

Press Ganey Engagement Portal

NAVIGATION AND USE

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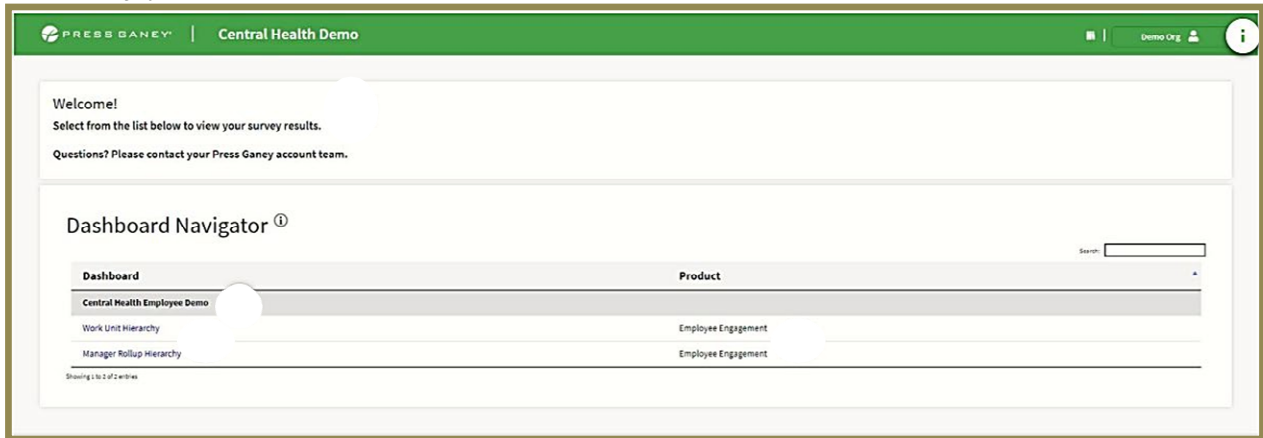
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Engagement Portal - Navigation and Use

This resource describes how to use common navigation and export features available throughout the tool.

Dashboard Navigator

After logging in you will arrive at your Dashboard Navigator. Here you can select which **Hierarchy** you would like to access.



Hierarchy Options:

Unit	Data organized by Team, Department, Unit (Each entity will be listed in Org Details; Managers may appear more than 1x if responsible for more than one entity.)
Manager Roll up	Data organized by Manager (Manager will appear 1x in Org Details. If Managemore than one entity all data will roll up under Manager)

Navigation Menu

In the upper left corner, click on the navigation menu icon to select Dashboard Navigator to switchbetween hierarchies, access helpful resources, or logout.

Navigation Menu



UMMS 2021 Team Member Survey
 UMMS Unit Dashboard **Current**
 UMMS Manager Rollup Dashboard

Other Links

[Dashboard Navigator](#)
[Resources](#)
[Logout](#)

Resources



You can also access Resources by clicking on the paper icon in the upper right-hand corner of the Summary Page. Here you will find a Glossary, Details on what is available in the portal and how to use, as well as guidance on how to run reports and create Improvement Plans.

Employee Support Resources

▼ Employee Engagement Guides for Managers

▼ Improvement Planning Tools

^ Employee Engagement Guides for Super Users

- Glossary of Terms
- Navigation and Exports
- Custom Filters
- Summary Page
- Nursing Summary Page
- Strengths and Concerns
- Item Details
- Org Details
- Comments
- Comments for Comment Analytics Supported Questions
- Comment Analytics
- Creating an Improvement Plan
- Navigating Improvement Plans
- Snapshot Export
- Response Rates
- Advanced Reporting
- Advanced Reporting using Custom Groups
- Super User Engagement Videos

Search

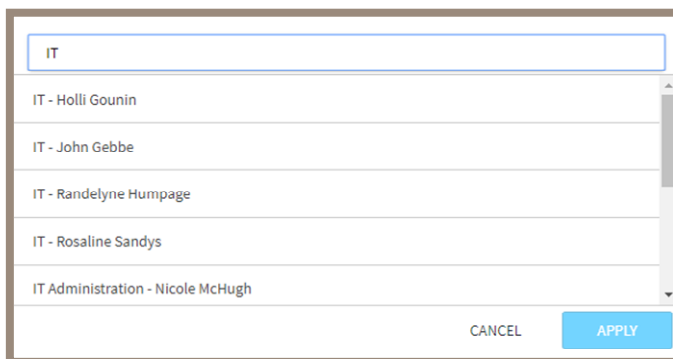
The **Hierarchy Title** is a clickable feature that pops up the hierarchy Search feature.

In the popup window that displays, use the search feature to search for keywords from a unit name or manager name.

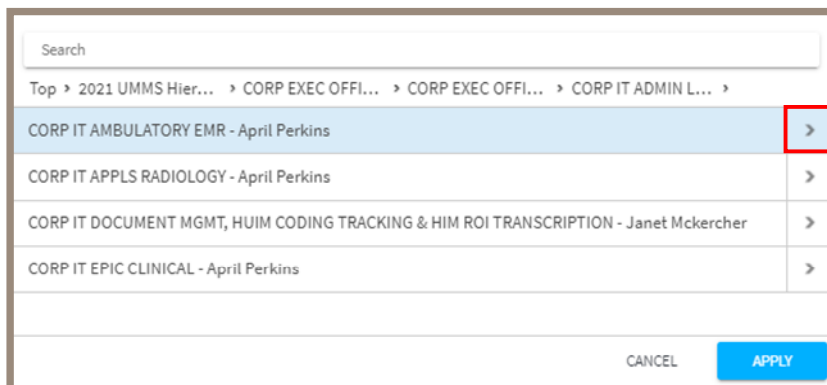
When you search, a list of the units with that keyword will appear below it for you to select from.

(In this example, the search term IT has been used.)

Click the unit you would like to view and then click **Apply** at the bottom of the popup.



To expand the hierarchy, use the right-facing arrow to the side of the unit to drill down into it.



Follow the breadcrumbs to the right of the Hierarchy Title to see where you are in the hierarchy. Make note that to go back through the hierarchy, you must use the breadcrumbs as there is not a back button.

2021 UMMS Hierarchy > CORP EXEC OFFICE - Mohan Suntha > CORP EXEC OFFICE - Jon Burns > CORP IT ADMIN LEADERSHIP - Joel Klein > CORP IT APPLS ADMIN LEADERSHIP - Teri Young > CORP IT AMBULATORY EMR - April Perkins
CORP IT AMBULATORY EMR - Rachel McFadden

Direct Reports/ Filters/ Exports

Direct Reports



Direct Reports is a feature that can be turned on or off with the toggle button and changes the data presented.

Direct Reports OFF – You see all data related to a manager/leader that is under their purview.

Direct Reports ON – You see data related only to those who directly report to a manager/leader.

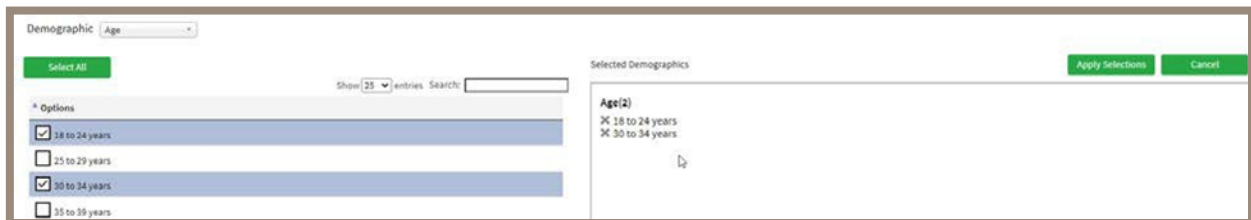
(Examples of how **Direct Reports** changes the data view will be presented in the **Org Details** section)

Filters

To filter the data on any page, click the **Filters** button from the upper right corner of the screen. This will open a new page where you can select and apply filters.



Demographic items appear as tabs on the left side of the screen. When you click a tab, the middle of the screen will show all the possible response options.



The screenshot shows the 'Filters' page. At the top, there's a 'Demographic' dropdown menu set to 'Age'. Below it, a 'Select All' button is visible. To the right, there's a 'Show 25 entries' dropdown and a 'Search' input field. The main area is divided into two columns. The left column, titled 'Options', lists age ranges with checkboxes: '18 to 24 years' (checked), '25 to 29 years' (unchecked), '30 to 34 years' (checked), and '35 to 39 years' (unchecked). The right column, titled 'Selected Demographics', shows the selected options: 'Age(2)' with '18 to 24 years' and '30 to 34 years' selected. At the bottom right, there are 'Apply Selections' and 'Cancel' buttons.

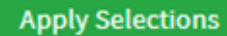
Search response options by using the Search bar to type keywords.



Place a check in the box next to each response option you would like to use as filters. You can also click the **Select All** to select all options.

☐ 18 to 24 years☐ 25 to 29 years☐ 30 to 34 years☐ 35 to 39 years☐ 40 to 44 years[Select All](#)

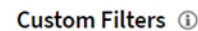
Once you have selected the desired filters, click **Apply Selections**. This will take you directly back to the page you were on when you clicked the **Filters** button.




Any Filter created can be saved for future use. After creating the desired Filter in the **Group Name**: box enter a unique name for the set of filter selections and click Save. Your custom filter is now applied to the data on each page.

Group Name: 

That **Custom Filter** is now available for use in the **Saved Groups** drop down.



Saved Groups: 

The number of filters and selections made are displayed at the top of the page next to the filter icon.



Total Filters: 3

Length of Service » 11 to 15 years of service, 16 to 20 years of service, 21 to 25 years of service

Filters will remain on until you turn them off. To turn off Filters, click **Clear Filters** next to Filter Results.




Exports

Throughout the portal Exports of sections of the page, the entire page, or spreadsheets of reports run can Export icons.

On the Summary page the information appears in 'Tiles'. These Tiles can be exported as individual .jpgs by clicking the Export icon in the upper right corner.







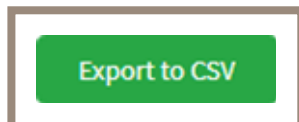



On the Summary page you also have the option to Export the entire page as a .jpeg by clicking the large Export icon in the upper right-hand corner of the page.



You can export the data on pages with item or work unit grids to a CSV (or Excel) file. These pages include:

- Strengths
- Concerns
- Item Details
- Org Details



If available:

- Comments
- Comment Analytics
- Response Rates
- Advanced Reporting

Snapshot Report Export

From the Summary page you can export a Snapshot Report that includes:

- .jpeg of the Summary Page
- Strengths
- Concerns
- Item Details
- Resources

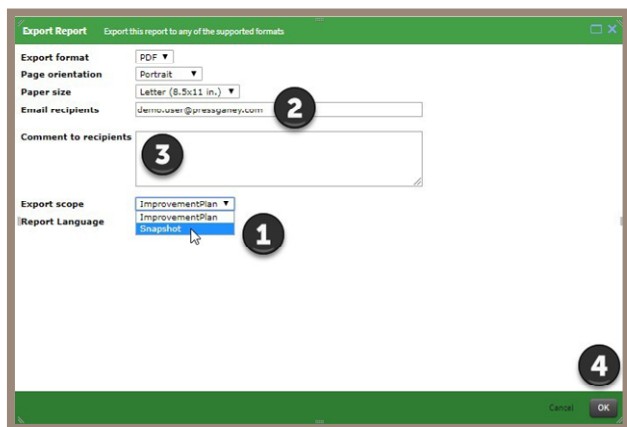
From the Summary page, click the Download icon in the upper right corner.



Follow these steps from the popup box that displays.

1. Select **Snapshot** from the **Export Scope** dropdown and click **OK**.
2. List the email recipients you wish to receive the Snapshot Export.
3. Enter any desired comments to the recipients.

4. Click **OK** to send or click **Cancel** to cancel the send.



The screenshot shows the 'Export Report' dialog box with the following fields and callouts:

- Export format:** PDF (dropdown)
- Page orientation:** Portrait (dropdown)
- Paper size:** Letter (8.5x11 in.) (dropdown)
- Email recipients:** demo-user@pressganey.com (text field, callout 2)
- Comment to recipients:** (text area, callout 3)
- Export scope:** ImprovementPlan (dropdown)
- Report Language:** ImprovementPlan, Snapshot (dropdown menu open, callout 1)
- Buttons:** Cancel, OK (callout 4)

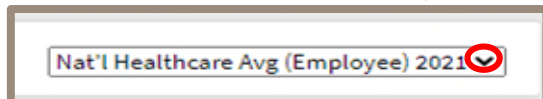
Summary Page

The Summary page is where you can see high-level results. You can also dig deeper into the areas that you are interested in or concerned about.



*Default Benchmark

By default, the Summary Page will show the data comparison to your top benchmark (typically the national). If you would like to view comparisons to an alternative benchmark, select the desired benchmark from the dropdown box.



Structure of the Summary Page

Scores for metrics are shown in tiles on the Summary tab. Each tile can be downloaded on its own using the Download icon. There is also an Information icon in each tile that contains a definition of the metric in question.



Download icon



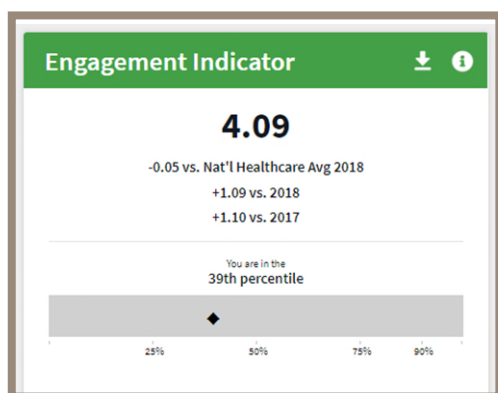
Information icon

Tiles

The Summary page displays information in tiles, as described below.

Engagement Indicator

The Engagement Indicator tile will show a score, the difference from a benchmark, and a historical comparison (if applicable). If you click the score, you will be taken to the Item Details tab to see the scores for all items that comprise the Engagement Indicator.

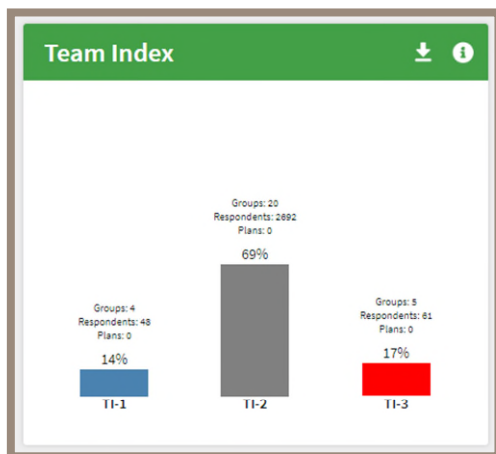


Team Index

The Team Index tile will display a graph showing the three Team Index groupings: Team Index 1, Team Index 2, and Team Index 3. It provides the following information:

- How many units or groups are in each Team Index grouping
- How many respondents are included in each Team Index group
- How many improvement plans have been created in each Team Index group
- The percentage of the total group each Team Index grouping comprises

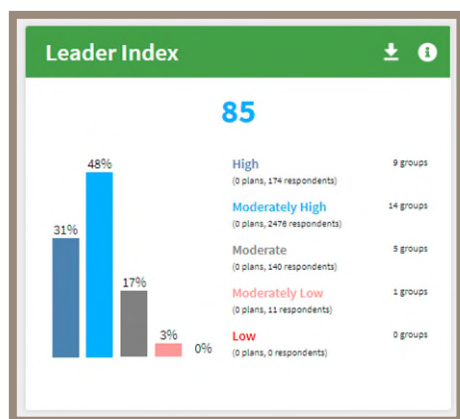
Clicking any bar in the graph will take you to the Org Details tab, where you can see all the direct report hierarchy units in the respective Team Index grouping.



Leader Index

The Leader Index tile displays a bar graph, as well as the leader index score for the group you are viewing results for. The left side of the graph displays the percentage of the units in each Leader Index grouping. The right side shows each Leader Index grouping, the number of units or groups that are in each, how many respondents are included, and the improvement plans created.

Click the overall score to view the Item Details tab, which details all the items that make up the Leader Index. Click any bar in the graph to view the Org Details tab, which displays all the direct report hierarchy units in the respective Leader Index grouping.





Domains

The domains for Employee Engagement will also appear with their own tile in the Summary tab.

Domain: Organization  	Domain: Manager  	Domain: Employee  
3.86 -0.09 vs. Nat'l Healthcare Avg 2018 +0.86 vs. 2018 +0.87 vs. 2017	4.05 -0.05 vs. Nat'l Healthcare Avg 2018 +1.02 vs. 2018 +1.02 vs. 2017	4.06 -0.06 vs. Nat'l Healthcare Avg 2018 +1.06 vs. 2018 +1.06 vs. 2017

Index Tiles

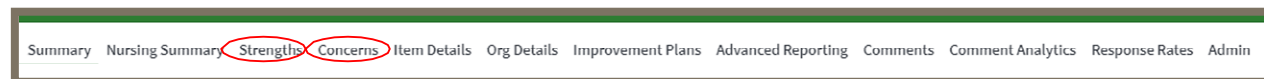
As shown below, you will also be able to see summary tiles for Safety and Resilience Modules if your organization included them on the survey.

Resilience Index  																			
4.11 -0.11 vs. Nat'l Healthcare Avg 2018 +1.10 vs. 2018 +1.10 vs. 2017	<table> <tr> <th></th><th>Score</th><th>vs. Nat'l Healthcare Avg 2018</th><th>vs. 2018</th><th>vs. 2017</th></tr> <tr> <td>Activation</td><td>4.46</td><td>-0.07</td><td>+1.44</td><td>+1.43</td></tr> <tr> <td>Decompression</td><td>3.77</td><td>-0.14</td><td>+0.78</td><td>+0.78</td></tr> </table>					Score	vs. Nat'l Healthcare Avg 2018	vs. 2018	vs. 2017	Activation	4.46	-0.07	+1.44	+1.43	Decompression	3.77	-0.14	+0.78	+0.78
	Score	vs. Nat'l Healthcare Avg 2018	vs. 2018	vs. 2017															
Activation	4.46	-0.07	+1.44	+1.43															
Decompression	3.77	-0.14	+0.78	+0.78															

Safety Culture Index  																								
3.97 -0.03 vs. Nat'l Healthcare Avg 2018 +0.96 vs. 2018 +0.95 vs. 2017	<table> <tr> <th></th><th>Score</th><th>vs. Nat'l Healthcare Avg 2018</th><th>vs. 2018</th><th>vs. 2017</th></tr> <tr> <td>Prevention & Reporting</td><td>4.13</td><td>0.00</td><td>+1.11</td><td>+1.11</td></tr> <tr> <td>Resources & Teamwork</td><td>3.66</td><td>-0.06</td><td>+0.66</td><td>+0.65</td></tr> <tr> <td>Pride & Reputation</td><td>4.17</td><td>-0.05</td><td>+1.17</td><td>+1.16</td></tr> </table>					Score	vs. Nat'l Healthcare Avg 2018	vs. 2018	vs. 2017	Prevention & Reporting	4.13	0.00	+1.11	+1.11	Resources & Teamwork	3.66	-0.06	+0.66	+0.65	Pride & Reputation	4.17	-0.05	+1.17	+1.16
	Score	vs. Nat'l Healthcare Avg 2018	vs. 2018	vs. 2017																				
Prevention & Reporting	4.13	0.00	+1.11	+1.11																				
Resources & Teamwork	3.66	-0.06	+0.66	+0.65																				
Pride & Reputation	4.17	-0.05	+1.17	+1.16																				

Strengths and Concerns

Strengths and **Concerns** provide summaries of the items with the strongest performance and the items which offer opportunities for improvement.



About the Strengths and Concerns Pages

On each page, you will see up to 10 strengths and concerns. Each page provides information about each item, such as sequence number, item text, domain, and descriptive statistics.

Tables Used

The screenshots pictured below display examples of what you will see on the Strengths and Concerns pages. On the next page, an explanation of the columns in these tables is provided.

Current View: Concerns ⓘ Export to CSV

Search:

#	Item	Domain	Distribution	Score	Vs. Overall Organization	Vs. Nat'l Healthcare Avg 2018	Responses	Improvement Planning
			Unfavorable Neutral Favorable					
Concerns (10 Items)								
B2	I am able to disconnect from work communications during my free time (emails/phone etc.).	Employee	<div><div></div><div></div><div></div></div>	2.53	-1.29	-1.42	19	+
B1	I can enjoy my personal time without focusing on work matters.	Employee	<div><div></div><div></div><div></div></div>	2.74	-1.05	-1.22	19	+

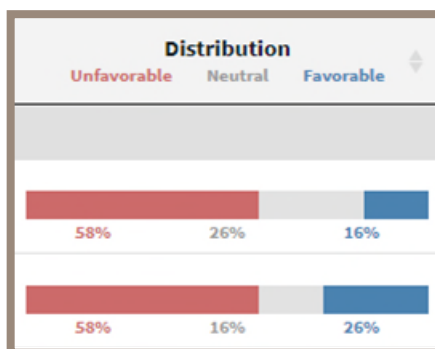
Current View: Strengths ⓘ Export to CSV

Search:

#	Item	Domain	Distribution	Score	Vs. Overall Organization	Vs. Nat'l Healthcare Avg 2018	Responses	Improvement Planning
			Unfavorable Neutral Favorable					
Strengths (10 Items)								
3	I enjoy working with my coworkers.	Employee	<div><div></div><div></div><div></div></div>	4.68	+0.25	+0.28	19	-
33	Employees in my work unit report a strong sense of connection to their work.	Employee	<div><div></div><div></div><div></div></div>	4.37	+0.29	+0.33	19	-

Explanation of Tables

The distribution graph for each item shows the distribution between Favorable, Neutral, and Unfavorable responses for each item. Strongly Agree (5) and Agree (4) responses make up the Favorable category, Neutral responses (3) fall into the Neutral category and Disagree (2) and Strongly Disagree (1) responses make up the Unfavorable category.



For each item, you will see a variety of scores, which are described next.

The Item Score

Item scores are displayed as a mean score which is the sum of all response options to an item divided by the total number of responses (this will always be within a range from 1 to 5).

Score
2.53
2.74

Comparison to Client Benchmarks Fields

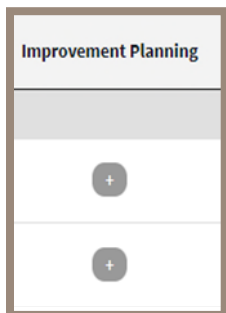


These fields display the mean score difference between the benchmarks you chose, and the number of individuals who responded to the survey for the group you are viewing. Vs. Overall Organization is a comparison to your overall organization item score (which will always be 0 when you are looking at the highest level of the organization).

Vs. Overall Organization	Vs. Nat'l Healthcare Avg 2018	Responses
-1.29	-1.42	19
-1.05	-1.22	19

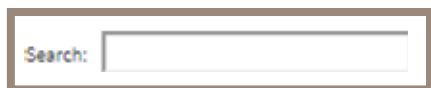
Improvement Planning

Each item has a button with a plus (+) sign on it in the Improvement Planning column. By clicking the plussign, you will be taken directly to an improvement plan template for this item.



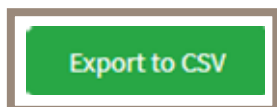
Searching

Located directly above the table to the right, the search feature can be used to search the page for keywords. Simply type any words you would like to find into the search field.



Exporting to CSV

The entire page can be exported to CSV by clicking the Export to CSV button, which is directly above the Search field.

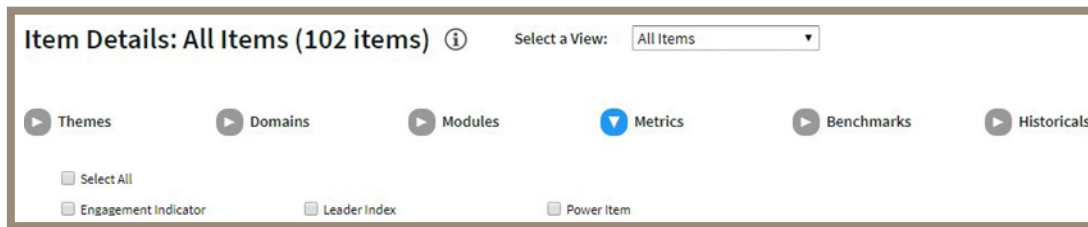


Item & Org Details

View Options

Options to limit the information on a specific page view appear on the **Item Details** and **Org Details** pages.

To select an option, click the right-facing arrow next to each one. Place a check in a box next to these selections you would like to make.



Click **Apply Selections** on the right side of the screen to apply your selections. To clear all your selections and start over, click **Clear All**.



Employee Engagement Item Details

On the Item Details page, you will be able to view details for all the items on your survey. Here you will find useful information about each item, such as sequence number, item text, domain, and descriptive statistics.

About the Item Details Pages

Each page provides information about each item, such as sequence number, item text, domain, and descriptive statistics.

Tables Used

The screenshot below displays examples of what you will see on the Item Details page. An explanation of the columns in this table is provided next.

Item Details: All Items (102 items) ⓘ

Select a View: All Items

Export to CSV

Themes

Domains

Modules

Metrics

Benchmarks

Historicals

Hide Too Few

Clear All

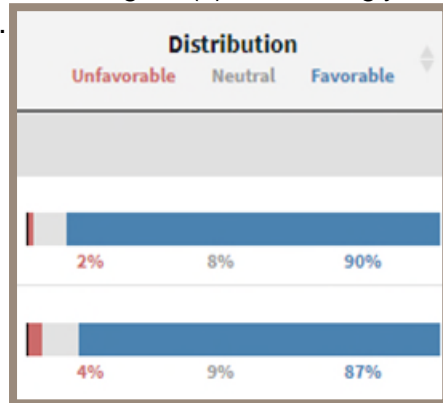
Apply Selections

Search:

#	Item	Domain	<div> <div>Unfavorable</div> <div>Distribution</div> <div>Neutral</div> <div>Favorable</div> </div>	Score	vs. Overall Organization	vs. Nat'l Healthcare Avg 2019	Responses	Improvement Planning
Current View: All Items								
1	This organization cares about its clients/patients.	Organization	<div> <div>2%</div> <div>8%</div> <div>90%</div> </div>	4.33	0.00	+0.03	2,803	✓
2	The person I report to treats me with respect.	Manager	<div> <div>4%</div> <div>9%</div> <div>87%</div> </div>	4.37	0.00	-0.01	2,805	✓

Explanation of the Distribution Table

The distribution graph for each item shows the distribution as a percentage between Favorable, Neutral, and Unfavorable responses for each item. Strongly Agree (5) and Agree (4) responses make up the Favorable category, Neutral responses (3) fall into the Neutral category and Disagree (2) and Strongly Disagree (1) responses make up the Unfavorable category.



The Item Score

Item scores are displayed as a mean score which is the sum of all response options to an item divided by the total number of responses (this will always be within a range from 1 to 5).

Score
4.33
4.37

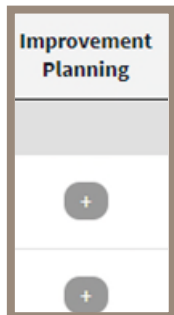
Comparison to Benchmarks Fields

These fields display the mean score difference between the benchmarks you chose, and the number of individuals who responded to the survey for the group you are looking at. Vs. Overall Organization is a comparison to your overall organization item score (which will always be 0 when you're looking at the highest level of the organization).

Vs. Overall Organization ▾	Vs. Nat'l Healthcare Avg 2018 ▾	Responses ▾
0.00	+0.02	2,803
0.00	+0.01	2,805

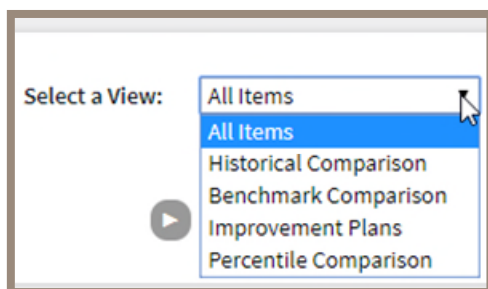
Improvement Planning

Each item has a button with a plus (+) sign on it in the Improvement Planning column. By clicking the plussign, you will be taken directly to an improvement plan template for this item.



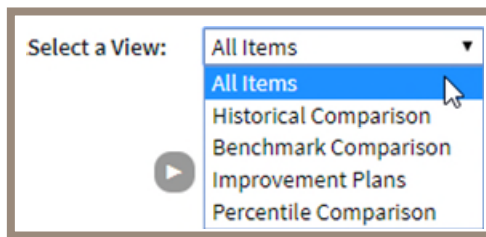
Select a View on the Item Details Page

Near the top of the page, you can select any of five different views of the Item Details page.



All Items View

All Items is the default view, which is the one you will likely use most.



Item Details: All Items (102 items) 1 Select a View:

All Items

Export to CSV

Themes

Domains

Modules

Metrics

Benchmarks

Historicals

☐ Hide Too Few's

Clear All

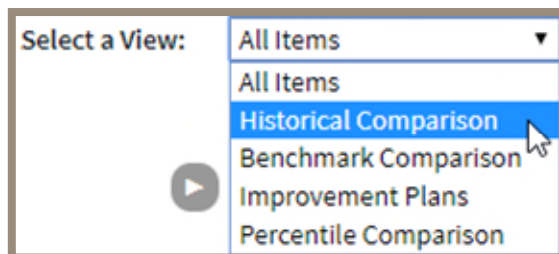
Apply Selections

Search:

#	Item	Domain	Unfavorable	Distribution	Neutral	Favorable	Score	vs. Overall Organization	vs. Nat'l Healthcare Avg 2019	Responses	Improvement Planning
Current View: All Items											
1	This organization cares about its clients/patients.	Organization	<div><div></div></div> 2%	<div><div></div></div> 8%	<div><div></div></div> 90%	4.33	0.00	+0.03	2,803	✓	
2	The person I report to treats me with respect.	Manager	<div><div></div></div> 4%	<div><div></div></div> 9%	<div><div></div></div> 87%	4.37	0.00	-0.01	2,805	✓	

Historical Comparison View

The Historical Comparison view displays all the previous surveys comparisons for which you will see data.



Item Details: Historical Comparison (102 items) 1 Select a View: Historical Comparison Export to CSV

Themes Domains Modules Metrics Benchmarks Hide Too Few's

Clear All Apply Selections

Search:

#	Item	Domain	Unfavorable	Distribution	Favorable	Score	vs. Nat'l Healthcare Avg 2019	2018	vs. 2018	2017	vs. 2017	Responses	Improvement Planning
Current View: Historical Comparison													
1	This organization cares about its clients/patients.	Organization	<div><div></div></div> 2%	<div><div></div></div> 8%	<div><div></div></div> 90%	4.33	+0.03	2.94	+1.39	2.94	+1.39	2,803	✓
2	The person I report to treats me with respect.	Manager	<div><div></div></div> 4%	<div><div></div></div> 9%	<div><div></div></div> 87%	4.37	0.01	3.02	+1.36	3.02	+1.36	2,805	✓

Benchmark Comparison View

The Benchmark Comparison view displays all the norms (also known as benchmarks) that are available for your survey. You will be able to see the score for the item in each norm, as well as the difference between your group's score and the benchmark average.

Select a View:

- All Items
- All Items
- Historical Comparison
- Benchmark Comparison**
- Improvement Plans
- Percentile Comparison

Item Details: Benchmark Comparison (102 items) Select a View: Benchmark Comparison Export to CSV

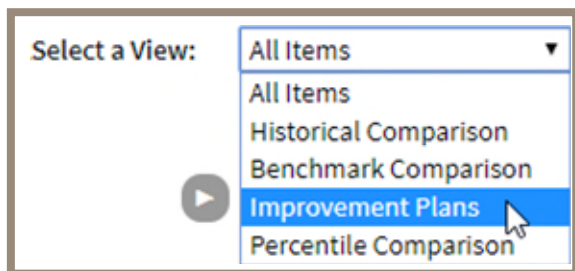
Themes Domains Modules Metrics Historicals ☐ Hide Too Few's Clear All Apply Selections

Search:

#	Item	Domain	Unfavorable	Distribution	Favorable	Score	Nat'l Healthcare Avg 2019	vs. Nat'l Healthcare Avg 2019	Nat'l Registered Nurse Avg 2019	vs. Nat'l Registered Nurse Avg 2019	Nat'l Resilience Avg	vs. Nat'l Resilience Avg	AHA-1 Employee Avg 2019	vs. AHA-1 Employee Avg 2019	Responses
Current View: Benchmark Comparison															
1	This organization cares about its clients/patients.	Organization	2%	9%	90%	4.33	4.30	+0.03	4.23	+0.10	-	-	4.29	+0.04	2,803
2	The person I report to treats me with respect.	Manager	8%	9%	87%	4.37	4.38	-0.01	4.36	+0.01	-	-	4.32	+0.05	2,805

Improvement Plans View

The Improvement Plans view will show you the number of plans created for each item, as well as an overview of the plans organized by their status: Draft, On Hold, In Progress, Completed.



Item Details: Improvement Plans (102 items) Select a View: Improvement Plans Export to CSV

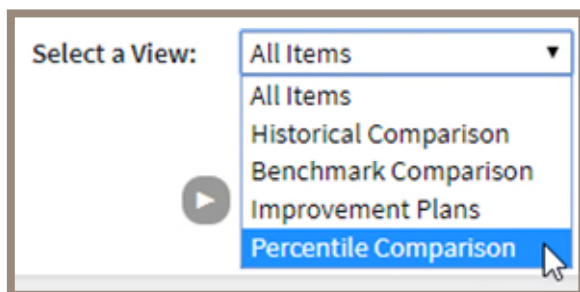
Themes Domains Modules Metrics Benchmarks Historicals ☐ Hide Too Few

Clear All Apply Selections

#	Item	Domain	Score	Plans	Draft	On Hold	In Progress	Completed	Responses	Improvement Planning
Current View: Improvement Plans										
1	This organization cares about its clients/patients.	Organization	4.33	2	1	0	1	0	2,803	✓
2	The person I report to treats me with respect.	Manager	4.37	1	1	0	0	0	2,805	✓
3	I enjoy working with my coworkers.	Employee	4.43	1	0	1	0	0	2,806	✓

Percentile Comparison View

Percentile Comparison view lets you see the percentile ranking for each item on the survey. This view may not be available to all users.



Here you can see the score and the national average score for the benchmark available, as well as the difference between the item score and benchmark score.

Score	vs. Overall Organization	Nat'l Healthcare Avg	vs. Nat'l Healthcare Avg
4.33	0.00	4.30	+0.03
4.37	0.00	4.38	-0.01

Additionally, you can see the percentile rank for each item comparative to the benchmark selected.

Item Details: Percentile Comparison (102 items) Select a View: Percentile Comparison Export to CSV

☒ Benchmarks ☐ Hide Too Few's Clear All Apply Selections

Search:

#	Item	Score	vs. Overall Organization	Nat'l Healthcare Aug 2019	vs. Nat'l Healthcare Aug 2019	Percentile Rank	Percentile 50th	Percentile 75th	Percentile 90th	Responses
Current View: Percentile Comparison										
1	This organization cares about its clients/patients.	4.33	0.00	4.30	+0.03	51	4.32	4.46	4.57	2,803
2	The person I report to treats me with respect.	4.37	0.00	4.38	-0.01	49	4.38	4.44	4.49	2,805
3	I enjoy working with my coworkers.	4.43	0.00	4.39	+0.04	67	4.39	4.45	4.52	2,806

Percentile Rank
45
54

Finally, you can see the score necessary to be in the 50th, 75th, and 90th percentile.

Percentile 50th	Percentile 75th	Percentile 90th
4.34	4.46	4.56
4.36	4.43	4.48

Hide Too Few's

To hide data when there are five or fewer responses, check the **Hide Too Few's** checkbox.

☒ Hide Too Few's

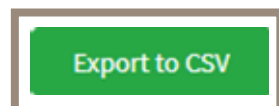
Search

Located directly above the table to the right, the search feature can be used to search the page for keywords. Simply type any words you would like to find into the search field.

Search:

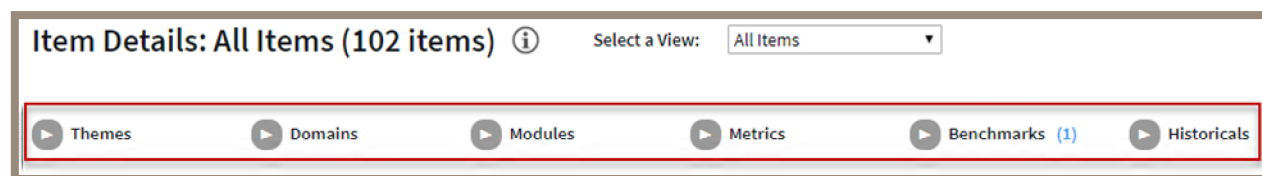
Exporting to CSV

The entire page can be exported to CSV by clicking the **Export to CSV** button.



Refinement Options

Use the options at the top of the page to narrow down items by selecting certain metrics, domains, themes, etc. You can also choose to view different norm (also known as benchmark) scores for each item. The **Historicals** option will show you the most recent surveys.



Employee Org Details

The Org Details page allows you to view all the information about each unit in your hierarchy.



Org Details: Default View ⓘ Select a View: Default View

Team Index Leader Index Group by: Add Columns Hide Too Few's

Expand All Collapse All Export to CSV

Clear All Apply Selections

Sort by Columns

Show 25 entries Search

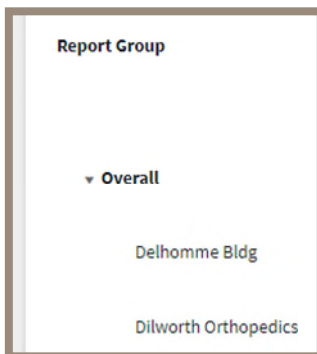
Report Group	Engagement Indicator	vs. Overall Organization	vs. Nat'l Healthcare Avg. 2019	Power Item	Team Index	Leader Index	Respondents	Rollup
Overall 	4.09	0.00	-0.03	3.94	2	85	2817	+
CEO Administration - Shannon West	4.08	-0.01	-0.04	3.94	2	85	2804	+
CFO Administration - Melinda Gegge	4.20	+0.11	+0.08	4.07	2	88	304	+

Navigating the Hierarchy

To navigate through all the units in your hierarchy, you have a couple of options on this page, which are explained below.

Expanding the Report Group

Clicking the down icon next to the word "Overall" allows you to expand and contract the hierarchy in the center of the screen. This makes it possible to view Report Group units in a format like the hierarchy export.



Report Group
▼ Overall
Delhomme Bldg
Dilworth Orthopedics

You can also use the green buttons at the top of the screen to expand all units or collapse all units. Selecting to expand all units will expand all units of the hierarchy; it will not remove rollup groups.

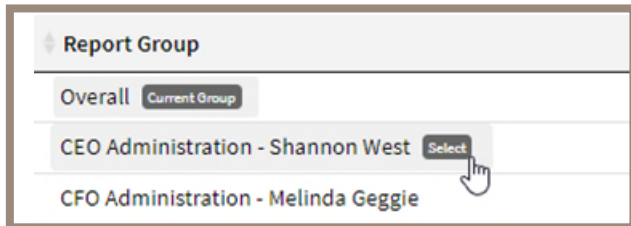
Expand All Units

Selecting to collapse all units will collapse the tree back down to the top level.

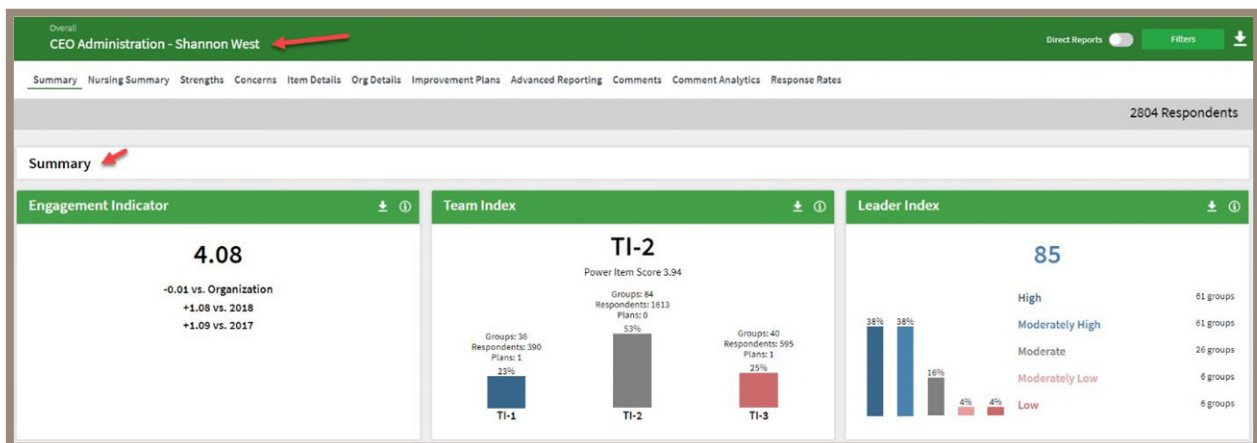
Collapse All Units

Direct Link to Report Group Summary Page

When you hover over a Report Group, the option to Select will appear.



When you click on Select, you will be taken to the Summary page for that group.



Explanation of Table

The table displays scores for each unit. You will see the Engagement Indicator score for each unit, the difference of the unit score from the overall organization, and the national average comparison.

Engagement Indicator	vs. Overall Organization	vs. Nat'l Healthcare Avg
4.09	0.00	-0.03
4.08	-0.01	-0.04

Additionally, the table displays the Power Item score that determines the Team Index, as well as the Team Index group (1, 2, or 3).

Power Item	Team Index
3.94	2
3.94	2

Next, you will see the Leader Index score on a 100-point scale and the number of respondents in each unit.

Leader Index	Responses
85	2817
85	2804

Finally, the Rollup column indicates when a unit includes all individuals rolling up to that leader, the leaders direct and indirect reports. A group marked as a rollup can expand to show all groups under it.



Direct Reports



Direct Reports is a feature that can be turned on or off with the toggle button and changes the data presented.

Direct Reports OFF – You see all data that Rolls up under a Manager/Leader.

Direct Reports ON – You see data by Manager/Leader and only their Direct Reports.

For example:

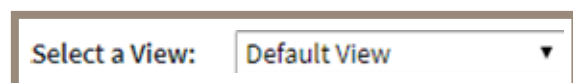
If the CEO of an organization is responsible for everyone then all data Rolls up to them.

Direct Report OFF - the CEO's total will be the conglomeration of all the organizations data.

Direct Report ON – the CEO will see only the total of their Direct Reports.

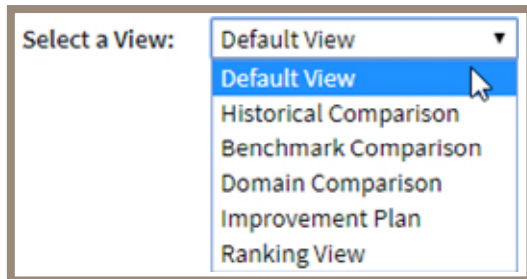
Selecting a View

At the top of the page, you can choose the view of the Org Details page. There are six different views you can choose from.



Default View

The Default View is what you will likely use most.



Org Details: Default View ⓘ Select a View: Default View

Team Index Leader Index Group by: Add Columns Hide Too Few

Expand All Collapse All Export to CSV

Clear All Apply Selections

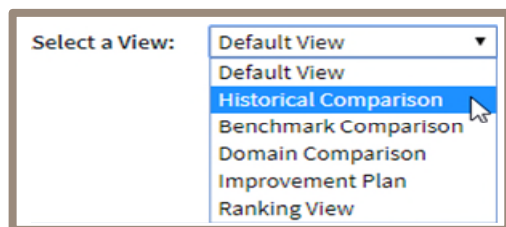
Sort by Columns

Show 25 entries Search:

Report Group	Engagement Indicator	vs. Overall Organization	vs. Nat'l Healthcare Avg 2019	Power Item	Team Index	Leader Index	Respondents	Rollup
Overall Summary	4.09	0.00	-0.03	3.94	2	85	2817	*
CEO Administration - Shannon West	4.08	-0.01	-0.04	3.94	2	85	2804	*
CFO Administration - Melinda Geggie	4.20	+0.11	+0.08	4.07	2	88	304	*

Historical Comparison View

The Historical Comparison view shows the previous Engagement Indicator, Power Item, Team Index, and Leader Index scores for comparison purposes.



Org Details: Historical Comparison ⓘ Select a View: Historical Comparison

Team Index Leader Index Group by: Add Columns Hide Too Few

Expand All Collapse All Export to CSV

Clear All Apply Selections

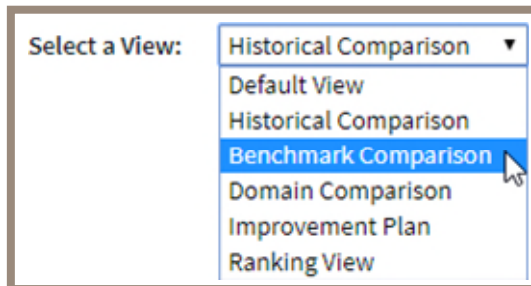
Sort by Columns

Show 25 entries Search:

Report Group	Engagement Indicator	Power Item	Team Index	Leader Index	Eng (2018)	Power Item (2018)	T.I. (2018)	L.I. (2018)	Eng (2017)	Power Item (2017)	T.I. (2017)	L.I. (2017)	Respondents	Rollup
Overall Summary	4.09	3.94	2	85	3.00	3.01	3	51	2.99	2.99	3	51	2817	*
CEO Administration - Shannon West	4.08	3.94	2	85	3.00	3.01	3	51	2.99	2.99	3	51	2804	*
CFO Administration - Melinda Geggie	4.20	4.07	2	88	2.97	3.03	3	51	2.97	3.00	3	51	304	*

Benchmark Comparison

The Benchmark Comparison view shows all the benchmarks you chose for your survey: the score for each average and the difference between the unit score and the national average score.



Org Details: Benchmark Comparison Select a View: Benchmark Comparison

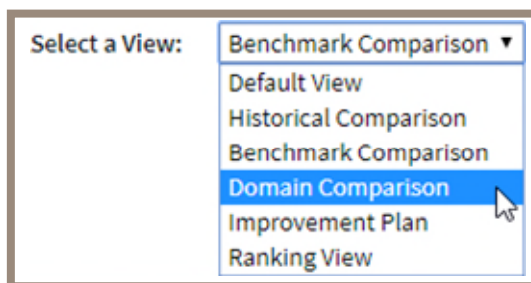
Team Index ☒ Leader Index ☐ Group by: Add Columns ☐ Hide Too Few ☐ Expand All Collapse All Export to CSV Clear All Apply Selections Sort by Columns ☒

Show 25 entries Search:

Report Group	Engagement Indicator	vs. Overall Organization	Nat'l Healthcare Avg 2019	vs. Nat'l Healthcare Avg 2019	Nat'l Registered Nurse Avg 2019	vs. Nat'l Registered Nurse Avg 2019	Nat'l Resilience Avg	vs. Nat'l Resilience Avg	AHA-1 Employee Avg 2019	vs. AHA-1 Employee Avg 2019	Respondents	RollUp
Overall Overview	4.09	0.00	4.12	-0.03	4.05	+0.04	-	-	3.98	+0.11	2817	*
CEO Administration - Shannon West	4.08	-0.01	4.12	-0.04	4.05	+0.03	-	-	3.98	+0.10	2804	*
CFO Administration - Melinda Geggie	4.20	+0.11	4.12	+0.08	4.05	+0.15	-	-	3.98	+0.22	304	*

Domain Comparison View

The Domain Comparison view shows the scores for each unit for all the Employee Engagement domains.



Org Details: Domain Comparison Select a View: Domain Comparison

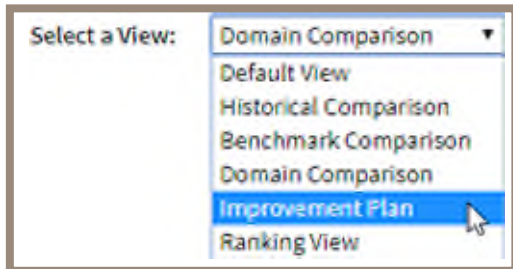
Team Index ☒ Leader Index ☐ Group by: Add Columns ☐ Hide Too Few ☐ Expand All Collapse All Export to CSV Clear All Apply Selections Sort by Columns ☒

Show 25 entries Search:

Report Group	Engagement Indicator	vs. Overall Organization	Organization	Manager	Employee	Respondents	RollUp
Overall Overview	4.09	0.00	3.86	4.05	4.06	2817	*
CEO Administration - Shannon West	4.08	-0.01	3.86	4.05	4.06	2804	*
CFO Administration - Melinda Geggie	4.20	+0.11	3.99	4.21	4.11	304	*

Improvement Plan View

The Improvement Plan view will show you the number of plans created for each unit, as well as an overview of the plans organized by their status: Draft, On Hold, In Progress, Completed.



Org Details: Improvement Plans 1 Select a View: Improvement Plans

Team Index Leader Index Report Group breakout Group by: Add Columns Hide Tool Fees

Expand All Collapse All Export to CSV

Clear All Apply Selections

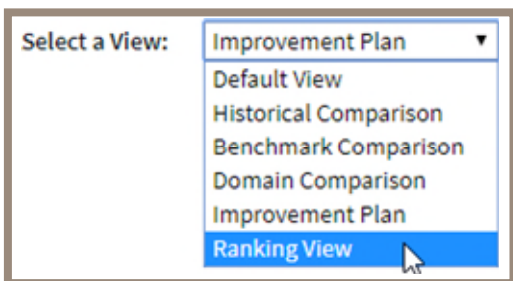
Sort by Columns

Show 25 entries Search:

Report Group	Engagement Indicator	vs. Overall Organization	vs. Nat'l Healthcare Avg 2019	Draft	On Hold	In Progress	Completed	Respondents	Rollup
Overall Greenhouse	4.09	0.00	-0.03	6	4	5	4	2817	*
CEO Administration - Shannon West	4.08	-0.01	-0.04	1	1	1	0	2804	*
CFO Administration - Melinda Geggie	4.20	+0.11	+0.08	0	1	0	0	304	*

Ranking View

Finally, the Ranking view will show you a flat list of units in the hierarchy. Ranking view organizes these units in a ranked order based on the item chosen in the Ranking Item dropdown menu. This dropdown menu includes all items on the survey, as well as all metrics, domains, themes, and modules. The default will be lowest score to highest score, but you can sort to show highest to lowest by clicking the column header.



Org Details: Ranking View 1 Select a View: Ranking View Rank by: Items

Items

Export to CSV

Clear All Apply Selections

Show 25 entries Search:

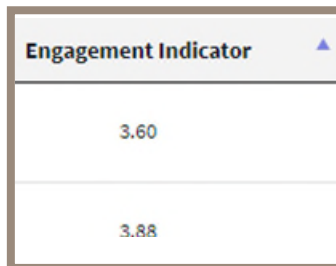
Report Group	Respondents	Rollup
Overall Greenhouse	2817	*
CEO Administration - Shannon West	2804	*
CFO Administration - Melinda Geggie	304	*

Sorting by Columns

To sort by the columns in the table, you can use the **Sort by Columns** toggle to turn this feature on or off.



In Org Details, when you turn this feature on, you will be shown a flat list of units that does not include any rollups. You will then be able to click the header of each column to sort by largest to smallest or viceversa for score columns, or alphabetical order for the Report Group column.



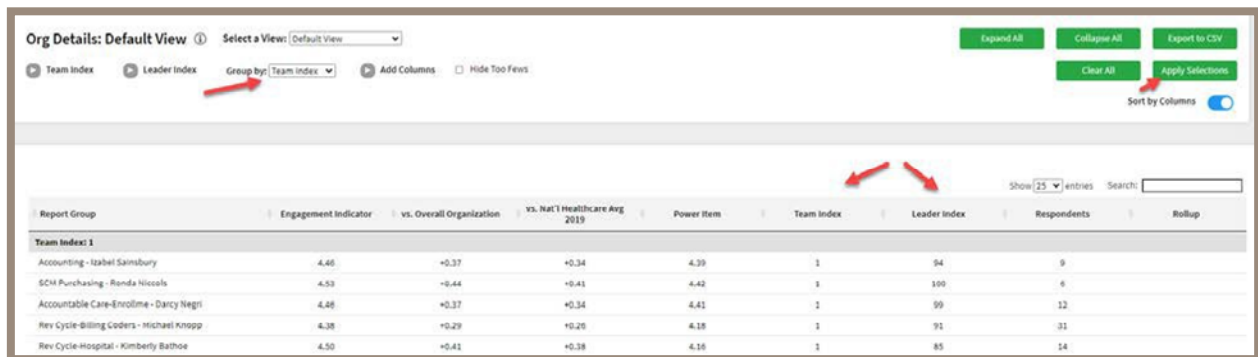
A screenshot of the "Engagement Indicator" column showing two values: 3.60 and 3.88, sorted from low to high.

Engagement Indicator
3.60
3.88

Figure 1: Here, the Engagement Indicator column is sorted from low to high.

Group by Team or Leader Index

To group by the team or leader index value, use the dropdown at the top of the screen, then apply your selection.



A screenshot of the "Org Details: Default View" interface. The "Group by" dropdown is set to "Team Index". The table below shows data grouped by Team Index 1.

Report Group	Engagement Indicator	vs. Overall Organization	vs. Nat'l Healthcare Avg 2019	Power Item	Team Index	Leader Index	Respondents	Rollup
Team Index: 1								
Accounting - Isabel Sainsbury	4.45	+0.37	+0.34	4.39	1	94	9	
SCM Purchasing - Ronda Nicolls	4.53	+0.44	+0.41	4.42	1	100	6	
Accountable Care-Enrollment - Darcy Negri	4.46	+0.37	+0.34	4.41	1	99	12	
Rev Cycle-Billing Coders - Michael Knopp	4.38	+0.29	+0.26	4.18	1	91	31	
Rev Cycle-Hospital - Kimberly Bathoe	4.50	+0.41	+0.38	4.16	1	85	14	

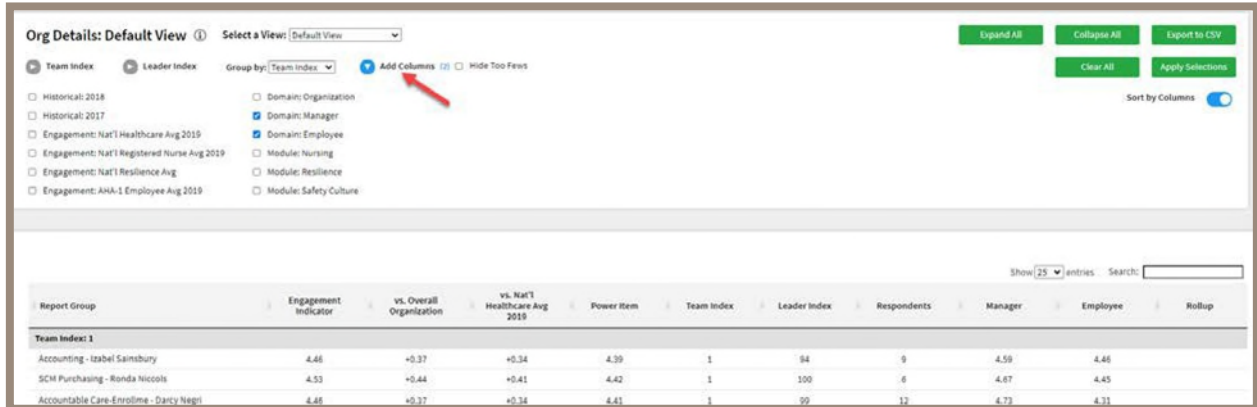
Hide Too Few

To hide data when there are five or fewer responses, check the **Hide Too Few** checkbox.



Add Columns

Use the Add Columns option to add additional information to the Org Details displayed. Make your selections and Apply Selections. Note that additional columns may need to be displayed on additional pages. Exporting to CSV will be the best way to view additional columns.



Org Details: Default View Select a View: [Default View]

Group by: Team Index **Add Columns** (2) Hide Too Few

☐ Historical: 2018
☐ Historical: 2017
☐ Engagement: Nat'l Healthcare Aug 2019
☐ Engagement: Nat'l Registered Nurse Aug 2019
☐ Engagement: Nat'l Resilience Aug
☐ Engagement: ANA-S Employee Aug 2019

☐ Domain: Organization
☒ Domain: Manager
☒ Domain: Employee
☐ Module: Nursing
☐ Module: Resilience
☐ Module: Safety Culture

Expand All Collapse All Export to CSV Clear All Apply Selections Sort by Columns

Report Group	Engagement Indicator	vs. Overall Organization	vs. Nat'l Healthcare Aug 2019	Power Item	Team Index	Leader Index	Respondents	Manager	Employee	Rollup
Team Index: 1										
Accounting - Isabel Sainsbury	4.46	+0.37	+0.34	4.39	1	94	9	4.59	4.46	
SCH Purchasing - Ronda Niccolo	4.53	+0.44	+0.41	4.42	1	100	6	4.67	4.43	
Accountable Care-Enrollee - Darcy Nagel	4.48	+0.37	+0.34	4.41	3	99	12	4.73	4.31	

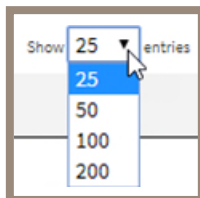
Search

The Search feature can be used to search the page for keywords. Simply type any words you would like to find into the search field.

Search:

Number of Search Entries to Show

In your search, you can choose to show 25, 50, 100, or 200 units on a page at a time.



Show 25 entries

- 25
- 50
- 100
- 200

Exporting to CSV

The entire page can be exported to CSV by clicking the Export to CSV button.


Export to CSV


Group By

Responses can be grouped by Leader Index or Team Index. Make your selection from the Group by dropdown menu and click **Apply Selections**.

Filtering Selections

You can also use the options at the top of the page to narrow down the units that appear on the page. Select any desired Team Index or Leader Index options, and then click the **Apply Selections** button (on the right side of the screen) to apply your selections.

 Team Index (1)


 Leader Index


☐ Select All

☒ Team Index 1

☐ Team Index 2

☐ Team Index 3

 Team Index

 Leader Index (2)

☐ Select All

☐ Low

☐ Moderately Low

☐ Moderate

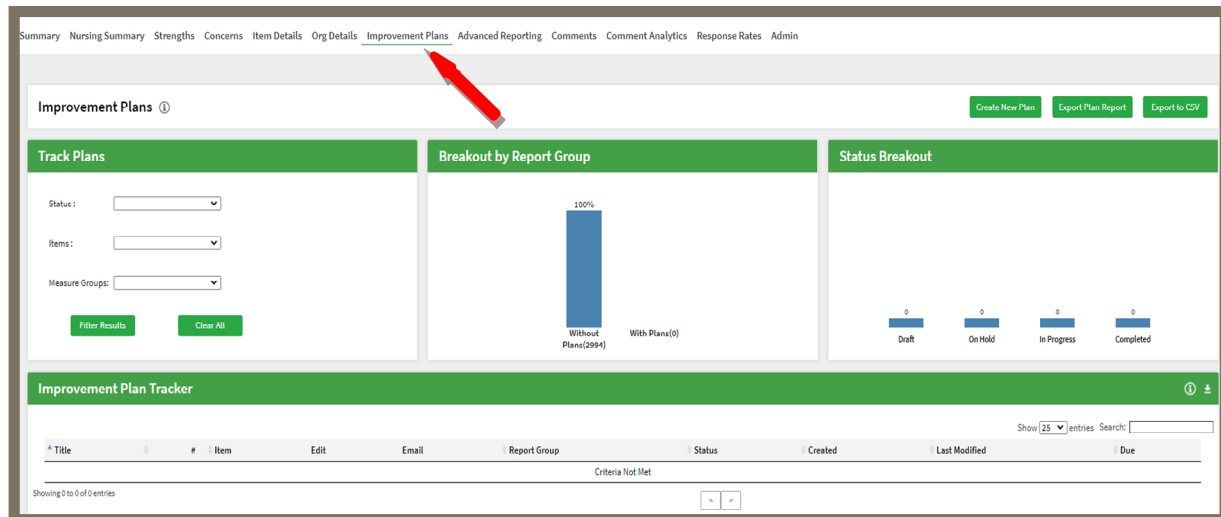
☒ Moderately High

☒ High

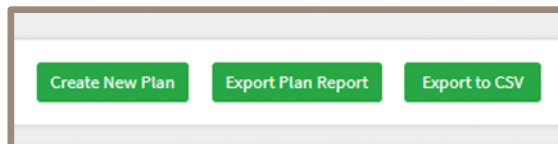
Apply Selections

Web Based Improvement Planning

Utilize the Improvement Plans tab to access the Improvement Planning Tracker and the Improvement Planning Tool. Create plans, track progress, and allow for interactive commenting on developed plans.

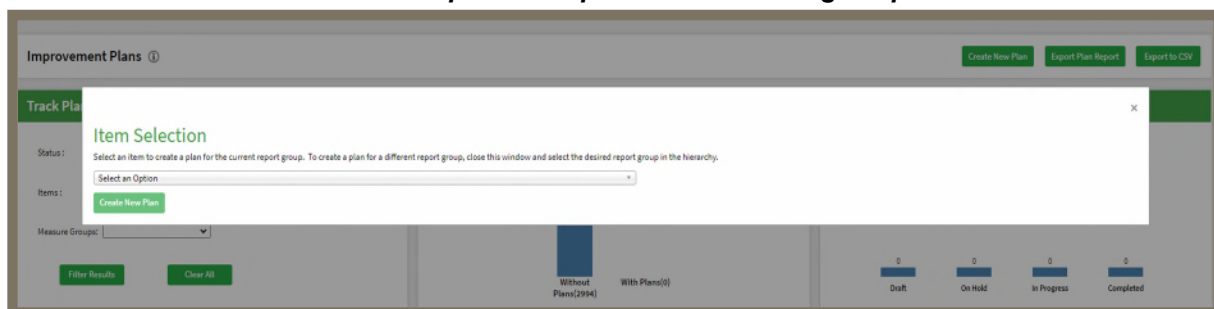


Create an Improvement Plan



In the upper right corner on the Improvement Plans page, select **Create New Plan**.

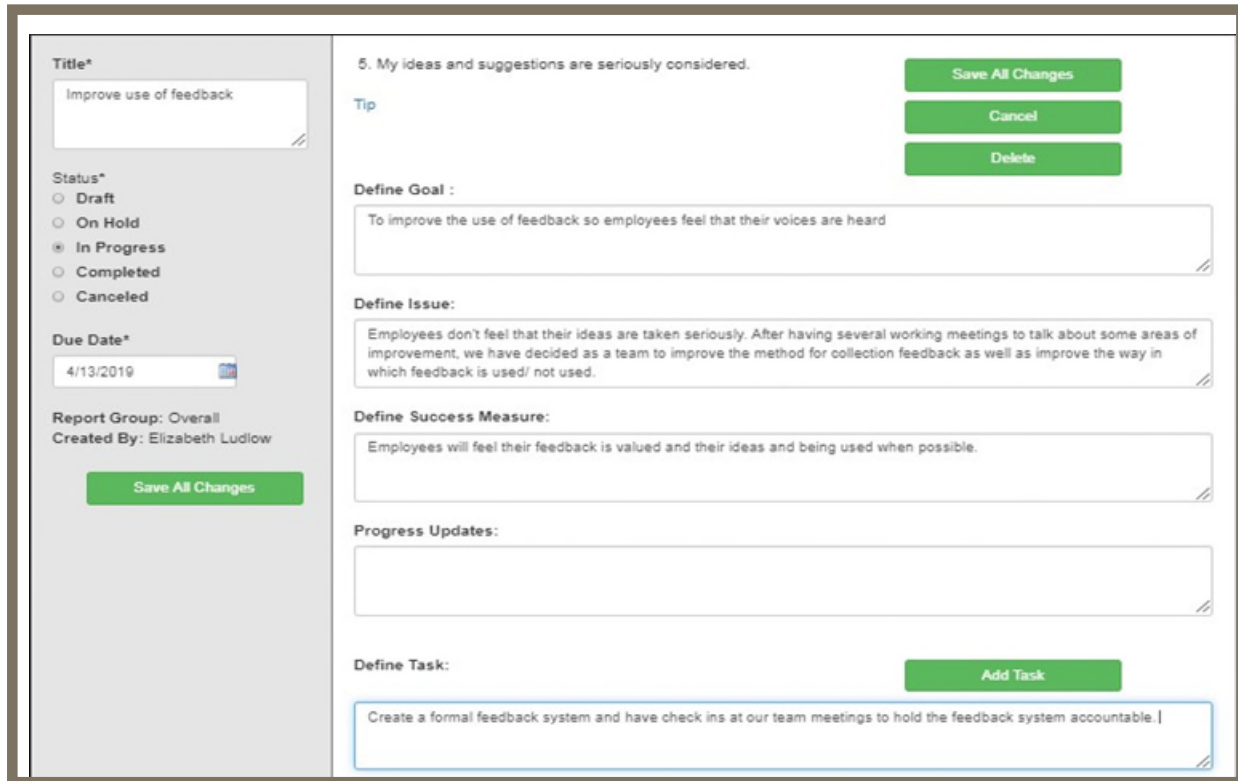
From the 'Item Selection' drop down, select a survey item, and click on **Create New Plan**. Your Improvement Plan can be specific to this item or more generally pertaining to the item or item theme. ***You must select an item to open the Improvement Planning template.***



The blank Improvement Planning template is designed to walk you through effective goal creation.

Items with an * must be filled in:

- Title
- Status
- Due Date



The screenshot shows a web-based form for creating an improvement plan. On the left is a sidebar with fields for 'Title*' (containing 'Improve use of feedback'), 'Status*' (with radio buttons for Draft, On Hold, In Progress (selected), Completed, and Canceled), 'Due Date*' (containing '4/13/2019'), 'Report Group: Overall', and 'Created By: Elizabeth Ludlow'. A 'Save All Changes' button is at the bottom of the sidebar. The main content area has a header '5. My ideas and suggestions are seriously considered.' with 'Save All Changes', 'Cancel', and 'Delete' buttons. Below this is a 'Tip' section. The 'Define Goal :' section contains the text 'To improve the use of feedback so employees feel that their voices are heard'. The 'Define Issue:' section contains the text 'Employees don't feel that their ideas are taken seriously. After having several working meetings to talk about some areas of improvement, we have decided as a team to improve the method for collection feedback as well as improve the way in which feedback is used/ not used.'. The 'Define Success Measure:' section contains the text 'Employees will feel their feedback is valued and their ideas and being used when possible.'. There is a 'Progress Updates:' section with a text area. The 'Define Task:' section contains the text 'Create a formal feedback system and have check ins at our team meetings to hold the feedback system accountable.' and an 'Add Task' button.









Training and support will be provided on goal setting and improvement plan creation.

Improvement Plan Tracking

For those responsible for Leaders/Managers responsible for creating and implementing Improvement Plans, utilize the **Improvement Plan Tracker** to monitor creation and progress of all plans created within your purview.

Improvement Plan Tracker

Show 25 entries Search:









#	Title	#	Item	Edit	Export	Report Group	Status	Created	Last Modified	Due
Icon Test 1		8	Employees in my work unit help clients/patients even when it's not part of their job.			Overall	In Progress	4/15/2019	4/15/2019	4/30/2019
Icon Test 2		22	This organization supports me in balancing my work life and personal life.			Overall	In Progress	4/16/2019	4/16/2019	5/23/2019
PG Demo IP Version		55	I have confidence in senior management's leadership.			Overall	Draft	4/1/2019	4/1/2019	10/10/2043
Smoke Test 4.12		5	My ideas and suggestions are seriously considered.			Overall	In Progress	4/12/2019	4/12/2019	4/13/2019

Showing 1 to 4 of 4 entries

<

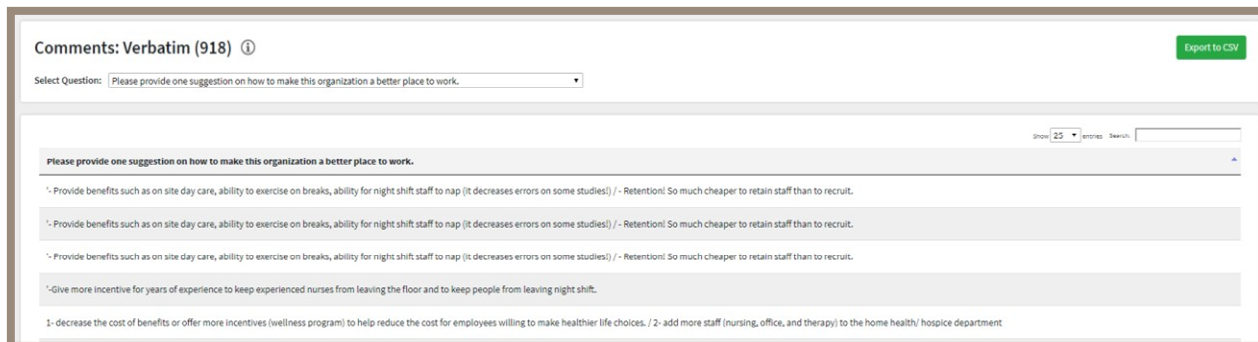
1

>

Item	Edit	Export	Report Group	Status
Employees in my work unit help clients/patients even when it's not part of their job.			Overall	In Progress
This organization supports me in balancing my work life and personal life.			Overall	In Progress
I have confidence in senior management's leadership.			Overall	Draft
My ideas and suggestions are seriously considered.			Overall	In Progress

Comments

The Comments page shows verbatim comments for all the open-ended items you asked on the survey.



Comments: Verbatim (918) ⓘ

Select Question: Please provide one suggestion on how to make this organization a better place to work. Export to CSV


Show 25 | Settings | Search

Please provide one suggestion on how to make this organization a better place to work.

- 1- Provide benefits such as on site day care, ability to exercise on breaks, ability for night shift staff to nap (it decreases errors on some studies!) / - Retention! So much cheaper to retain staff than to recruit.
- 1- Provide benefits such as on site day care, ability to exercise on breaks, ability for night shift staff to nap (it decreases errors on some studies!) / - Retention! So much cheaper to retain staff than to recruit.
- 1- Provide benefits such as on site day care, ability to exercise on breaks, ability for night shift staff to nap (it decreases errors on some studies!) / - Retention! So much cheaper to retain staff than to recruit.
- 1- Give more incentive for years of experience to keep experienced nurses from leaving the floor and to keep people from leaving night shift.
- 1- decrease the cost of benefits or offer more incentives (wellness program) to help reduce the cost for employees willing to make healthier life choices. / 2- add more staff (nursing, office, and therapy) to the home health/ hospice department

Selecting Items to View

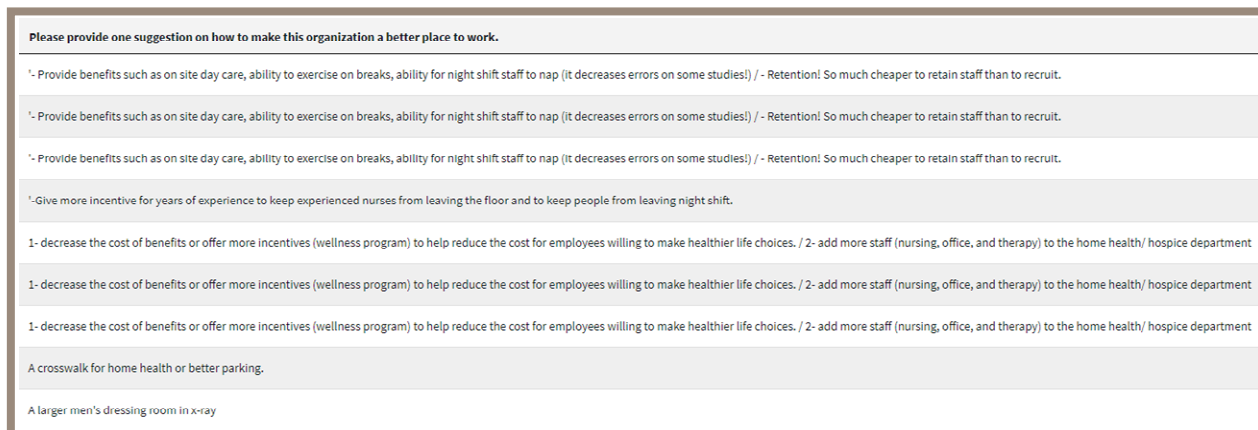
To view an item, select it from the **Select Question** dropdown menu.



Select Question: Please provide one suggestion on how to make this organization a better place to work.

Viewing Comments

The middle of the screen will show all available comments.



Please provide one suggestion on how to make this organization a better place to work.

- 1- Provide benefits such as on site day care, ability to exercise on breaks, ability for night shift staff to nap (it decreases errors on some studies!) / - Retention! So much cheaper to retain staff than to recruit.
- 1- Provide benefits such as on site day care, ability to exercise on breaks, ability for night shift staff to nap (it decreases errors on some studies!) / - Retention! So much cheaper to retain staff than to recruit.
- 1- Provide benefits such as on site day care, ability to exercise on breaks, ability for night shift staff to nap (it decreases errors on some studies!) / - Retention! So much cheaper to retain staff than to recruit.
- 1- Give more incentive for years of experience to keep experienced nurses from leaving the floor and to keep people from leaving night shift.
- 1- decrease the cost of benefits or offer more incentives (wellness program) to help reduce the cost for employees willing to make healthier life choices. / 2- add more staff (nursing, office, and therapy) to the home health/ hospice department
- 1- decrease the cost of benefits or offer more incentives (wellness program) to help reduce the cost for employees willing to make healthier life choices. / 2- add more staff (nursing, office, and therapy) to the home health/ hospice department
- 1- decrease the cost of benefits or offer more incentives (wellness program) to help reduce the cost for employees willing to make healthier life choices. / 2- add more staff (nursing, office, and therapy) to the home health/ hospice department
- A crosswalk for home health or better parking.
- A larger men's dressing room in x-ray

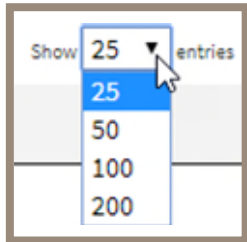
Search

The Search feature can be used to search the page for keywords. Simply type any words you'd like to find into the search field.

Search:

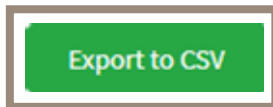
Number of Search Entries to Show

In your search, you can choose to show 25, 50, 100, or 200 comments on a page at a time.



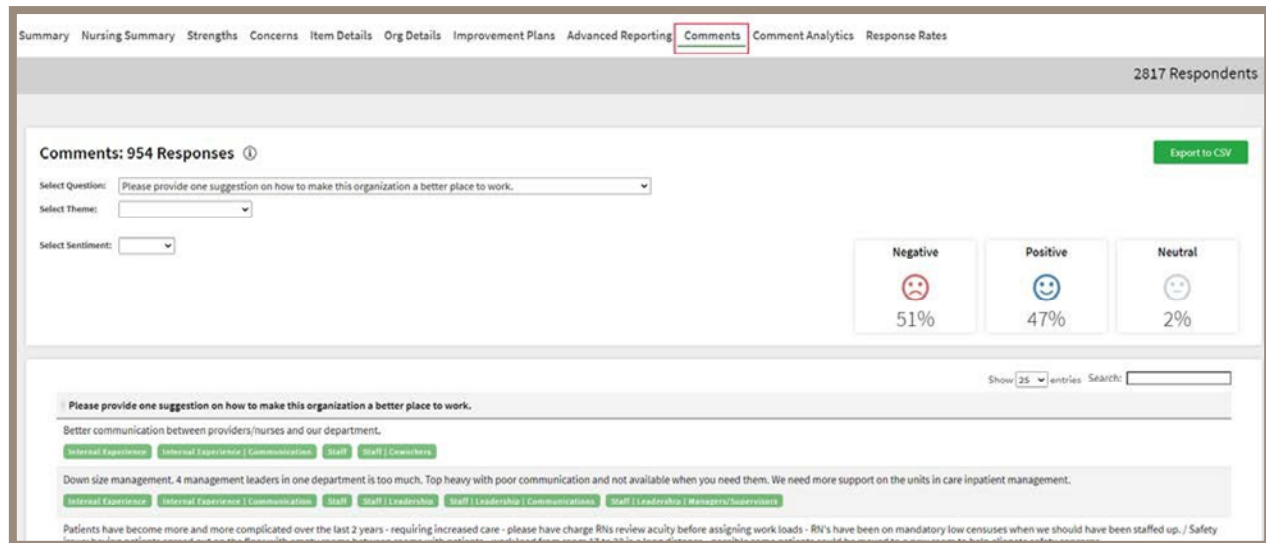
Exporting to CSV

The entire page can be exported to CSV by clicking the Export to CSV button.



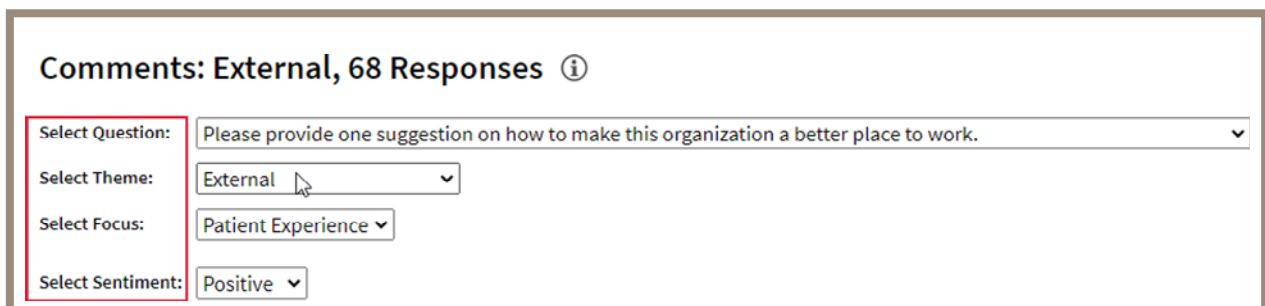
Comment Analytics Supported Questions

The Comments page shows verbatim comments for all the open-ended items you asked on the survey.



Filter Comments

First, use the Select Question dropdown menu, then you can narrow down the comment theme



Comments: External, 68 Responses ⓘ

Select Question: Please provide one suggestion on how to make this organization a better place to work. ▼

Select Theme: External ▼

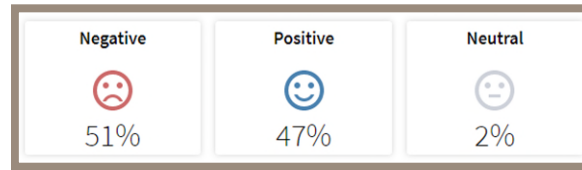
Select Focus: Patient Experience ▼

Select Sentiment: Positive ▼

and Focus in the dropdown menus. You can also select the sentiment (positive, neutral, or negative).

Viewing Comments

The icons show the percentage of comments in each sentiment category, based on the filters you selected.



Comments are listed below the comment filters. The theme(s) and focus of the comments are highlighted in green below the comments.

Please provide one suggestion on how to make this organization a better place to work.

Better communication between providers/nurses and our department.
[Internal Experience](#) [Internal Experience | Communication](#) [Staff](#) [Staff | Coworkers](#)

Down size management. 4 management leaders in one department is too much. Top heavy with poor communication and not available when you need them. We need more support on the units in care inpatient management.
[Internal Experience](#) [Internal Experience | Communication](#) [Staff](#) [Staff | Leadership](#) [Staff | Leadership | Communications](#) [Staff | Leadership | Managers/Supervisors](#)

Patients have become more and more complicated over the last 2 years - requiring increased care - please have charge RN's review acuity before assigning work loads - RN's have been on mandatory low censuses when we should have been staffed up. / Safety issue: having patients spread out on the floor with empty rooms between rooms with patients - work load from room 17 to 23 is a long distance - possible some patients could be moved to a new room to help alleviate safety concerns.
[Resources](#) [Resources | Facility](#) [Resources | Staffing](#)

Cheaper insurance
[Compensation](#) [Compensation | Benefits](#)

More flexibility in work/life balance for management staff

Care more about employee safety/health in the work place.
[Internal Experience](#) [Internal Experience | Place to Work](#)

Search

The Search feature can be used to search the page for keywords. Simply type any words you'd like to find into the search field.

Search:

Number of Search Entries to Show

In your search, you can choose to show 25, 50, 100, or 200 comments on a page at a time.

Show entries

25
50
100
200

Exporting to CSV

The entire page can be exported to CSV by clicking the Export to CSV button. Export to CSV can export more than one page. All comments will be exported based on the end user's permissions, the current report group, and any filters applied.

[Export to CSV](#)

Comment Analytics

Comment Analytics provides breakout details on sentiments and common themes addressed in the verbatim comment responses to open-ended questions. Users may expand themes to view further distribution details of theme focus areas or click-thru from any theme to view the associated comments.

Please note: Comment Analytics provides verbatim comments from your survey for the following items (if applicable):

- What do you like most about working for this organization?
- Please provide one suggestion on how to make this organization a better place to work.
- In response to this survey, what actions would you take to improve your area and/or the organization?

Navigate to Comment Analytics

- select the Comment Analytics tab

A rectangular button with a thin border and the text "Comment Analytics" in a sans-serif font.

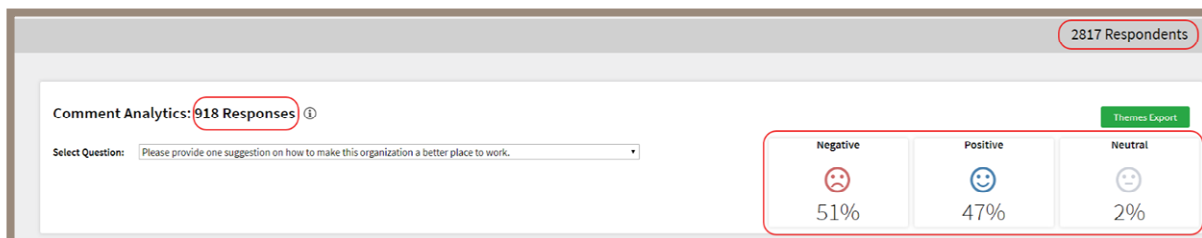
Selections

To view an item, select it from the Select Question drop-down menu.

A dropdown menu with the text "Select Question:" followed by a selected option "Please provide one suggestion on how to make this organization a better place to work." and a downward arrow icon.

Number of Responses & Sentiments

- At the top left of the page, you will see the number of responses based on your selections.
- The top right will show the total number of respondents.
- In the top portion of the page the percentage of comments in each Sentiment category is displayed. Note these will update as you make changes to the Question, Theme, Focus, and Sentiment selections.



Top 5

The center section of the page shows the top 5 Themes which received the most comments (Top 5 Commented), most positive comments (Top 5 Positive), and most negative comments (Top 5 Negative). The themes and number of comments within each theme are displayed. The graph is a visual representation of the count or number of comments in the theme. The sentiment of the comments are color-coded throughout the page: blue for positive, gray for neutral, and red for negative.

Top 5 Commented			Top 5 Positive			Top 5 Negative		
Themes	Count		Themes	Count		Themes	Count	
Resources	294	<div></div>	Internal Experience	136	<div></div>	Resources	194	<div></div>
Internal Experience	282	<div></div>	Resources	96	<div></div>	Staff	158	<div></div>
Staff	249	<div></div>	Compensation	87	<div></div>	Compensation	148	<div></div>
Compensation	238	<div></div>	Staff	80	<div></div>	Internal Experience	142	<div></div>
External	142	<div></div>	External	79	<div></div>	External	60	<div></div>

To view the comments included in any of the Top 5 lists, simply click on the name of a Theme. This takes you to the same report format you see in the Comments subtab.

Comments: Resources, 294 Responses ⓘ
Export to CSV

Select Question: Please provide one suggestion on how to make this organization a better place to work.
Select Theme: Resources
Select Focus:
Select Sentiment:

Negative 66%
Positive 33%
Neutral 1%

Show 25 entries Search:

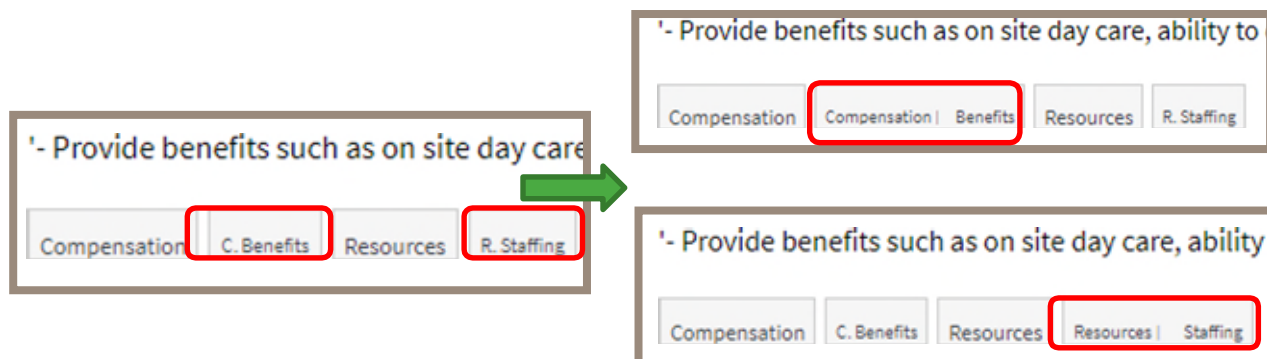
Please provide one suggestion on how to make this organization a better place to work.

Provide benefits such as on site day care, ability to exercise on breaks, ability for night shift staff to nap (it decreases errors on some studies!) / - Retention! So much cheaper to retain staff than to recruit.
Compensation C.Benefits Resources R.Staffing

Provide benefits such as on site day care, ability to exercise on breaks, ability for night shift staff to nap (it decreases errors on some studies!) / - Retention! So much cheaper to retain staff than to recruit.
Compensation C.Benefits Resources R.Staffing

Provide benefits such as on site day care, ability to exercise on breaks, ability for night shift staff to nap (it decreases errors on some studies!) / - Retention! So much cheaper to retain staff than to recruit.
Compensation C.Benefits Resources R.Staffing

Hover over any of the Themes and Filters assigned to a comment to expand the description.



Themes

The bottom of the page lists the Themes, number of comments included, and the percentage of positive, neutral, and negative comments. Select the arrow next to a Theme to view the Focus areas within the Theme.

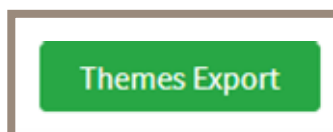
Themes	Count	Positive	Neutral	Negative	Distribution
► Compensation	238	87 ●	3 ○	148 ■	37% 1% 62%
▼ Development	67	43 ●	0 ○	24 ■	64% 0% 36%
◦ Career Advancement	24	14 ●	0 ○	10 ■	58% 0% 42%
◦ Education/Training	37	30 ●	0 ○	7 ■	81% 0% 19%
◦ Leadership Development	6	0 ●	0 ○	6 ■	0% 0% 100%

Click on the Theme or Focus to view the comments included in that specific Theme or Focus. This takes you to the same report format you will see in the Comments subtab.

Note that some comments may be assigned to multiple themes.

Themes Export

All the themes, response counts, and sentiment percentages and counts can be exported to CSV by clicking the Export to CSV button.

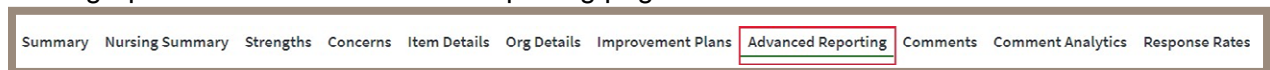


Advanced Reporting

Advanced Reporting provides the ability to dynamically generate views of results based on items, demographics, or permissioned report groups. Based on the selections made for columns and rows, users can select metrics or other data display options. Results are limited to the report groups and hierarchy that users are permissioned to access. A CSV file export that provides all scores and user selections is available for permissioned users.

Creating a Report

To create a report which contains a customized selection of items, item groups, units and demographics, select the Advanced Reporting page.



Making Your Selections

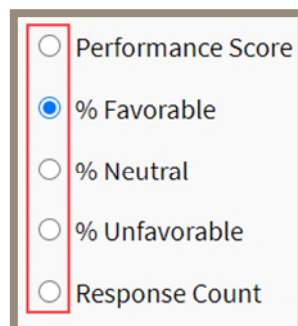
As you work through the options in Advanced Reporting, radial buttons indicate you can make a single selection while check mark boxes indicate you can make multiple selections.



A screenshot of a list of five items, each preceded by a checkbox. The first and third items have unchecked checkboxes, while the second, fourth, and fifth items have checked checkboxes. A red box highlights the checkboxes.

- ☐ 1. This organization cares about its clients/patients.
- ☒ 2. The person I report to treats me with respect.
- ☐ 3. I enjoy working with my coworkers.
- ☒ 4. This organization values employees from different backgrounds.
- ☒ 5. My ideas and suggestions are seriously considered.

Square indicates Multi-select Options



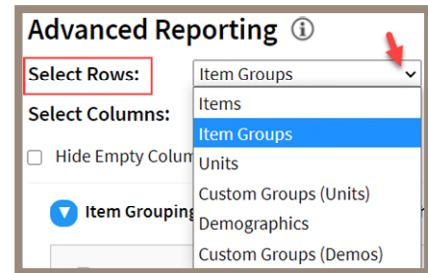
A screenshot of a list of five metrics, each preceded by a radio button. The second metric, '% Favorable', has a selected radio button. A red box highlights the radio buttons.

- ☐ Performance Score
- ☒ % Favorable
- ☐ % Neutral
- ☐ % Unfavorable
- ☐ Response Count

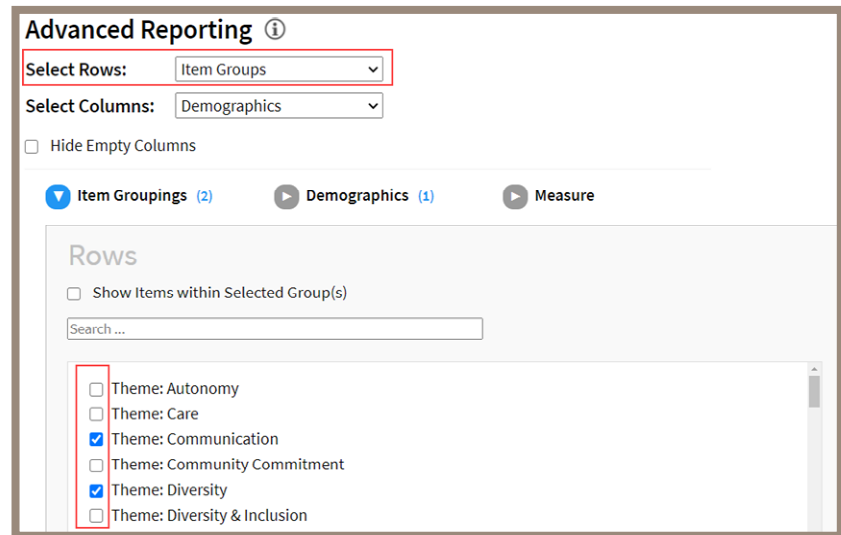
Circle indicates Single-select Options

Select Rows

Select the information you would like for the rows of your report.

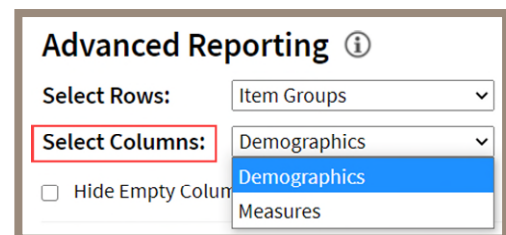


After you select rows, the information below will update for you to make specific selections. For example, this screenshot shows that the user selects Item Groups for their Rows and the themes of Item Groupings of Communication and Diversity.



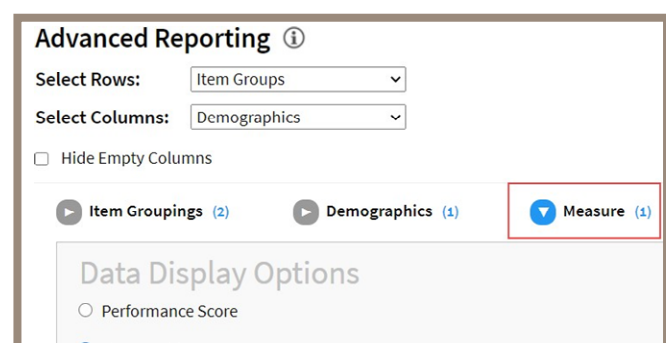
Select Columns

Select the information you would like for the columns of your report. The options made available to you in Select Columns are dependent on your choice in Select Rows. Following our previous example, the screenshot to the right shows the Column options are Demographics or Measures. Make the appropriate selection for your report.



Selecting Data Display Options

You can make selections which will vary based on what was chosen under Select





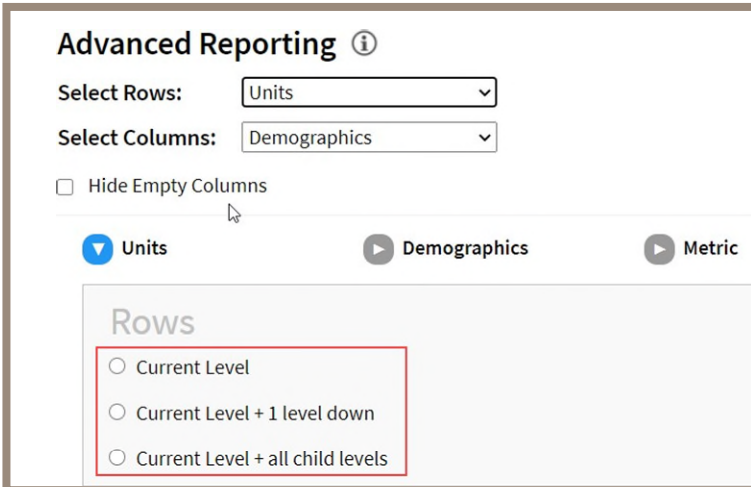
Rows and Select Columns. Using our same example, the user can select Measure.

- Measures apply when Items or Item Groups are selected.
- Metrics are offered when a user selects population related content for the Rows or Columns like Units, Demographics and Custom Groups.

Choosing Your Unit Display

Choose your Unit display from the following options:

- Current Level: Only the unit selected in the hierarchy
- Current Level + 1 level down: Unit selected plus all units directly reporting to that unit
- Current Level + all child levels: Unit selected and all units directly and indirectly reporting to that unit



Advanced Reporting ⓘ

Select Rows:

Select Columns:

☐ Hide Empty Columns

Units Demographics Metric

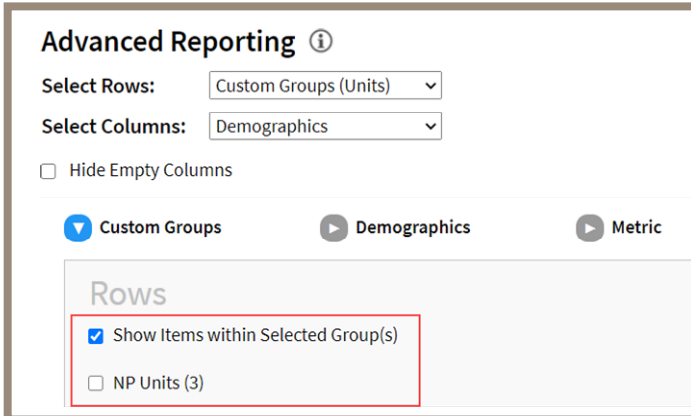
Rows

- ☐ Current Level
- ☐ Current Level + 1 level down
- ☐ Current Level + all child levels

Using Show Items within Selected Group(s)

Choose your Custom Groups (Units) display from the following options:

- Show items within Selected Group(s): All units within the Custom Group
- List of Custom Groups created



Advanced Reporting ⓘ

Select Rows:

Select Columns:

☐ Hide Empty Columns

Custom Groups Demographics Metric

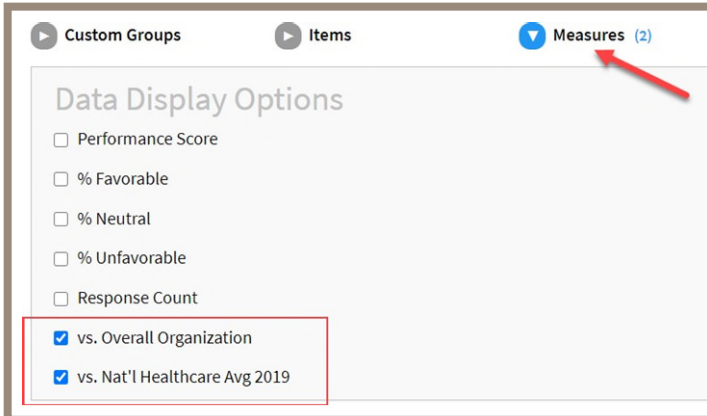
Rows

- ☒ Show Items within Selected Group(s)
- ☐ NP Units (3)

Heatmap

Choose any Row/Column combination with Measures available. Then select “vs.

Overall Organization” or “vs. Benchmark” as the Measure. The Data Table is then presented with



Custom Groups Items Measures (2)

Data Display Options

- ☐ Performance Score
- ☐ % Favorable
- ☐ % Neutral
- ☐ % Unfavorable
- ☐ Response Count
- ☒ vs. Overall Organization
- ☒ vs. Nat'l Healthcare Avg 2019



color-coding based on the difference from the benchmark chosen.

#	3. I enjoy working with my coworkers.			5. My ideas and suggestions are seriously c	
	Performance Score	vs. Company Overall	vs. Nat'l Healthcare Avg 2019 (4.39)	Performance Score	vs. Company Overall
Comparisons					
Company Overall	4.48	0.00	+0.09	3.98	0.00
NP Units (3)					
NP Units (3)	4.50	+0.02	+0.11	3.79	-0.19
100002 - CM NURSING SUPERVI - Naomi Fowler	4.47	-0.01	+0.08	4.00	+0.02
100003 - CM MED/SURG - Hailey Perkins	5.00	+0.52	+0.61	4.00	+0.02
100003 - CM MED/SURG - Lydia Clark	4.50	+0.02	+0.11	3.66	-0.32

Color Coding

- Dark Blue: +.20 and above
- Light Blue: +.01 to +.19
- No Color: no difference
- Light Red: -.01 to -.19
- Dark Red: -.20 and below

Create Report

After you have made all your selections you can select Apply Selections to see the resulting data table at the bottom of your screen.

Clear Selections and Clear All

Choose Clear Selections to clear the data selections from the carets. Choose Clear All to clear the table and ALL selections made.

Export to CSV

Export the entire data table to CSV by clicking Export to CSV. Many of the

Export To CSV

Custom Groups

Clear Selections

Clear All

Apply Selections



reports you create will have many columns and rows and will be best viewed in the CSV format.

Report Size

If the report you create is too large to display you will receive the following message and may select to send the report to you via email.

The data requested is too large to display on screen.

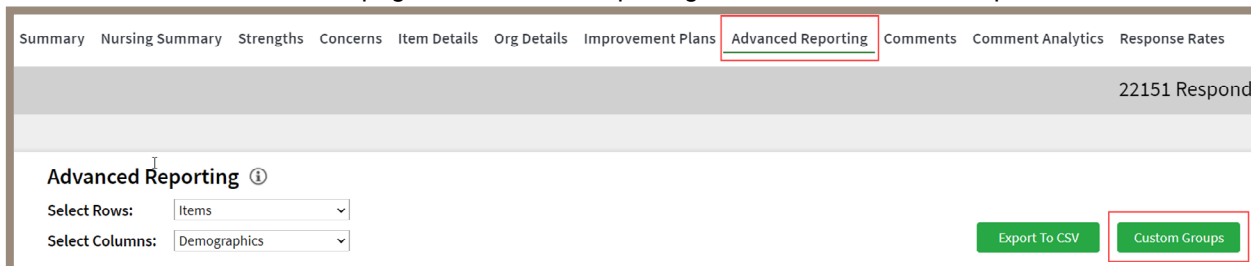
Send Excel Export as Email

Custom Groups in Advanced Reporting

The Custom Groups feature in Advanced Reporting allows you to group multiple units or demographics and create reports for that combination of units/demographics. You can create Custom Groups based on the report group and demographic permissions you have. The Custom Groups you create are only visible to you and cannot be seen by other users.

Create a New Custom Group

To create a new Custom Group, go to Advanced Reporting and select Custom Groups.



Summary Nursing Summary Strengths Concerns Item Details Org Details Improvement Plans **Advanced Reporting** Comments Comment Analytics Response Rates

22151 Respond

Advanced Reporting ⓘ

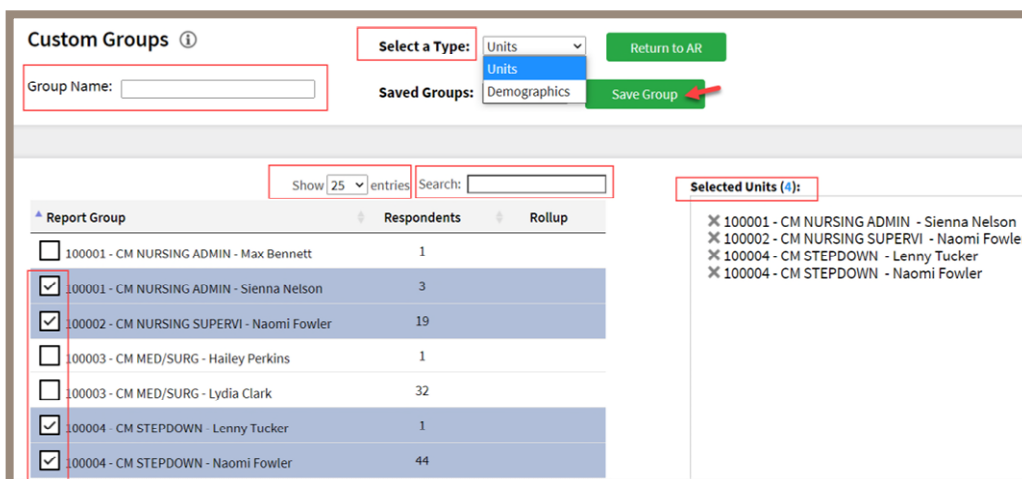
Select Rows: Items

Select Columns: Demographics

Export To CSV Custom Groups

Custom Group by Units

Enter a Group Name (be sure use a unique naming convention to avoid multiple reports having the same name) and select the Type: Units. Check the boxes next to the Report Groups you want to include. As you make your selections, the names of the Report Groups you choose will appear to the right under Selected Units. The number in parenthesis is the number of units you selected. The number of respondents appears as a column in the report group table on the left. You may view 25, 50, 100, or 200 groups at one time. Use the Search box to look for a specific report group. When you have made all your selections click **Save Group**.



Custom Groups ⓘ

Group Name:

Select a Type: Units

Return to AR

Saved Groups: Demographics

Save Group

Show 25 entries Search:

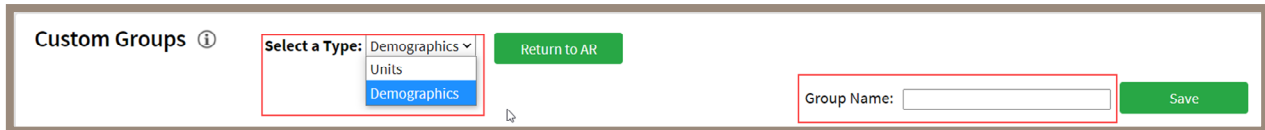
Report Group	Respondents	Rollup
<input type="checkbox"/> 100001 - CM NURSING ADMIN - Max Bennett	1	
<input checked="" type="checkbox"/> 100001 - CM NURSING ADMIN - Sienna Nelson	3	
<input checked="" type="checkbox"/> 100002 - CM NURSING SUPERVI - Naomi Fowler	19	
<input type="checkbox"/> 100003 - CM MED/SURG - Hailey Perkins	1	
<input type="checkbox"/> 100003 - CM MED/SURG - Lydia Clark	32	
<input checked="" type="checkbox"/> 100004 - CM STEPDOWN - Lenny Tucker	1	
<input checked="" type="checkbox"/> 100004 - CM STEPDOWN - Naomi Fowler	44	

Selected Units (4):

- ✕ 100001 - CM NURSING ADMIN - Sienna Nelson
- ✕ 100002 - CM NURSING SUPERVI - Naomi Fowler
- ✕ 100004 - CM STEPDOWN - Lenny Tucker
- ✕ 100004 - CM STEPDOWN - Naomi Fowler

Custom Group by Demographics

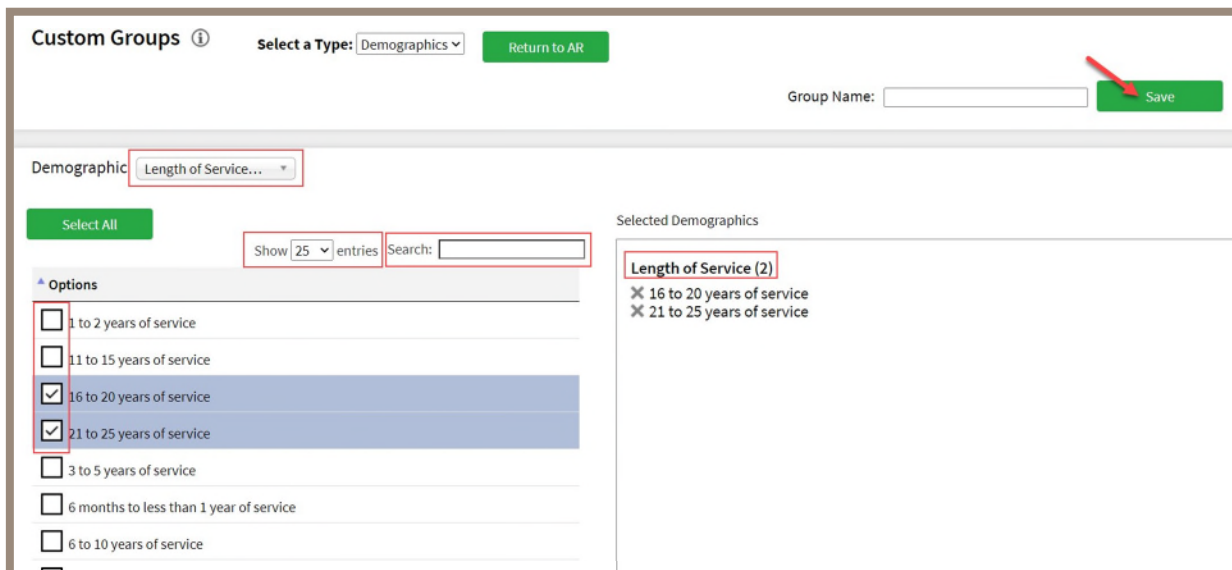
Enter a Group Name and select the Type: Demographics.



Custom Groups ⓘ **Select a Type:** Demographics Units Demographics **Return to AR**

Group Name: **Save**

Next, select the Demographic dropdown to make your selection. Under Options, check the boxes next to the demographics you want to include. As you make your selections, your choices will appear to the right under Selected Demographics. The number in parenthesis is the number of demographics you selected. You may view 25, 50, 100, or 200 groups at one time. Use the Search box to look for a specific demographic. When you have made all your selections click Save Group.



Custom Groups ⓘ **Select a Type:** Demographics **Return to AR**

Group Name: **Save**

Demographic Length of Service... **Select All** Show 25 entries Search:

Options

- ☐ 1 to 2 years of service
- ☐ 11 to 15 years of service
- ☒ 16 to 20 years of service
- ☒ 21 to 25 years of service
- ☐ 3 to 5 years of service
- ☐ 6 months to less than 1 year of service
- ☐ 6 to 10 years of service

Selected Demographics

Length of Service (2)

- ✕ 16 to 20 years of service
- ✕ 21 to 25 years of service

Once a Custom Group by Demographic is saved, it is also available in Custom Filters. Similarly, Custom Filters will be available in Custom Groups (Demos).

Edit or Delete a Custom Group


To edit an existing Custom Group, Select a Type, then select the custom group you wish to edit under Saved Groups. To edit, select the pencil icon, make your changes by selecting or deselecting the check boxes and select Update Group/Filter. To delete the group select Delete Group/Filter.

Custom Groups ⓘ

Select a Type: Demographics ▼

Return to AR

Saved Groups: All Non-FullTime (3) ▼



Update Filter

Delete Filter

Custom Filter Name: All Non-FullTime

Demographic Age (15) ▼

Select All

Show 25 ▼ entries Search:

Options

☐ 18 to 24 years
 ☐ 25 to 29 years

Selected Demographics

Employment Status (3)

- ✕ Casual, Temporary, PRN or Per Diem
- ✕ Leave of Absence
- ✕ Part-Time

Note: When editing Custom Groups by Unit, select the group from the drop down, make changes, and select **Update Group**.

Custom Groups ⓘ

Select a Type: Units ▼

Return to AR

Group Name: Nursing Admin

Saved Groups: Nursing Admin (4) ▼

Update Group

Delete Group

Show 25 ▼ entries Search:

Report Group	Respondents	Rollup
<input checked="" type="checkbox"/> 100001 - CM NURSING ADMIN - Max Bennett	1	
<input checked="" type="checkbox"/> 100001 - CM NURSING ADMIN - Max BennettNew	1	
<input checked="" type="checkbox"/> 100001 - CM NURSING ADMIN - Sienna Nelson	3	
<input checked="" type="checkbox"/> 100001 - CM NURSING ADMIN - Sienna NelsonNew	3	

Selected Units (4):

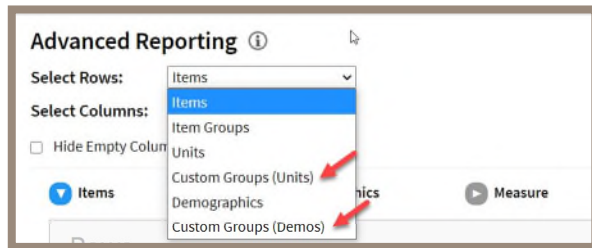
- ✕ 100001 - CM NURSING ADMIN - Max Bennett
- ✕ 100001 - CM NURSING ADMIN - Max BennettNew
- ✕ 100001 - CM NURSING ADMIN - Sienna Nelson
- ✕ 100001 - CM NURSING ADMIN - Sienna NelsonNew

Using Custom Groups

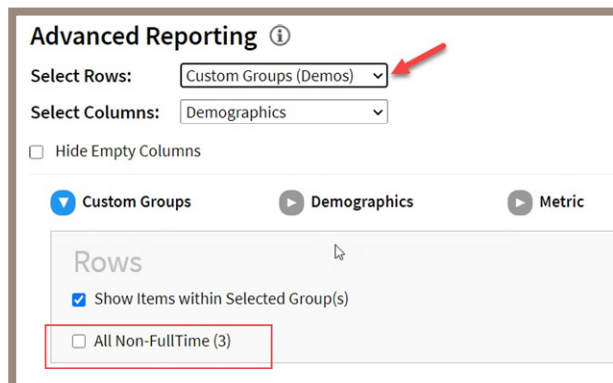
After creating the desired Custom Group(s), return to Advanced Reporting by selecting Return to AR and build a report using those Custom Groups.

Return to AR

In Advanced Reporting, you will see Custom Groups (Units) and Custom Groups (Demos) as options.



Once you make a selection you will see your Custom Groups for units or demographics appear in the dropdown.



Glossary of Terms

Following are common terms you will see as you navigate the Press Ganey Workforce and Engagement Solution.

Term	Definition
Benchmark/Norm	The average score of the respective comparison group. An organization's survey results are compared to benchmarks/norms to see if the scores are above or below the national average for similar groups of employees or physicians.
Concerns	Identified through the application of an algorithm that considers performance score, Percent (%) Unfavorable, and negative difference from a designated National Benchmark. Note: The Percent (%) Unfavorable calculation is comprised of Disagree (2) and Strongly Disagree (1) survey item responses on the 5-point Likert Scale.
Demographic	Characteristics of your survey population (employees or physicians) which may come from the data an organization provides to Press Ganey or questions answered on the survey.
Distribution	Proportion of responses that are Favorable, Neutral, and Unfavorable for a given item. The Favorable category includes Strongly Agree (5) and Agree (4) responses, the Neutral category includes Neutral (3) responses, and the Unfavorable category includes Disagree (2) and Strongly Disagree (1) responses.
Domain	Broad levels by which the survey items are grouped.
Employee Domain	These items measure the degree to which employees feel connected to their colleagues and jobs.
Engagement Indicator	Composite metric of six (6) items that measure employees' degree of pride in the organization, intent to stay, willingness to recommend, and overall workplace satisfaction. This score is considered Press Ganey's primary outcome metric.
Hierarchy	Ways of organizing and grouping respondents.
Leader Index	Measures how well-prepared a work group leader is to manage a work group through activities that support improvement and positive outcomes. This key metric provides insight into leader-employee relationships by measuring trust, respect, communication skills and openness to discussing issues and solutions. This score is presented on a 100-point scale.
Manager Domain	These items measure the degree to which employees feel connected to the person they report to, typically a supervisor or manager.
Metric	A grouping of survey items that measures a specific outcome (i.e., desired changes in behaviors/attitudes). This includes Engagement, Alignment, Leader Index, and Team Index. These metrics are most commonly used to track overall improvement for a group.
Module	Collection of items added to the core Employee and Physician survey designed to gather information on additional workforce concerns. Examples include Nursing, Safety Culture, and Resilience.

Organization Domain	These items measure the degree to which employees feel connected to the overall organization. This Domain relates to broader perceptions about organizational culture.
Power Item Score	Average score of 15 items on the Employee survey representative of all 3 domains that most powerfully drive engagement at the national level. The power item score drives the Team Index designation for each work unit.
Resilience Index	Measures the ability of employees and physicians to recover and remain engaged even in challenging work circumstances, providing an early warning system for burnout. The index is divided into two themes: Activation and Decompression. Activation items focus on finding meaning in the work and focusing on patients/clients as individuals. Decompression items focus on employees' ability to disconnect from work.
Response Rate	Rate of return of participant survey responses. Calculated by dividing the number of surveys returned from the total number invited and multiplying by 100.
Safety Culture Index	The safety culture of an organization is the product of individual and group values, attitudes, perceptions, competencies, and patterns of behavior that impact the commitment and ability to provide a safe environment for employees, physicians, and patients.
Score	The mean (average) of responses for a specific survey item or grouping of items.
Strengths	Identified through the application of an algorithm that considers performance score, Percent (%) Favorable, and positive difference from a designated national benchmark. Note: The Percent (%) Favorable calculation is comprised of Agree (4) and Strongly Agree (5) survey item responses on the 5-point Likert Scale.
Team Index	Measures the level of team functioning and viability. Scores in this index indicate the level of support needed to effectively drive improvement and positive outcomes.
Themes	Topics of interest within the survey that make up a common theme. Some examples include work-life balance, fair compensation, leadership, coworker relations and job-person match.
Work Unit/Report Group	Group of employees that report to a common manager.