

## Grant Yourself Permissions for hx2go

Before you can use hx2go Administration, you must set yourself up as an administrative user for online reviews.

In Minute Menu HX:

1. Click the **Providers** menu, and select **Monitors**. The Users/Monitors Information window opens.
2. Click the **Select User/Monitor** drop-down menu and select your username.
3. Click the **Select User Type** drop-down menu and select **Monitor+General HX User**.
4. Click **Save**.
5. Click **Online Review**. The Online Review dialog box opens.
6. Check the **Online Review Configuration** box.
7. Click **Save**. You can now access hx2go Administration.

## Customize the Review Questionnaire

Log in to <https://hx2go.minutemenu.com> using the same credentials you use to log into Minute Menu HX. Once you are logged in, click the **Design** tab (top-right) to begin creating your review questionnaire.

Building a review questionnaire involves the following:

8. Create review sections for each category. Click **Add Section** (top-right), select a category, enter a name, and click **Save**.
9. Create questions for each review section. Click **+** next to the section to which to add questions and enter question details.
  - **Question Text:** Enter the question itself. Example: How is meal claim information submitted to the Sponsor?
  - **Response Details**
    - **Response Type:** This dictates the question layout and how the Monitor can answer it. See the heading **Question Types & Layouts** for a table of all available response types.
    - **Advanced Options:** This button gives you access to additional configuration options. For example, if you do not wish for a question to display on the Provider's copy of the review, you would click **Advanced Options** and clear

# hx2go Administration Getting Started Guide

the **Display on Provider Copy** box. The remaining options vary according to the **Response Type** you selected.

- o **Check Boxes:** The remaining check boxes in this section allow you to mark a question as required, read-only, or as mapped to HX.
- **Question Location:** This allows you to change the category and section in which to place the question.
  - o **Follow-Up Question To:** Check this box if this is a follow-up to another question. Then, select the initial question from the drop-down menu.
  - o **Help Text:** Use this box to enter any directions or other helpful information for your Monitors to reference while completing the questionnaire.

For step-by-step instructions, see our help article [Customize the Review Questionnaire](#).

## Question Types & Layouts

Question Type	Response
Text, Email, Phone, Temperature, or Number	Single-line text box that allows Monitors to enter their response. <ul style="list-style-type: none"><li>• <b>Text:</b> Text input box</li><li>• <b>Email:</b> Text input box that validates text input that is in the following format: TEXT@TEXT.com</li><li>• <b>Phone:</b> Numeric input box that limits users to no more than 10 digits (phone number separators are added automatically)</li></ul>
Date	Date picker
Yes/No	Button selection. Monitors can only select one option (Yes or No)
Yes/No/NA	Button selection. Monitors can only select one option (Yes, No, or N/A)
Single Choice, Single Child Picker, Meal Picker	Single-select drop-down menu
Multiple Choice, Multiple Child Picker	Multiple-select drop-down menu
Time/Duration	Time picker (no restrictions for past, current, or future times)


# hx2go Administration Getting Started Guide



Question Type	Response
Date and Time	Date and time picker (no restrictions for past, current, or future times)
Memo	Multi-line text input box
Signature	Used on the Finalize page of the review (users can sign their name with a mouse, finger, or stylus. You cannot configure this box on the Admin site)

## Reports in hx2go Administration

Click the **Reports** tab (top-right) to access reports in hx2go Administration.

- **View Reviews:** This function allows you to download and view PDFs for completed reviews. Filter to the review to view, and click .
- **Export Data:** This function allows you to export review data to a spreadsheet file (XLSX). Filter to the reports to export, check the box next to each one, and click **Export Selected**.
- **Review Discrepancies Report:** This report allows you to compare review start and end times that hx2go recorded automatically with the start and end times your Monitors recorded manually. If GPS data was also captured at the time of the review, this report also indicates if there was a difference between the location where the review started and where it ended.
- **Other Reports**
  - **Providers Due Reviews Report:** This report lists all providers who must be visited, as well as the days and meals you should visit. You can also print this report in Minute Menu HX.
  - **Review History Report:** This report provides a concise list of reviews completed since the beginning of the selected claim month. You can also print this report in Minute Menu HX.