## **CHADIS Survey Workflow Overview**

## WITH OR WITHOUT A PATIENT PORTAL

Patient does not have

active portal account

END

Provider views

CHADIS

Survey results in OP.  $\rightarrow$ 

## Appointment \* in OP is marked confirmed, self-confirmed, or left message.

\* This assumes the appointment has an associated **standing** order/task for the CHADIS Survey.



Patient has active portal account

## OP sends a message \* to the patient's portal account.

\*How the parent is notified of a new message depends on their preferences.

The parent accesses the Survey by entering their email address, which must match what is in OP.

The parent completes, and — submits the Survey.

 $\uparrow$ 

Results are brought into OP;

survey status is changed to

received.

Survey responses are sent from CHADIS to OP.

Practice staff double-clicks the Survey task and closes the window.

Practice staff logs into the Clinician area of the CHADIS site and searches the CHADIS Waiting Room for the patient.

Practice staff selects respondent or creates new respondent.

The parent logs in \* to CHADIS and selects the Survey.

\*Via Device Switch or Login switch

The parent completes, and submits the Survey.