Patient Navigator Program Focus MI

Survey Collection Tool Guide

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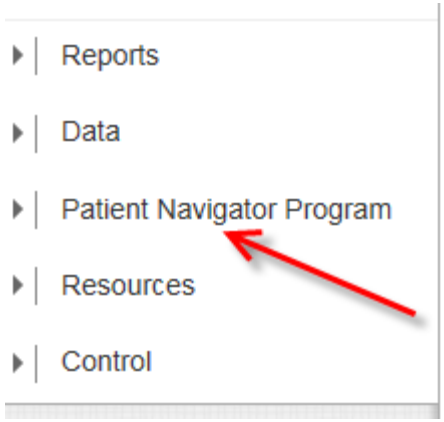
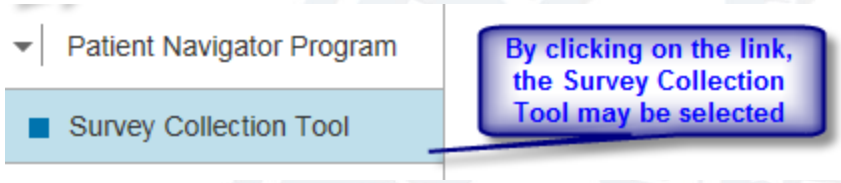
Accessing the Tool

- By logging into the ACTION registry, the left navigation bar will reflect the *Patient Navigator Program Focus MI* option.





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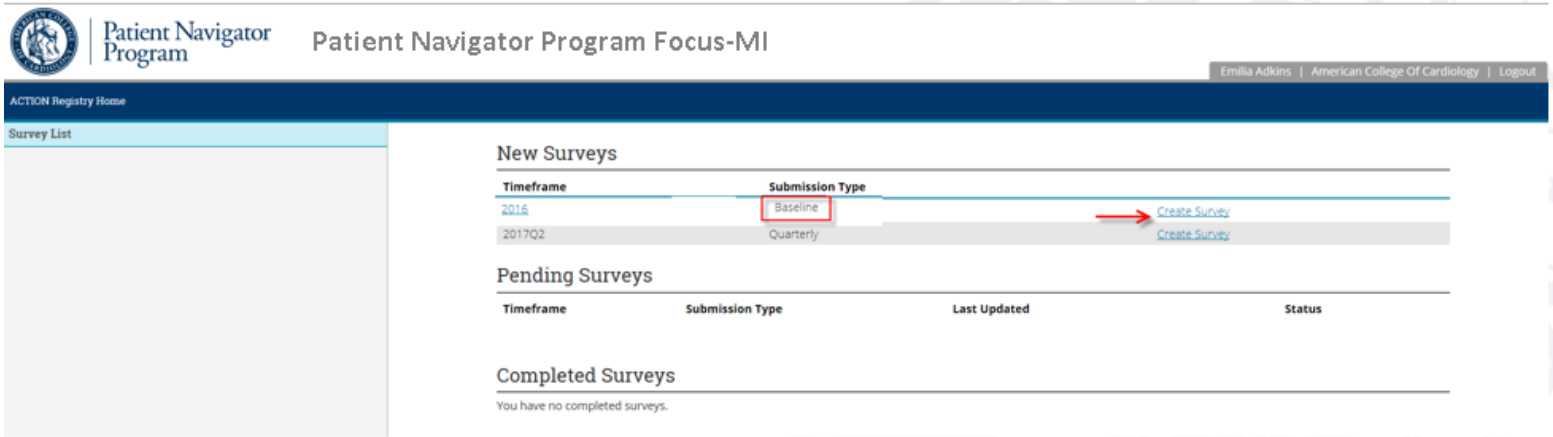
Survey Tool Layout

Upon opening the survey tool, you will see three main pieces:

- New Surveys
- Pending Surveys
- Completed Surveys



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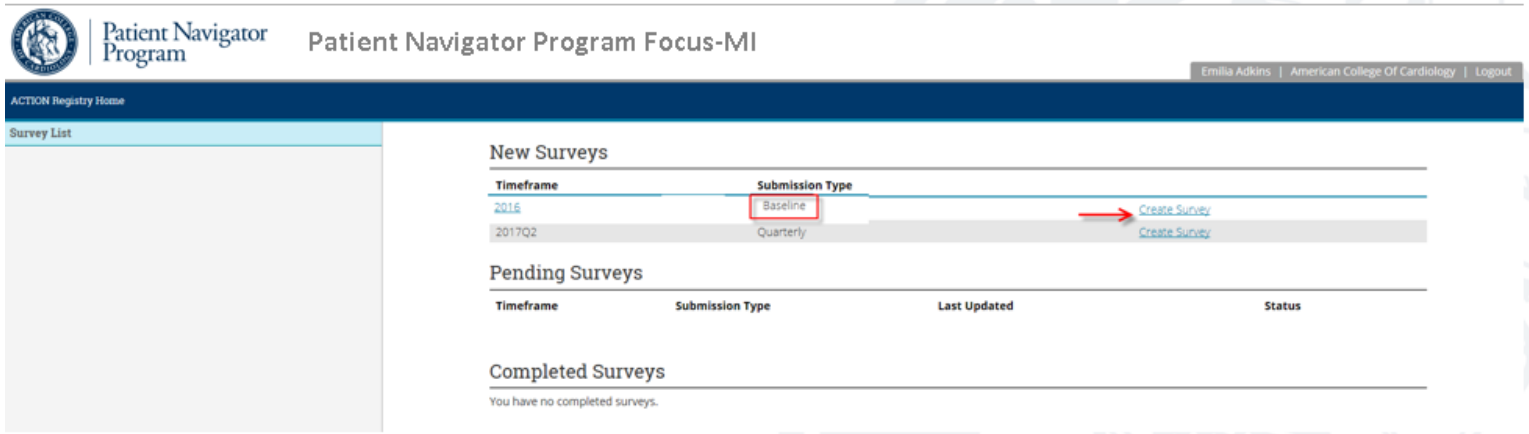
Survey Tool Layout

New Surveys are those surveys ready to be populated. Pending surveys are those in progress, and completed surveys are those fully populated and submitted.



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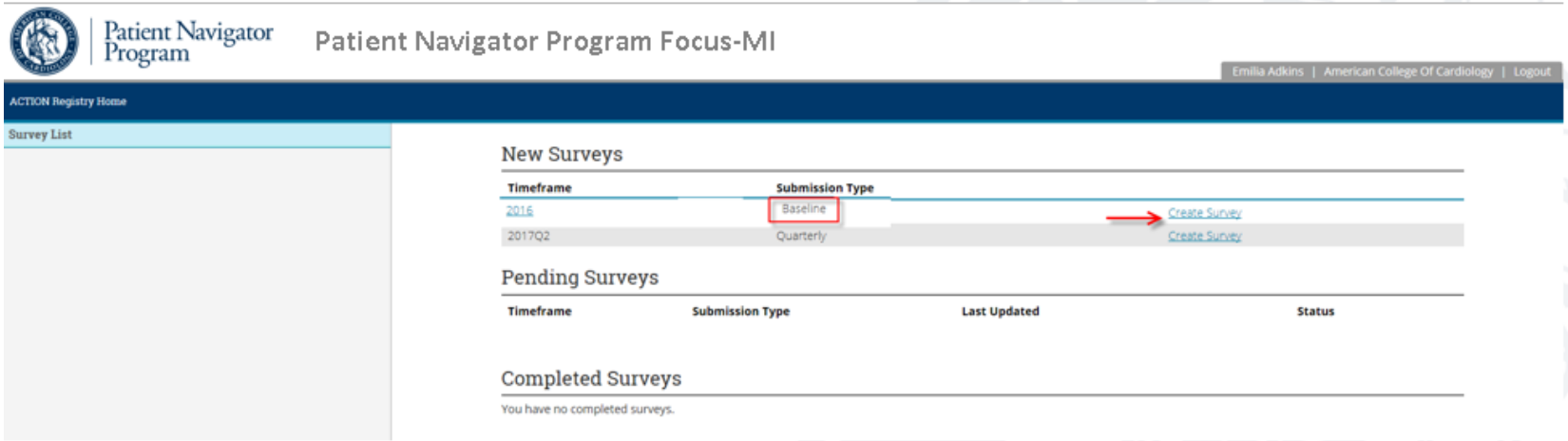
Survey Tool Layout

Upon entering the program, the very first survey to populate is called your baseline survey. This survey will capture data pertaining to the period prior to joining the program. This data will also allow participants to compare their current performance to their baseline at any point in the program.



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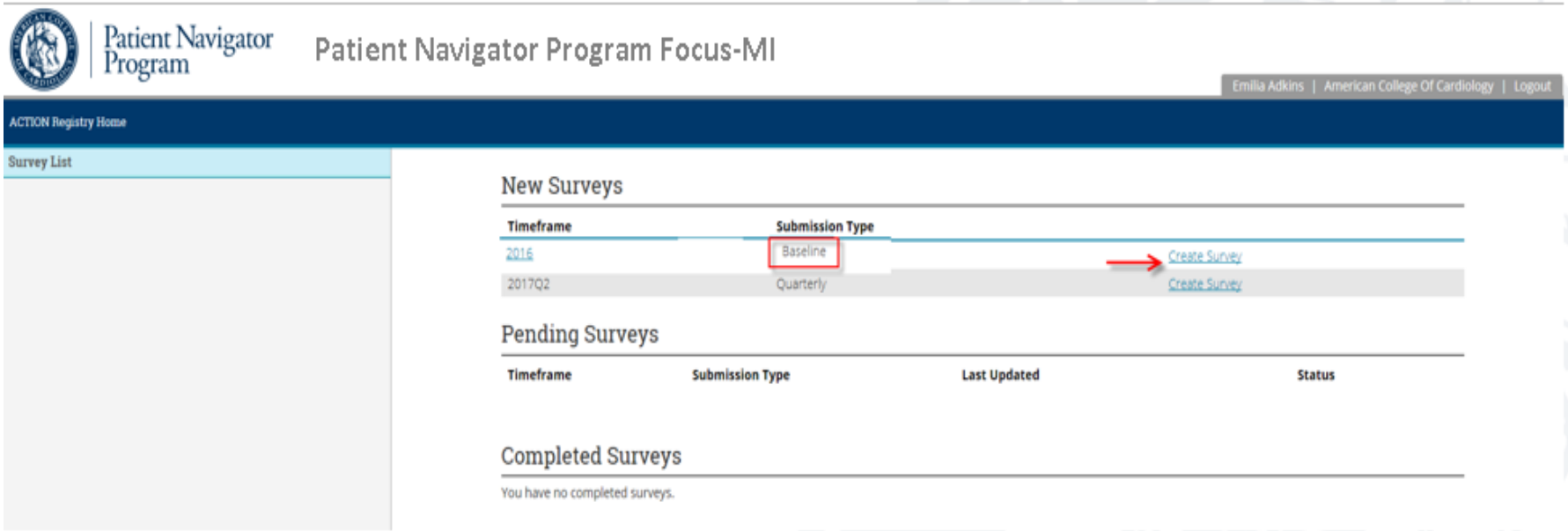
Survey Tool Layout

To populate the baseline survey, click on “Create Survey” for the line with a submission type of “Baseline.”



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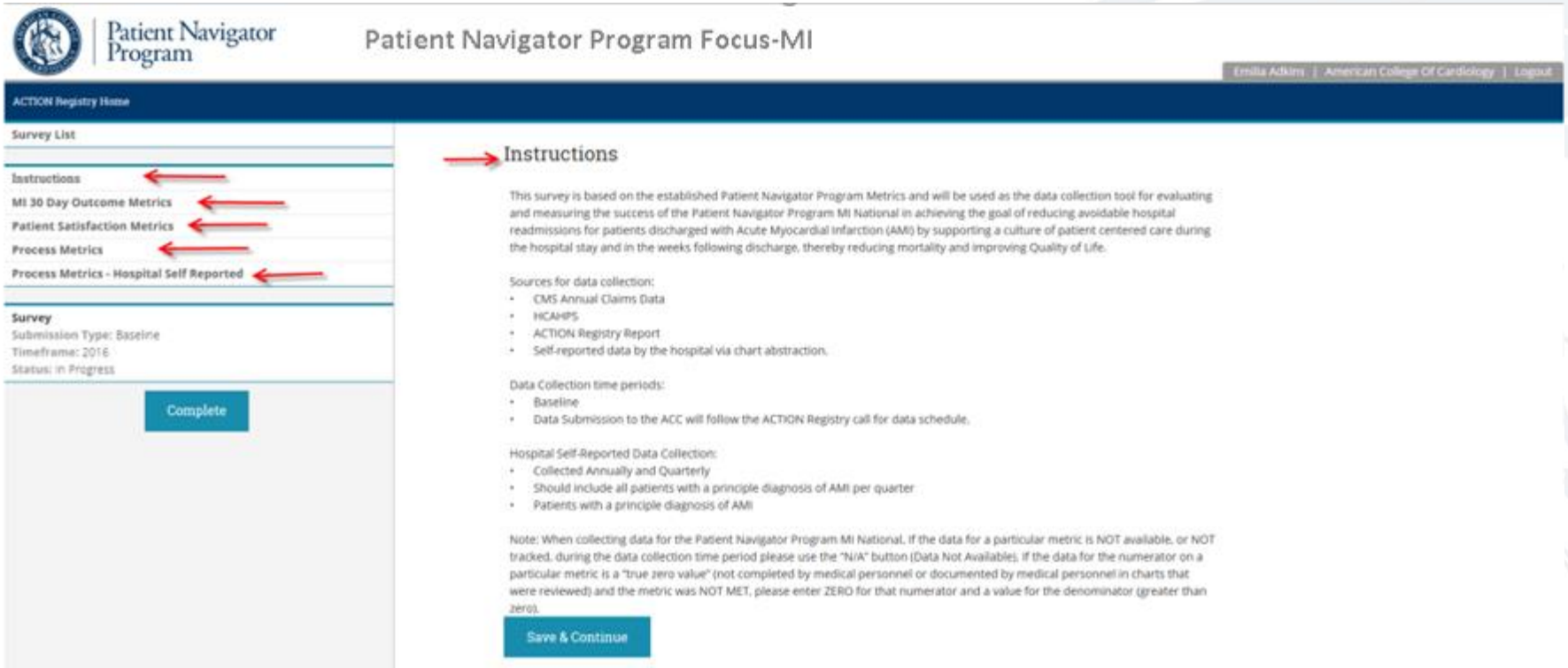
Baseline Survey

Once you have chose the “Baseline” survey, the layout will change as follows:

- The left navigation will now display all the categories/sections of the survey and you can use this to move to a particular section.
- Instructions for filling out the survey display with buttons to Save and Continue.



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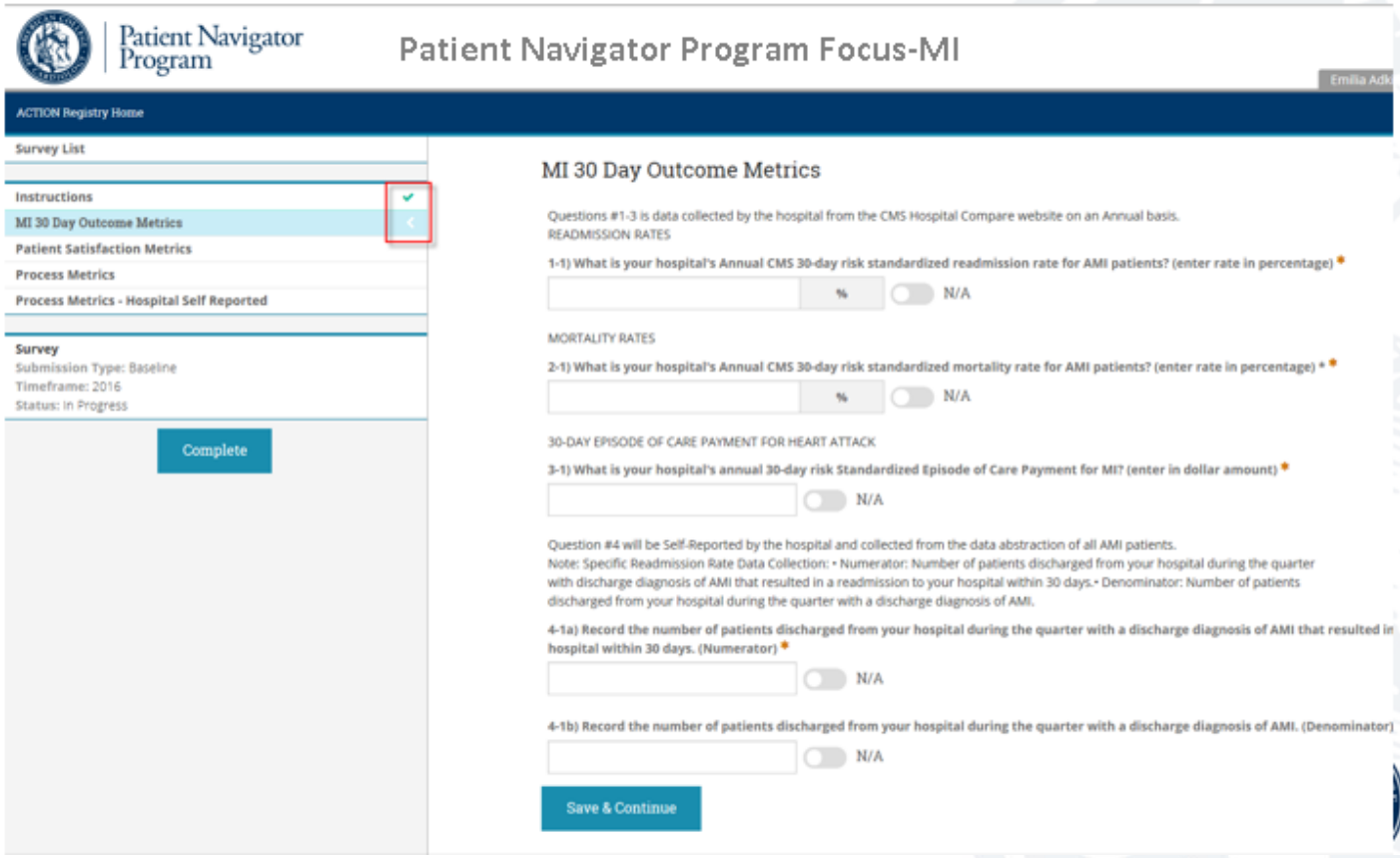
Baseline Survey

By clicking on Save and Continue, you will be directed to the next section of the survey questions: MI 30 Day Outcome Metrics

-Notice a checkmark after "Instructions." As you complete a section, the survey will check it off for you to help you navigate back where you need to with ease.



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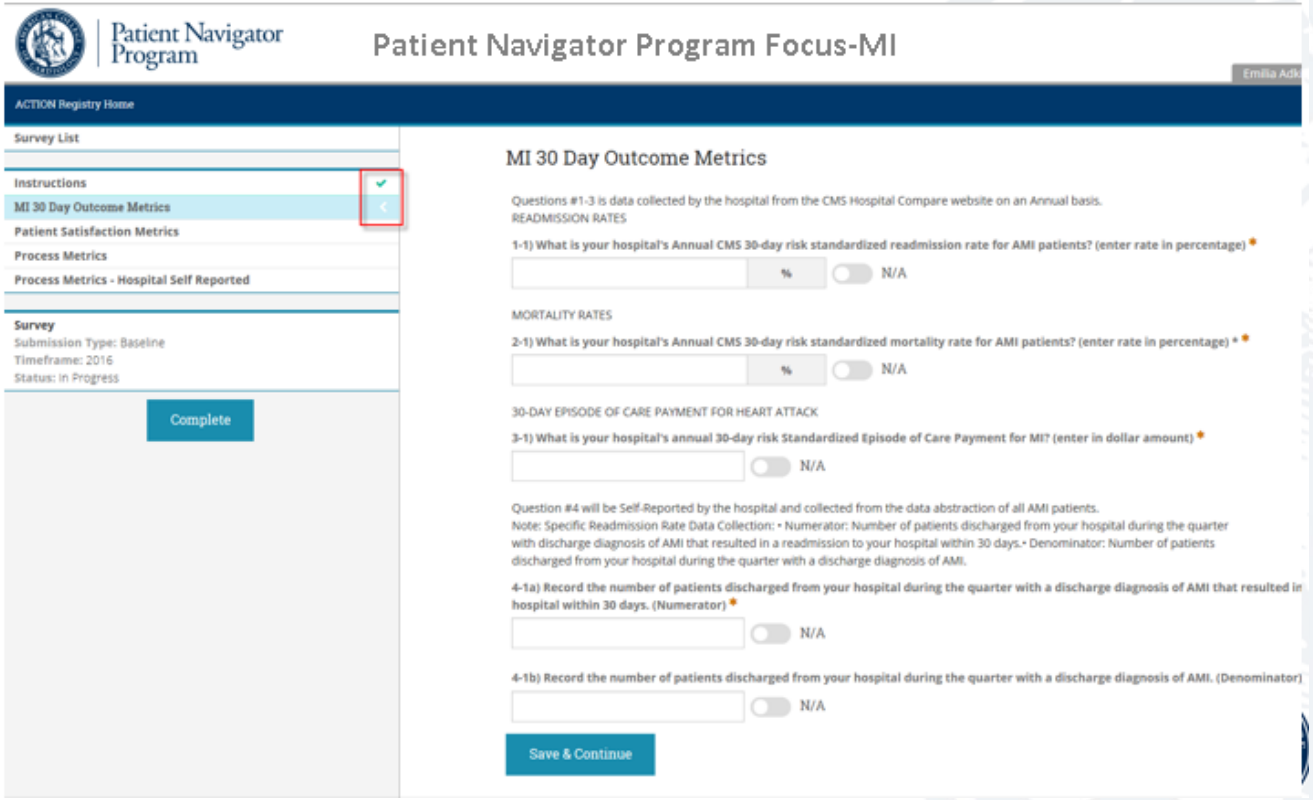
Baseline Survey

As you populate the survey, simply key in your data.

- If you do not have applicable data, click on “N/A’”
- If you need to come back to a question later, this is permitted, simply Save and Continue.
- NOTE: sections without a response or N/A are not considered complete.



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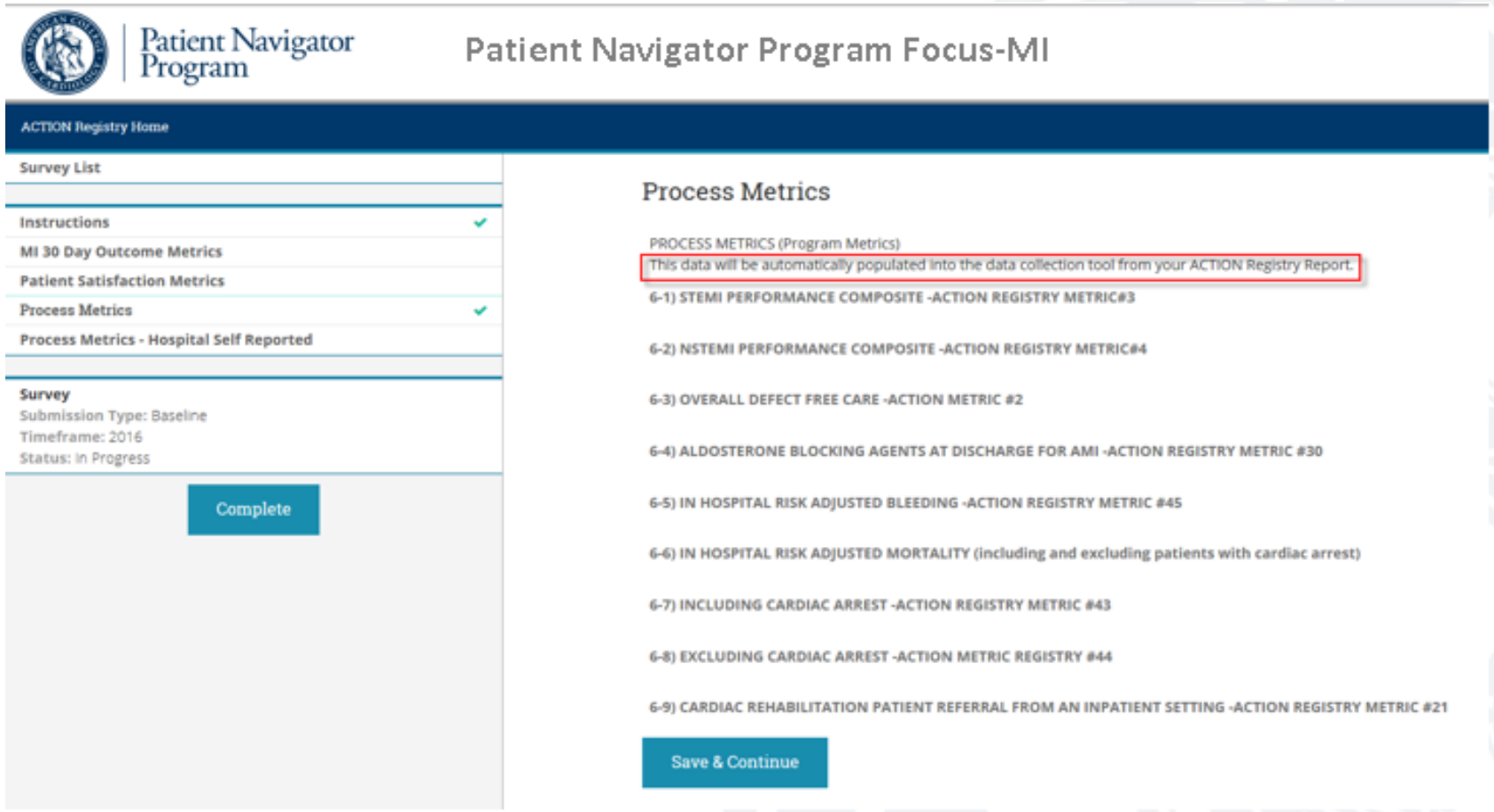
Baseline Survey

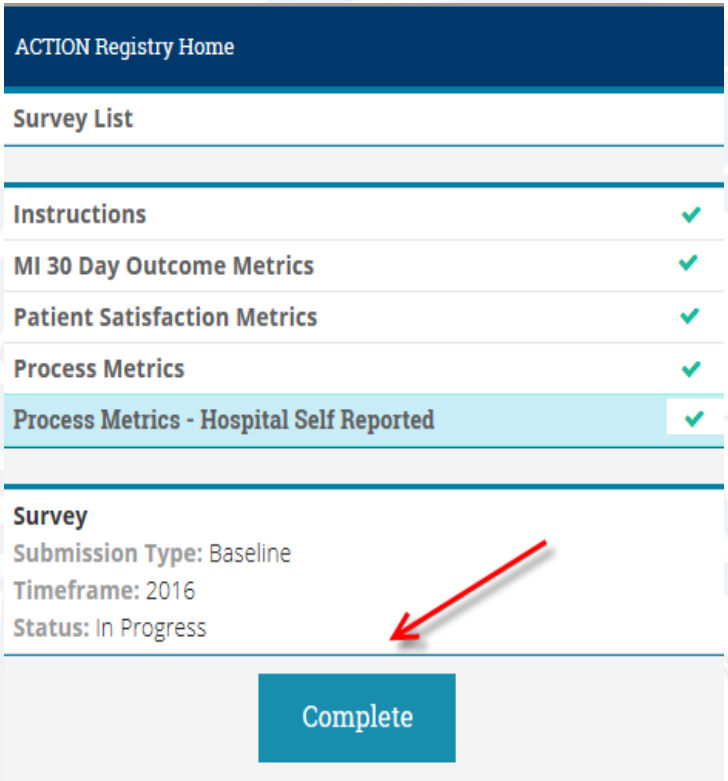
Great News! Process metrics do not need to be manually entered. The Process Metrics page functions to inform you of the metrics that will automatically pull from the ACTION Registry Report. When you get to this page, simply Save and Continue.



Baseline Survey

Once all the metric data is populated, you may now complete your survey. What this does is submit your data, and move it to completed status. It will also check for the following before allowing the data to move forward:

- Zero denominators
- Missing data
- Numerator greater than denominator
- Invalid character/data



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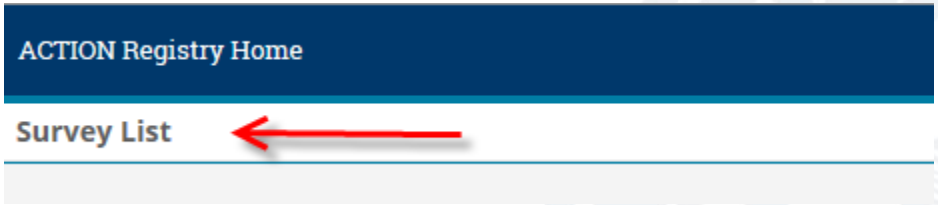
Quarterly Survey

Once a baseline is complete, quarterly surveys shall be populated. These surveys contain a subset of the full survey found in the baseline, but will pertain to the given quarter. For example, a baseline was completed for Q4 2016- Q3 2017 data, now a 2017Q4 quarterly survey would be next.

At any time to navigate to the Survey list, simply click on “Survey List” in the left navigation:



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Quarterly Survey

Populating the quarterly survey works exactly the same way as the baseline.
In this example, we have two quarterly surveys waiting to be populated. Simply click on “Create Survey” and the tool opens with the questions:

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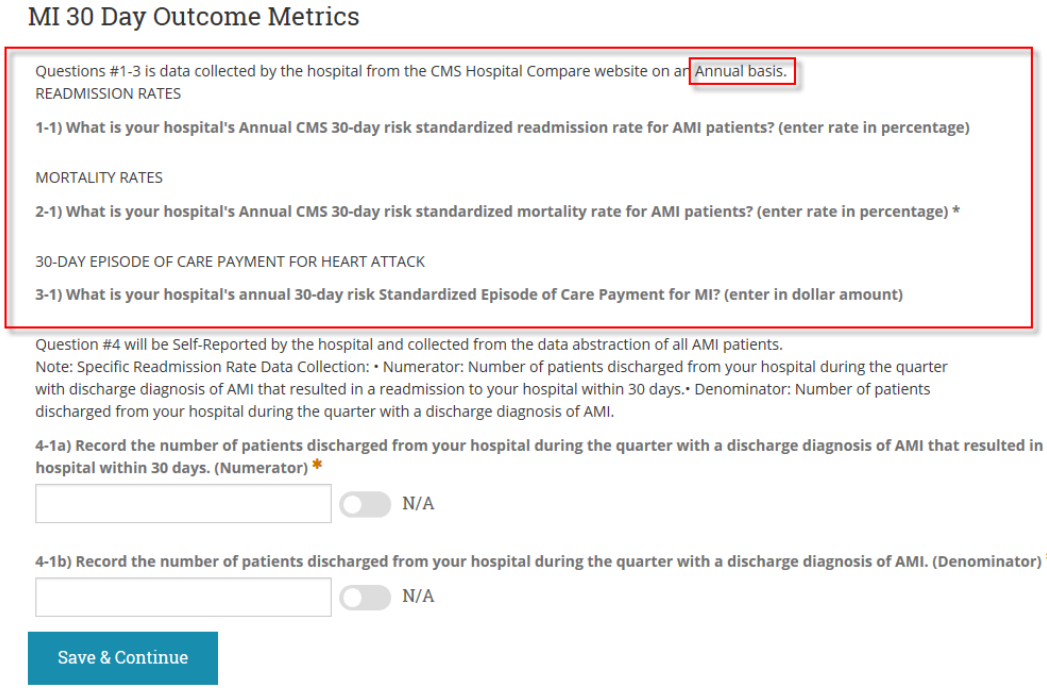
Quarterly Survey

As the full subset of questions contains annually reported data, you will see that for quarters 1, 2 and 3, these questions are not answered:



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Annual Q4 Survey

The fourth quarter of every year is when the annual questions are also answered. This is the annual survey and will contain the annually collected data, as well as the quarterly data for the fourth quarter. It will look exactly like the baseline survey.

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