

Quality Outcomes Instructions

1. **Manually generated survey:** *This is the recommended best practice method to ensure a patient is provided a survey while still in the office.*

To generate a survey: from the transaction screen select the patient then click the “Create Survey” button at the bottom right. **The transaction must be in an open status and the service date must be the same or earlier than the current day and have a qualifying HCPC code.**

Once you click the “Create Survey” button, a new Quality Outcomes tab will appear at the top of the transaction. Then, click on the Quality Outcomes tab and follow-up with one of 4 choices:

- I. **Patient Email)** a link to the survey will be emailed to the patient to be fill out online or a backup survey can be send by choosing one of the other 2 options below.

If the patient did NOT have an email address on their demographic screen at the time the survey button was clicked you can input the email address and click “Resend Survey.” It will update the survey request on the Quality Outcomes web site and Quality Outcomes will then email a link to the survey for the patient to fill out online. Then you can click the “Update Patient’s email Address” button and the system will add the email address to the patient’s demographic screen for future use.

- II. **Survey Code)** the survey Code and web address will be supplied for the patient to access the survey online. Be sure to select the check box for selected method used.

- III. **Printed Survey)** provides the option to print the survey form for the patient to fill out and return. The selected method will automatically be checked for Printed Survey.

- IV. **Survey Response)** Survey Response can be used to walk through and fill out the survey with the patient while they are still in the office. If you click on the button “Enter Survey Response Now” the survey questioner will open to record the patient’s response.

2. **Automatic Survey:** the system has an auto function that will attempt to generate a survey for up to 30 days from the date of service on any open transaction with a qualifying HCPC code. Once 30 days from the service date have passed, the system will no longer attempt to generate the survey automatically.

It is strongly suggested that you frequently check your Quality Outcomes account for surveys that may have been sent by the automated system for patients with no email address attached to ensure you follow-up with one of the manual processes for getting the patient to fill out the survey.

NOTES: The email account information is pulled from the patient demographics screen.

To view, by patient, what transactions had a survey processed for them, on the patients demographic screen you will find a Quality Outcomes tab that shows you all the transactions for that patient. The columns “Survey Type” and “Last Sent Date” will tell you what type of survey was sent and on what date it was sent for that transaction.

The survey results can be manually entered here: www.surveycare.com