PHOENIX
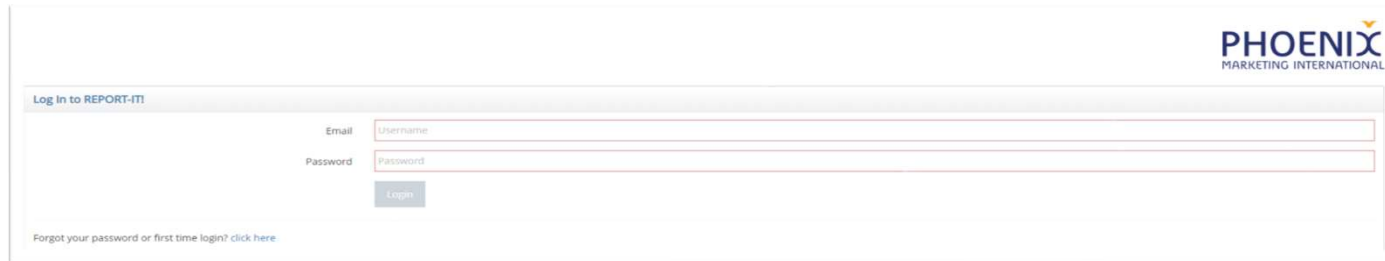
Online Reporting Platform User Guide

LOGIN

- Users must have an account setup by PMI before they can access the site: https://cxportal.phoenixmi.com/nva
- First time users must click the "**Forgot your password or first time login**" link to create a password.
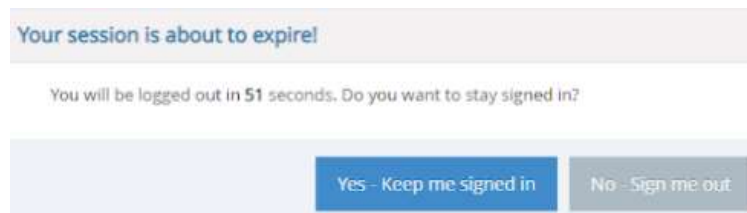
You will receive the warning shown below if you attempt to log in with an invalid password. Use the 'forgot your password' process to avoid lockout.

Your login attempt was not successful. Your account will be locked after 5 repeated unsuccessful attempts. Please click the 'Forgot your password or first time login?' link to receive a new password.

You will receive the message below anytime you are inactive within the site for 30 minutes notifying you that your session is about to expire. You must respond to this prompt within 60 seconds or the system will automatically sign you out for security reasons.

Your session is about to expire!

You will be logged out in **51** seconds. Do you want to stay signed in?

Yes - Keep me signed in   No - Sign me out

DASHBOARD

- The Dashboard will be blank initially. Click the (+ Add Chart Type) button to add charts to the Dashboard.
- Click the checkbox for each chart type that you want added to your dashboard and then click the OK button.
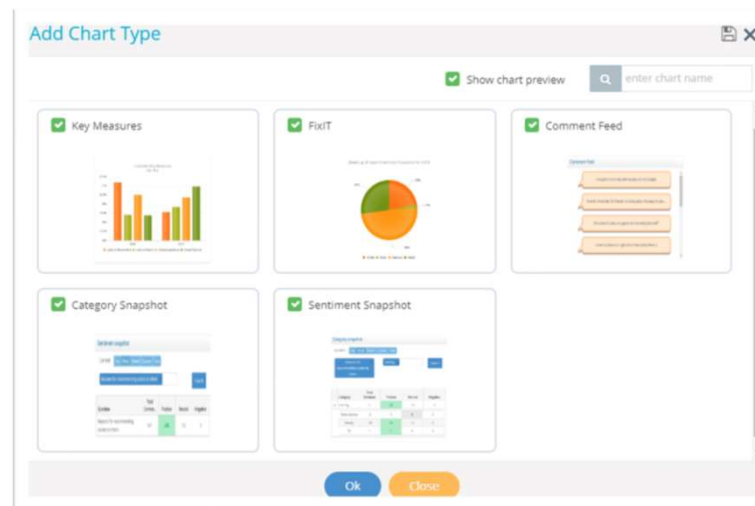
- Click the edit button 🖉 to move charts to different positions, expand them to full screen or delete them.
- Note that some charts are interactive so clicking on them will link to other modules to display specific surveys or comments.

MODULE OVERVIEW

- Besides the Dashboard, there are several additional modules in the reporting site. Each has different features that are explained throughout this User Guide.
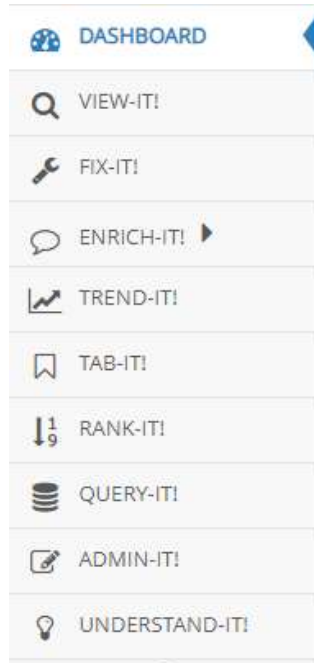
VIEW-IT!, FIX-IT!, and ENRICH-IT! display individual survey records

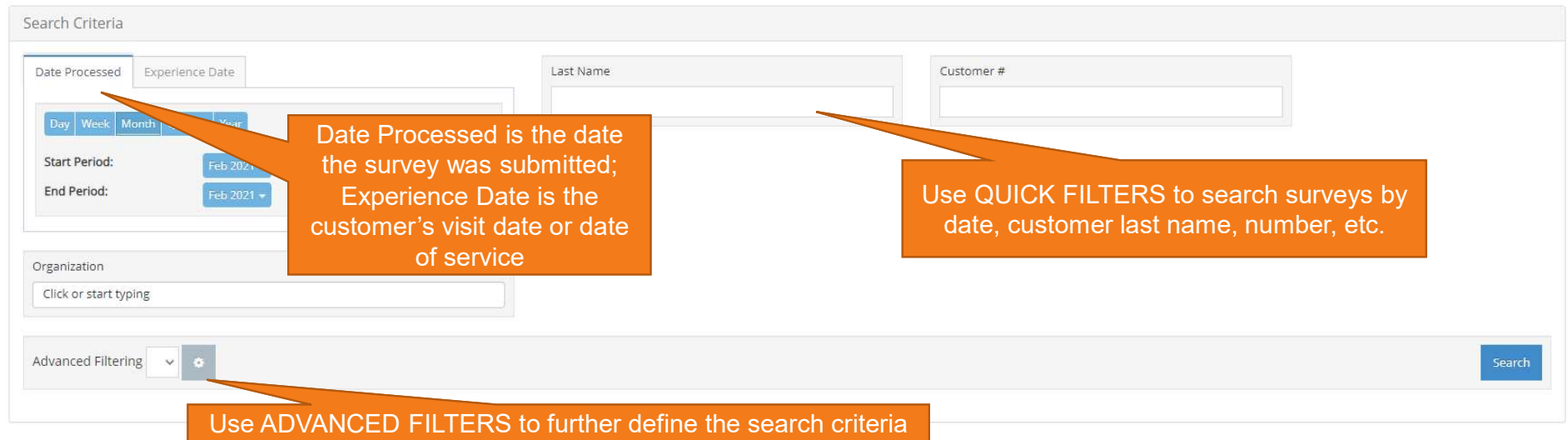TREND-IT!, TAB-IT!, and RANK-IT! display aggregate survey results

QUERY-IT! includes reports that can be run by the user as needed

ADMIN-IT! is used by PMI and admin users for account administration

UNDERSTAND-IT! contains training videos and contact information

USING FILTERS

- Two types of filters are used to define Search Criteria:
  - **Quick filters**: key filters always shown at top of screen
  - **Advanced filters**: additional filters available by clicking the settings button ⚙ or selecting from the drop down under Advanced Filtering
- Saved filters appear throughout the site for convenience

Date Processed is the date the survey was submitted; Experience Date is the customer's visit date or date of service

Use QUICK FILTERS to search surveys by date, customer last name, number, etc.

Use ADVANCED FILTERS to further define the search criteria

ADVANCED FILTERS

- Advanced filters are used in conjunction with Quick filters to refine searches and drill down further into survey results
- Users can create new filters, save and reuse them in future searches

Click the + New Filter button to see the full list of available advanced filter options

Give the filter you create a descriptive Name, define it by selecting from the dropdowns, and then click Save

VIEW-IT!

- This module contains all surveys that have been submitted. They are available in real time as soon as surveys are received and processed.

Select the Quick and Advanced filters of interest and then click Search to view those specific surveys

Click to view individual surveys

Search results display 50 surveys per page and can be exported to PDF or Excel; you may also sort the surveys by clicking on the various column headings

FIX-IT!

- This module contains surveys from respondents who were 'Very Dissatisfied' with some aspect of their visit or rated their likelihood to recommend 0-6 on the 0-10 scale.

Use the Assignee list to find all surveys assigned to a particular user.

Click to enter service recovery details, such as the cause of the issue, the offer, and the outcome.

FIX-IT! DETAILS

- Surveys that qualify for Fix-IT! are automatically assigned to the hospital contact and an e-mail alert is sent to the contact to ensure timely follow-up. The screen below tracks the follow-up effort.

When follow-up is complete, the Outcome can be selected, and the Status changed to Done.

The cause of the issue can be recorded, along with the offer that was provided, and any value associated with the offer.
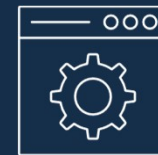
A history of all activities is saved with the survey record.

FIX-IT! Service Recovery Guidelines

Understand **cause(s) of dissatisfaction**: Review entire survey.

Select the **most relevant** cause(s) for dissatisfaction from the Details window

Determine the most appropriate offer, considering details of client and complaint.

Contact client by email to apologize only. Contact client by phone to gather more information, or offer atonement.

Log the Offer, Offer $ value and comments in the Fix-IT! module.

Select outcome of the client contact *(Satisfied, Not Satisfied, Unable to Contact)*

Update Status: Work in Progress or Done

ENRICH-IT! Theme & Sentiment Snapshot

- This module provides an overview of the general themes of the written comments provided by clients as well as the primary sentiment of those comments.

Select one of the open-ended questions for analysis.

Comments are grouped into various categories based on key words within the comment.

The size of the box represents the number of mentions within that category and the color represents the sentiment: Green=Positive, Gray=Neutral, Red=Negative Click the box to see the underlying comments.

ENRICH-IT! Category & Sentiment Trends

- Trend the number of mentions and their sentiment within each category.

Select one or more categories for analysis.

Results for the category are trended over the selected time periods. The red/gray/green bars indicate the overall sentiment.

ENRICH-IT! Verbatim Comment Report

- View and export verbatim written comments provided by clients to all open-ended survey questions.

Specify key words or phrases to search for comments containing those words.

Select one or more open-ended questions.

Results display the open-ended comments for each survey and the key word is highlighted in yellow.

TREND-IT!

- Trend aggregate data at various levels over time on any question on the survey.

Select multiple time periods

Analysis Groups may be used to analyze how results differ by new/existing clients, medical/dental clients, and PAW Plan/Non-PAW Plan members

The table output displays the number of respondents that answered the question within each time period as well as the percentage that selected each point on the scale.

TAB-IT!

- By providing users the ability to slice and dice the data, Tab-IT! allows users to perform ad-hoc queries into the data to determine the strength of relationships between variables.

Select a Column and Row Question for analysis

The table output displays the results of the Row Question within the results of the Column Question. In this example, 96% of respondents that are Very Satisfied with 'Knowledge of medical staff' are also Very Satisfied with 'Overall satisfaction with the exam.'

RANK-IT!

- This module ranks the performance of all hospitals on any like survey measure. This module is especially useful for identifying 'best in class' performers.

Analysis Groups can also be ranked instead of hospitals.

Results are ranked by Top Box (% Very Satisfied) but can be sorted in ascending or descending order by any column.

Rank	Analysis Group	Top Box ▼		Top 2 Box		Bottom 2 Box		Bottom Box		Mean
1	Quail Hollow Animal Hospital	16	100.00 %	16	100.00 %	0	0.00 %	0	0.00 %	5
2	Greenbrier Veterinary Hospital	8	100.00 %	8		0	0.00 %	0	0.00 %	5
3	Countryside Pet Clinic	2	100.00 %						0.00 %	5
4	Kimberly Pines Veterinary Hospital	6	100.00 %						0.00 %	5
5	Clark - Missouri	15	100.00 %						0.00 %	5
6	Enid Pet Hospital	4	100.00 %	4	100.00 %				0.00 %	5
7	Honegger Animal Clinic	5	100.00 %	5	100.00 %	0	0.00 %	0	0.00 %	5
8	Kitsap Veterinary Hospital	3	100.00 %	3	100.00 %	0	0.00 %	0	0.00 %	5
9	Ridge Animal Hospital	9	100.00 %	9	100.00 %	0	0.00 %	0	0.00 %	5
10	Creature Comfort Animal Clinic	12	100.00 %	12	100.00 %	0	0.00 %	0	0.00 %	5

QUERY-IT!

- Custom reports are provided here that can be run on-demand. Additional reports may be developed by PMI, as needed.
  - Note: Users will only see the reports for which they have permissions.

	Report Name ▲
Run	Negative Review Report
Run	Net Promoter Score
Run	Response Rate Report
Run	Score By Question
Run	Score By Question Trend

|◀ ◀ **1** ▶ ▶| 1 - 5 of 5 items

ADMIN-IT!

- Create and edit user accounts. This module is only available to administrative users.

Select the appropriate Role:
Administrator – Access to all modules, including Admin-IT!
Division Leader – Access to all modules except the Admin-IT! module
Hospital User - Access to all modules except the Admin-IT! module and the Enrich-IT! Snapshot and Trend modules. This role also does not have access to the Data Export and User Activity Report in the Query-IT! module.

Select hospital(s) in the Recovery Group box if the user may be assigned Fix-IT! surveys for follow-up.

Expand the Organization hierarchy to select the Hospital, Division, or Group that the user should be able to view.

UNDERSTAND-IT!

- Training videos are provided here for a more detailed overview of each module.
- PMI contact information as well as a Help link are provided for further assistance.