

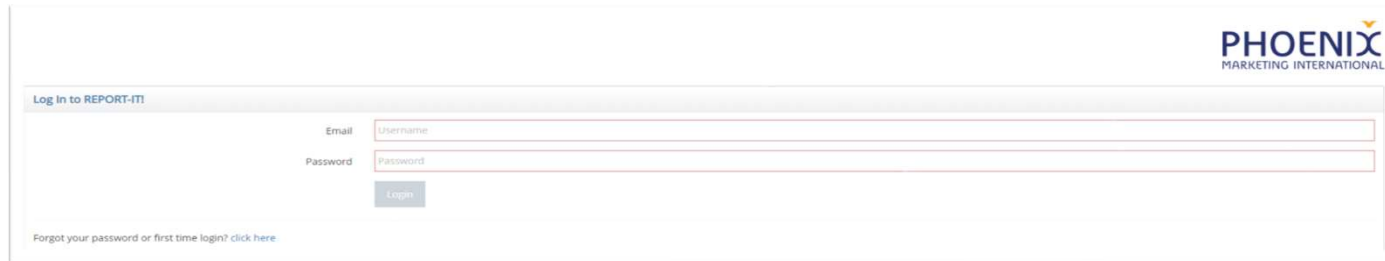


PHOENIX

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.

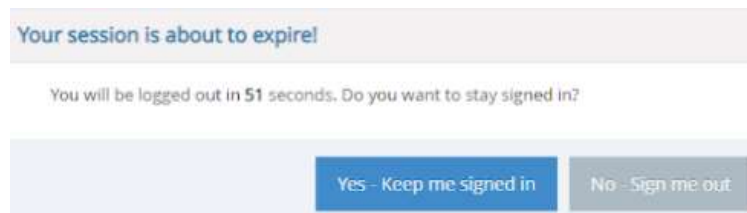


The screenshot shows the login interface for Phoenix Marketing International. In the top right corner is the logo with the text "PHOENIX MARKETING INTERNATIONAL". On the left, there is a link "Log In to REPORT-IT!". The main form has two input fields: "Email" with a placeholder "Username" and "Password" with a placeholder "Password". Below these fields is a "Login" button. At the bottom left of the form, there is a link: "Forgot your password or first time login? click here".

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.

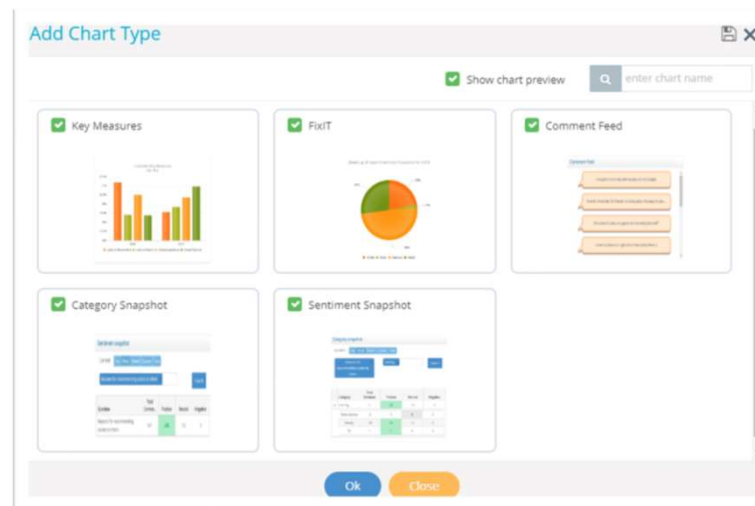
You will receive the message below anytime you are inactive within the site for 30 minutes notifying you that your session is about to expire. You must respond to this prompt within 60 seconds or the system will automatically sign you out for security reasons.




The screenshot shows a modal dialog box with a light gray background. At the top, it says "Your session is about to expire!". Below that, it says "You will be logged out in 51 seconds. Do you want to stay signed in?". At the bottom, there are two buttons: "Yes - Keep me signed in" (highlighted in blue) and "No - Sign me out" (gray).

DASHBOARD

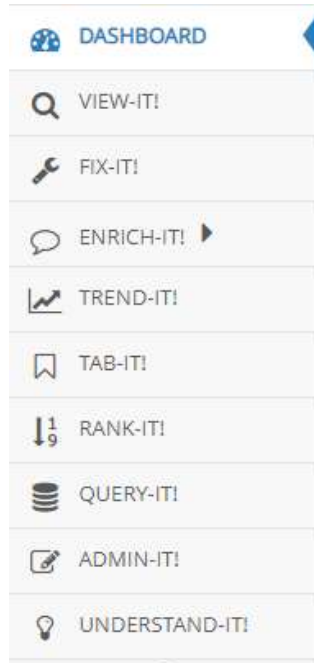
- The Dashboard will be blank initially. Click the + Add Chart Type button to add charts to the Dashboard.
- Click the checkbox for each chart type that you want added to your dashboard and then click the OK button.



- 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

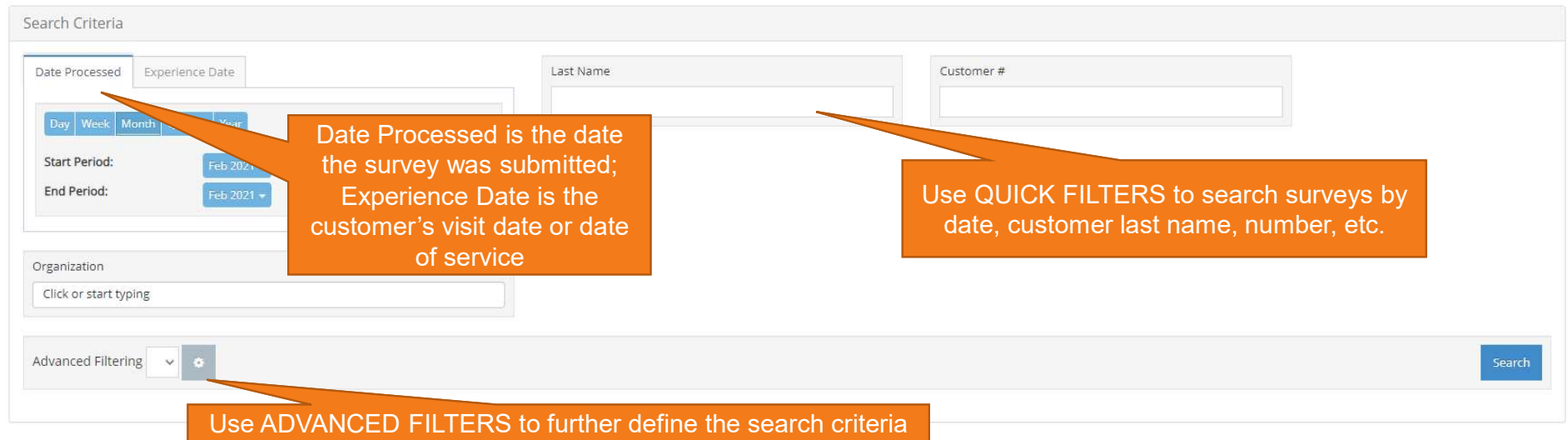
QUERY-IT! includes reports that can be run by the user as needed

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



The screenshot shows the 'Search Criteria' form with the following fields and callouts:

- Date Processed:** A callout box explains: "Date Processed is the date the survey was submitted; Experience Date is the customer's visit date or date of service".
- Experience Date:** A callout box explains: "Experience Date is the customer's visit date or date of service".
- Last Name:** A callout box explains: "Use QUICK FILTERS to search surveys by date, customer last name, number, etc."
- Customer #:** A callout box explains: "Use QUICK FILTERS to search surveys by date, customer last name, number, etc."
- Organization:** A callout box explains: "Use QUICK FILTERS to search surveys by date, customer last name, number, etc."
- Advanced Filtering:** A callout box explains: "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

This screenshot shows the 'Advanced Filtering' sidebar. At the top, it says 'Advanced Filtering'. Below that, it says 'Selected Filter: None' and has a '+ New Filter' button. Further down, there is a 'Saved Filters' section with a list icon. At the bottom right of the sidebar is a 'Done' button.

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

This screenshot shows the 'Advanced Filtering' form for creating a new filter. The form has a title 'Advanced Filtering'. It starts with a 'Name' field containing 'Filter Name' and a red error message 'Filter Name is required'. Below this are several dropdown menus arranged in a grid: 'Tier', 'CustType', 'Overall Experience', 'Overall Service', 'Return', 'Recommend', and 'Problem Experienced'. Each dropdown has the text 'Click or start typing'. At the bottom right of the form are 'Save' and 'Cancel' buttons.

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.

Search Criteria

Date Processed

Experience Date

Day

Week

Month

Quarter

Year

Start Period: Feb 2021

End Period: Feb 2021

Last Name

Customer #

Organization

Click or start typing

Advanced Filtering

Search

Data Export is limited to 5000 records.

Export to Excel

Export to PDF

Total Items : 5424

	FIX-ITI Status	Hospital #	Overall Exam	Overall D	Recommend	Comment	Customer #	Customer Name	Experience Date	Processed Date
Q			Very Satisfied							2/1/2021
Q			Very Satisfied							2/1/2021
Q			Very Satisfied							2/1/2021
Q		512	Somewhat Satisfied							2/1/2021

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

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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.

Search Criteria

Date Processed Experience Date

Day Week Month Quarter Year

Start Period: Feb 2021

End Period: Feb 2021

Last Name

Customer #

Organization

Click or start typing

Assignee

Click or start typing

FIX-IT! Status

Click or start typing

Advanced Filtering

Search

Data Export is limited to 5000 records.

Export to Excel Export to PDF

Total Items : 243

	FIX-IT! Status	Overall Exam	Overall Dental	Recommend	Comment	Customer #	Customer Name	Experience Date	Processed Dat...	Division	Hospital #	Hospital Name	Assignee
Q	Assigned	Very Dissatisfied						1/26/2021	2/1/2021	Keystone Empire Division	387	City Creatures Animal Hospital	Dawn Para
Q	Assigned	Very Dissatisfied						1/28/2021	2/1/2021	Southwest Division	560	Aurora Animal Hospital	Lisa Little
Q	Assigned							1/21/2021	2/1/2021	Suncoast Division	356	Bayshore Animal Hospital	Joey Knuds

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.

The screenshot displays the 'Fix-IT! Details' form. At the top, there are fields for 'Client Name' and 'Record Age: 7 days'. Below these are dropdown menus for 'Status' (with 'Done' selected), 'Outcome' (with 'Satisfied' selected), 'Group Assignment' (with 'Animal Hospital of Lubbock' selected), and 'User Assignment' (with 'User Name' selected). Further down, there are fields for 'Cause' (with 'Long wait' selected), 'Offer' (with 'Verbal apology' selected), and 'Value (\$)' (an empty text box). A 'Comments' text area contains the text: 'Spoke to client and apologized for wait time. She said it was not a problem and thanked me for calling.' At the bottom left are 'Save Changes' and 'View Survey' buttons. At the bottom right is a table showing a history of activities.

Date	User	Description
2/2/21 11:03 AM	User Name	Outcome changed to 'Satisfied'
2/2/21 11:03 AM	User Name	Status changed to 'Done'
2/2/21 11:03 AM	User Name	Offer changed to 'Verbal apology'
2/2/21 11:03 AM	User Name	Comment changed to 'Spoke to client and apologized for wait time. She said it was not a problem and thanked me for calling.'
2/2/21 11:03 AM	User Name	Cause changed to 'Long wait'

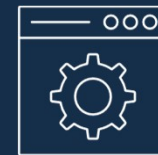
A history of all activities is saved with the survey record.

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.



Update Status:
Work in Progress
or Done



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



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



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



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.

Date Processed Experience Date

Day Week Month Quarter Year

Start Period: Feb 2021

End Period: Feb 2021

Question: Other comments or feedback

Organization: Click or start typing

Sentiment: Click or start typing

Advanced Filtering Search

Categories Comments

Other comments or feedback

Staff	Animals	Service	Exam/Procedure
General Staff	Technicians	Animals/Pets	Procedures
Doctors	Dogs	Cats	Facility
		Service	Price

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.

Question
Other comments or feedback

☐ Facility
☐ Medication/Vaccinations
☐ PAW Plan
☒ Price/Cost
☐ Service
☐ Staff

Sentiment
Click or start typing

Advanced Filtering

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.

Organization

Keyword

[Keyword Search Tips](#)

Question

Other comments or feedback ×
Primary reason why you would recommend this hospital to others ×

Advanced Filtering ▼ ⚙️

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

Select one or more open-ended questions.

Data Export is limited to 5000 records.

Export to Excel
Export to PDF

Total items : 8842

	FIX-IT! Status	Hospital #	Overall Exam	Overall Dental	Recommend	Customer #	Customer Name	Experience Date	Primary reason why you would recommend this hospital to others	Other comments or feedback
<input type="button" value="Q"/>		319	Very Satisfi					7/8/2021	The staff and the doctors are kind, compassionate, competent and just amazing!	I just love the doctors and staff and have complete confidence in how they care for my cats.
<input type="button" value="Q"/>		709	Very Satisfi					1/4/2021	Friendly staff and vets are amazing with your pets. Clinic always checks up to see how your animal is doing after they go see the vet.	

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

Date Processed: Experience Date

Day Week Month Quarter Year

Period Type: Select Period(s)

☐ Feb 2021
☒ Jan 2021
☒ Dec 2020
☒ Nov 2020
☐ Oct 2020

Click or start type

Advanced Filter

Graph Measure Type: Mean Top Box Bottom Box

Table Options: Percents Frequencies Both

Analysis Groups: 1 2 3 4 5 6

Group 1: Total

Question: Overall satisfaction with the exam

Search

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

Export to Excel Export to PDF

Overall satisfaction with the exam					
	Nov 2020		Dec 2020		Jan 2021
Total	10704		17010		24209
N/A	874		944		1284
No Answer	143		94		145
Total Answer	9687		15972		
Very Satisfied	8756	90.39 %	14625	91.57 %	
Somewhat Satisfied	569	5.87 %	838	5.25 %	1244
Neither Satisfied nor Dissatisfied	186	1.92 %	254	1.59 %	344
Somewhat Dissatisfied	95	0.98 %	123	0.77 %	156
Very Dissatisfied	81	0.84 %	132	0.83 %	177

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.

Column Question
Knowledge of the medical staff and their empathy for your concerns

Row Question
Overall satisfaction with the exam

Advanced Filtering ▼ ⚙️

Search

Select a Column and Row Question for analysis

Export to Excel
Export to PDF

Jan 2021 - Jan 2021		Knowledge of the medical staff and their empathy for your concerns					
		Total	Very Satisfied	Somewhat Satisfied	Neither Satisfied nor Dissatisfied	Somewhat Dissatisfied	Very Dissatisfied
	Total	25422	-	-	-	-	-
	No Answer Column	1213	-	-	-	-	-
	No Answer Row	1213	-	-	-	-	-
	No Answer To Both	1213	-	-	-	-	-
	Total Answer To Both	22530	21011	93			
Overall satisfaction with the exam	Very Satisfied	20666	91.73 %	20197	96.13 %	369	1.76 %
	Somewhat Satisfied	1215	5.39 %	679	3.23 %	436	1.93 %
	Neither Satisfied nor Dissatisfied	333	1.48 %	101	0.48 %	82	0.36 %
	Somewhat Dissatisfied	146	0.65 %	18	0.09 %	24	0.11 %
	Very Dissatisfied	170	0.75 %	16	0.08 %	11	0.05 %

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.

Question

Analysis Groups

Advanced Filtering

Analysis Groups can also be ranked instead of hospitals.

Measure: Wait time for pet to be seen

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	100.00 %	0	0.00 %	0	0.00 %	5
3	Countryside Pet Clinic	2	100.00 %	2	100.00 %	0	0.00 %	0	0.00 %	5
4	Kimberly Pines Veterinary Hospital	6	100.00 %	6	100.00 %	0	0.00 %	0	0.00 %	5
5	Clark - Missouri	15	100.00 %	15	100.00 %	0	0.00 %	0	0.00 %	5
6	Enid Pet Hospital	4	100.00 %	4	100.00 %	0	0.00 %	0	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

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

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

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1 - 5 of 5 items

ADMIN-IT!

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

Account Setup

Email	<input type="text"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>
Title	<input type="text"/>
Employee ID	<input type="text"/>
Phone#	<input type="text"/>
Is Active	<input type="checkbox"/>
Roles	<input type="text" value="Please select Role"/>
Is Locked Out	<input type="checkbox"/>
Recovery Groups	<div><input type="checkbox"/> Select All Items ABC Veterinary Hospital ABQ Petcare Hospital ACC Homer Glen AMSC</div>
Custom Attribute	<div>☆ Organization + <input type="checkbox"/> NVA</div>

Create Cancel

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.


 Home

In this module, you will find training videos and our contact information should you require help on any aspect of this site.


Downloads


All Modules - Training Video(s)


 Internet Explorer


 For all other browsers


Training Videos


 Login


 View-IT

 Fix-IT




 Enrich-IT

 Trend-IT

 Rank-IT

 Track-IT

Contact Information

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