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Employee Engagement Portal User Guide

The Press Ganey Engagement Portal supports the Employee and Physician Engagement solutions to deliver results and deep insights through an intuitive, web-based solution. The interactive reporting system delivers the most meaningful metrics for leaders at all levels, including engagement scores, strengths and concerns and other key performance metrics. The portal is designed so users can quickly access the information needed to efficiently and effectively prioritize improvement initiatives and make informed decisions.

This document is designed to explain how users can access and use any of the features of the Engagement Portal. However, not all users will have access to the features included in this guide. Many features are permissions based and will only be accessible to a limited number of users. If questions arise related to permissions, please discuss with your internal super users and with your Press Ganey Account Team.

Logging In
To access the Engagement Portal:

2. Enter your username and password. This information is provided in an email from Press Ganey once the survey results are released.

If you do not remember your password, click “Forgot my password,” which will redirect you to a page where you can enter your username and have a recovery password sent to your email account.
Summary Dashboard

After logging into the Engagement Portal, you will land on the Summary Page. The Summary provides you with a wealth of information based on your role within the organization. Here’s a quick rundown of the main elements of the Summary Page. More detailed information on each will follow on the next several pages.

1. The upper left corner of the screen contains the Project Name.
2. The upper right corner of the screen contains your Profile icon.
3. Directly below the project name is the green general navigation area. Use this feature to move to other pages in the Engagement Portal. The page currently being viewed is highlighted in blue.
4. The top center of the screen contains Results For. This dropdown allows you to adjust the displayed results to any area of the organization for which you have access.
5. Filters allow you to filter your respondents based on a series of demographic categories.
6. Responses indicates the number of respondents.
7. Six tiles make up the bulk of the Summary screen. They are: Engagement, Tier Breakdown, Action Planning Readiness, Organization, Manager, and Employee.
8. The Group Breakdown Table frames the bottom portion of the page and includes data for your level of responsibility within the organization.
9. Export Page in the far lower left corner of the page allows you to download this page as a PDF.
10. (i) Information Buttons are included throughout the Engagement Portal and provides additional information about each feature.
Results For

Within **Results For**, adjust the view of the entire Engagement Portal to an area specific to a user/report group you select. This function is dependent on the level of permissions you have within the Engagement Portal. After clicking the dropdown menu, there are several options:

1. Use the “Search Hierarchy” text box to search for a report group to select.
2. Adjust the hierarchy setup from Direct Hierarchy to Location/Position. This allows you to select from multiple organization structures if your organization built multiple organizational structures into the project.
3. Review performance for your direct reports by selecting the “Direct Reports Only” check box.
4. Select a report group by clicking on it. Use the arrows to expand report groups to reveal those teams that roll up in that area.

For any report group you choose, your selection will be highlighted and the Summary view will recalculate based on your selection. The Responses number in the upper right will change to reflect the respondents included in that report group.

![Results For](image)

*Please Note:* The **Results For** functionality can be accessed and adjusted from any page in the Engagement Portal. It is a powerful way to adjust any page in the Engagement Portal to better understand responses from specific employee populations.
Filters
Click on **Filters** to reveal a menu which allows you to adjust the view of the entire Engagement Portal based on a series of demographic categories. The demographic filter functionality is permission-based and can be turned off, on, for select individuals within your organization. You have several options after opening the screen:

1. Click on the dropdown menu for filters when you want to make selections.
2. You are able to select one or multiple categories within each demographic filter.
3. Multiple demographic filters can be applied simultaneously and the banner will reflect those selections as well.
4. To remove the filters, simply select “All” within each category.
5. To hide the demographic filters from view, uncheck the “Show Selected Filters” option.
6. When finished making selections, click “Done.”

For any filters you choose, your selection will be highlighted and the Summary view will recalculate based on your selection(s). The Responses number in the upper right will change to reflect the respondents in the selected filters.

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**Please Note:** The Filters functionality can be accessed and adjusted from any page in the Engagement Portal. It is a powerful way to adjust any page in the Engagement Portal to better understand the responses from specific employee populations.
Summary Page – Engagement Tile
The first tile provided is the **Engagement tile** and shows the composite score for the six Engagement items, which assess the employee’s appraisal of his/her work environment, emotional experiences and attachment to the workplace:

- I would recommend this organization to family and friends who need care.
- I would recommend this organization as a good place to work.
- I am proud to tell people I work for this organization.
- Overall, I am a satisfied employee.
- I would like to be working at this organization three years from now.
- I would stay with this organization if offered a similar position elsewhere.

This score is considered Press Ganey’s primary outcome metric. This tile also includes the difference from the primary National Benchmark applied to the project and the overall Percentile Rank for Engagement, which is also based on the primary National Benchmark applied to the project.

The Benchmarks dropdown menu allows you to change the benchmark and compare to other benchmark groups applied to the project.

To review performance on the six measures that make up the Engagement score, click on the actual Engagement score. This click through action will redirect you to the Item Details page, where you will be provided with key information on the specific set of items that are included in the Engagement score.

In the upper right hand corner of each tile, you will notice an information icon (i) which will provide you with additional information about what is included in each tile.
Summary Page – Tier Breakdown Tile

The **Tier Breakdown tile** provides insight into the Tier distribution for the entire organization or for an individual report group.

At the Overall Organization level, you are provided with the Overall Power Item score, the number and percentage of report groups that fall into each of the three tier designations as well as the corresponding number of respondents.

At a report group level, the tile changes slightly to reflect the Power Item score for that single report group as well as their tier designation.

Performance on 15 key measures (seven Organization domain items, five Manager domain items, three Employee domain items) determine a report group’s placement in Tier 1, Tier 2 or Tier 3, and indicates the level of work-unit action planning that may be required.

- **Tier 1:** Tier 1 report groups require minimal action planning.
- **Tier 2:** Tier 2 report groups require some action planning.
- **Tier 3:** Tier 3 report groups require significant action planning and perhaps additional training and resources to successfully improve.

To review performance on the report group within a specific tier, click on the performance metrics for that tier. This click through action will redirect you to the Org Details page, where you will be provided with performance information for each of the report groups that are included in that tier.
Summary Page – Action Planning Readiness Tile

The **Action Planning Readiness (APR) tile** provides insight into action planning readiness at the overall organization or individual report group level. This score assesses how prepared a report group leader is to lead a report group through the action planning process. This key metric provides insight into the manager-employee relationships by measuring six items (all from the Manager domain) that cover the following topics: manager communication effectiveness, respect for employees, involving team members in decision making, encouraging teamwork, respect for supervisor and supervisor cares about my satisfaction.

These measures are combined and translated to a 0-100 scale.

- Scores in the range of 81-100 are very positive scores.
- Scores in the range of 71-80 are moderate scores.
- Scores below 70 need attention in at least one or more items within the APR score.

The scores are then distributed into one of five groups: Low, Moderately Low, Moderate, Moderately High and High.

At the overall organization level, the tile provides an Overall APR score, number and percentage of report groups at each level as well as the number of action plans at each level. The tile also includes a graphical representation of report groups at each level.

At the individual report group level, the tile provides that report group’s APR score, their APR level and number of action plans.

To review performance on the report groups within an APR level, click on the performance metrics for that level. This click through action will redirect you to the Org Details page, where you will be provided with performance information for each of the report groups that are included at that level.
Summary Page – Organization, Manager and Employee Tiles

The **Organization, Manager and Employee tiles** are composite measures formatted similarly to the Engagement tile. They will include the score, difference from previous performance (history) and difference against the National Healthcare Average.

**Organization**: Items in the Organization Domain measure the degree to which employees feel connected to the overall organization. Although this domain taps into broader perceptions about the organization’s culture, lower scoring items within this domain can be influenced by how effectively the report group leader helps employees connect to the overall organization’s mission and values.

**Manager**: Items in the Manager Domain reflect the degree to which your employees feel connected to the person that they report to, typically a supervisor or manager. Lower scoring manager domain items may require support from outside of the report group to address.

**Employee**: Items in the Employee Domain reflect the degree to which your employees feel connected to their colleagues and jobs. Low scoring Employee Domain items can typically be addressed by working with employees at the report group level.

To review performance on the measures that make up the Organization, Manager or Employee Domain scores, click on the actual score for the domain you wish to review. This click through action will redirect you to the Item Details page, where you will be provided with key information on the specific set of items that make up that domain.
Summary – Group Breakout
The **Group Breakdown** shows a summary of how different levels within the organization above and below your area of responsibility perform on the key metrics of the survey. The Group Breakdown view is based on your level of responsibility within the organization. This view is designed to provide you with a quick overview of report group results. Included in the report are the following features:

1. Report group name including the assigned manager
2. Engagement: Engagement score
3. Vs. Organization: Difference from Overall Organization performance
4. History: Difference in Engagement score from last engagement to current (if applicable)
5. Tier Ranking: Tier 1, Tier 2 or Tier 3
6. History: Difference in tier from last engagement to current (if applicable)
7. AP Readiness: Action Planning Readiness score
8. History: Difference in Action Planning Readiness score from last engagement to current
9. Number of employees who responded from each report group

<table>
<thead>
<tr>
<th>Group Breakdown</th>
<th>Engagement</th>
<th>Vs Organization</th>
<th>(History)</th>
<th>Tier (History)</th>
<th>AP Readiness</th>
<th>(History)</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Organization</td>
<td>4.15</td>
<td>+0.00</td>
<td>-</td>
<td>Tier 2</td>
<td>-</td>
<td>96</td>
<td>+0</td>
</tr>
<tr>
<td>Memorial Health System 2014 Overall - Karen Culpepper</td>
<td>4.16</td>
<td>+0.00</td>
<td>+0.12</td>
<td>Tier 2</td>
<td>-</td>
<td>96</td>
<td>+1</td>
</tr>
<tr>
<td>Finance - Markie Mikkord</td>
<td>4.21</td>
<td>+0.06</td>
<td>-0.28</td>
<td>Tier 2</td>
<td>↓</td>
<td>96</td>
<td>-14</td>
</tr>
<tr>
<td>Medical Services - Devin Widgeon</td>
<td>4.03</td>
<td>-0.12</td>
<td>+0.34</td>
<td>Tier 2</td>
<td>-</td>
<td>92</td>
<td>+4</td>
</tr>
<tr>
<td>Development - Brent Farve</td>
<td>4.54</td>
<td>+0.39</td>
<td>-</td>
<td>Tier 1</td>
<td>-</td>
<td>100</td>
<td>+0</td>
</tr>
<tr>
<td>VPs/Directors/Associates - Steven Garvey (100001)</td>
<td>4.63</td>
<td>+0.68</td>
<td>-</td>
<td>Tier 1</td>
<td>-</td>
<td>94</td>
<td>+0</td>
</tr>
<tr>
<td>Senior Living Services - Dana Black</td>
<td>4.12</td>
<td>-0.03</td>
<td>-0.51</td>
<td>Tier 2</td>
<td>↓</td>
<td>86</td>
<td>-6</td>
</tr>
<tr>
<td>Associate Services and Wellness - Jessica Porter</td>
<td>4.64</td>
<td>+0.49</td>
<td>+0.10</td>
<td>Tier 1</td>
<td>-</td>
<td>97</td>
<td>+4</td>
</tr>
</tbody>
</table>
Strengths

The **Strengths** page lists up to 10 items that are scoring notably well based on the application of a Press Ganey algorithm. This algorithm assigns a point value to each survey item based on select criteria including percent Favorable, Performance score and difference from a designated national benchmark (this defaults to the primary national benchmark defined during the initial project setup).

The Default View displays each qualifying item (sort is based on the item number) with its assigned domain, response distribution, score, difference from the organization average and the number of employees responding to each item.

When you click on the plus sign (+) in the Action Planning column, a green check mark appears. This function adds the survey item to the Action Planning page and you can begin developing an action plan for that item. For more information about how to create an action plan, see the Action Planning section of this guide.

The view of the 10 items can be adjusted by clicking on the column headers. For example, if you would like to assess the list of Strengths based on percent favorable, simply point and click on the Distribution column and you will notice the items sort from highest percentage favorable.

**Download to CSV**: This function in the upper right exports the report to a CSV file format.

**Export Page**: This function (not pictured) exports this report to a PDF.
Concerns

The **Concerns** page lists up to 10 items that are scoring notably poorly based on the application of a Press Ganey algorithm. This algorithm assigns a point value to each survey item based on select criteria including Percent Unfavorable, Performance score and difference from a designated national benchmark (this defaults to the primary national benchmark defined during the initial project setup).

The Default View displays each qualifying item (sort is based on the item number) with its assigned domain, response distribution, score, difference from the organization average and the number of employees responding to each item.

When you click on the plus sign (+) in the Action Planning column, a green check mark appears. This function adds the survey item to the Action Planning page and you can begin developing an action plan for that item. For more information about how to create an action plan, see the Action Planning section of this guide.

The view of the 10 items can be adjusted by clicking on the column headers. For example, if you would like to assess the list of Concerns based on percent unfavorable, simply point and click on the Distribution column and you will notice the items sort from highest percentage unfavorable.

**Download to CSV:** This function in the upper right exports the report to a CSV file format.

**Export Page:** This function (not pictured) exports this report to a PDF.
Item Details

Item Details provides various views of survey results for all closed-ended items on the survey. This feature is especially useful as you can limit the view to specific groups of survey items as well as add additional data columns.

The Default View (pictured below) displays each item, in order as it appeared on the survey, with its assigned domain, response distribution, score, difference from the organization average, difference from the National Healthcare Average and the number of employees responding to each item.

When you click on the plus sign (+) in the Action Planning column, a green check mark appears. This function adds the survey item to the Action Planning page and you can begin developing an action plan for that item. For more information about how to create an action plan, see the Action Planning section of this guide.

Search: This function in the upper left allows you to search for an item or items based on keywords.  
Download to CSV: This function in the upper right exports the report to a CSV file format.  
Export Page: This function (not pictured) exports this report to a PDF.

Showing All Items: To adjust or limit the measures to review, use the items dropdown menu on the left. This feature allows you to limit the view to specific groups of items, such as:

- **Metrics:** Review performance for those measures that makeup the Engagement indicator or Power Item score.
- **Domains:** Review performance for one of three domains, Employee (EMP), Manager (MGR) or Organization (ORG).
- **Themes:** Review performance for thematic areas of importance, Employee Involvement, Fair Compensation, Growth and Development, My Work or Organizational Alignment.
- **Modules:** Review performance for added survey modules such as Nursing Excellence, which are groupings of additional survey items.
**Showing Default Columns:** To focus your view to specific columns or to add columns to your report, use the column dropdown menu on the right. There are two types of changes you can make to the columns. They are:

- **Change Column Focus:** Choose from Default, Historical, Benchmark or Action Planning to change the overall focus of the Item Details columns.
- **Add New Columns:** After clicking “Add Columns” in the menu, choose additional columns to add to your report. Options include historical performance as well additional benchmarking groups.
Org Details

The **Org Details** page provides a table of performance by report group for several key metrics. The amount of available data on this page varies by your level of responsibility within the organization.

The **Default View** (pictured below) includes the following columns:

2. Engagement: Engagement score
3. Vs. Prior Year: Difference from last engagement to current (if applicable)
5. Power Item score
6. Tier: Tier 1, Tier 2 or Tier 3
7. APR: Action Planning Readiness score
8. Response Count: Number of employees who responded

**Download to CSV**: This function in the upper left exports the report to a CSV file format.

**Export Page**: This function (not pictured) exports this report to a PDF.

**Focused View**: Focused View allows you to view the scores for direct reports of your direct reports. By selecting Focused View, you can look across your area of responsibility and assess how, for example, mid-level managers or supervisors rated each item.

**Showing All Groups**: To focus your view to specific groups within your organization, use the Groups dropdown menu on the left, next to the Focused View selection. You can limit to groups within two categories:

- **APR**: Select from Low, Moderately Low, Moderate, Moderately High and High
- **Tiers**: Select from Tier 1, Tier 2 or Tier 3

After making a selection, the Org Details page will refresh and include only report groups within that APR level or Tier.
Showing Default Columns: To focus your view to specific columns or to add columns to your report, use the column dropdown menu on the right. There are two types of changes you can make to the columns. They are:

- Change Column Focus: Choose from Default, Historical, Benchmark, Domain Comparison, Action Planning or Participation Rates to change the overall focus of the Org Details columns.
- Add New Columns: After click “Add Columns” in the menu, choose additional columns to add to your report. These additional columns include Engagement, Response Count, Power Item score, Tier, APR, Historical Engagement, Historical APR, Historical Tier, Benchmarks and Domains.
Comments

The Comments feature allows you to review responses to open-ended items (depending on access permissions). These valuable responses provide context to the answers employees provided on the survey. There are three main user functions available on this page:

1. Use the dropdown menu on the left side of the report to select from open-ended survey items for which you would like to review responses.
2. Use the “Search Responses” feature in the center of the report to search for comments with specific key words.
3. Use the paging mechanism on the right side of the report to review additional comments.

Export Page: This function (not pictured) exports this report to a PDF.
Ranking View

The **Ranking View** Report provides you with the ability to compare responses for a selected survey item, or a grouping of items (e.g. themes, domains or metrics) across the organization. Follow these steps to create a Ranking View Report:

1. Click on the “Please choose an item” dropdown menu:

   ![Dropdown Menu](image)

2. Select a measure or group of measures for review. The options include:
   a. **All Items**: This selection provides an aggregate of all survey items.
   b. **Metrics**: Compare performance for those measures that makeup Engagement or the Power Items core.
   c. **Domains**: Compare performance for one of three domains, Employee (EMP), Manager (MGR) or Organization (ORG).
   d. **Themes**: Compare performance for thematic areas of importance, Employee Involvement, Fair Compensation, Growth and Development, My Work or Organizational Alignment.
   e. **Modules**: Compare performance for added survey modules such as Nursing Excellence.
   f. **Items**: Compare performance for an individual survey item.

3. Review your report:

   ![Report](image)

   **Download to CSV**: This function in the upper right exports the report to a CSV file format.
   **Export Page**: This function (not pictured) exports this report to a PDF.
   **Focused View**: Focused View allows you to view the scores for direct reports of your direct reports. By selecting Focused View, you can look across your area of responsibility and assess how, for example, mid-level managers or supervisors rated each item.
**Historical Tier**

The **Historical Tier** report provides you with trending and comparison data to your previous survey results relative to important metrics, with a focus on highlighting changes in tier designation.

The report includes the following information:

1. **Time Frame**: Compare the organization’s current project performance for all report groups to the organization’s previous project for all report groups on the following metrics:
   a. Power Item Score
   b. Action Planning Readiness
   c. Tier

2. **Color designation**: Certain rows are highlighted. Each color indicates a change in tier score from the previous survey for the highlighted report group.
   a. Red: Declined by two tiers.
   b. Yellow: Declined by one tier.
   c. No Color: No tier change.
   d. Green: Improved by one tier.
   e. Blue: Improved by two tiers.

3. **Sorting Capabilities**: The columns can be sorted alphabetically or numerically in ascending or descending order by clicking on them.

4. **Focused View**: Focused View allows you to view the scores for direct reports of your direct reports. By selecting Focused View, you can look across your area of responsibility and assess how, for example, mid-level managers or supervisors rated each item.

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**Export Page**: This function (not pictured) exports this report to a PDF.
Engagement Portal

**Percentile View**

*Percentile View* provides you with your organization’s score and percentile ranking for each item on the survey, as well as the scores that represent the 50th, 75th and 90th percentiles in the Press Ganey national database. The information can be very helpful when setting future goals.

The report includes the following information:

1. **Item # and Name**: Each item on the survey is included in this report. The default sort is by item #.
2. **Overall**: Each item’s score for the entire organization is included.
3. **Overall National Healthcare Average Ranking**: The percentile rank for each item.
4. **50th, 75th and 90th Percentile**: These columns include the scores that currently represent the 50th percentile, 75th percentile and 90th percentile in the primary peer group that was setup during project implementation.
5. **Benchmark Dropdown Menu**: The benchmark dropdown menu provides the ability to change the benchmark so the organization’s percentile rank, as well as the 50th, 75th and 90th percentiles will be based on the makeup of performance within a different benchmark group (if applicable).
6. **Sorting Capabilities**: The columns can be sorted alphabetically or numerically in ascending or descending order by clicking on them.
7. **Download to CSV**: This function in the upper left exports the report to a CSV file format.
8. **Export Page**: This function (not pictured) exports this report to a PDF.
Ad-Hoc Reporting

The **Ad-Hoc Reporting** tool provides advanced and in-depth analysis. Select survey items and report groups and review performance on key demographics and data metrics.

This report is designed by selecting survey items or report groups to include in rows, and then selecting respondent demographics and survey metrics (scores) for columns. Together, ad-hoc reporting allows you to create a tabular report.

Creating Ad-Hoc Reports for Survey Items

Ad-Hoc reports can be created using survey items or report groups as the primary feature in rows. This first example explores using survey metrics to create a report.

1. **Rows Menu:** Click to select items you would like to include from the Rows dropdown menu. There is no limit to the number of items that can be selected. Options include:
   - a. **All Items:** This selection provides an aggregate of all survey items.
   - b. **Metrics:** Compare performance for those measures that makeup Engagement or the Power Item score.
   - c. **Domains:** Compare performance for one of three domains, Employee (EMP), Manager (MGR) or Organization (ORG).
   - d. **Themes:** Compare performance for thematic areas of importance, Employee Involvement, Fair Compensation, Growth and Development, My Work or Organizational Alignment.
   - e. **Modules:** Compare performance for added survey modules such as Nursing Excellence.
   - f. **Items:** Compare performance for an individual survey item.

![Rows Menu Example]

2. **Columns:** Click to select demographics or survey metrics you would like to include from the Columns dropdown menu. There is no limit to the number of columns that can be selected from either demographics or survey metrics. Options Include:
   - a. **Demographics:** Age, Direct Patient Care, Employment Status, Length of Service, etc.; as determined by the organization during the survey setup process.
   - b. **Column Metrics:** Performance score, Overall Organization, “vs. National Healthcare Average,” % Favorable, % Neutral, % Unfavorable and Number of Responses.

![Columns Menu Example]

   - c. **Please Note:** You cannot choose both demographics and survey metrics to show as columns. If demographics are chosen for columns, move onto step 4 for additional actions. If column metrics are selected, your report is complete.
3. As rows and columns are selected, the report will dynamically begin to form (example below shows three items selected for rows and age of employees selected for columns):

![Report Example](image)

Additional step if Demographics are chosen for columns:

4. Score Metric Adjustment: After choosing demographics, an additional dropdown menu will appear. Use this third dropdown to select the metric type that should populate for the demographics. In the example above, Performance score is selected, therefore, the score for each measure is reflected as a Performance score. The dropdown menu options are as follows:

![Dropdown Options](image)

**Download Full Report**: This function in the upper right exports all the available data and details in Ad-Hoc reporting into one excel file.

**Download to CSV**: This function in the upper right exports the current report to a CSV file format.

**Export Page**: This function (not pictured) exports this report to a PDF.
Creating Ad-Hoc Reports for Units

Ad-Hoc reports can be created using survey items or report groups as the primary feature in rows. This second example explores using report groups to create the report.

1. **Rows Menu**: The last option on the Rows dropdown menu is Units. Two options appear:
   a. **All Units**: The rows of the ad-hoc report will load with all of the report groups in your organization.

   ![All Units Option](image)

   b. **Units**: This option allows you to select the report groups you wish to include rather than including all units.
      i. **Add Units**: After choosing Units, the report will add a new option, "Search Hierarchy." Use this menu to search for report groups to include in the report.

   ![Add Units Option](image)

      ii. **Multiple units may be selected.**

2. **Remove Units**: To remove a unit from the report, click the "x" which appears to the left of each unit. This will remove that report group from the report.

   ![Remove Unit](image)

3. **Columns**: Click to select demographics or survey items you would like to include from the Columns dropdown menu. There is no limit to the number of columns that can be selected from either demographics or survey items. Options Include:
   a. **Demographics**: Age, Direct Patient Care, Employment Status, Length of Service, etc.; as determined by the organization during the survey setup process.
   b. **Survey Items**: Metrics, Domains, Themes, and survey items.

   ![Columns Option](image)

   c. **Please Note**: You cannot choose both demographics and survey items to show as columns. If demographics are chosen for columns, move onto step 5 for additional actions. If survey items are selected, your report is complete.
4. As rows and columns are selected, the report will dynamically begin to form (example below shows two report groups selected for rows and the three survey domains for columns):

![Image of report interface]

Additional step if Demographics are chosen for columns:

5. Metrics: After choosing demographics, an additional dropdown menu will appear. Use this third dropdown to select the survey item that should populate for the demographics. The same standard survey items of Metrics, Domains, Themes, and specific survey items are available.

![Image of metrics dropdown]

6. Just as in step 4, as more and more selections are made, the report will dynamically form.

![Image of report interface with selected demographics]

**Download Full Report:** This function in the upper right exports all the available data and details in Ad-Hoc reporting into one excel file.

**Download to CSV:** This function in the upper right exports the current report to a CSV file format.

**Export Page:** This function (not pictured) exports this report to a PDF.
Action Planning

The **Action Planning** page allows you to create action plans for a single survey item or for a broader thematic area, share the action plan with others in the organization, and assign tasks to employees. When accessing the Action Planning page, any action plans you previously created will be listed on the screen. Several actions can be taken from this screen:

1. Rename action plans: Rename action plans by clicking on the name of the action plan.

2. Status: Adjust the plan’s status using the dropdown menu to the right of the action plan name.

3. Percent Complete: Adjust the percent of the action plan that is complete in the % field.

4. Copy and Delete: Copy or Delete the action plan by using the far right dropdown menu and selecting the appropriate option.

5. To create a new action plan, select “+Create New Action Plan” at the bottom of the page. See the full Action Planning screen below.

![Action Planning Screen](image-url)
+Create New Action Plan

1. Click the green "+Create New Action Plan" button.
2. Name: Name the action plan by clicking and typing where it says, “Untitled Action Plan.”
3. Survey Items: Add a survey item or multiple items.
   a. Options include specific survey items, metrics, domains, themes, etc.
4. Due Date: Add a due date. Use the calendar or free type to complete.
5. Owners: The default is you. Add owners by clicking “Add Owner” and searching for them.
   a. By choosing other owners, this action plan will be added to their Engagement Portal account and they will be notified via email. They will then be able to make changes and add information.
6. Org Hierarchy Details: The default is your report group. Add additional units by selecting “Add Org Hierarchy Unit” and searching for them. Assigning a report group will trigger an email notification to that leader as well.
7. Define Issue: Free type in this field to define the issue and reason for the action plan.
8. Goal: Complete this field with specific, measurable goals for the action plan.
9. Success Measure: Hypothesized positive outcomes that occur because of the action plan.
10. New Task: Click “+New Task” to add specific tasks, assign owners (triggers email notification), add start/end dates, mark task status (not started, in progress, etc.) and percentage complete.
   a. Colors: On time = green, due in 14 days = yellow, 1+ days overdue = red
   b. An email will be sent to the person assigned the task when it is one day overdue.
11. Add Comment: Add comments related to the Action Plan at the very bottom.
12. Export Page: This function (not pictured) exports this report to a PDF.
Action Planning Tracker

Action Planning Tracker provides you with a high level view of all action plans in the system. A quick glance at this page can assist you in assessing the extent to which action plans are or aren’t being implemented across the organization.

Several specific features of Action Planning Tracker include:

1. Filters: Use the filters to search for specific action plans. Options include Measure Groups (e.g. EMP domain), Status (e.g. Not Started), Due Date, APR/Tier and “Filter by owner.”
   a. Clear filters using the “Clear Filters option.”

2. Columns: The tracker includes the following action plan information:
   a. Title of the action plan, associated survey items, owners, report groups assigned, status, creation date, due date and progress.

3. Download to CSV: This function in the upper right exports the current report to a CSV file format.

4. Export Page: This function (not pictured) exports this report to a PDF.
Response Rates

During survey administration (and afterwards), the Response Rates view provides information on the percentage and number of responses to the survey. This report refreshes automatically to provide the most up-to-date information. Columns and functions on this page are as follows:

1. Overall and Direct Hierarchy: The first column lists each report group as well as Overall, which includes all parties to whom the survey was sent.
   a. To view more specific report groups within a report group, click the triangle to expand that area.
2. Invited and Responded: These are the individuals to whom the survey was sent, and by whom a survey was completed.
3. Participation Rate: This is the percentage of employees who responded out of the total number who were invited.
4. Export to CSV: This function in the upper right exports the current report to a CSV file format. Please note that if certain departments are collapsed, that is exactly how they will display in the Excel document.
   a. The export to CSV button does not appear unless the mouse cursor is hovered over the body of the report.
5. Export Page: This function (not pictured) exports this report to a PDF.

Documents

The Documents page (not pictured) can be populated with reports and/or analysis completed outside of the Engagement Portal (e.g. Comment Analysis and Executive Overview).
Snapshot Export

Press Ganey’s **Snapshot Export** provides the user the capability to generate or email a printable document that includes several of the most common Engagement Portal views. This report can be created for the overall organization and/or for specific units. The snapshot includes:

1. **Summary Page:** The Summary provides you with a wealth of information based on your role within the organization. The snapshot will include all of the features on the Summary Page, which are the Engagement Tile, Tier Breakdown Tile, Action Planning Readiness Tile, Domain Tiles of Org, Manager and Employee, and the Group Breakdown Table.

2. **Strengths Page:** The Strengths page lists up to 10 items that are scoring notably well based on the application of a Press Ganey algorithm.

3. **Concerns Page:** The Concerns page lists up to 10 items that are scoring notably poorly based on the application of a Press Ganey algorithm.

**Follow these steps to create a Snapshot Export:**

1. Enter text in the Unit Search text box to locate and select one or more units to include in the export. If multiple units are selected, a report will be generated for each unit.
2. Select a File Type. Options include PDF, JPG and PNG.

3. Select a Paper Size and Orientation. **Press Ganey recommends Landscape**.

4. Select a Scale or size for font and page elements. **Press Ganey recommends Extra Small**.

5. Select the Show Filters on Export check box if you want them included in the report(s) (optional).

6. There are two options for completing the report process, Download Reports or Email Reports. You may choose one or the other, but not both.
   a. Download Reports: Click Download Reports. The request will be processed. Once completed, click “Download” above the report settings on the right side of the page to download the report(s).
   b. Email Reports: Enter a valid email address where the report(s) should be distributed.
      i. Only one email address can be entered.
      ii. Emails that are generated and distributed are not available to be forwarded by the recipient.

7. The file will be compressed as a ZIP file, so extracting the document is required.
**Snapshot Export for Direct Reports Only**

To create a Snapshot Export for those employees who report directly to you, use the Direct Reports Only Option. The steps are nearly identical to those for the general Snapshot Export view, but you will start with one additional selection.

1. To begin, click on the **Results For** menu at the top of the page (above Filters) and place a checkmark for Direct Reports Only as seen below.

   ![Direct Reports Only](image)

2. Once Direct Reports Only has been selected, follow all the Snapshot Export directions on the preceding two pages.