# Case Management Rapid Safety Feedback Qualtrics Single Review Tool User Guide

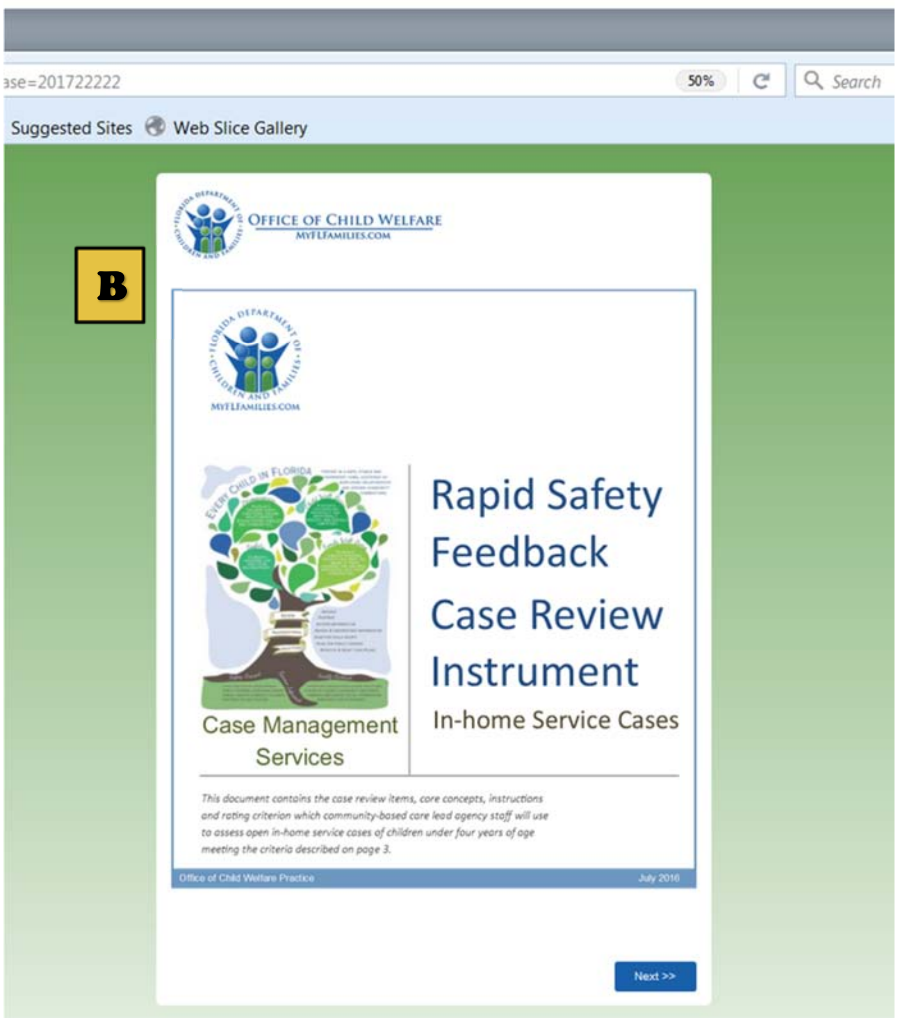
This guide to be followed if one review will be submitted at a time.

## STEP 1: LINK

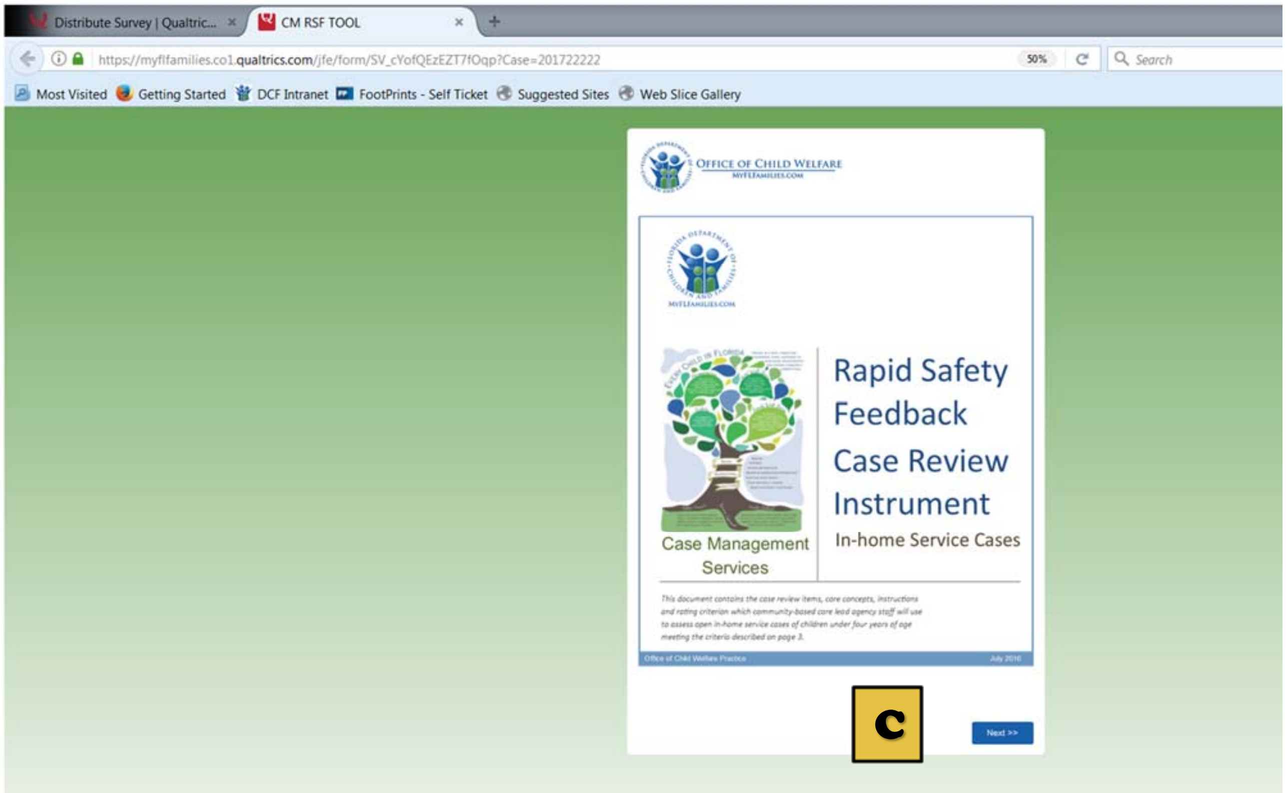
A. Click the link below to access a blank tool. This same link will be used for each case review to be entered. A blank tool will not appear until the case review in progress has been submitted to the manager – so if you leave your session at any time, you can click on the link and be brought back to where you last left off with the review.

Blank Case Review Tool Link: http://myflfamilies.co1.qualtrics.com/jfe/form/SV_cYofQEzEZT7fOqp

B. The tool will appear in your browser.

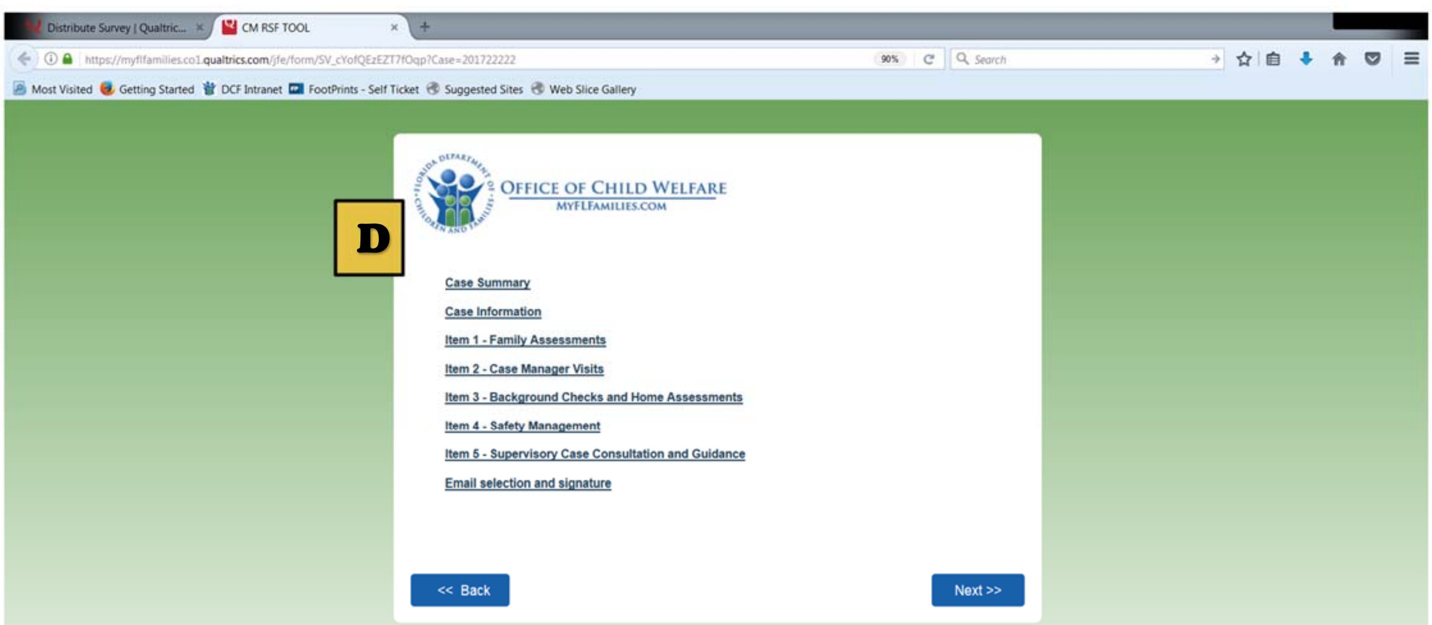


C. Click the “Next” button to proceed with the case review.

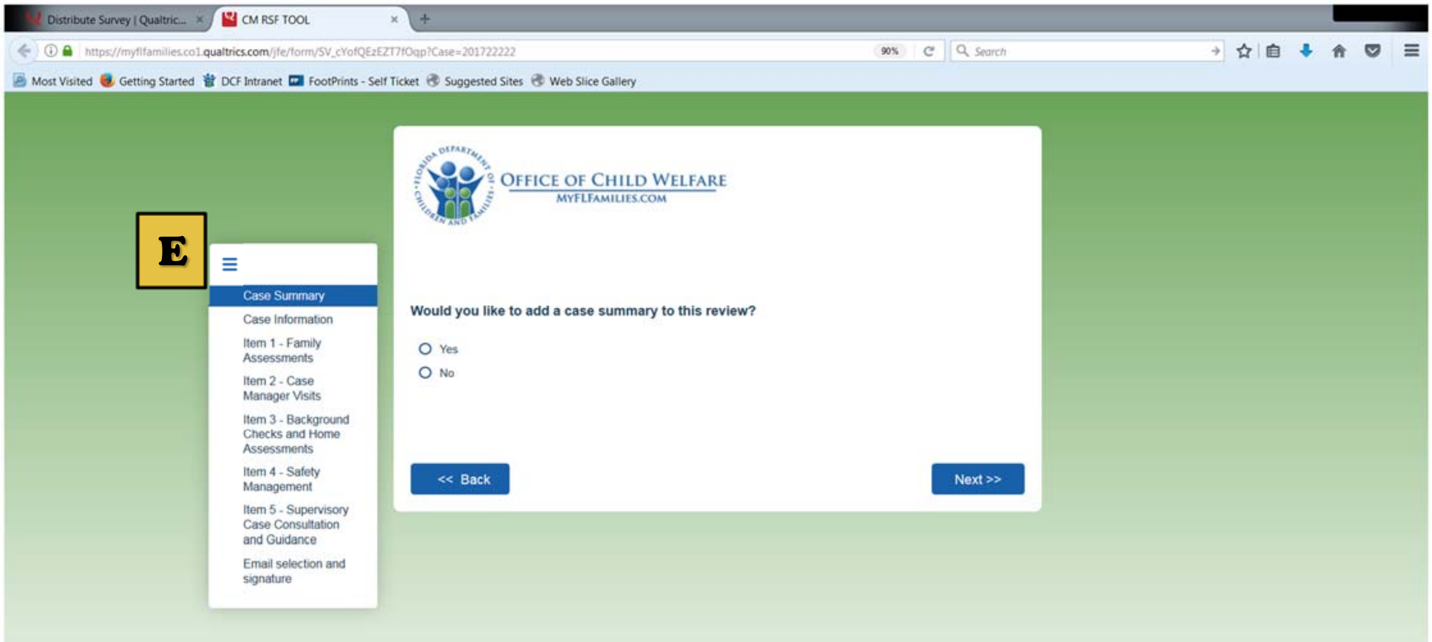



## STEP 2: COMPLETING THE SURVEY REVIEW TOOL

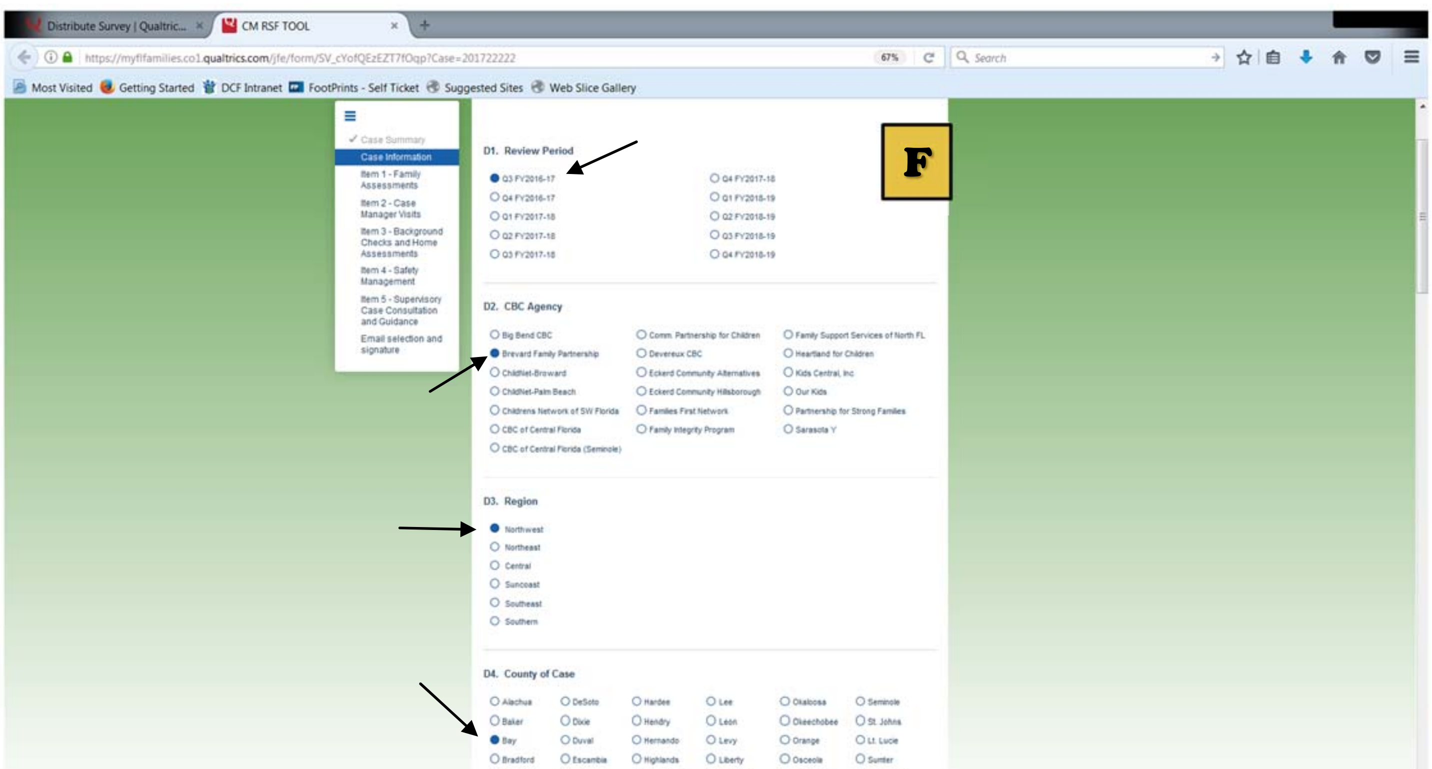
D. The Table of Contents appears. If you have a review in progress, you can click on any link in the contents to be directed to that page. Otherwise, click on the Next button to move forward with the review.



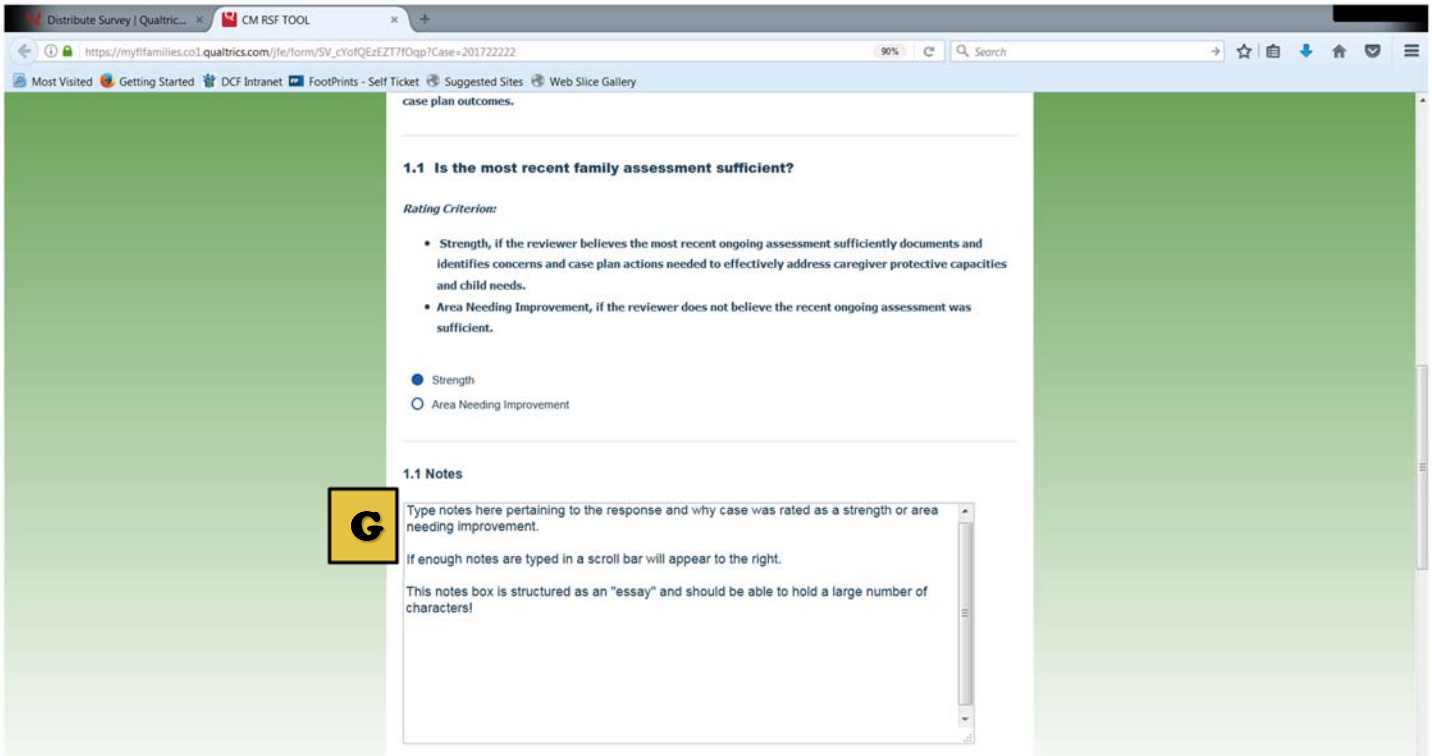
E. When you begin the review, you will find that the Table of Contents will always appear to the left of the screen. This feature will allow you to go jump from section to section of the survey review tool by clicking on any of the item links.



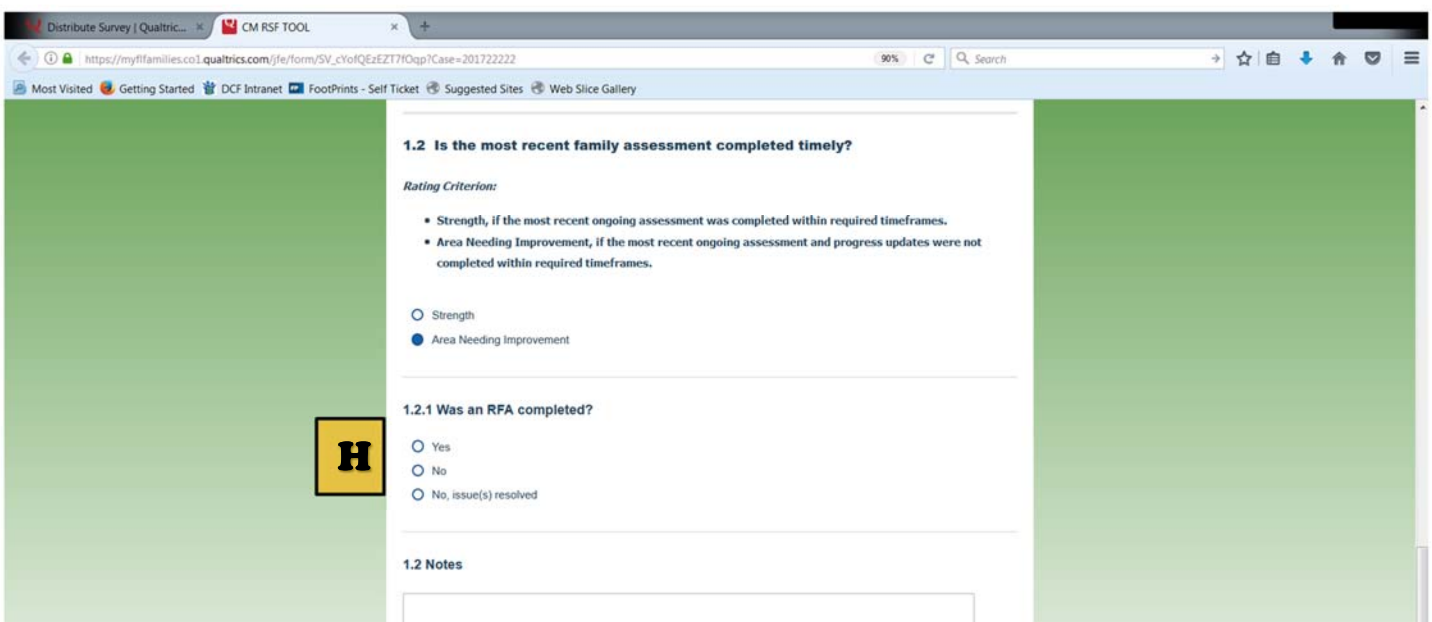

F. Continue through the survey review tool by selecting a response for each question. The response you select will show a filled radio button. Users can change responses at any time throughout the case review. Responses will not be saved unless you advanced to the next page.



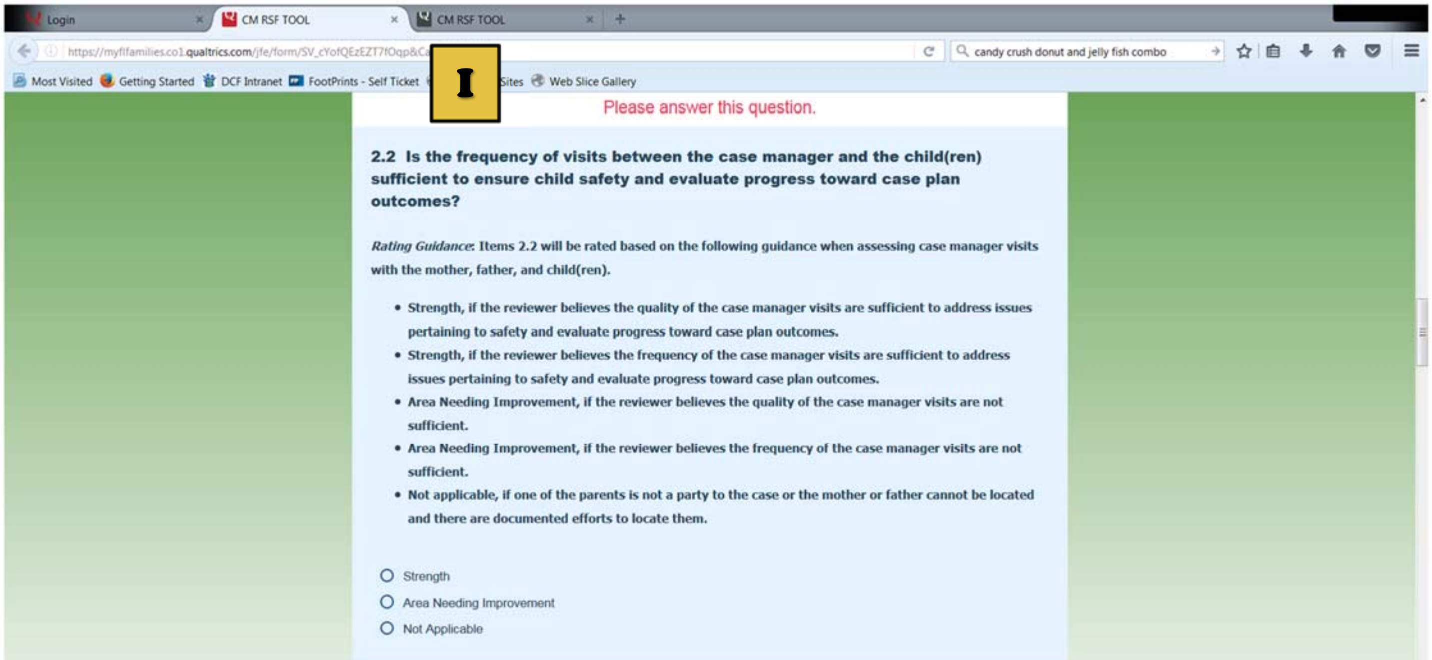
G. Each item will have a notes box where comments/notes can be typed.



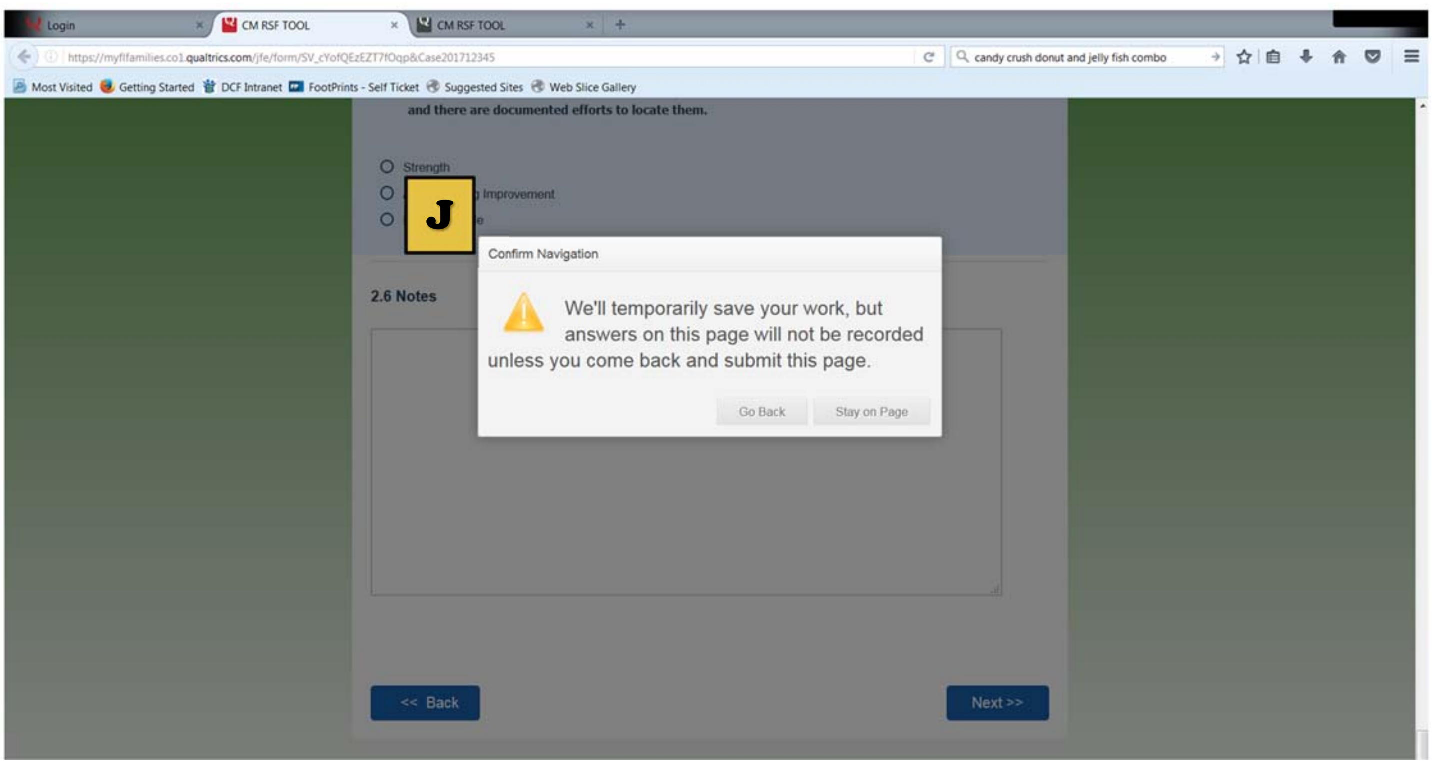

H. Any item with a response of “Area Needing Improvement” is selected, a question pertaining to an RFA being completed will appear.



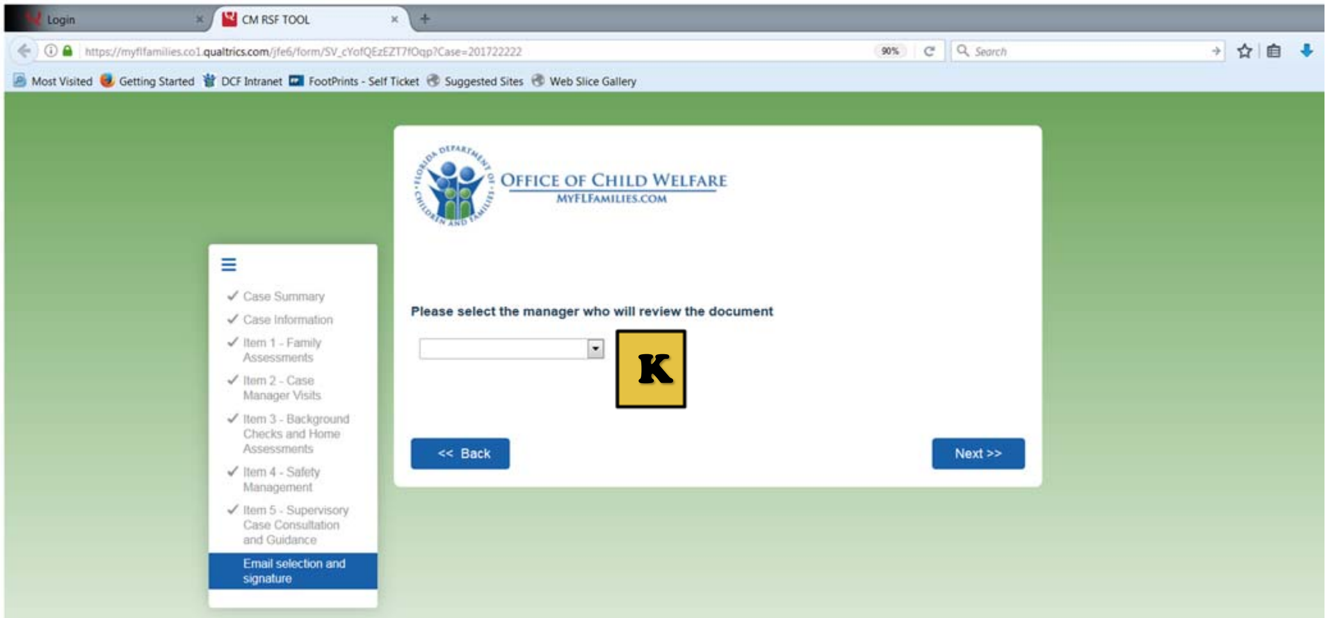
I. If you try and proceed through the survey review tool without answering an item, upon clicking the “next” button, you will receive a message in red asking you for a response to be selected.



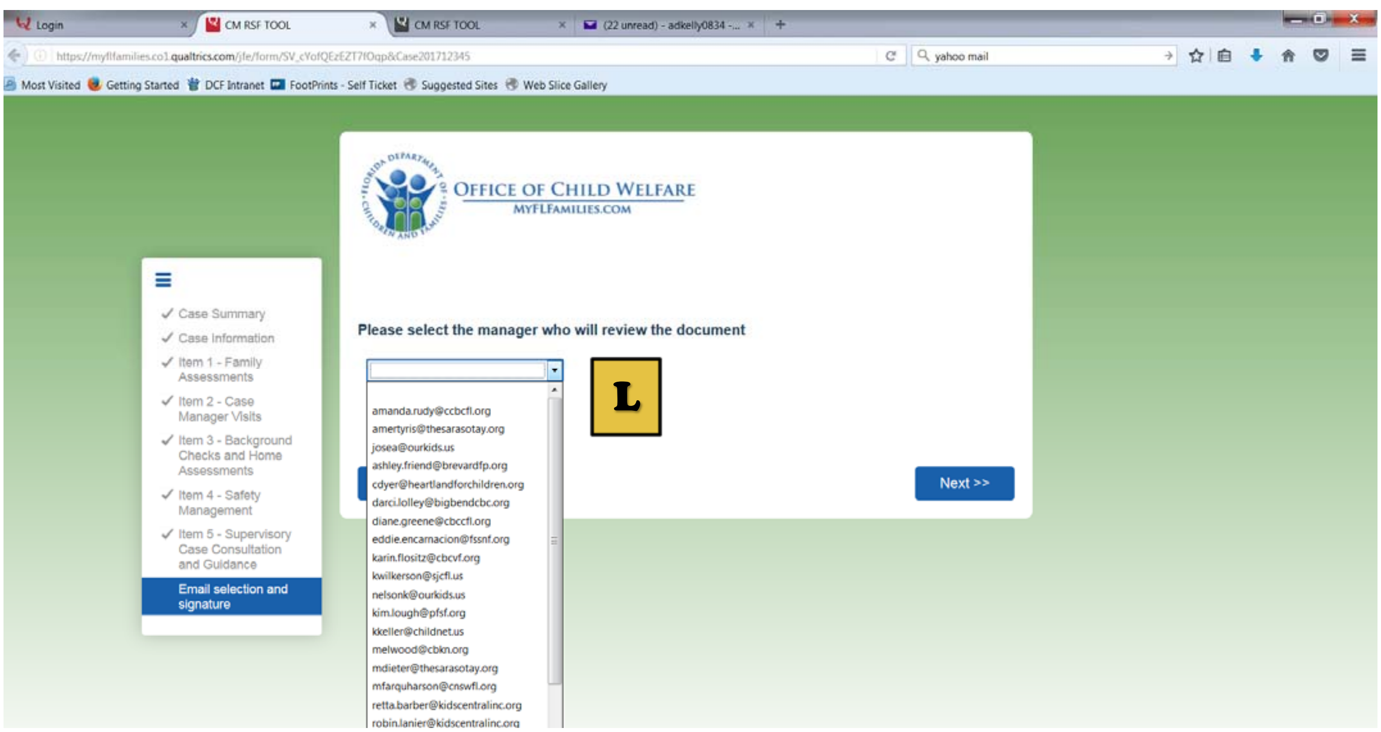

J. If you attempt to go to a previous page in the survey review tool by clicking on the “Back” button, you will receive a navigation message. If you “Go Back,” responses entered will be temporarily saved but not recorded until you return to the same page and click on the “Next” button.



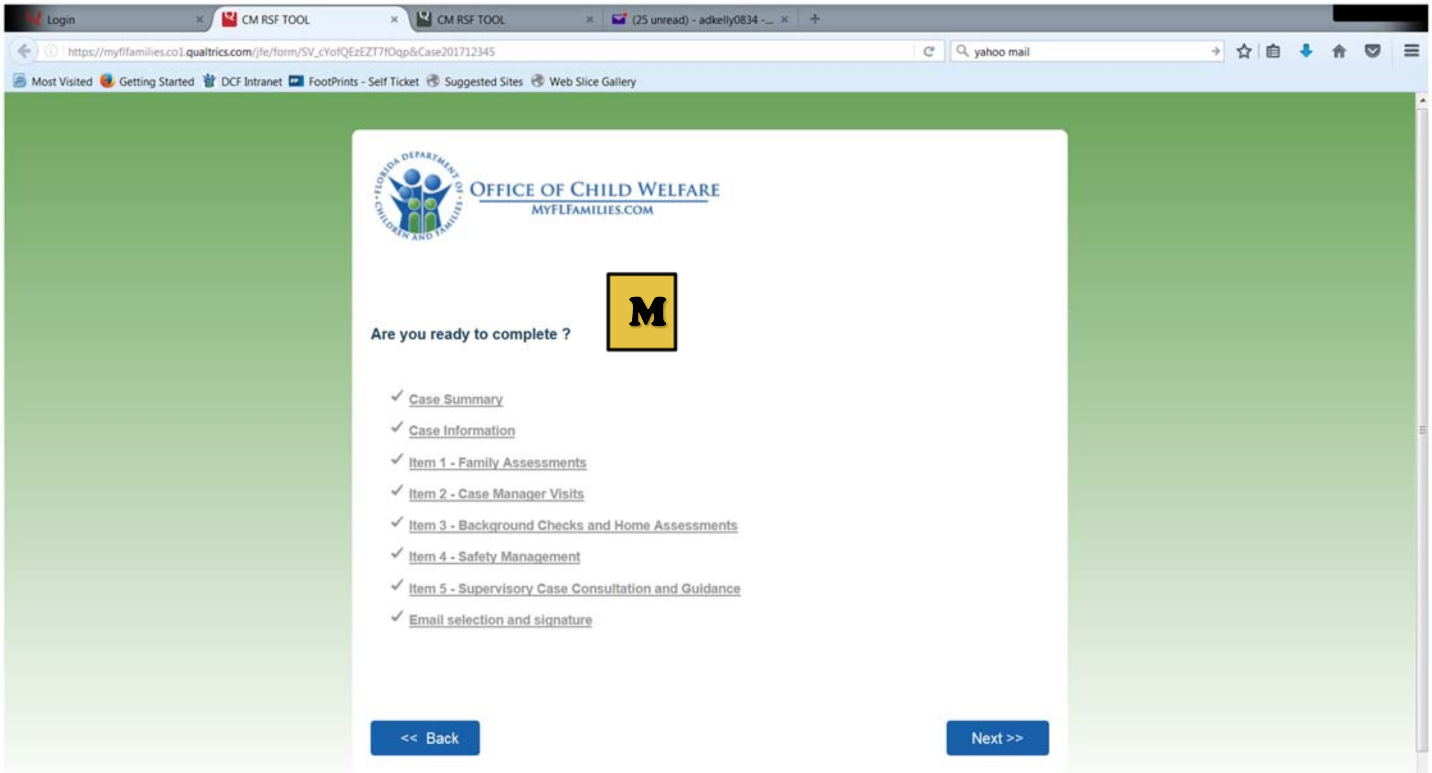
K. When you have responded to all questions in the survey review tool, you will be asked to select the manager who will review your case.



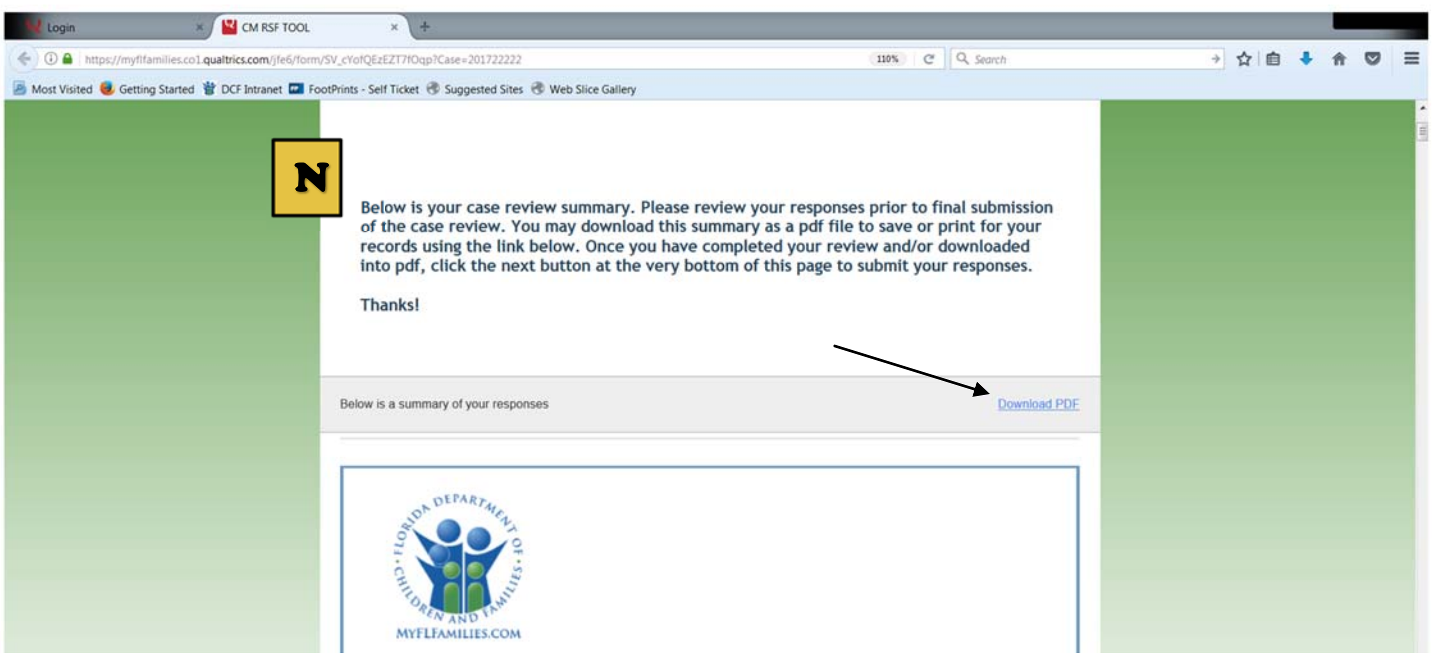

L. From the drop-down box, carefully select the manager to whom your case review tool will be emailed for a final review. You must be careful with your selection, otherwise the case review tool will be sent to someone else!



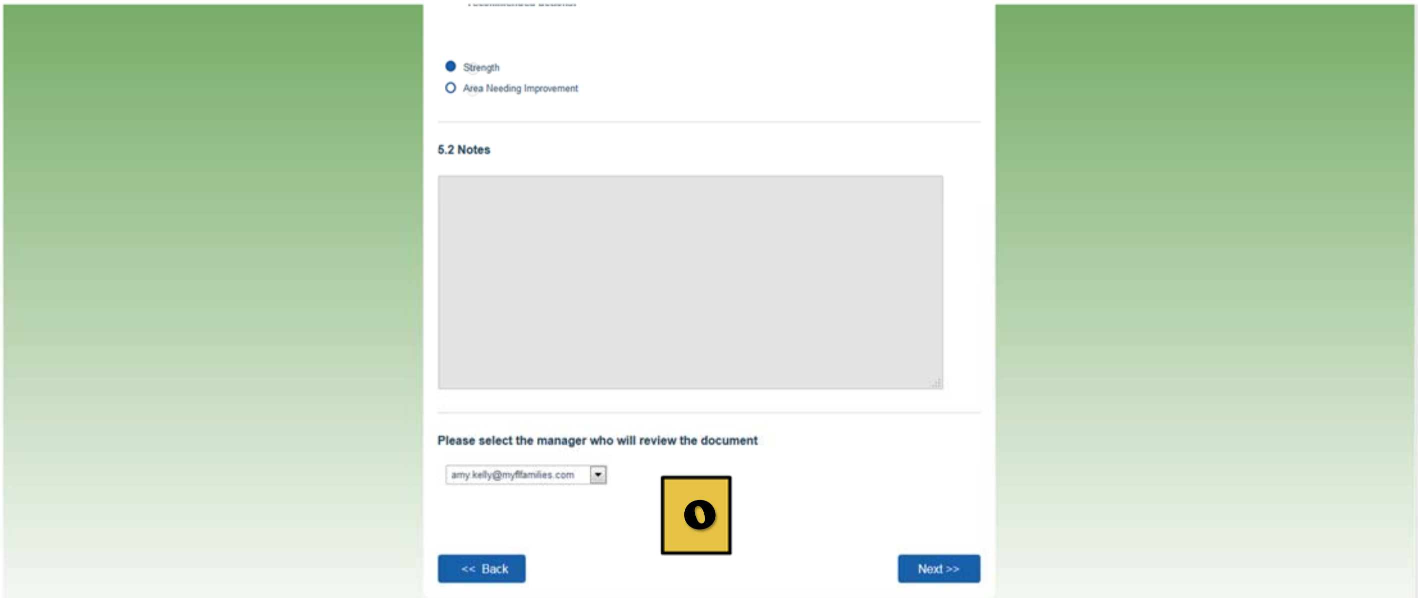
M. Once you select your manager's email and click on the "Next" button, you will be asked if you are ready to complete. Select "Next" or if needed, click on any item link to go back to that section and make any corrections.



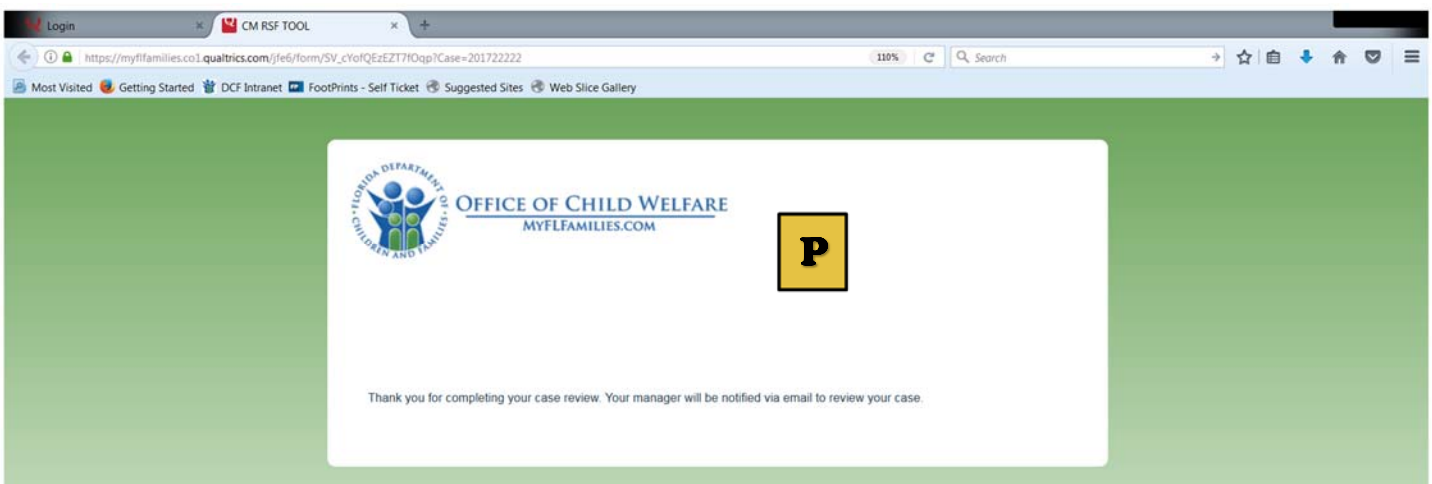

N. When you click "Next" in step M, you will then be provided a case review summary. Here you can scroll down the page and review all of your responses for each question/item. You can also download a PDF of this summary to save on your computer or print for a hard copy.



O. Changes cannot be made in the case review summary. You must use the “Back” button or Table of Contents to go back into the review tool and make any needed corrections. Otherwise, click on the “Next” button to submit your work.



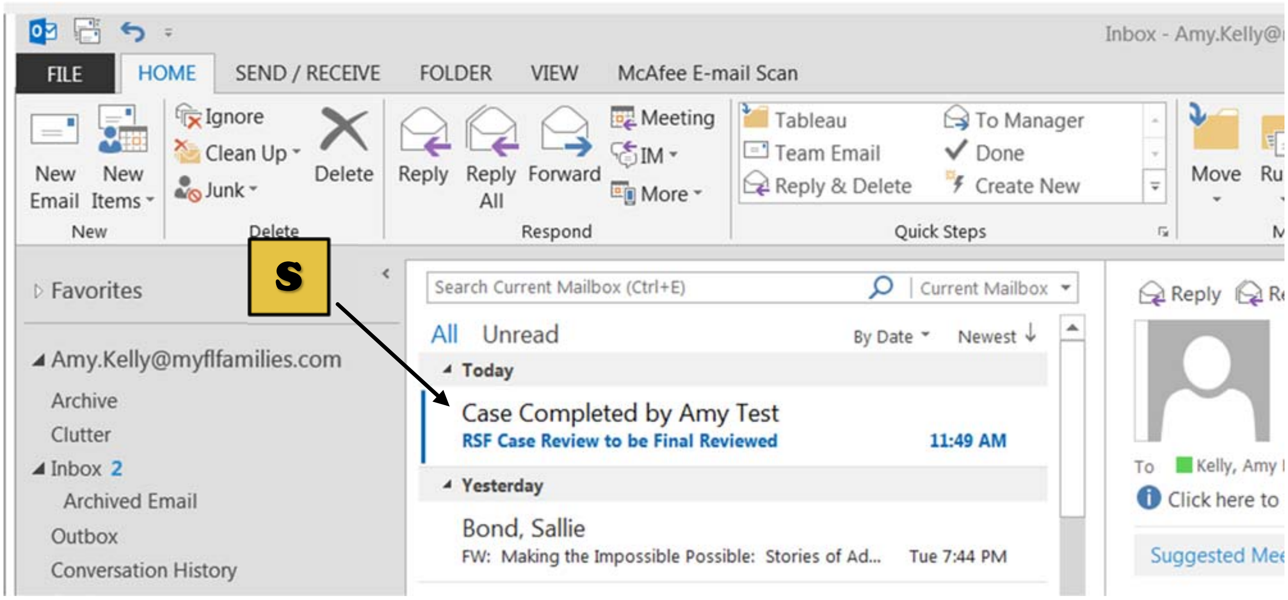

P. Once you click on “Next” from the case review summary page, you will receive a thank you message and your case review will be automatically emailed to the designated manager for a final review. The manager will be alerted via email that a case is pending their review. Once submitted to the manager, you will no longer have access to the case review. Either the manager can make changes upon their final review or the Qualtrics admin in CQI QA can assist.



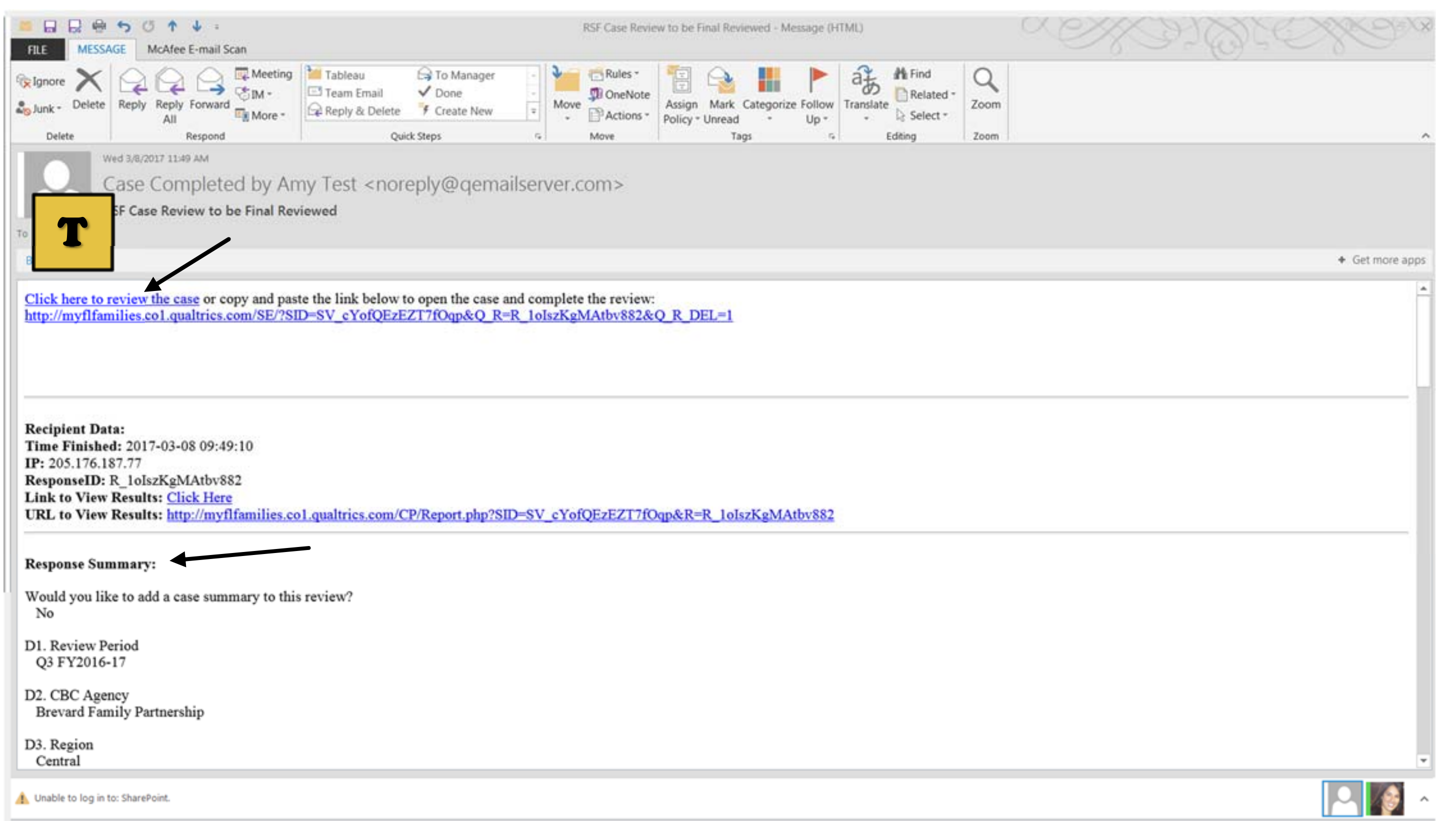

Q. Complete steps A through P for each case review to be completed.
R. Should you need to exit your browser at any time during prior to submitting the tool, click on the next button at the bottom of the page of the tool to save your work. You can then click on the survey link and you will be redirected to the page you left off. A blank tool will not appear until you have submitted the current tool in progress.

## STEP 3: MANAGERS FINAL REVIEW PROCESS

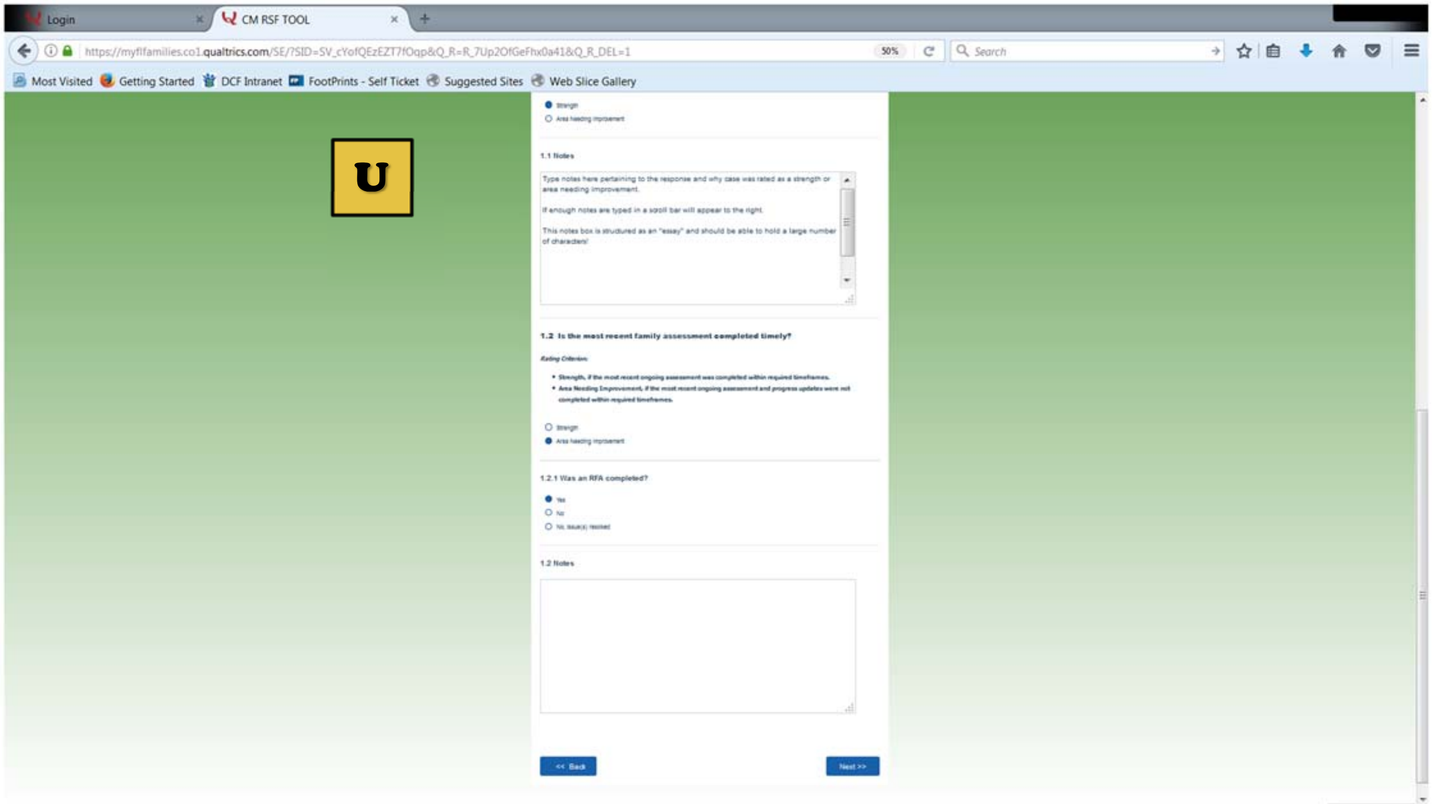
S. When a reviewer has completed a case review and submitted the survey case review tool, the manager will be notified via email to conduct a final review.



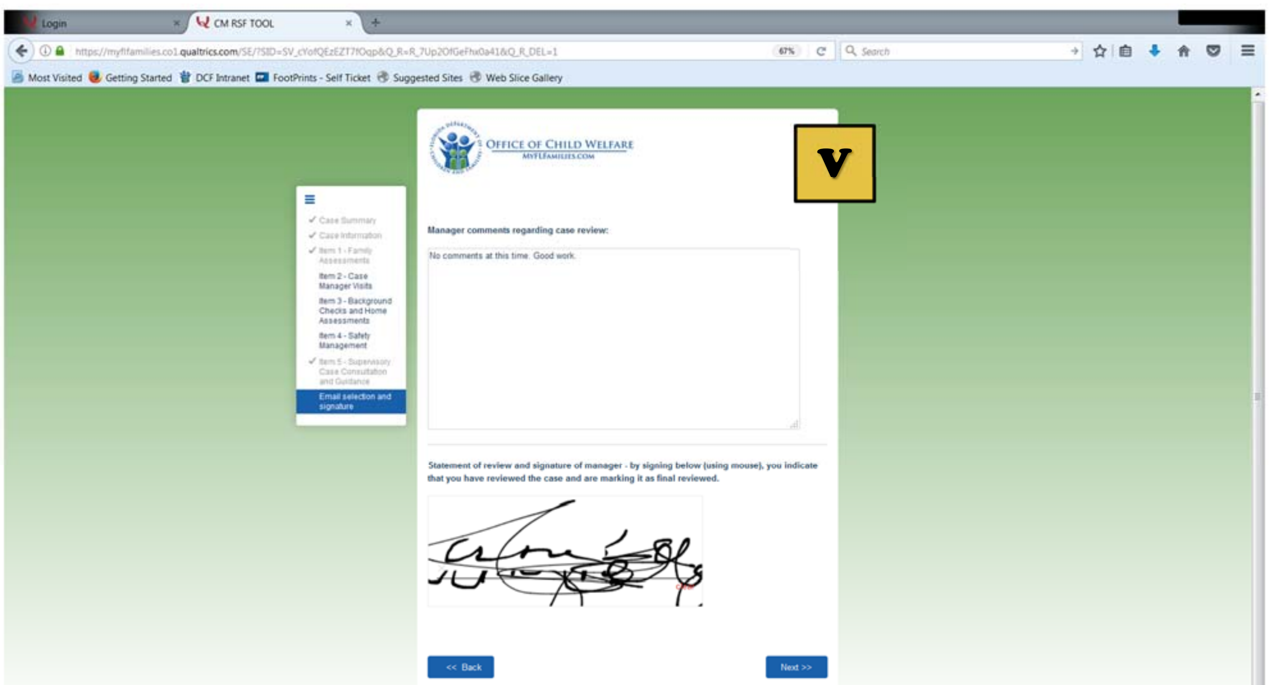
T. Open the email. You will find the review summary in the body of the email but will need to click on “Click here to review the case” to open the case review tool for final review.



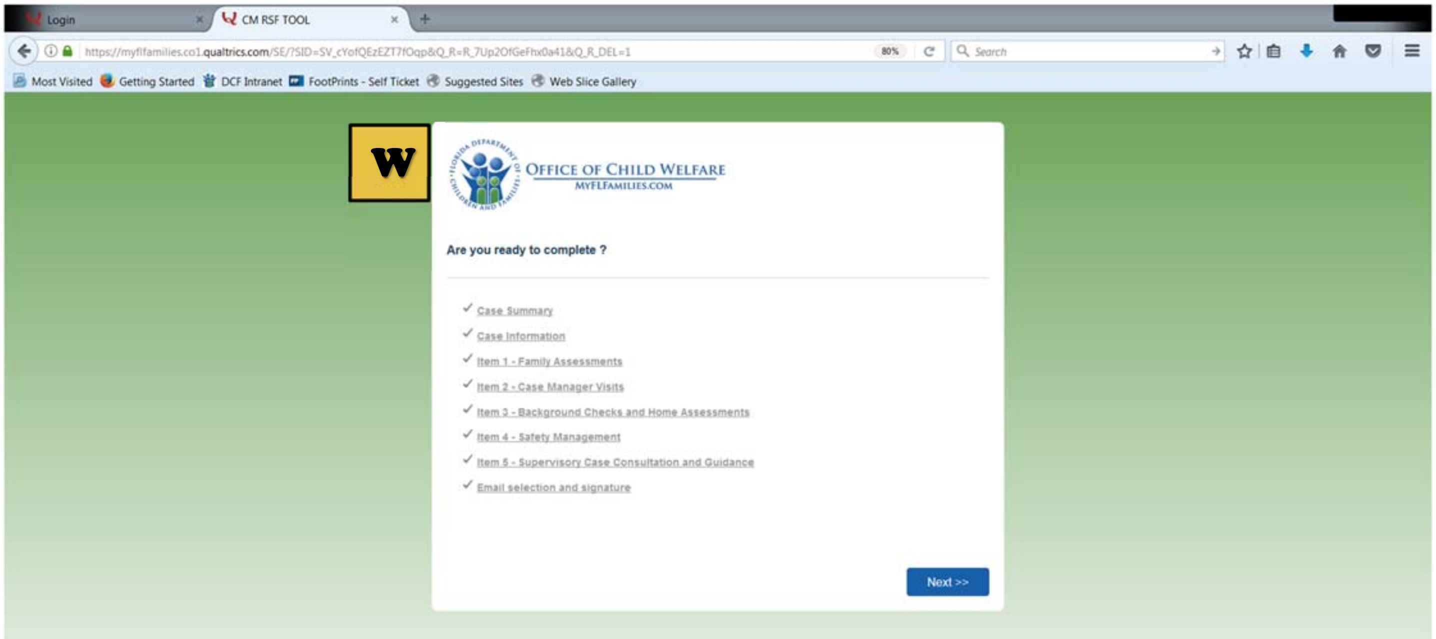
U. When you click on the “Click here to review the case” link, the survey case review tool will open. Navigate through the survey case review tool and review the work of the reviewer. Make any needed changes at this point since the tool cannot be re-opened for corrections to be made.




V. After all items have been reviewed, the manager will be prompted to enter any comments regarding the case review. The manager must also sign on the line indicating they have completed a final review of the survey case review tool. Signature will need to be done with the computer mouse.



W. Once signed and the “Next” button clicked, the manager will be prompted to ensure completion of the final case review. Any items in the list with no check mark indicates that page was not viewed. The manager can click on that item link in the list to be directed to that page for review and continue through the tool and be brought back to this screen. Click the “Next” button.




X. You have completed the final case review! A thank you message will appear and the responses to each item will be stored for reporting.


Complete steps S through W for all cases emailed to you pending a final review.

## ADDITIONAL INFORMATION

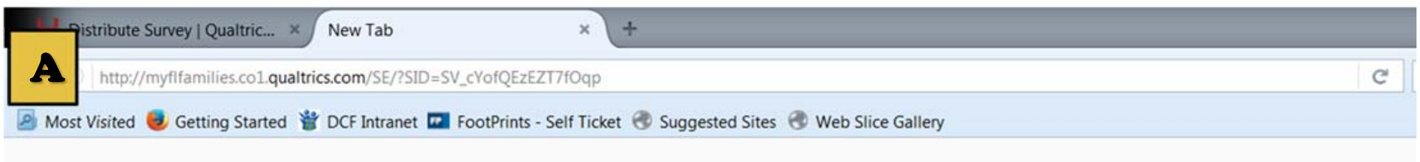
- Mozilla Firefox is the preferred web browser to use for Qualtrics
- Use the same web browser for completing each survey case review tool
- Clicking the “Next” button in the survey review tool will save the work on the page you completed
- If you close out of your survey prior to submitting it, you can copy and paste the link from your excel template into your web browser and pick up where you left off
- Once a survey case review tool has been submitted for a final review, corrections can be made at the hands of the manager. Otherwise, call or email the Qualtrics administrator in central office/headquarters CQI/QA to assist

# Case Management Rapid Safety Feedback Qualtrics Multiple Review Tool User Guide

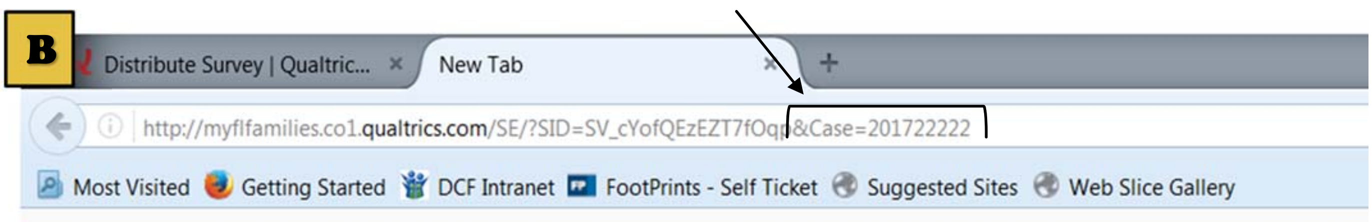
## STEP 1: MAKING THE SURVEY REVIEW TOOL LINK UNIQUE TO EACH CASE REVIEW

A. Copy and paste the link below into your web browser. Before pressing enter on the keyboard or clicking "go" in the web browser, you must add a unique identifier in the URL. Adding a unique identifier to the URL will provide users with the ability to complete multiple cases simultaneously. Refer to step 1B on adding the unique identifier.

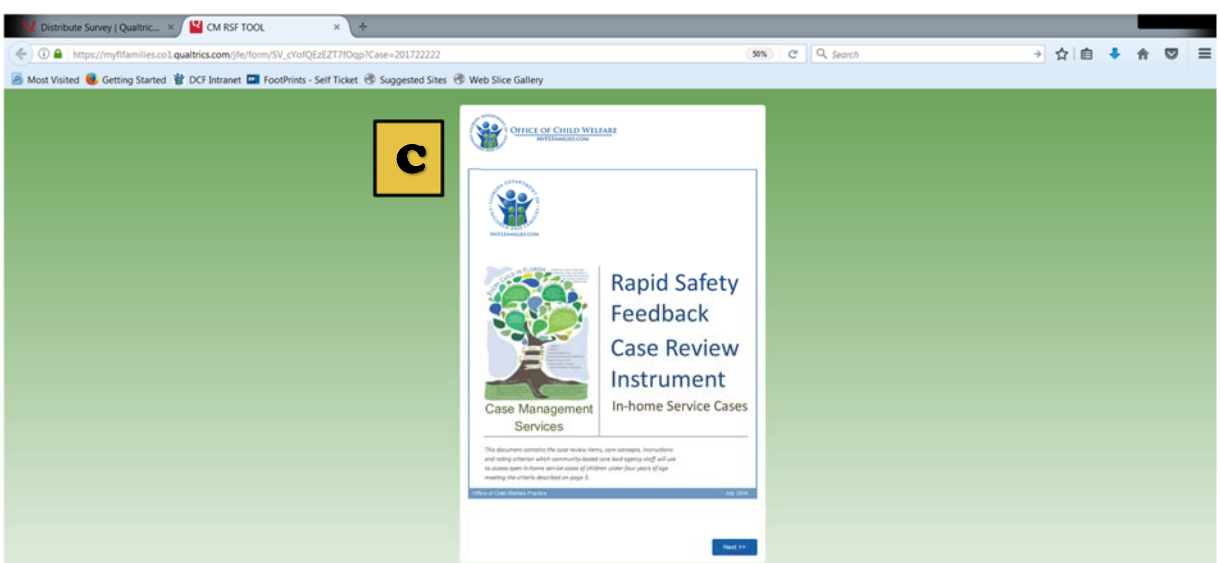
Blank Case Review Tool Link: http://myflfamilies.co1.qualtrics.com/SE/?SID=SV_cYofQEzEZT7fOqp




B. Append to the very end of the URL, the following with no spaces: & Case = # (where # is the case id of the case you are reviewing - no dashes). The "C" in case must always be capitalized.

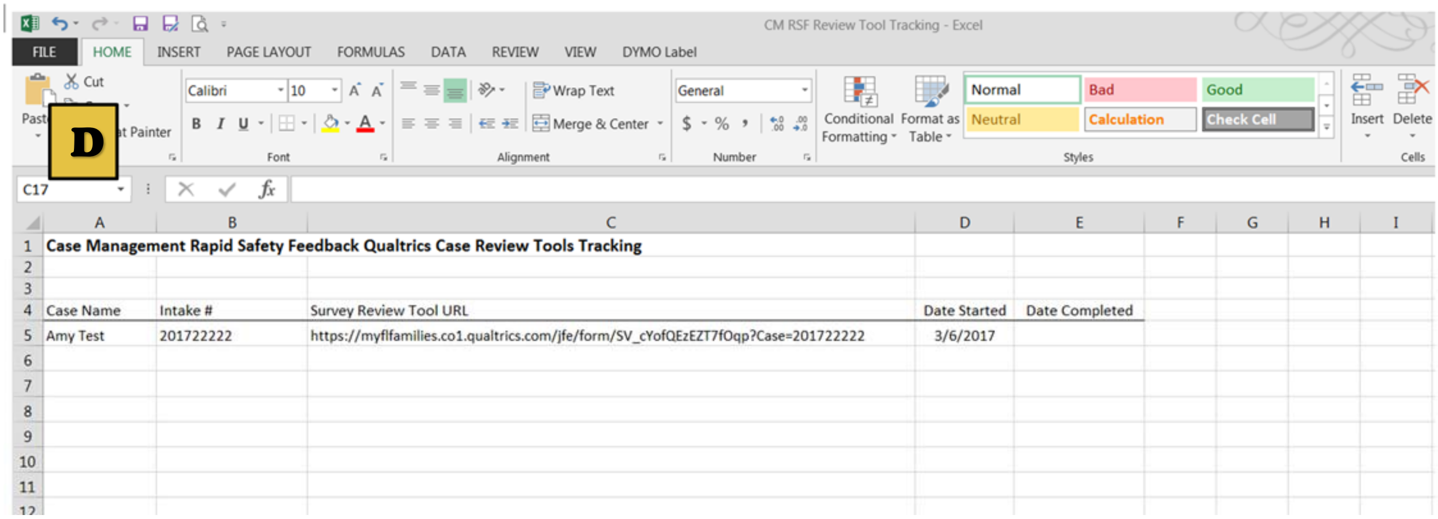



C. After appending the unique identifier to the end of the URL as instructed in steps A and B, press enter on the keyboard or the go/refresh arrow in your browser. You will then be directed to a new blank tool.

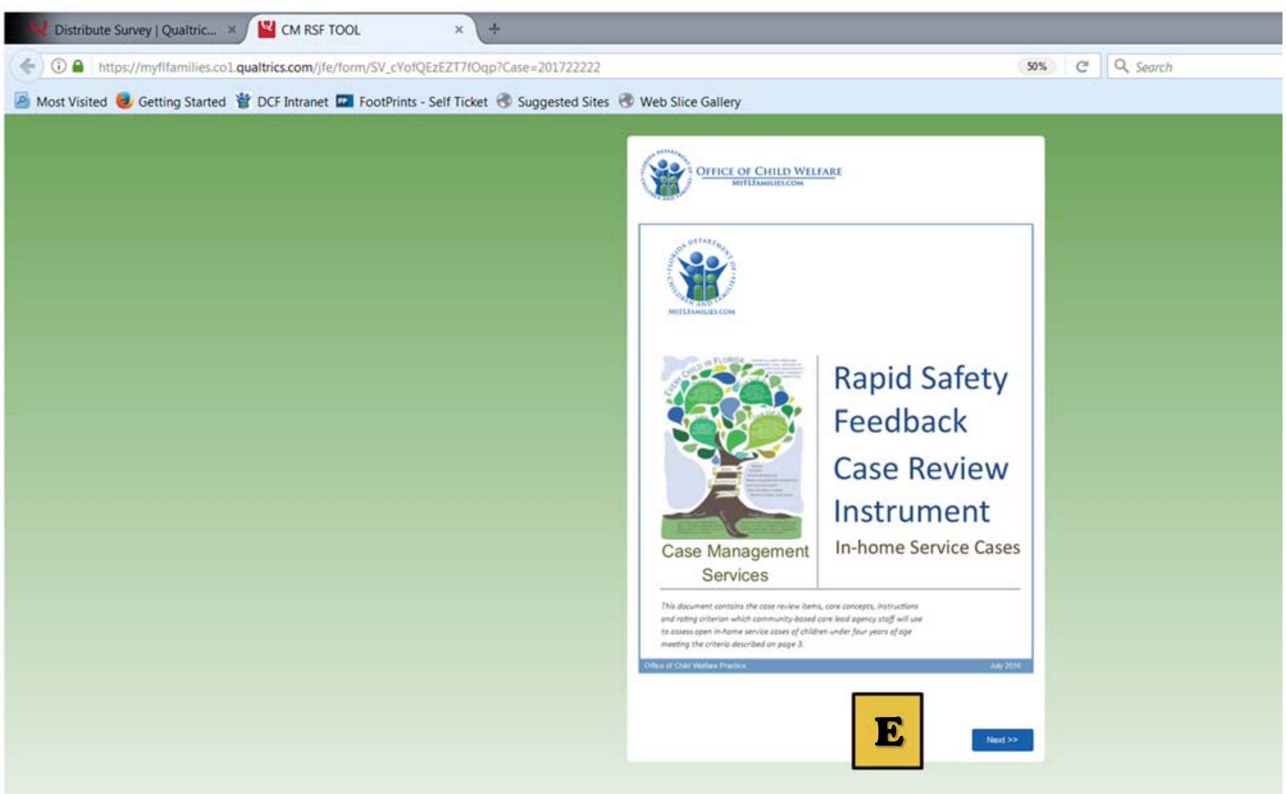


D. Before continuing with the case review, open the excel spreadsheet tracking template and copy and paste the new unique link from your browser into column C. Keeping all unique links in the spreadsheet will serve as a tracking mechanism and provide organization of your review tools in progress. Save this file.

***The unique URL will change. Qualtrics automatically changes the ampersand to a question mark – leave as is***

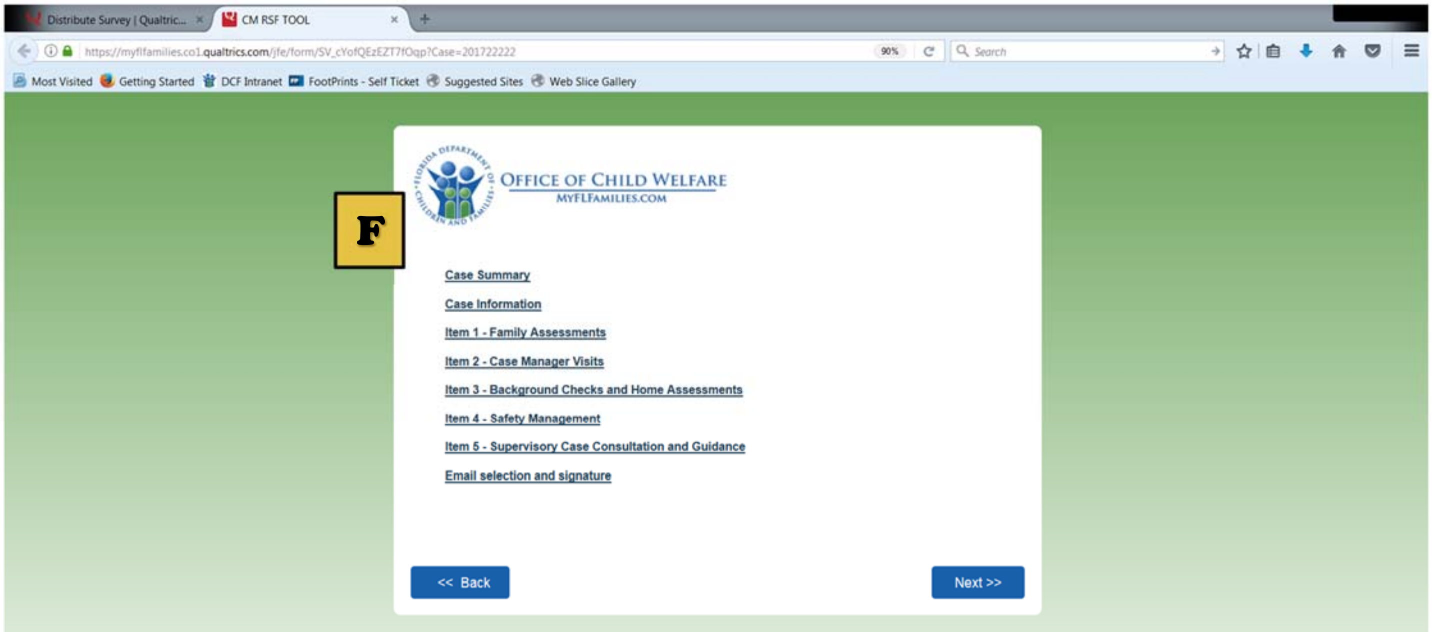



E. After pasting in the unique URL into the excel template, go back to your browser and Click on the “Next” button to proceed with the case review.

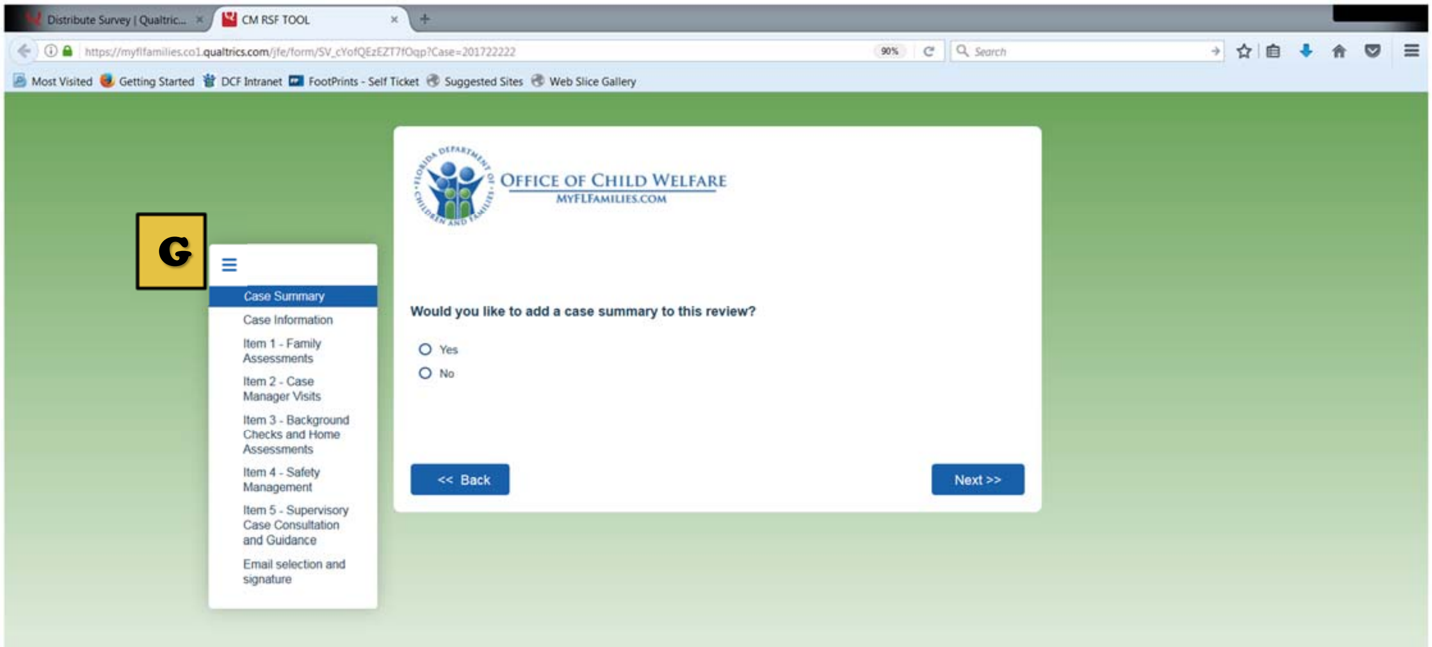


## STEP 2: COMPLETING THE SURVEY REVIEW TOOL

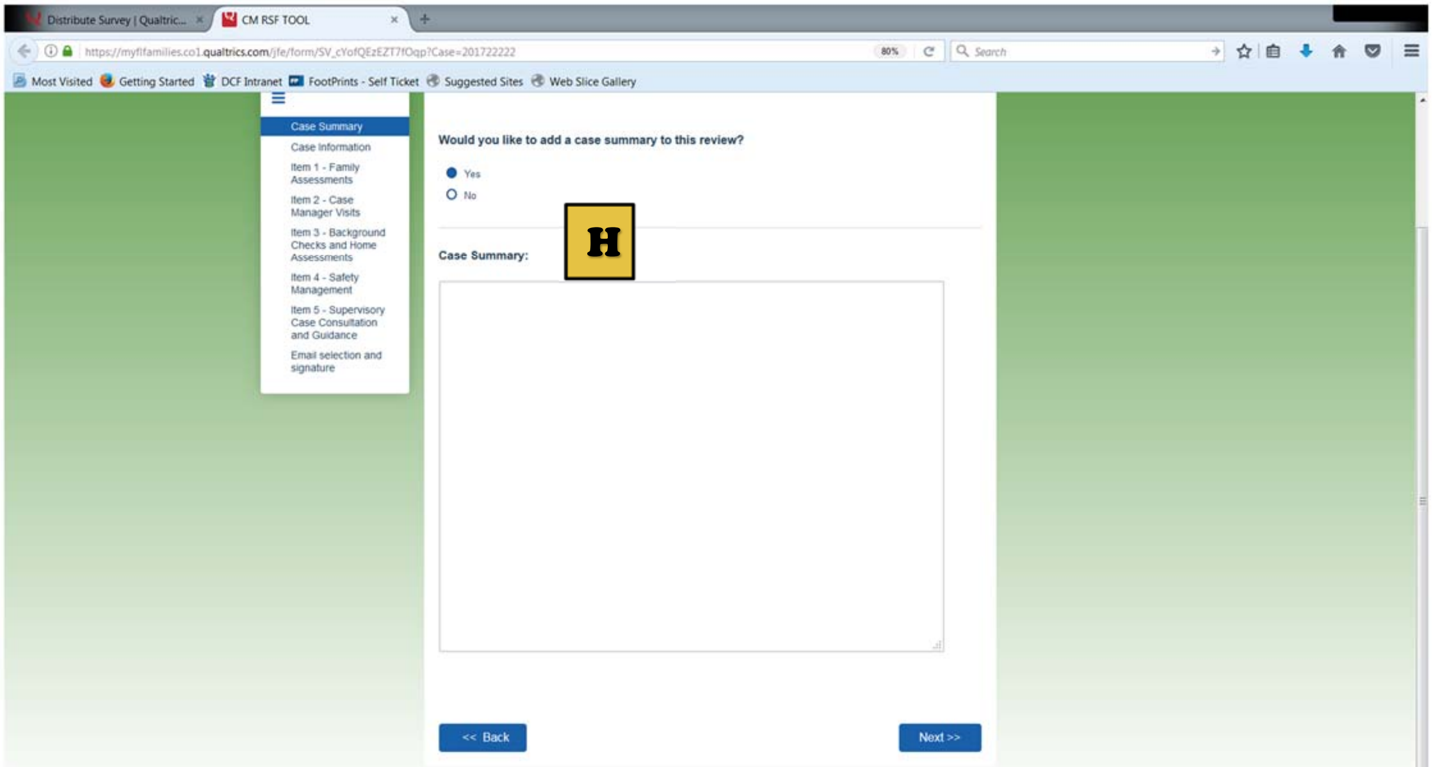
F. The Table of Contents appears. If you have a review in progress, you can click on any link in the contents to be directed to that page. Otherwise, click on the Next button to move forward with the review.



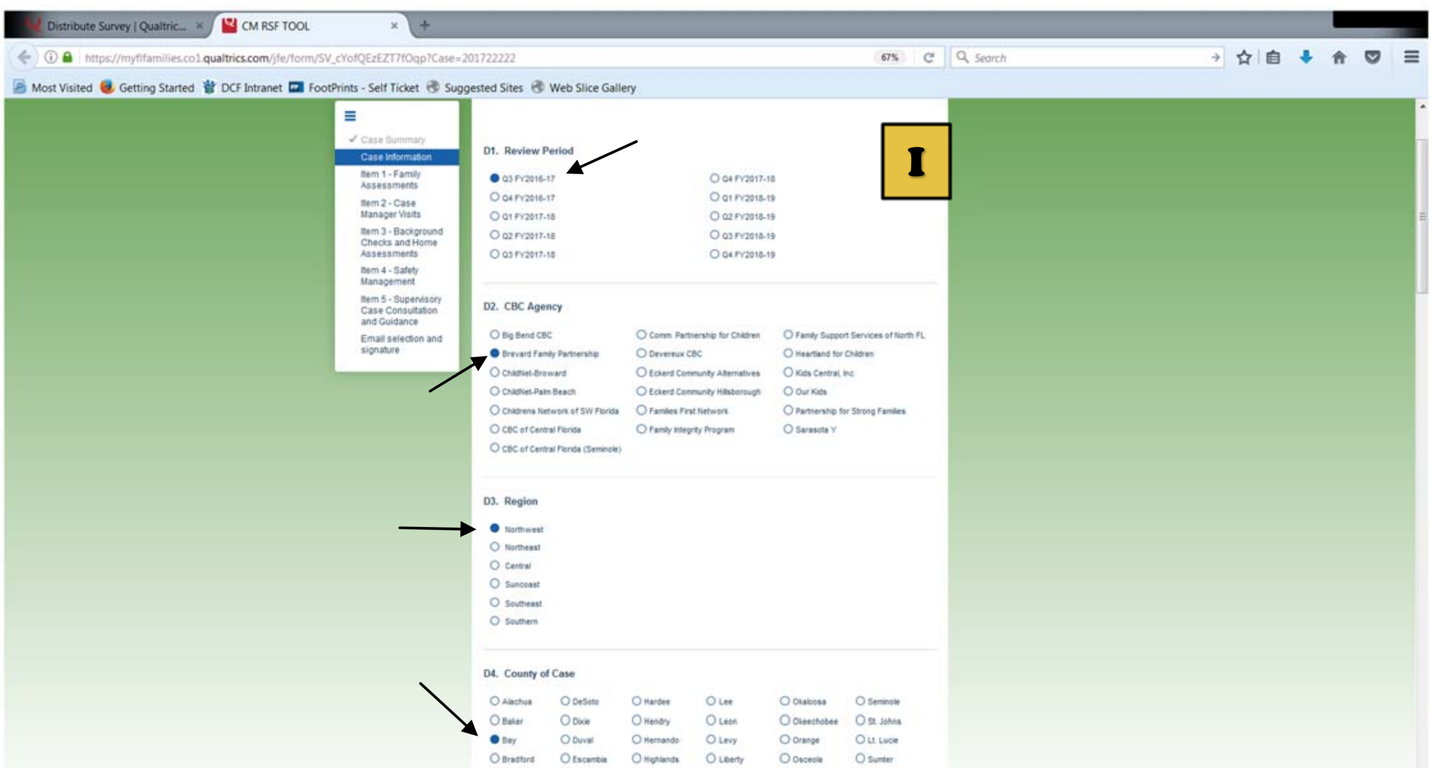

G. When you begin the review, you will find that the Table of Contents will always appear to the left of the screen. This feature will allow you to go jump from section to section of the survey review tool by clicking on any of the item links.



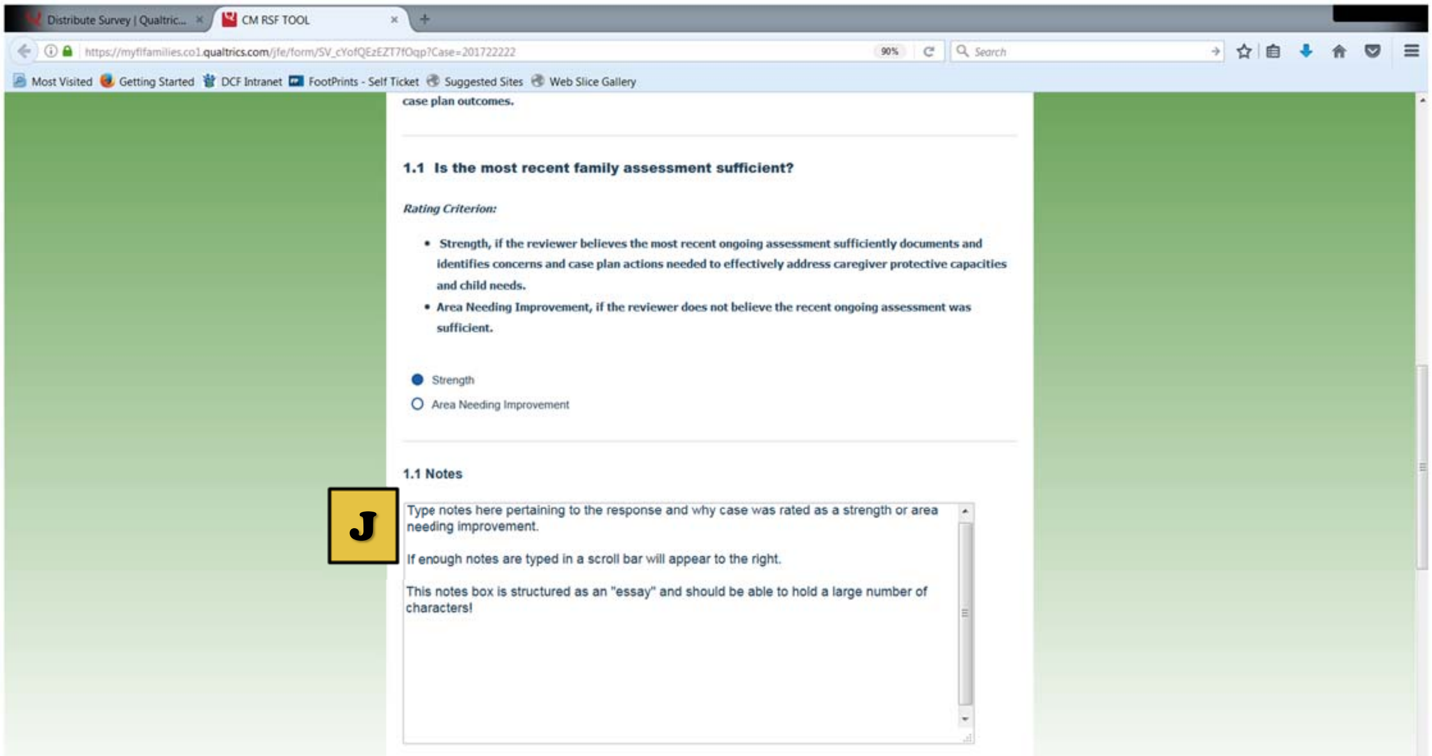
H. The beginning of the survey review tool allows users to complete a case summary if desired. By selecting “yes,” a pop up notes box will appear where the reviewer will type the case summary. If “no” is selected, continue by clicking “next.”



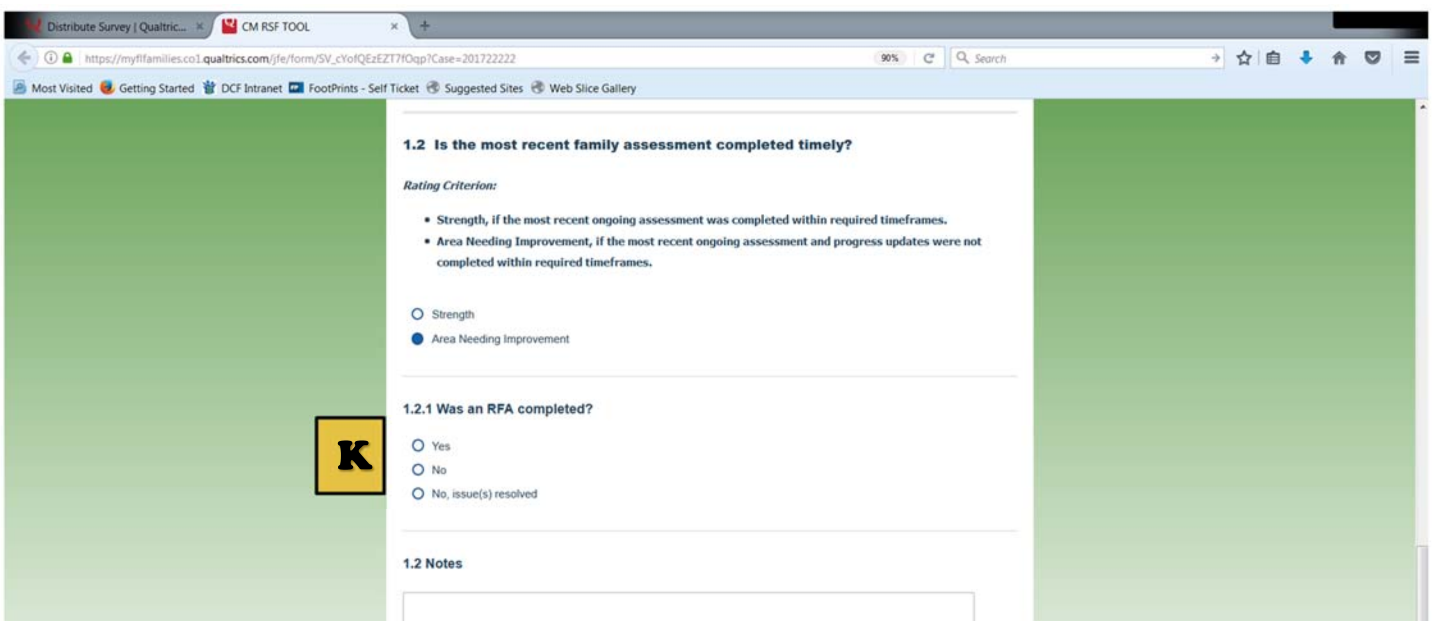

I. Continue through the survey review tool by selecting a response for each question. The response you select will show a filled radio button. Users can change responses at any time throughout the case review. Responses will not be saved unless you advanced to the next page.



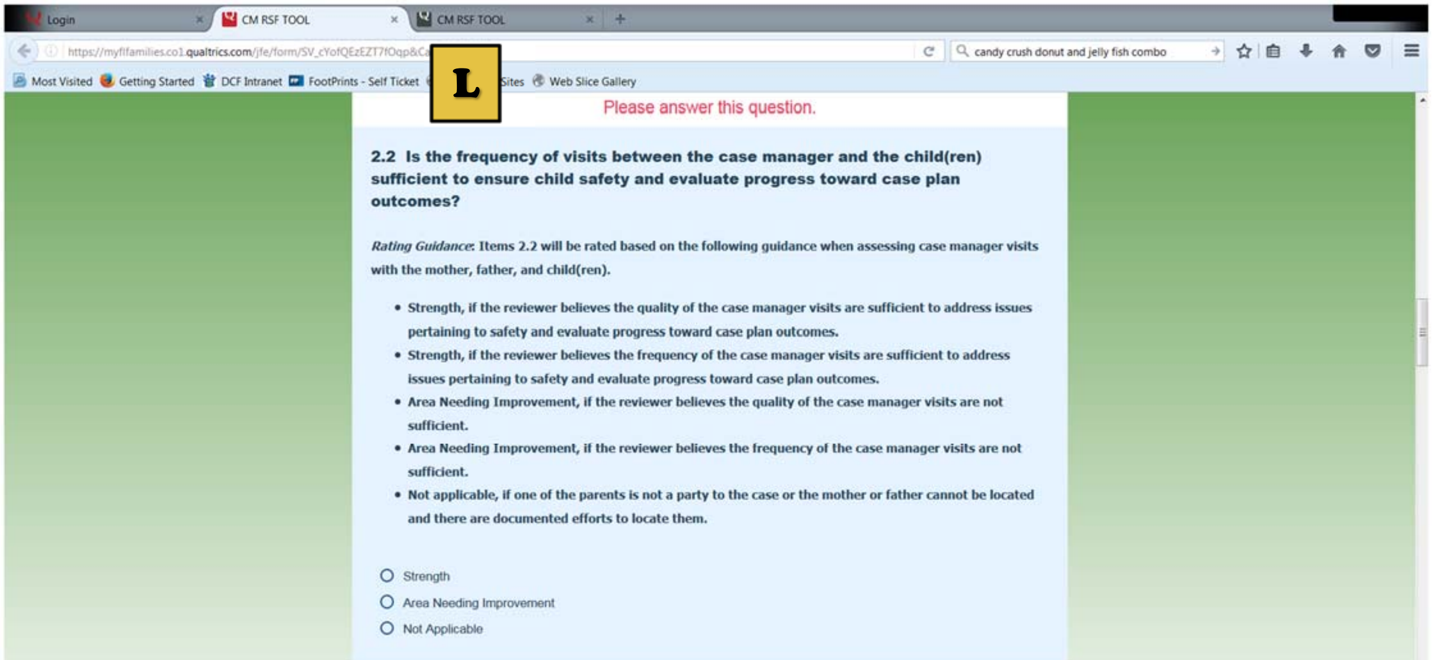
J. Each item will have a notes box where comments/notes can be typed.



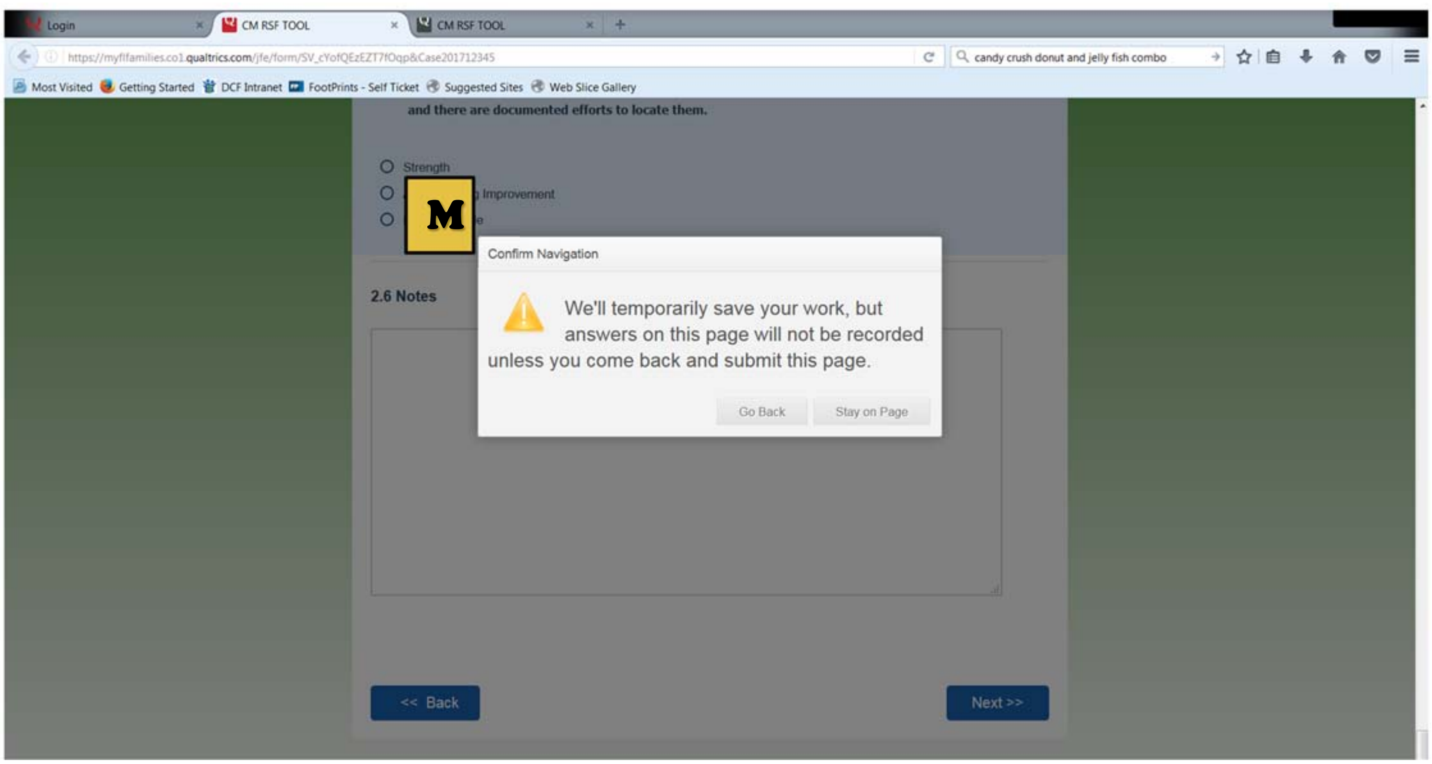

K. Any item with a response of "Area Needing Improvement" is selected, a question pertaining to an RFA being completed will appear.



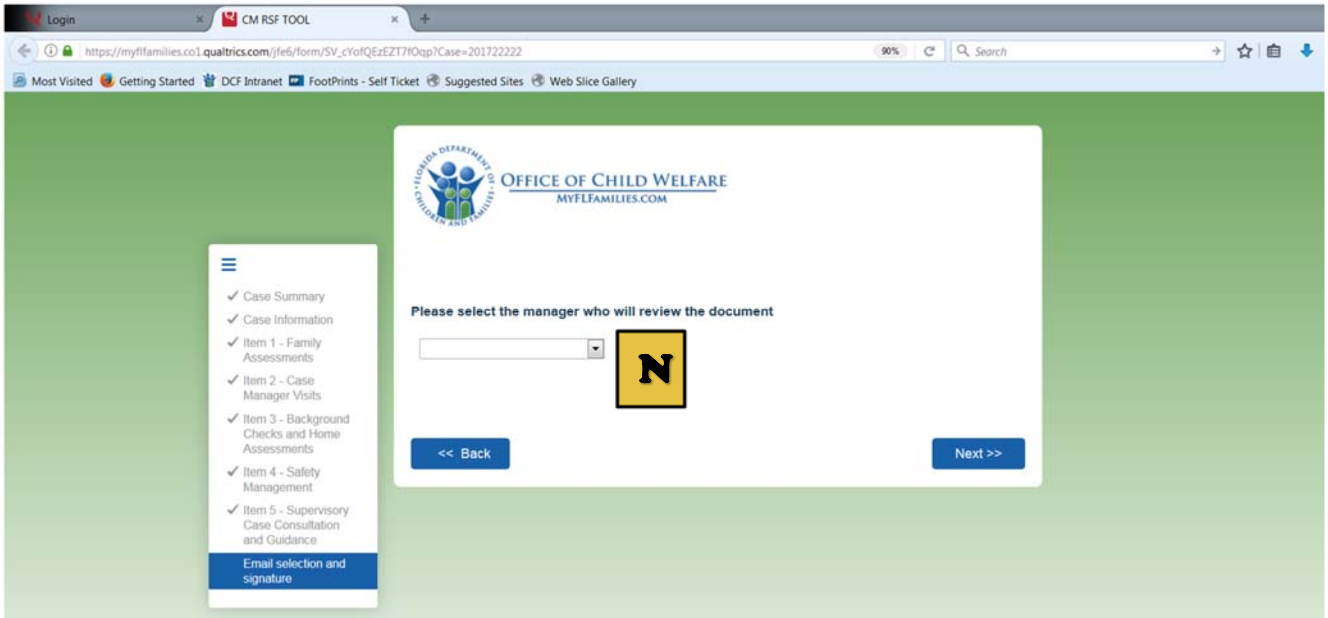
L. If you try and proceed through the survey review tool without answering an item, upon clicking the “next” button, you will receive a message in red asking you for a response to be selected.



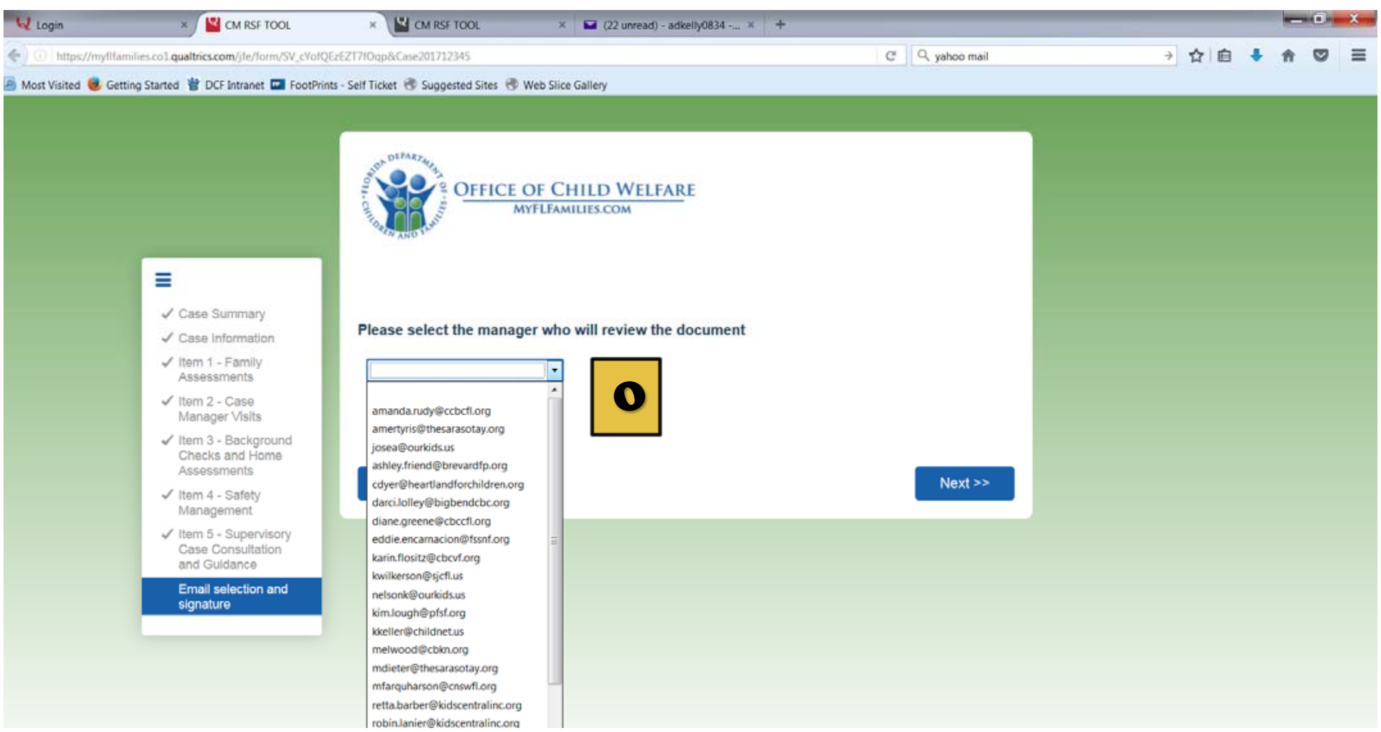

M. If you attempt to go to a previous page in the survey review tool by clicking on the “Back” button, you will receive a navigation message. If you “Go Back,” responses entered will be temporarily saved but not recorded until you return to the same page and click on the “Next” button.



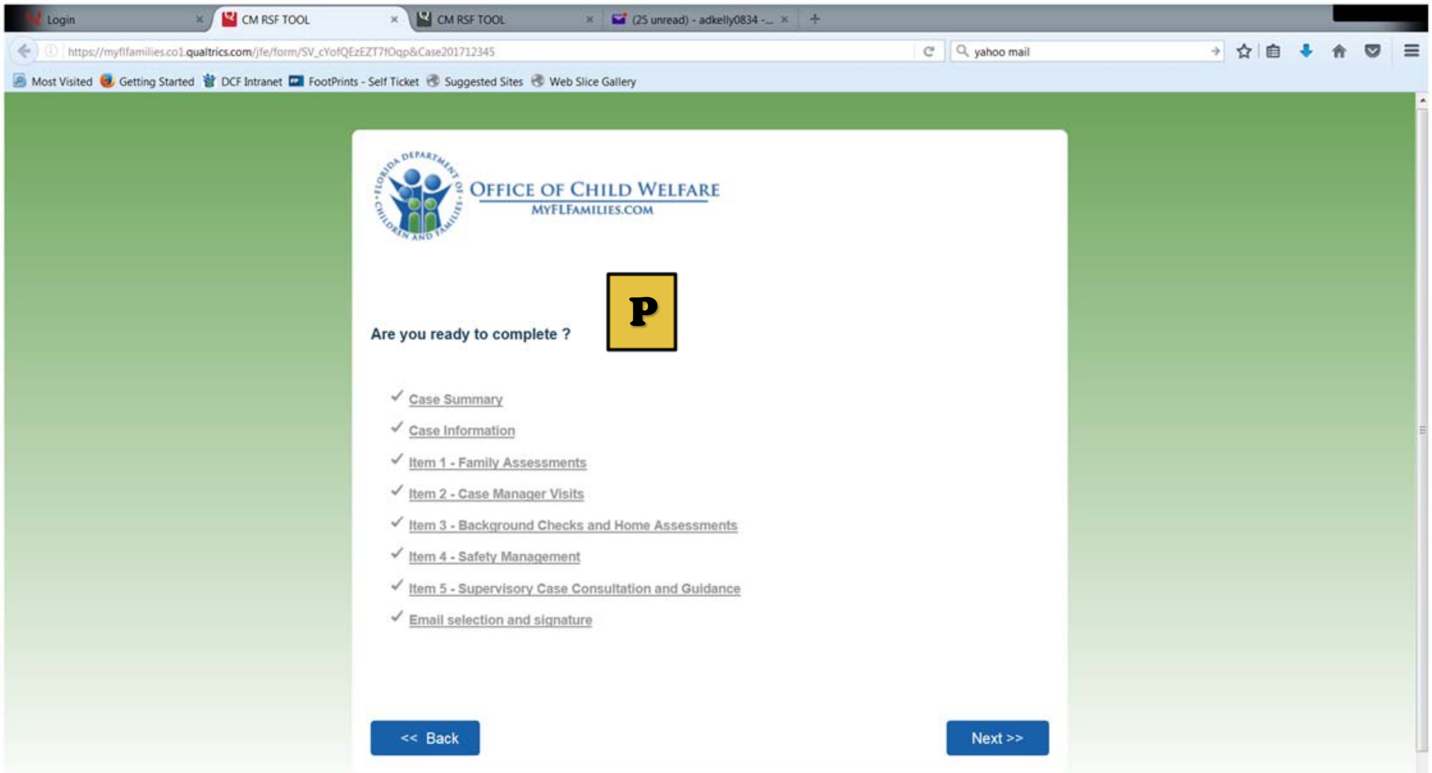
N. When you have responded to all questions in the survey review tool, you will be asked to select the manager who will review your case.



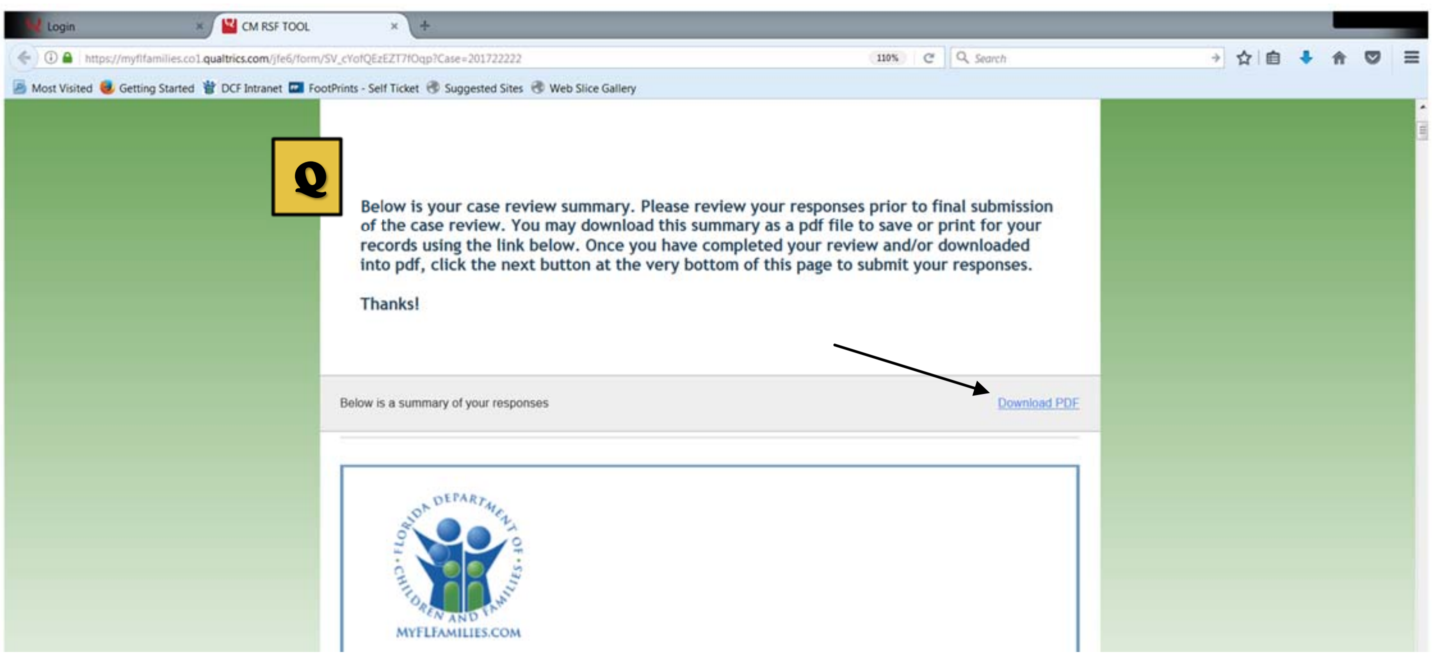

O. From the drop-down box, carefully select the manager to whom your case review tool will be emailed for a final review. You must be careful with your selection, otherwise the case review tool will be sent to someone else!



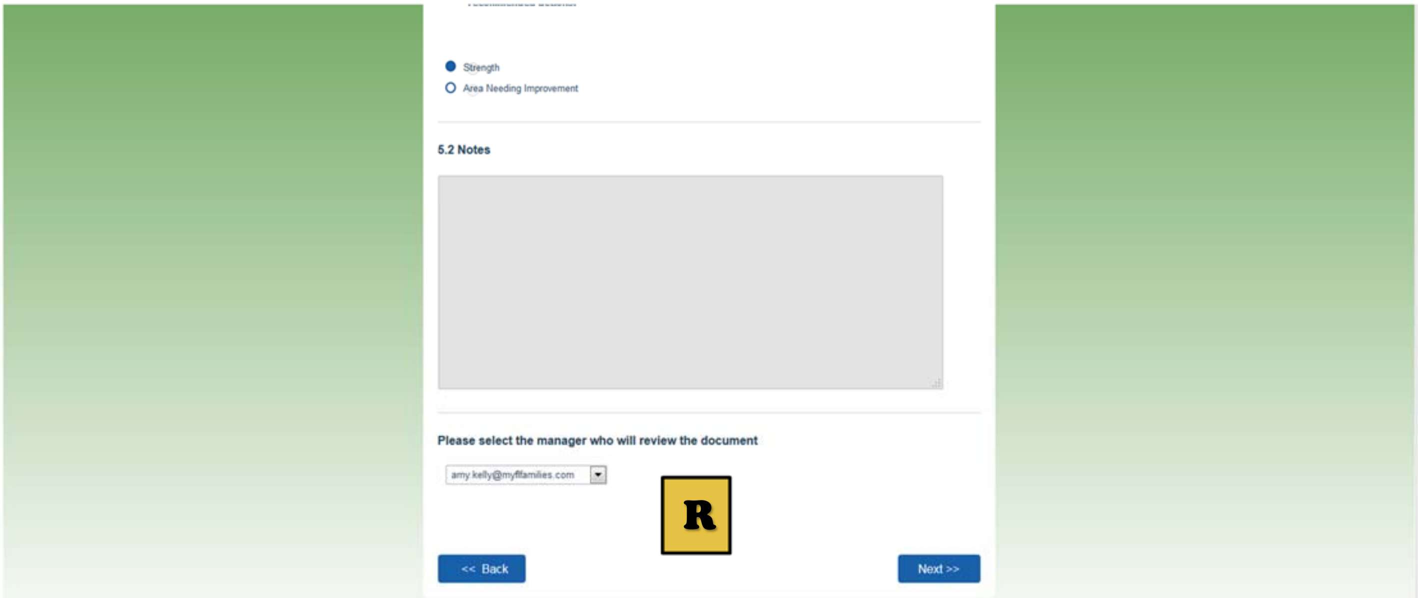
P. Once you select your manager's email and click on the "Next" button, you will be asked if you are ready to complete. Select "Next" or if needed, click on any item link to go back to that section and make any corrections.



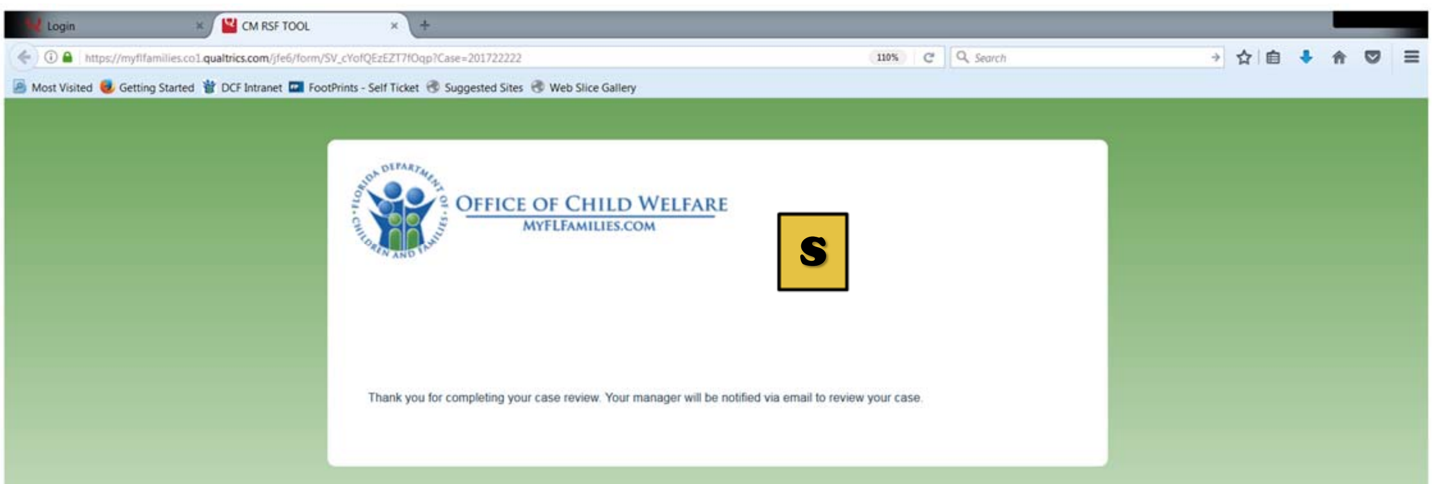

Q. When you click "Next" in step P, you will then be provided a case review summary. Here you can scroll down the page and review all of your responses for each question/item. You can also download a PDF of this summary to save on your computer or print for a hard copy.



R. Changes cannot be made in the case review summary. You must use the “Back” button or Table of Contents to go back into the review tool and make any needed corrections. Otherwise, click on the “Next” button to submit your work.




S. Once you click on “Next” from the case review summary page, you will receive a thank you message and your case review will be automatically emailed to the designated manager for a final review. The manager will be alerted via email that a case is pending their review. Once submitted to the manager, you will no longer have access to the case review. Either the manager can make changes upon their final review or the Qualtrics admin in CQI QA can assist.

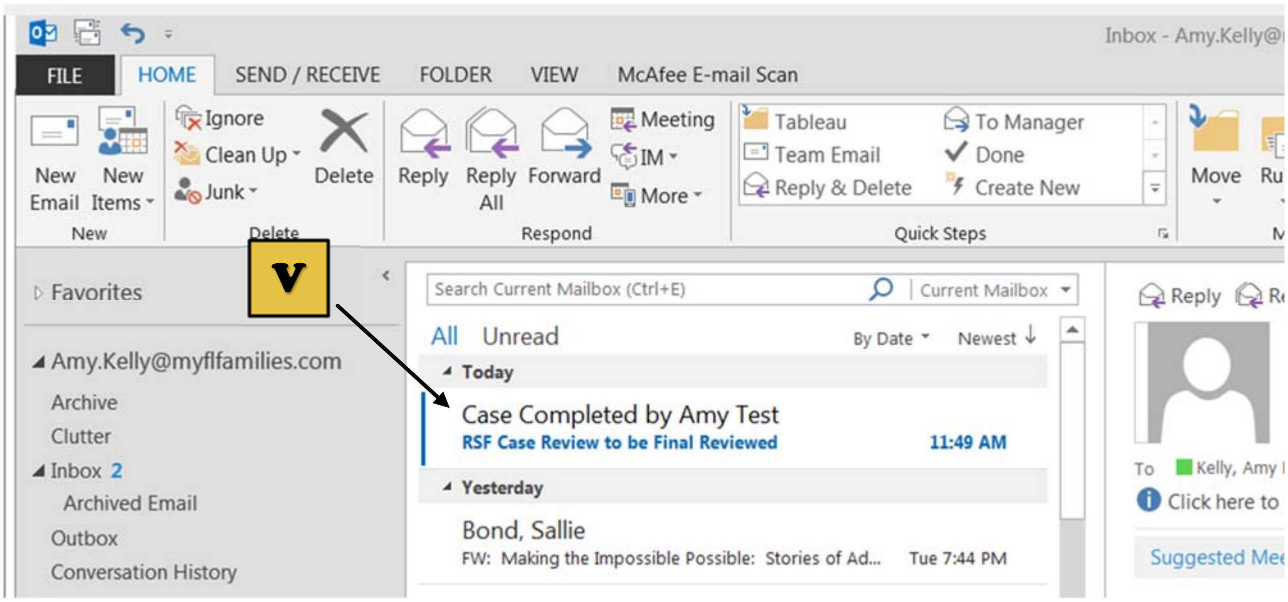



T. Refer back to your excel tracking sheet and log the date you submitted the completed review tool.

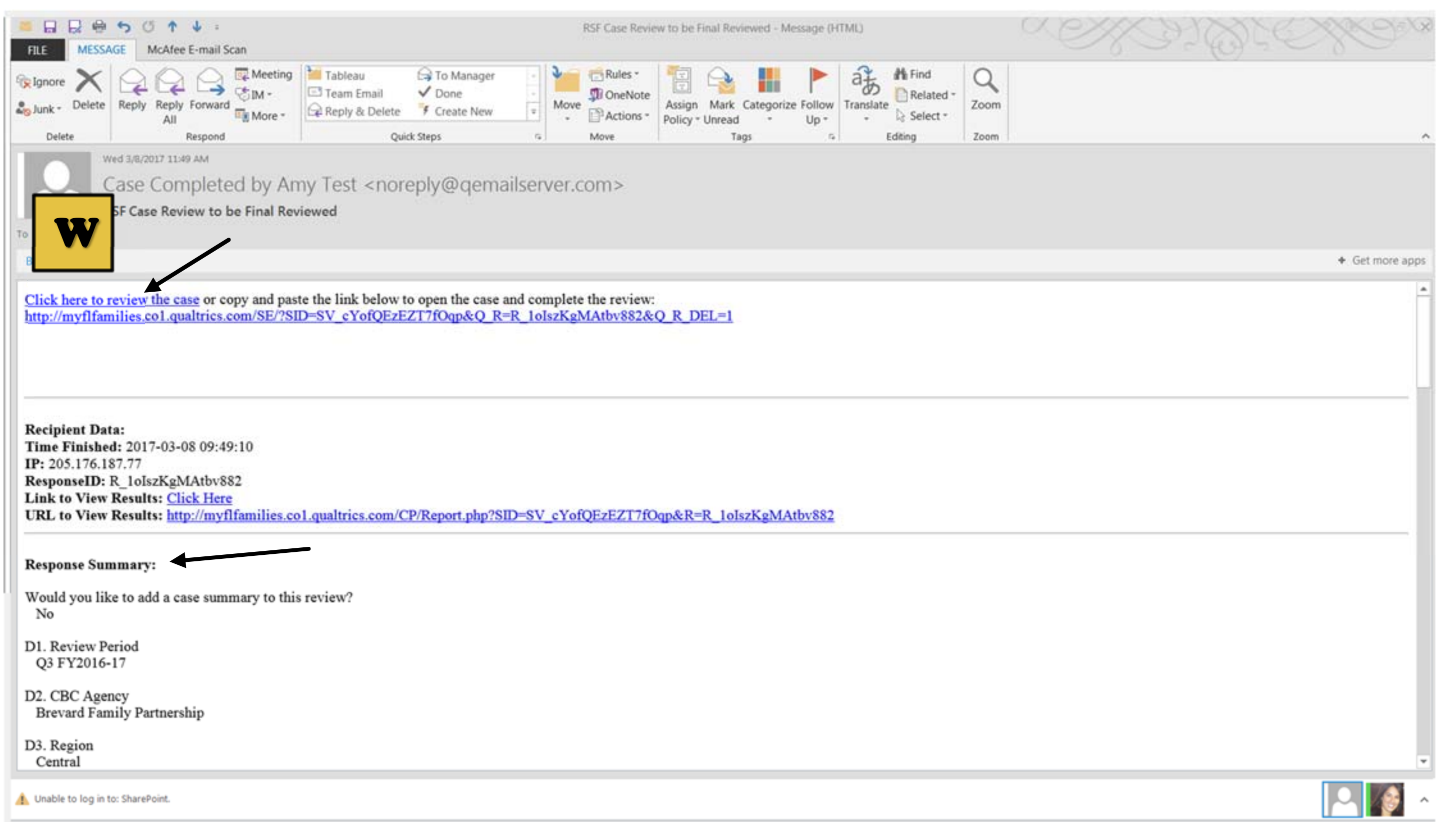
U. Complete steps A through T for each case review to be completed.

## STEP 3: MANAGERS FINAL REVIEW PROCESS

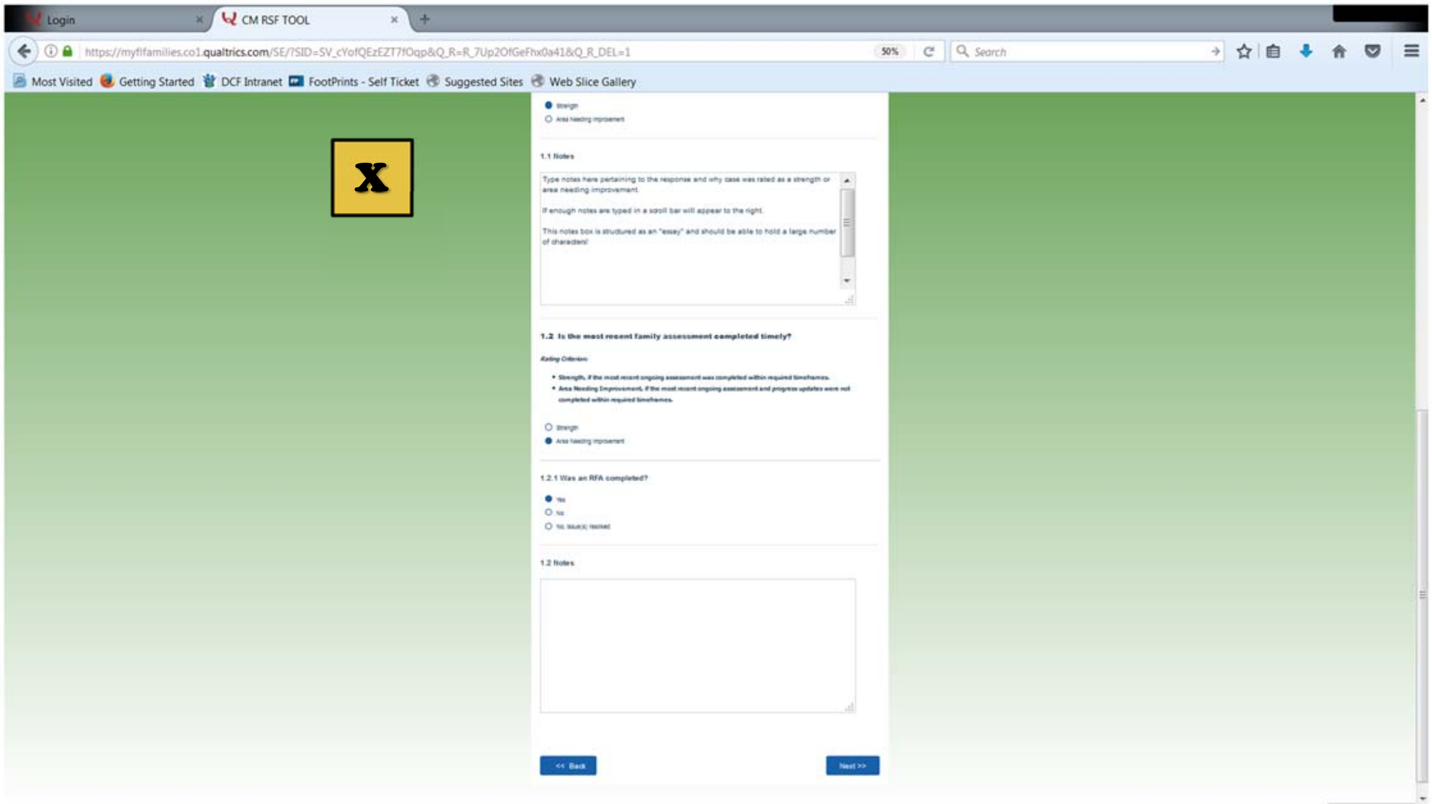
V. When a reviewer has completed a case review and submitted the survey case review tool, the manager will be notified via email to conduct a final review.



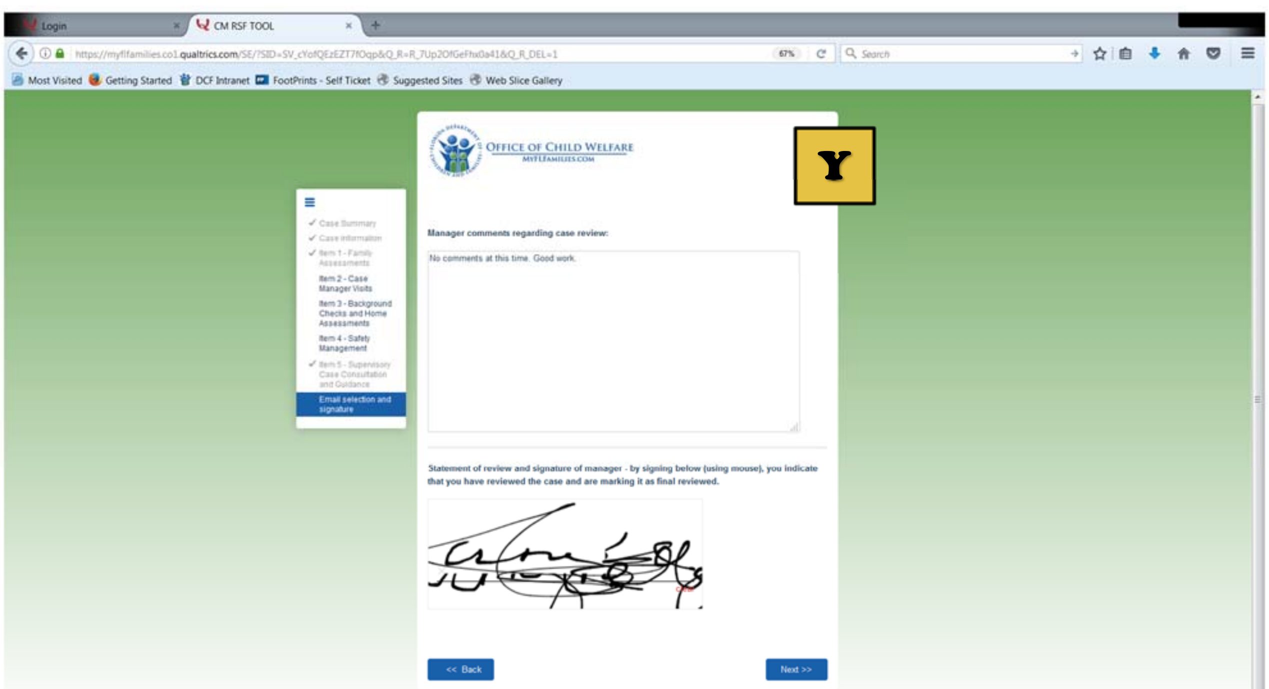

W. Open the email. You will find the review summary in the body of the email but will need to click on “Click here to review the case” to open the case review tool for final review.



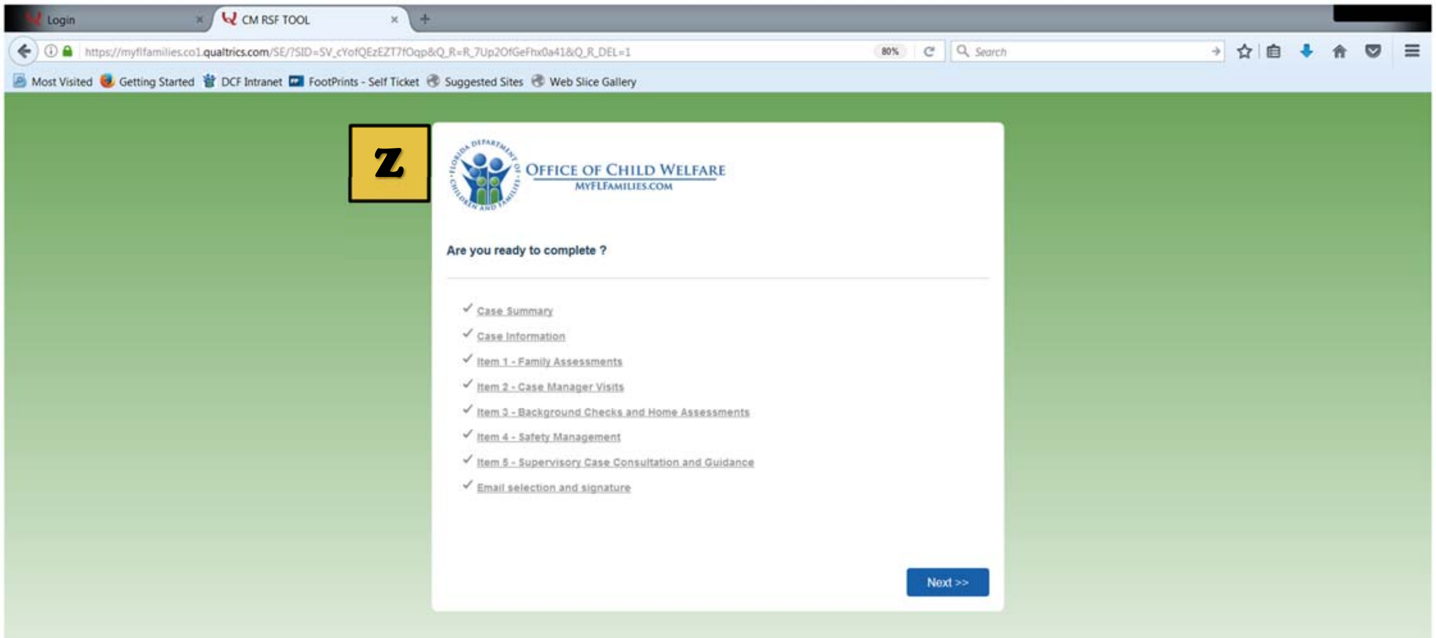
X. When you click on the “Click here to review the case” link, the survey case review tool will open. Navigate through the survey case review tool and review the work of the reviewer. Make any needed changes at this point since the tool cannot be re-opened for corrections to be made.




Y. After all items have been reviewed, the manager will be prompted to enter any comments regarding the case review. The manager must also sign on the line indicating they have completed a final review of the survey case review tool. Signature will need to be done with the computer mouse.



Z. Once signed and the “Next” button clicked, the manager will be prompted to ensure completion of the final case review. Any items in the list with no check mark indicates that page was not viewed. The manager can click on that item link in the list to be directed to that page for review and continue through the tool and be brought back to this screen. Click the “Next” button.




AA. You have completed the final case review! A thank you message will appear and the responses to each item will be stored for reporting.


Complete steps V through Z for all cases emailed to you pending a final review.

## ADDITIONAL INFORMATION

- Mozilla Firefox is the preferred web browser to use for Qualtrics
- Use the same web browser for completing each survey case review tool
- Clicking the “Next” button in the survey review tool will save the work on the page you completed
- If you close out of your survey prior to submitting it, you can copy and paste the link from your excel template into your web browser and pick up where you left off
- Once a survey case review tool has been submitted for a final review, corrections can be made at the hands of the manager. Otherwise, call or email the Qualtrics administrator in central office/headquarters CQI/QA to assist
- After pasting the original survey case review tool link into your browser, append the “&Case=#” (as described in step 1 A – C) to the URL before proceeding. If this is not done correctly and in the order as instructed, the survey will not save and be inaccessible should you close out of it
- Qualtrics is web-based and the survey tool can be accessed from any device so long as you have the link