intiveo.

Introduction to Pre-Appointment Surveys and Wellness Checks

This document is specific to Intiveo Enterprise product offering.

Pre-Appointment Surveys and Wellness Checks builds on Intiveo's existing Survey feature, adding the ability to send surveys before the patient's booked appointment, to include "patient wellness checks" to pre- and post-appointment surveys for required pre-screening questions due to COVID-19, symptoms alert email notifications, and a new Intiveo Report: "Patient Wellness Check Report" to monitor responses.


This informational document will give you a high level of the functionality of the Pre-Appointment and Wellness Check features. We'll go through the following:

- How to Setup a Wellness Check Questionnaire
- How to Setup Sending Questionnaires Pre-Appointment Time
- How to Manage Symptom Alert Email Notifications
- How to Use *new* Intiveo Report: "Wellness Check Report"
- How to Manually Resend Surveys
- Associated Costs for Pre-Appointment Surveys and Wellness Checks

If you want to learn more, you can check out our Help Center for more in-depth setup and functionality information.

How to Setup a Wellness Check Questionnaire

Setting up a pre-appointment survey or a wellness check questionnaire starts off the same way you would setup a feedback survey, at **Global Surveys**.
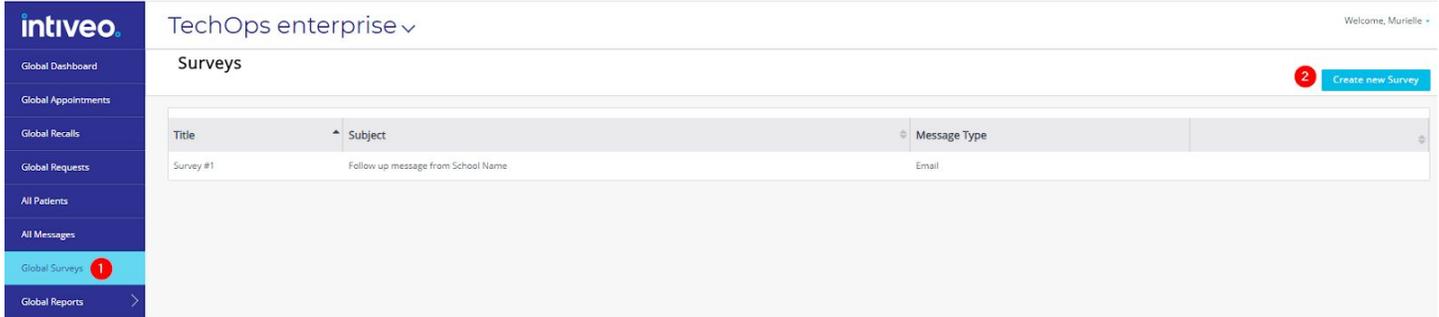
When you get to setting up your questions, we've made it really easy for you to add the standard pre-screening questions that are required. Simply add "**Wellness Screening Questions**" and the list of questions will automatically populate.

You can then make any changes or edits.
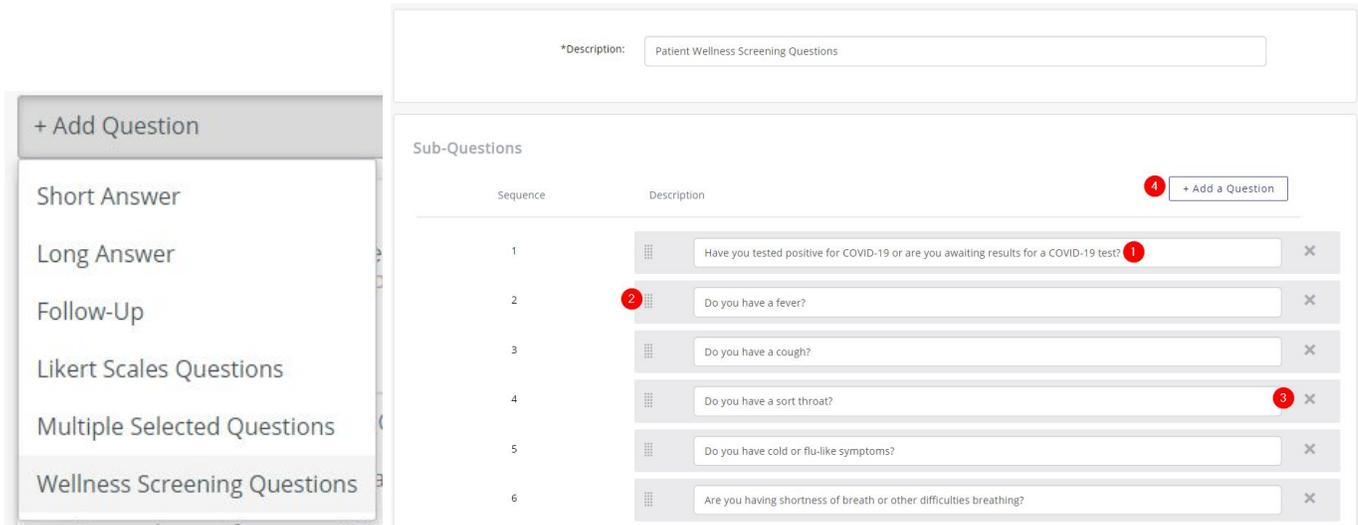
How to Setup Sending Questionnaires Pre-Appointment Time

Once your questionnaire is completed, and you're ready to start sending to your patients to ensure they receive it before their appointment, then you can go to your message settings (you can customize this for each clinic).

You'll set up a new message setting, and select the option to "**Send Wellness Check Form**", and then you can customize how many days or hours you want the questionnaire to go out before the patient's appointment time.

```
4 hours before the appointment
10 hours before the appointment
1 day before the appointment
2 days before the appointment
3 days before the appointment
4 days before the appointment
5 days before the appointment
6 days before the appointment
7 days before the appointment
8 days before the appointment
9 days before the appointment
10 days before the appointment
2 weeks before the appointment
3 weeks before the appointment
4 weeks before the appointment

2 days before the appointment
```

⊙ Back to Appointment Reminders Settings

Create Email Setting

Active Status	OFF
Use Group	OFF
Send To Already Confirmed	OFF
Send Wellness Check Form	OFF

How to Manage Symptom Alert Email Notifications

Once your pre-screening check starts going out to your patients, you can customize your questionnaire to receive symptom alerts (meaning when a patient responds "Yes" to any question in your wellness questions).

To turn this setting on, you edit your questionnaire and select **Yes** for "Notification Upon Negative Survey Completion."

Survey Options

Include Survey Link: Yes
Use Alternate Survey Link: Off

Notification Upon Survey Completion: Yes
Notification Upon Negative Survey Completion: Yes
Contact Us Form For Negative Responses: No

Display Google Link: Not Included
Display Facebook: Not Included
Display Twitter: Not Included
Display Referral: Not Included

How to Use *new* Intiveo Report: "Wellness Check Report"

We've made it easy for you to monitor your questionnaire responses. We have made a new pre-built report called the **Patient Wellness Check** report, accessible via Intiveo Reports.
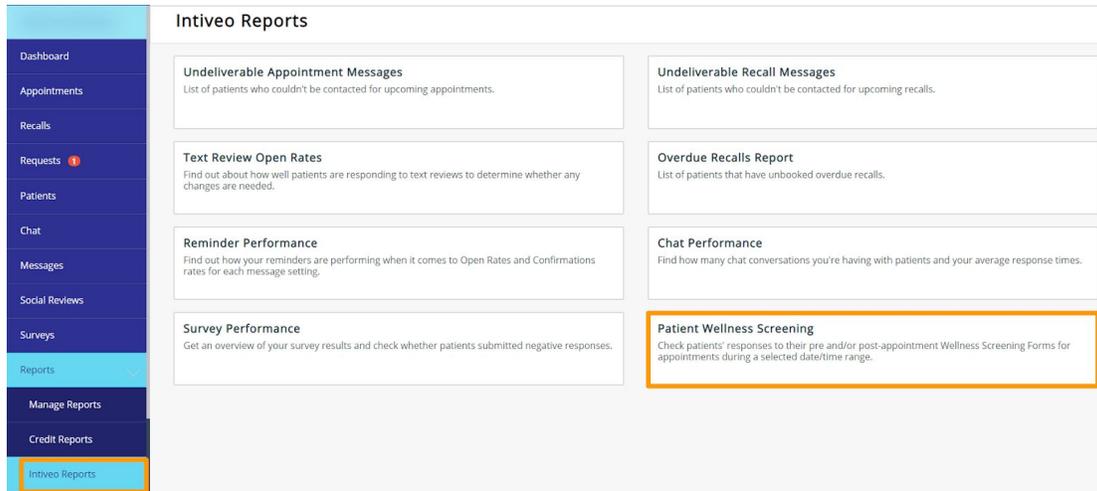
You'll see all patients who were sent a questionnaire, if and when they completed the survey, and if they have a **Symptom Alert** (meaning they said Yes to one or more questions). You can also click **View** to see their completed questionnaire.

If they do have a symptom alert, we'll highlight that patient in **red** to help you action on it immediately.

Appointment Date-Time	Patient Name	Wellness Survey Name	Sent Time	Status	Response Submitted Time	Symptom Alert	Full Survey
2020-08-04 19:00:00	Allen	wellness Test	2020-08-04 19:01:24	Sent	Pending	Pending	
2020-08-01 10:32:17		wellness Test	2020-07-31 10:32:18	Completed	2020-07-31 10:34:02	No	View
2020-08-01 10:30:48	sewon	wellness Test	2020-07-31 10:30:50	Completed	2020-07-31 10:32:29	Yes	View
2020-08-01 10:30:19	french post-appt	wellness Test	2020-07-31 10:30:20	Completed	2020-07-31 10:31:17	Pending	View
2020-08-01 10:28:46	french post-appt	wellness Test	2020-07-31 10:28:48	Read email	Pending	Pending	

How to Manually Resend Surveys

In the event that a patient didn't receive the initially sent survey, or they made an error in their submission, you can manually resend the survey to that patient to give them an opportunity to resubmit.
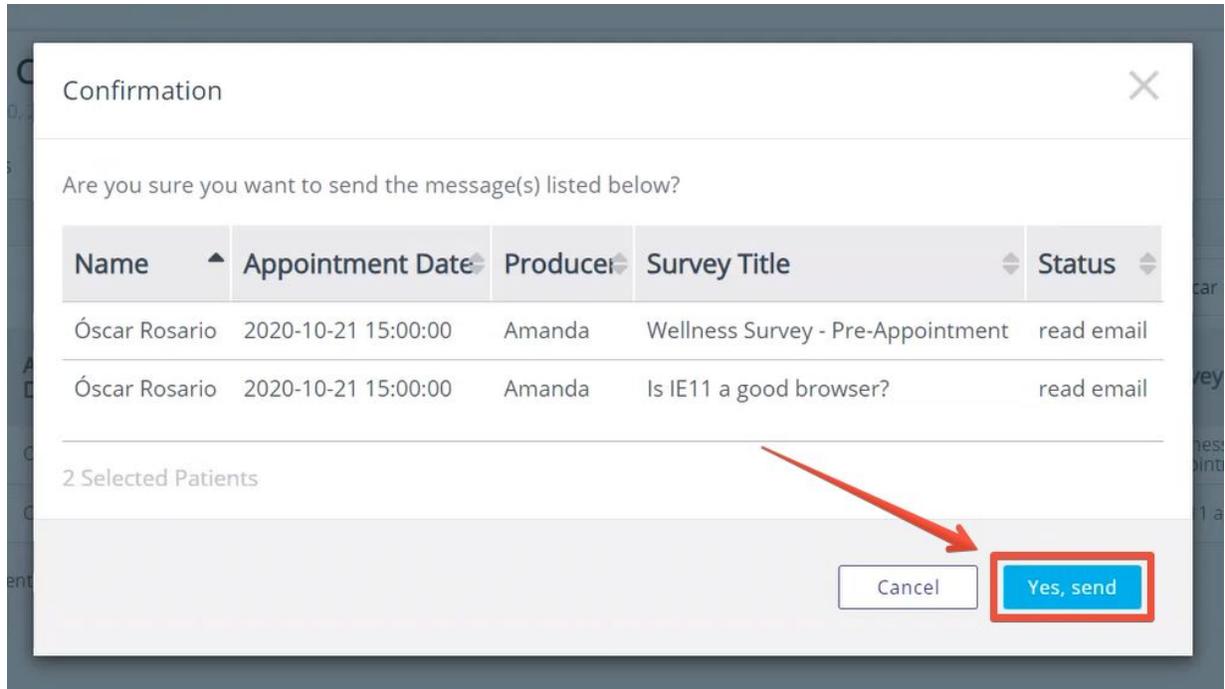
Associated Costs for Pre-Appointment Surveys and Wellness Checks

These features are already included as part of your Intiveo subscription.

You may see a small increase in credit usage if you are sending surveys via SMS, and you can monitor your usage via the **Credits Report**.

Intiveo offers bulk credit packages at a lower cost per credit rate. Contact your Customer Success Manager to learn more about these options.

If you want to learn more, you can check out our Help Center for more in-depth setup and functionality information, or if you want to learn more about our pre-appointment surveys and wellness checks or you're ready to start using it, contact your Customer Success Manager!