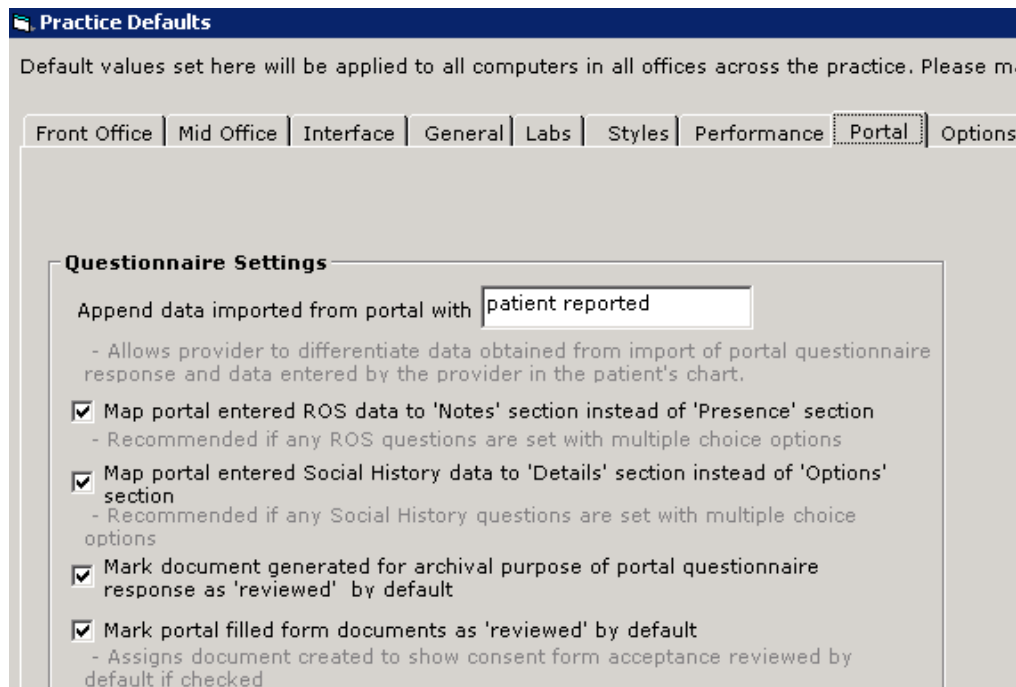# eClinicalWorks Patient Portal Questionnaires Quick Reference Guide

1. Create the Questionnaire

a. Go to EMR\Questionnaire Designer and select Create New/Edit

b. Use the navigation pane on the left side to select the structured data from the progress note section. Double click to expand. (be patient since it may take a moment to refresh)

c. Add a Page Header to the questionnaire. This can include the title and brief instructions for the patient.

d. Insert items by either double clicking on the item from the section. This can be free text or structured data. You will get more reporting power by creating and using structured data.

e. Edit the question detail to add a Heading. This can provide more visual space or provide context to the patient.

f. The question type will match your item from the EMR of Single Choice, Multiple Choice, numeric, free text or the various date types.

g. Use the Preview feature to see how it will display for the patient.

h. Be sure to Save before you close.

2. Configure Settings

a. File/Settings/Practice Defaults/Portal.

b. Decide what text you want appended on the progress note when you import the data from the patient. You may want to use "patient reported" to indicate it was from the patient and not the provider.

3. Questionnaire – Visit Mapping*

    a. Admin/Patient Portal/Questionnaire Setting

    b. Click the Add button to map the appropriate visit types, facilities or providers to the questionnaire. Then click Submit

Note: Depending on your eCW version this may be under the Form (Ques & Imms) tab or the Questionnaire tab.

4. Portal Configuration

    a. Admin/Patient Portal/Form (Ques & Imms) settings

    b. Select the number of questionnaires to make available on the portal

    c. Check the display options desired

Please see the eCW Patient Portal User Guide for more information on how to set up Questionnaires.