How to View Survey Reports

You can view satisfaction survey results in real time using My InnerView’s Satisfaction Survey Report Builder.

*(For the Employee Commitment Report and Resource Guide, see HOW TO VIEW SURVEY REPORTS — Employee Commitment Report and Resource Guide.)*

**LOG IN**

1. Go to 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 Satisfaction Surveys on the left-hand navigation bar and click on the Survey Report tab
4. If you can’t remember your user name go to help@myinnerview.com

**Note:** If you do not see Satisfaction Surveys 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.

The ability to view survey reports is controlled by a user name and password. **Users can view only those reports associated with their user name and password.** Assigned by your organization’s Superuser, the permission level determines:

- Who has access to survey reports
- What types of reports (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.

**NOTE:** If you are an administrator, you will only have a view of your building(s).

Surveys are scanned into the system within a short period of time after they are received by My InnerView.

*(For other features of the Satisfaction Survey tool, see HOW TO MONITOR SURVEY ACTIVITY and HOW TO USE COMMENT VIEWER™)*
Builder

You will see this screen. The Builder requires you to make several choices (left-hand column). The “exclamation” symbol ( ! ) will lead you step by step.

- Report types — lets you choose the type of report (see available reports on next page)
- 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
- Survey version — displays the provider and survey types administered for your organization
- Peers — defines a group of facilities (e.g., state, corporation, number of beds) to benchmark against
- Date — identifies the date range for which surveys were received by My InnerView for your organization

See details for each step on the following pages.

Once those selections are made, the appropriate results are displayed.

REPORT TYPE

1. Choose one of these report types:

Date Range by Survey

- Use this option for an overall summary of satisfaction surveys for a specific period of time. This report is commonly used for annual resident, family, and employee survey results.
- This report is automatically Chosen as the default report.

Ongoing Survey

- This option focuses on a specific month. This report can be used to (1) monitor ongoing survey activity and (2) view results for the current month and previous five months. It is commonly used for discharge, move-in, and move-out surveys.
- Click on Select to build this report.
ORGANIZATION SCOPE

2. 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. Click on the triangle beside each folder to “drill down” into the organization. The level you have chosen will be shaded orange, and will appear in the left-hand column.

(The Filter field, at bottom of white area, can be used to search for an organization, group, or facility by partial or full name.)

SURVEY VERSION

3. Any survey type for which you have data will be listed.

a. Choose the provider type.
b. Choose the survey type. (You can only choose one survey type per report.)
c. Choose the service type.

Traditional: Automatically checked for “Family” and “Resident” when no specialty units have been identified for your surveys.

ALZHEIMER’S: Automatically checked for “Family” reports IF you identified Alzheimer’s units for your surveys.

PEERS

For Date Range By Survey Only

1. You can choose only one peer group. (See “Frequently asked questions”) MIV is the default unless you choose from the options below. (The MIV selection benchmarks against My InnerView’s nationwide database minus your corporation.)
2. Click on the box beside the category of choice
3. Click on the drop-down menu to view choices within the category and select your choice or click the box beside Corporation (to benchmark against all data for your corporation minus the group you are in)
DATE

For Date Range By Survey Only

4. You will then have the option of choosing either a single survey date or a range of dates.

Here’s how to set a date range:

A  Yellow shading indicates months with available results. 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 each set of dates, notice the buttons three years or five years. Click on either of these buttons to access additional data (if applicable to your organization).

Your report may include charts that display both current data as well as previous data. It is critical that you understand the date ranges you are choosing as your reports will aggregate the data according to your selections. By defining specific periods of time, you control the date ranges displayed in time-related comparisons.

There are three possible date ranges:

CURRENT: The first date range is used to define the primary survey cycle. This data is displayed on page views that show one survey cycle (typically the most current survey).

PREVIOUS: The second date range is used to define a comparison of data. This data is displayed on page views that compare surveys, such as a year-over-year comparison. (If you have not conducted multiple survey cycles, this bar can be left at the default placement.)

PRIOR: The third date range is used to define a second comparison of data (typically the survey cycle immediately preceding the two surveys chosen above). This data is displayed on page views that give a historical view, such as a global satisfaction and domain scores. (If you have not conducted multiple survey cycles, this bar can be left at the default placement.)

The three cycles are typically set to contain only one survey each. For example: If your surveys were conducted in March 2007, October 2006 and May 2006, you could do a year-over-year comparison of the three consecutive surveys.

(NOTE: It is possible to choose a date range with more than one survey cycle.)
For Ongoing Survey Only

4. You will select a single month for this report. The system will automatically report on the five months preceding the month you select.

Here’s how to select the month:

A  Yellow shading indicates months with survey activity. (Note: If you receive surveys in bulk, yellow will indicate months with surveys returned. If your surveys are distributed via a mail list submitted to My InnerView, yellow will indicate months with surveys sent or returned.)

B  To define the desired month, grab and pull the “handle” of the date caliper. As you move the date caliper, notice that the date changes.

C  At the end of each set of dates, notice the buttons 3 years or 5 years. Click on either of these buttons to access additional data (if applicable to your organization).

TO VIEW A REPORT

5. You can check your choices in the left-hand column menu.

   Click on the Build Report button.

   The process of retrieving all relevant data for the report you have requested will take a short time. The system is pulling both facility/corporation data and peer group data.

   Once the clock disappears, there are two options. Both produce a report in PDF format. (Note: Adobe Reader© must be used to view the document. If you can’t open the file, see HOW TO PREPARE COMPUTER in “Help.”)

   Download Report

   - This option allows you to save the PDF to your system.

   Open Report

   - This option opens the report for viewing within the screen.

To create a different report, click on Build.
FREQUENTLY ASKED QUESTIONS

I want to benchmark against more than one peer group. How can I do that?

You can generate as many reports as you like. For example, perhaps your competitors are for-profit and privately owned, and you’re considering some different marketing strategies. You can generate a report by using the “Facility ownership type” category to see where you stand. Then, if you wish to compare yourself to a different group, you can return to the “Peer” screen, make another choice and generate a second report.

Note: If you generate a new report on a different day, you may see a change in your peer group comparison because of data that has been added to the database since your last report was generated.

In addition, if your facility/company publishes data after the close of the survey cycle, you will see a change in your reports.

Who decides what charts are included in my report?

If you are a part of a multi-facility organization, your company determines the page views that are included in your reports.

If you are an individual facility, you can choose the pages you want to include in your reports.

How many pages can I include in my reports?

In order to maintain the efficiency of report generation, you should limit your page views to thirty pages or less.