How to Use Comment Viewer

You can view satisfaction survey comments in real-time throughout the survey process using My InnerView’s Comment Viewer.

**LOG IN**

1. Go to [nationalresearch.com/client-logins](http://nationalresearch.com/client-logins) and select My InnerView
2. In the Log in box provided, enter your user name and password and click [Login]
3. Click on Organization Editor on the left-hand navigation bar
4. If you can’t remember your user name help@myinnerview.com

![Admin](image)

Note: If you do not see Organization Editor in the left-hand navigation bar or cannot perform a certain function within the tool, you may not have permission to do so. Contact your organization’s Superuser.

Comments submitted in handwritten form are transcribed into My InnerView’s web-based system. You should not see handwritten comments. The ability to view comments is controlled by a user name and password. **Users can view only those comments associated with their user name and password.** Assigned by your organization’s Superuser, the permission level determines:

- Who has access to Comment Viewer
- What types of comments (i.e. family, resident, discharge, employee, etc.) can be viewed by each user
- What part of the organization (i.e. entire company, a certain part of the company, only one facility, etc.) can be viewed by each user

Comments are transcribed within three business days once they are received by My InnerView. (For other features of the Satisfaction Survey tool, see ‘How to Monitor Survey Activity’ and ‘How to View Survey Reports’).
Builder
You will see the following screen:

The Builder requires you to make several choices (left-hand column). The exclamation symbol (!) will lead you step-by-step.

- **Organization Scope** - lets you choose which part of the organization (i.e. entire company, a certain part of the company, only one facility, etc.) you want to view. The Filter field, at the bottom, can be used to search for an organization, group, or facility by partial or full name.
- **Survey Version** - displays the provider and survey types administered for your organization
- **Date** - identifies the date range for which comments were received by My InnerView for your organization
- **Filters** (optional) - allows you to narrow down your search

Once those selections are made, the appropriate comments are displayed. Additional filters and tags can be applied to sort and mark for future actions.

**Organization Scope**

1. The facility or facilities you have been given permission to view will be listed in the right-hand column. Choose different organizational levels - **Organization, Groups, Facilities** - with the tabs above the list.

   ![Organization Scope]

   Click on the triangle beside each folder to expand the organization. The level you have chosen will be shaded in orange, and will appear in the left-hand column.

**Survey Version**

2. Now click on the box labeled **Survey Version**. This will display (in the box on the right-hand side) **the next set of selections**. Choose one or more provider types. You will then have the option of choosing one or more survey types.
Date

3. You will then have the option of choosing either a single survey date or a range of dates. All comments are tied to the date the surveys were conducted.

Here’s how to set a date range:

A - Yellow shading indicates months with available comments. Focus on these months to select your date range

B - To define a date range, grab and pull the edge of the date calipers. As you move the date calipers, notice that the dates on the left and right change. The month displayed on the left denotes the beginning point. The number in the middle box indicates the number of months selected for the time period. The month at right denotes the ending point.

C - At the end of the each set of dates, notice the buttons **3 years** or **7 years**. Click on **7 years** to access additional data (if applicable to your organization).

Filters (Optional)

Filters can be used to quickly retrieve comments by specific criteria, including:

1. Have been flagged
2. Have been read
3. Have staff notes
4. Are specific to the question answered
5. Belong to a focus area
   
   Note: It is not necessary for you to use this feature

4. To use a filter, check the box(es) of the criteria you would like to apply. To unselect a filter, click on the box to remove the checkmark.
   
   For more information on using flags and focus areas, see the following pages.

6. Click on **[Build Report]** and all comments matching your selections will load into the viewer window.
   
   Note: Click on **Builder** at any time to make changes to your selections

   Comments will be listed under the List tab (see next page for more details)
Note the other two tabs in the upper-right screen:

- **Detail** - Displays the actual transcribed comment
- **Survey Activity** - Allows you to monitor the activity during the survey process (for more information, see ‘How to Monitor Survey Activity’)

**Report**

**List**

If more than 100 comments have been selected for viewing, then system will display the list in groups of 100. Click the numbers at the bottom of the screen to move through the list.

Several options for sorting and filtering are available.

First let’s identify each category of information:

1. **ID** - Identifies the comment by respondent (if a respondent writes a comment for each of the questions, the ID will appear three times; once for each comment. Remember, not all respondents submits comments and some submit only one or two)

2. **Facility** - Name of facility

3. **Question** - Three opportunities for comments are included in our standard survey. This column identifies which question the comment was submitted for:
   - Tell us what we do best
   - Tell us what we can do to improve
   - Any other comments and suggestions

4. **Type** - Survey type (e.g., resident, employee)
5. **Flag** - Comments can be marked for future action. It is important that your organization determine how the Flag option will be used and who had responsibility for flagging comments and for responding to the flagged comments.

6. **Received** - The date the survey was scanned into the system.

7. **Read** - This flag can be checked at any time by any user to indicate that the comment has been read. You can choose to display the list of comments by any category. Click on any category heading (1-7) to sort comments by that category. Click the triangle again to sort that same category in the opposite order.

**The [Refresh] Feature**
Click this button to ‘refresh’ the screen.
Example: You are flagging comments for future action and are halfway through the list. By clicking the Refresh button, the flagged comments will move to the top of the list.

**The [Export Feature]**
CSV format export

**The [Print] Feature**
Adobe printable format

**Detail**
To view a specific comment, click on the **Details** tab (or click on the magnifying glass in the **Builder** view). From this screen, you have the ability to:

1. **Read the Comment**
   The image displayed is an exact replica of the comment submitted on the survey.
   By clicking the ‘Read’ box, the comments can be sorted and/or filtered (see ‘Filters’).

2. **View the Comment Full Screen**
   Click on **Full Screen** to view the comment in the full area of your screen. Use the slider scale (0% to 200%) to enlarge or decrease the size of the scanned image.

3. **Navigate Through Comment List**
   Click on **Previous Comment** and **Next Comment** to navigate through the list.
   Note: To return to the itemized list of comments, click on **List**.

4. **Assign Focus Areas**
   Click on Focus Areas to categorize comments by pre-defined topics called ‘focus areas’. To assign more than one focus area for a given comment, simply check the boxes next to the appropriate focus areas. Comments can be sorted and/or filtered by these focus areas (see ‘Filters’).
   Note: Click on the X in the top-right corner to return to the Details screen.
5. **View Survey Detail**
   
   Click on Survey Detail to see the respondent’s rating for survey items. This helps in determining the overall satisfaction of the respondents and may provide additional information about the comment.

   (This feature is available with permission from your Superuser)

6. **Attach a Note**

   Create Note is an open-text field that can be used to ‘attach’ a message of your own (i.e. an alert, a description of the issue, a category specific to an organization initiative)

   Note: Click on the X in the top-right corner to return to the Detail screen

**Survey Activity**

This feature allows you to monitor survey activities, such as:

- Number of surveys mailed
- Number of surveys received and scanned into the system
- Number of surveys currently in the database used to generate your reports
- Number of comments
- Number of comments flagged
- Number of comments read

Refer to ‘How to Monitor Survey Activity’ for more information