full episode of care).
- Guarantor contact information will be requested if the patient is under 18 years of age.

Sending walk-through.
1. Start by selecting a provider from the dropdown menu at the top of the page.

   **Point of Care** ABC Emergency Department

   Select provider and input patient information to send survey.
   **Select Provider**
   | Clyde Thomas
   | Curtis Myers

2. Next, enter the patient email or phone number, or both.

   **Contact Email**
   testPatient@email.com

   **Contact Phone**
   (777) 888-9999

3. After contact information is entered you may, optionally, put in the patient’s first name, last name, and date of birth. (Reminder: if this isn’t entered now, the patient will be asked to enter this on the survey.)

   **Patient First Name** Optional
   Test

   **Patient Last Name** Optional
   Patient

   **Patient Date of Birth** Optional
   04/14/1982
4. Finally, press submit to send the survey.

I understand that the survey will be sent instantly with no restriction of the date or time. I verify that myself or a member of my team has informed the patient that this will occur, and I have received consent from the patient for surveys to be administered to their cell phone.

5. After submitting, you will see one of the following confirmation messages. A failure notice will result in the red message below. Please double check the input information, or, if recently sent, please see the status log for more information.

- Survey was sent successfully
- This email address has received this survey within the last 60 days. This phone number has received this survey within the last 60 days.

See more error messages in the FAQ

Additional Survey sending features
Guarantor
If the patient is under 18 years old, the survey sending form will ask for the Guarantor First Name and Last Name. While optional, this information helps to better join data together for ongoing surveys.
Getting Started Guide: POC Tool

**Patient Date of Birth** Optional

02/15/2001

**Guarantor First Name** Optional

First Name

**Guarantor Last Name** Optional

Last Name
Alerts Log

The alerts log shows the last 48 hours of surveys that had low scores, each of which is classified as Alert. An alert is issued when a patient answers a strongly disagree, disagree, or a rating of 0-4 on a question. See below for setting up and managing alert emails and personnel.

Alerts log allows you to:
- Review low scored surveys (simply click the alert row)
- Set status of the alert during service recovery (deconflict with other users)
  - Open
  - Pending
  - In-progress
  - Closed
The sent log shows the last 48 hours of patient surveys input into the POCT. It includes data on:

1. **Time Sent and Status**
   a. Status include
      i. **Sent** (Survey successfully sent)
      ii. **Taken** (Survey taken)
      iii. **Failed** (Survey failed to send)
        1. Hover a failed status to see failure detail.

2. **Patient & Provider Information**
3. **Patient Email & Phone**

Seeing sent log items beyond 48 hours will require using the search tool. Click the microscope icon found in the bottom of the sent log to open the search interface.
Additional Features
Search Alerts and Sent Log

The search tool, accessible via microscope button, found at the top of the page and the bottom of the alert and sent logs opens a search tool allowing you to find previously issued survey requests.

**Search**

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>mm/dd/yyyy</td>
<td>mm/dd/yyyy</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Provider</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Search**

Reporting
The Point of Care Tool has a built-in Reporting Tool that shows statistics from the previous 7 days. To navigate to the Reporting Tool, click on the Reporting icon in the top right-hand corner of the Point of Care Tool.

On the Reporting Tool page, you can view Input Statistics and Patient Statistics from the past 7 days.
Report

Input Statistics

Entered
67

Sent
45

Taken
8

Patient Statistics

Taken by Modality
Email: 8 SMS: 0

Opt-out
34

Average time between sending and taking survey
32 minutes

Input Statistics are metrics regarding the delivery and completion of surveys.

- **Entered** - The number of times that a provider filled out patient information on the Point of Care Tool and clicked “Send.” Discrepancies between Entered and Sent could be due to ineligible patient information that was entered into the system. For more information, see the Sent Log.

- **Sent** - The number of surveys that were sent to patients.

- **Taken** - The number of surveys that patients completed during the past 7 days.

Patient Statistics are metrics regarding patient responses.

- **Taken by Modality** - A comparison of the modes that patients used to complete their Point of Care surveys.

- **Opt-out** - The number of patients that chose to opt-out of their Point of Care survey.
● **Average time between sending and taking survey** - The average amount of time that it took patients to submit a survey that they received, using data from the previous 7 days.

### Settings

To access the Settings Menu, click on the “gear” icon in the top right corner of the Point of Care Tool.

![Gear Icon]

There are three settings you can adjust on the Settings Menu: Timezone, Today’s Alert Manager(s), and Alert Providers. Each of these sections is discussed in more detail below. Once you have finished adjusting your settings, click the Save button on the right-hand side of the Settings Menu.

**Save**

Additionally, there is a Logout button if you would like to Logout directly from the Settings Menu. It is located on the left-hand side of the Settings Menu, just below the Alert Providers option.

**TIMEZONE**

The **Timezone** must be set before sending Point of Care surveys. To adjust the timezone, click on the Timezone drop down menu. You will have the option between Eastern, Central, Mountain, Mountain no DST (Daylight Savings Time), Pacific, Alaska, Hawaii, Hawaii no DST (Daylight Savings Time).
**Timezone**

Mountain

TODAY’S ALERT MANAGER(S)

**Today’s Alert Manager(s)** is used to select which administrative users will receive alerts from surveys throughout the day. To add a user, click the drop down menu and then click on the user that you would like to receive alerts.

To remove an administrator from the list of users receiving alerts, click the “X” next to their name.

To add multiple administrators to the list of users receiving alerts, click the blank space below the first user’s name to show the dropdown menu and select the appropriate administrator’s name.
Alert Providers
The Alert Providers setting allows users to enable or disable low score alerts. Toggle “Yes” or “No” to choose whether providers receive low-score alerts from the Point of Care surveys.

Alert Providers
This setting will alert the providers of low-scores on the survey.

Yes  No

FAQ
Error messages

“Please select a valid provider.” The selected provider is invalid. Select a different provider from the Select Provider dropdown menu and try again.

“Please enter a valid contact email or phone number.” A valid email address and/or a valid phone number is required to send a Point of Care survey. Check the contact email and contact phone number and try again.

“Please set up the settings for Point of Care in the top right.” Settings must be saved in order to send surveys. Check your settings by clicking the “gear” icon in the top right corner of the Point of Care Tool.

“A birth date cannot be in the future. Please enter a valid birth date.” Double check the Patient Date of Birth and try sending the survey again.
“Please correct the fields outlined in red above.” Double check the information that is outlined in red. When you have finished, try sending the survey again.

“Some inputs are incorrect or missing for the patient form.” Double check the information in the patient form. To send a Point of Care survey, you must select a provider and enter either a patient email or a patient phone number.

“Some inputs are incorrect or missing for the guarantor form.” Double check the guarantor information and try sending the survey again.

“Some inputs are incorrect or missing for the provider data.” Double check the guarantor information and try sending the survey again.

“Please set up the settings for Point of Care in the top right.” Check your settings by clicking the “gear” icon in the top right corner of the Point of Care Tool. When you are satisfied with your settings click “Save.”

“No organization found. A user may not be logged in.”

“The provider is not attached to this location or is not connected to Point of Care.”

“This email address has received this survey within the last 60 days.”

“This patient has opted-out of receiving email surveys.”

“This phone number has received this survey within the last 60 days.”

“Malformed JSON.”

“User that is logged in is not authorized to send.”

“SMS (text-message) surveys are not enabled, please contact your account manager to enable this feature.”

“A system error has occurred. Please re-login.”

“Phone is invalid.”
“This patient has opted-out of receiving text message surveys.”

“Email is invalid.”

“Phone is unreachable.”

How to provide feedback