



SITE REVIEW

USER GUIDE

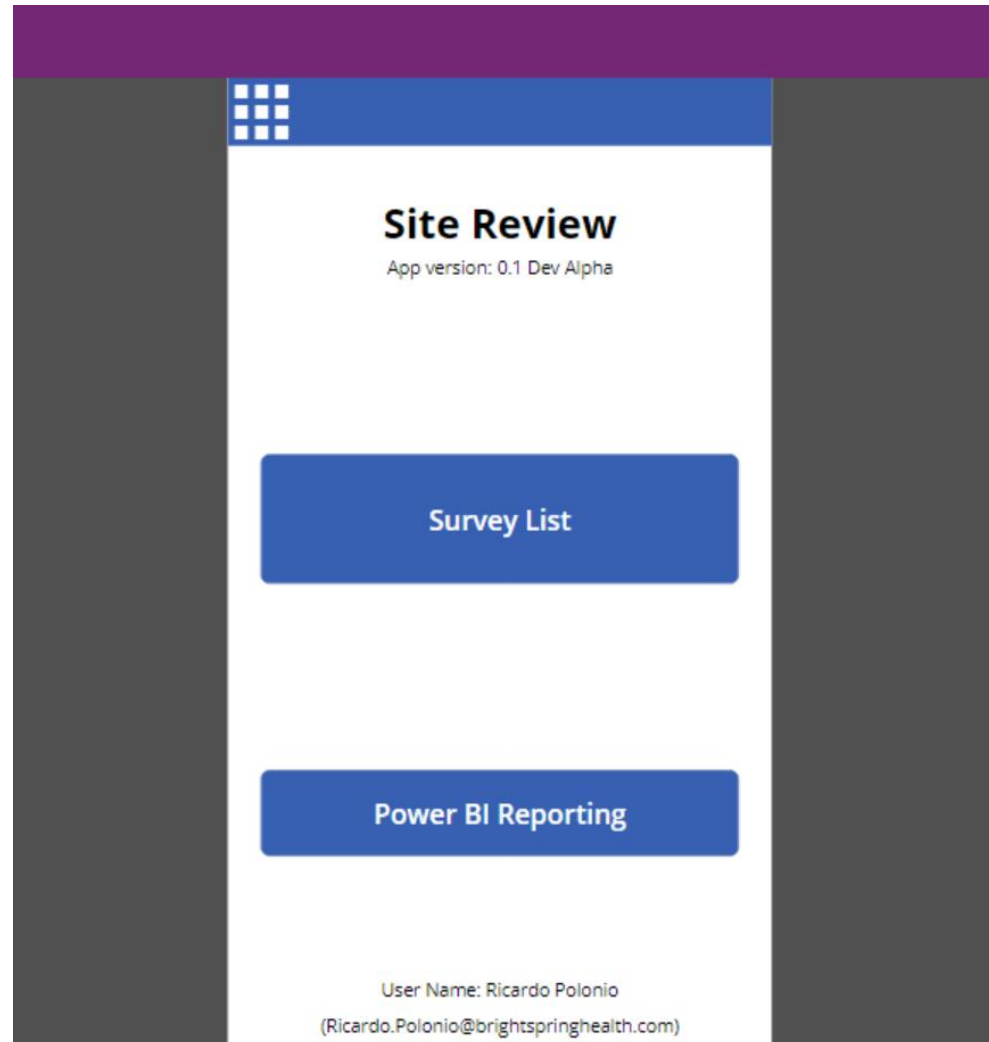
THIS DOCUMENT WILL SHOW HOW TO ACCESS AND USE THE SITE REVIEW



HOW TO ACCESS THE APP?

- Click on this link to open the app: [Site Review](#)
- This is an application that was designed to be used on mobile devices such as smart phones but it also can be open on other devices such as computers for example.
- In order to be able to open and use this application on a mobile device, you will need to have **Intune** previously installed on your device.
- What is Intune? Intune is a cloud-based service that focuses on mobile device management (MDM) and mobile application management (MAM). You control how your organization's devices are used, including mobile phones, tablets, and laptops. You can also configure specific policies to control applications. On personal devices, Intune helps make sure your organization data stays protected, and can isolate organization data from personal data.
- How to get Intune? You may download it from the App Store or Google play store, depending on your device.

THE FIRST TIME YOU OPEN THE APP YOU WILL GET THE MAIN SCREEN, THIS SCREEN CONTAINS TWO OPTIONS: SURVEY LIST AND POWER BI REPORTING, ADDITIONALLY IT WILL DISPLAY THE USER NAME AND EMAIL AT THE BOTTOM OF THE SCREEN



SURVEY LIST



Site Review



App version: 0.1 Dev Alpha

Survey List

Power BI Reporting

User Name: Ricardo Polonio
(Ricardo.Polonio@brightspringhealth.com)

ONCE YOU CLICK ON “SURVEY LIST” YOU WILL GET THE SITE REVIEW MAIN SCREEN



Select President here

Select RD here

Select ED here

Select Location here

☐ Only show Completed and Scored site reviews below.

Filter Reviews

Type here to search site review list below

CHSAN - MONTGOMERY OHIO Followup Site Review - 8/24/2021 10:01 PM

RD: RSC - HALL

ED: RCRS OH CANTON

(49227) - CHSAN - MONTGOMERY OHIO

Reviewer:



zADM_Limited Powell (), 8/24/2021 11:53 PM - 8/24/2021 9:53 PM

() -

Reviewer:

Create Blank Site Review

YOU WILL FIND DIFFERENT OPTIONS IN THIS SCREEN



Select President here

Select RD here

Select ED here

Select Location here

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Filter Reviews

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CHSAN - MONTGOMERY OHIO Followup Site Review - 8/24/2021 10:01 PM

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() -

Reviewer:



Create Blank Site Review

This button  will allow you to go back to the main screen.

This button  will refresh the data in the data section of this screen

Filter section

Search bar, you can search by different criteria such as names, employee id, dates

Data section, in here you will find all the surveys that have been created

This button will allow you to create a new survey

FILTER SECTION

Select President here

Select RD here

Select ED here

Select Location here

PR: COMMUNITY LIVING CENTRAL

RD: RSC - HALL

ED: RCRS OH CANTON

ARI II EAST OHIO X

ARI II EAST OHIO

ARI II EAST OHIO

AVAILABLE - 88697

CHSAN - MONTGOMERY OHIO

CHSAN - OH NEW BUSINESS

You can filter on five different levels:
President
RD
ED
Location
State

Select President here

RD: HOMECARE - SPOONER X

RD: HOMECARE - SPOONER

RD: HOMECARE - SPOONER

If you need to remove a filter level, you may just click on the “X” mark that appears at the end of the level.
Note: If the “X” doesn’t appear at the end it means that the character line is too big for the screen so please scroll to the right and then you will find the “X” mark

Once you select the filters needed, you will have to click on the “Filters Reviews” button to apply the filter selection, otherwise the filters won’t work

Filter Reviews

FILTER SECTION

☒ Only show Completed and Scored site reviews below.

This checkbox, if checked, will allow you to see all the surveys that are completed

James Bolling (), 8/18/2021 2:58 PM - 8/18/2021 12:58 PM



RD: RSC - TURNER

ED: RCRS IN FORT WAYNE

(88408) - VO IN N ICF S WHITLEY

Reviewer: James Bolling

97%



James Bolling (), 8/18/2021 2:51 PM - 8/18/2021 12:51 PM



RD: RSC - TURNER

ED: RCRS IN FORT WAYNE

(88412) - VO IN N ICF SANIBEL

Reviewer: James Bolling

66%



Once the option is checked, only the completed surveys will appear and they will show a percentage of completion, also if the percentage is below 85%, the survey cell will show a red background color

You can use all the filters at the same time or combine them as well, just remember to click on the “Filter Reviews” button to apply the upper filters

Filter Reviews

☒ Only show Completed and Scored site reviews below.

Select President here

Select RD here

Select ED here

Select Location here

- There are 4 different views with respect to the reviews:

Blank review

zADM_Limited Powell (), 8/26/2021 12:19 PM - 8/26/2021 10:19 AM

() -

Reviewer:

Incomplete/In Progress review

Ricardo Polonio (0661953), 8/26/2021 1:30 PM - 8/26/2021 1:30 PM

In Progress

() -

Reviewer: Richard Powell

Complete review

James Bolling (), 8/18/2021 2:58 PM - 8/18/2021 12:58 PM

RD: RSC - TURNER

ED: RCRS IN FORT WAYNE

(88408) - VO IN N ICF S WHITLEY

Reviewer: James Bolling

97%

James Bolling (), 8/18/2021 2:51 PM - 8/18/2021 12:51 PM

RD: RSC - TURNER

ED: RCRS IN FORT WAYNE

(88412) - VO IN N ICF SANIBEL

Reviewer: James Bolling

66%

This section will show you all the surveys that have been created

There are two actions that can be performed in this section


FDS WINNETKA - 3526 Followup Site Review - 8/17/2021 9:15 AM


RD: RSW - KARIMI

ED: RCRS CA SAN DIEGO

(58169) - FDS WINNETKA - 3526

Reviewer:





If you click in this icon, you will be able to view all the survey information or finish an incomplete survey

If you click on the gear image, you will be able to view a summary of the survey

FDS WINNETKA - 3526 Followup Site Review - 8/17/2021 9:15 AM

RD: RSW - KARIMI

ED: RCRS CA SAN DIEGO

(58169) - FDS WINNETKA - 3526

Reviewer:

If you click in this icon, you will be able to view all the survey information and continue it in case it's incomplete

This button will allow you to go back to the previous screen

This button will allow you to go to the next section of the survey

This button will allow you to go back to the previous section of the survey, if this is the first section then it will get you to the Survey Main screen

Site Review Entry Name
ATLA NEW HOME #5 Followup Site Review

Survey Month
August

* Mark Location as Inactive
Active

* Date of Review
12/31/2001

* Time of Review
8:00 am - 8:59 am

* Reviewer Name
Find items

<< Prev. Section

Next Section >>

This button will allow you to stop editing an existing survey. This option will only be available for surveys that have been started, it won't appear in blank surveys

Once you are done editing, regardless of the section you just edited, you will need to go to the last section and click on the "Save and Submit" button

Save and Submit

Reviewer:



If you click on the gear image, you will be able to view a summary of the survey

This button will allow you to go back to the previous screen

This section will display the score of the review, it will display information only on completed reviews

This button will allow you to see any pictures attached to the review, it may have from none up to 10 pictures

Here you will have the option to delete the current survey

Site Score:

No Score Calculated

File Attachments

No non-photo files attached to this review.

[View Attached Pictures](#)

To send a .PDF copy of this Site Review, please search for recipient in the list below.

Find users

If not listed, type recipient email address here.

Send .PDF by Email

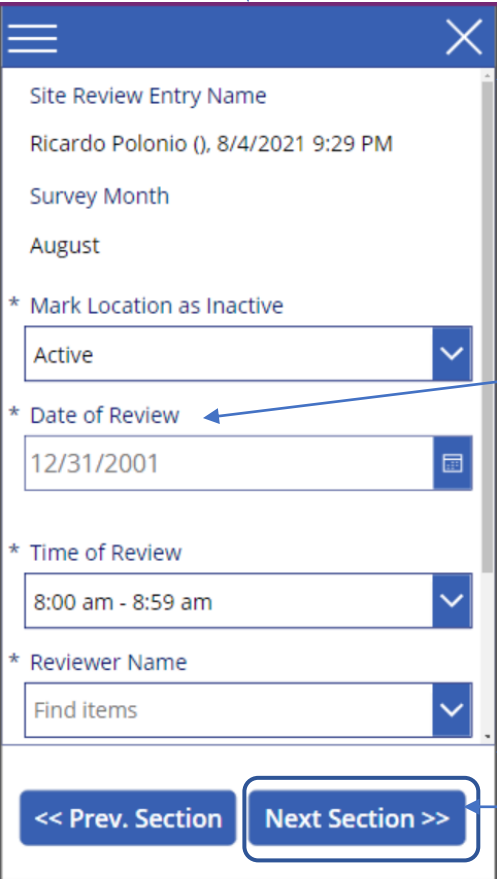
Delete this Survey

In this section you will be able to send a PDF file containing all the review information through email. Just select a user from the drop down list and click on “Send .PDF by Email” button

In case you could not find a specific person on the list or you need to send it to a specific mailbox you can type in the information directly in this box

NOTE: This will only validate the email format, not if the email address does exist

After clicking on the “Create New Survey” button, you will get a form with several sections that you will need to fill out

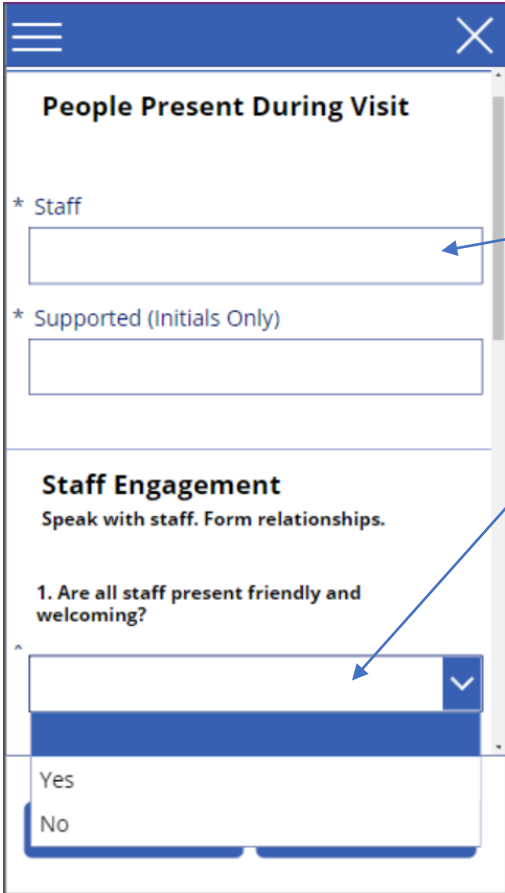


The screenshot shows the first section of the survey form. It includes a header bar with a menu icon and a close button. The main content area contains several fields: 'Site Review Entry Name' with a text input and a timestamp 'Ricardo Polonio (), 8/4/2021 9:29 PM'; 'Survey Month' with a text input showing 'August'; a required field '* Mark Location as Inactive' with a dropdown menu currently set to 'Active'; a required field '* Date of Review' with a date input showing '12/31/2001' and a calendar icon; a required field '* Time of Review' with a dropdown menu showing '8:00 am - 8:59 am'; and a required field '* Reviewer Name' with a dropdown menu showing 'Find items'. At the bottom, there are two buttons: '<< Prev. Section' and 'Next Section >>'. The 'Next Section >>' button is highlighted with a blue border.

All fields are required, they all consist in drop down lists, you need to fill them all to be able to move to the next section

For the “Date of Review” field, it will only take from the present date to past dates, if you select a future date it will default the controller to “12/31/2001” so you will need to enter a correct date in order to go to the next section

Once you are done with this initial section and all the fields are selected, you may click on the “Next Section” button

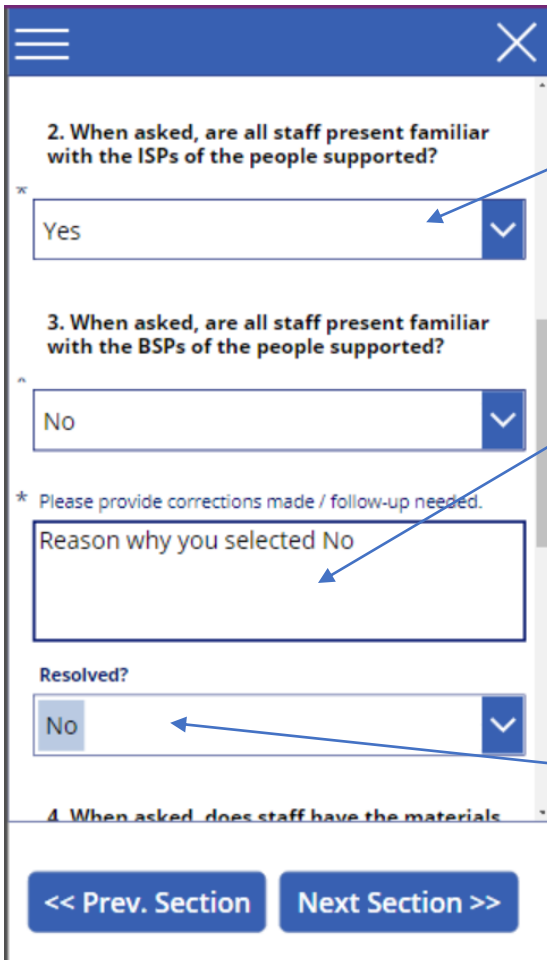


The screenshot shows the second and third sections of the survey form. The second section, titled 'People Present During Visit', contains two required fields: '* Staff' and '* Supported (Initials Only)', both with text input boxes. The third section, titled 'Staff Engagement', has a sub-header 'Speak with staff. Form relationships.' and a question '1. Are all staff present friendly and welcoming?'. Below the question is a dropdown menu with 'Yes' and 'No' options. The dropdown menu is currently open, showing the 'Yes' and 'No' options.

In the second section you will need to manually fill out the “Staff” and “Supported” fields

After that you will have the questions drop down lists

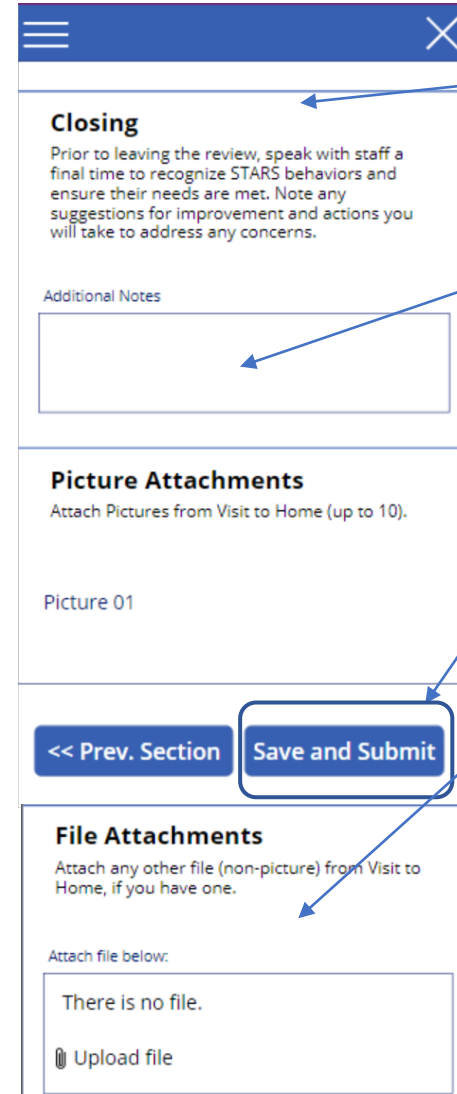
IMPORTANT NOTE: There are 30 questions and all of them must be selected between “YES”, “NO” and for very few you will have an “NA” option as well



Please remember that you need to select an option for each question of the current section, otherwise you won't be able to move to the next section

If you select "No" in any question, a text box will appear where you will be asked to enter the reason for it, this is a required field as well

In addition to the textbox another dropdown field named "Resolved?" will appear as well and it will be set as "No" by default



Once you are done with the 30 questions, you will get the final section

In this section you can add notes in the "Additional Notes" textbox field and also you can upload up to 10 pictures in the picture attachments section

Once you are done you can click on "Save and Submit" and then your survey will be completed

At the bottom of the form there is a final section where you can upload different kinds of file attachments such as .doc, txt, PDF, etc.

IMPORTANT NOTE: If you are not able to complete the survey you may close it or return to the main screen, then search for it and when it opens, you will see that all the responses up to the previous section you were working before interrupting the survey will be saved, however, the site review will not be considered complete until all sections are completed

BLANK SURVEY PROCESS

- At the first of each month, there will be an automated process that will create a blank survey for all locations.
- In order to get them you may just use the filtering feature and check the surveys form that location.
- It will be the latest one in the location.
- Remember that to easily spot a blank survey it will be white and won't have any number, yellow/red color or "score".

