

Vendors may add or update the contact information for an existing vendor point of contact, vendor Survey Administrator, Backup Administrator, or Non-Administrator user at any time during the performance year. Vendors will need to update the PCF PEC Survey website in the following locations:

- Update the User Access portion of your Vendor Dashboard.
  - o You must update all newly added or updated users in your dashboard
  - Users who will receive vendor communications from the PCF PEC Survey team must be listed as a Survey Administrator or Backup Administrator
- Update your Vendor Application
  - o Update Part 1 (General Information) and Part 3 (Key Project Staff)
  - o Review Part 7 (Applicant Organization Qualification and Acceptance) for accuracy and add a reason for the update
  - o If the newly added or updated user is not considered Key Project Staff, you do not need to update your application.

See the instructions on the pages below for how to update each item.

**NOTE:** Requests to update or replace the Survey Administrator must be made via email to the PCF PEC Survey team at <u>pcfpecs@rti.org</u>. It is the vendor's responsibility to provide updated contact information as needed in the event of a change in personnel or other reason for the contact information update.

If you are adding or updating a Backup Administrator or a Non-Administrator user you need to update the website, but you <u>do not need</u> to notify the PCF PEC Survey team.



### How to Update User Access on the Vendor Dashboard

- 1. Open your Vendor Dashboard.
- 2. Under the section called "User Access", select the hyperlink for "Manage User Console".

NOTE: You can also access the "Manage User Console" by selecting it in the drop-down menu on the Vendor tab.

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	Jennifer Jones							
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3. Once on the "Manage User Console" screen, you will see a list of your registered users.



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H	ome	Dashboa	ard Gen	eral Inforn	nation Practice Sites	Vendors	Survey and Protocols	Training	Data Submission	
Vendo	rs / I	/lanage Users								( Back
N A	lan Md N	age Use ew User	rs							
		Username	First Name	Last Name	Email	Phone	Role			
1	8 ×	jenjones	Jennifer	Jones	jjones@surveyshop.com	3015551212	Admin			
3	×	Jmjones	John	Jones	jjones@surveyshop.com	3015551212	Admin			
1	8 ×	rtivendor2	RTI	Staff	adjangali@rti.org		Admin			



#### How to Add a New User:

1. To add a brand-new user, select the button labeled "Add New User". Complete the form with all information and select the "Add User" button.

Primary Care First (PCF) Patient Experience of Care Survey (PECS) (CAHPS® with PCF supplemental items) The official website for news and information about the PCF PEC Survey

Home	Dashboard	General Information	Practice Sites	Vendors	Survey and Protocols	Training	Data Submission	
endors / Manage	Users							
User Det	ails							
Username								
First name								
Last name								
Emai								
Confirm								
Phone								
Role	Backup Admi	inistrator 🗸						
	NOTE: Backup and submittin announcemen sample.	p Administrators accounts wing data files and other mate nts and other communication	vill have the same per rials to the PCF PEC ons from the PCF PEC	ermissions as tł Survey team. B I Survey team.	ne Survey Administrator inclu ackup Administrators will als Only Survey Administrators a	uding adding n o receive emai are able to rece	ew users iled eive survey	
	Non-Administ Submission h communicatio	trator Users will have limited istory report and the Survey ons materials from the PEC	d access to most of t / Vendor Authorizatio Survey team.	he website and on report. Non	l are able to run vendor repo Administrator Users will not	rts such as the automatically	: Data receive	
	For more info	ormation on these roles, plea	ase see our Quick Lir	nk on How to A	dd or Update Vendor Point o	f Contact Infor	mation.	
	If you need to	o update or change your <b>Sur</b>	vey Administrator, p	lease inform t	ne PCF PECS Team at pcfpecs	@rti.org.		
Locked out	: 🗆		Add User C	ancel				

When completing the User Details form, you can designate each user a role of either Backup Administrator or Non-Administrator User.

- **Backup Administrator** accounts will have the same permissions as the Survey Administrator, including adding new users and submitting data files and other materials to the PCF PEC Survey team. Backup Administrators will also receive emailed announcements and other communications from the PCF PEC Survey team.
  - Please note that some areas of the website, such as the Sample Download page are restricted to the Survey Administrator only; the Backup Administrator cannot access that part of the website. If your Survey Administrator will be away on leave or extended



PTO, it is best to assign another staff member to that role temporarily to ensure your organization retains access to all areas of the website. Please reach out to the PCF PEC Survey team if you need to update or change Survey Administrators.

• Non-Administrator Users will have limited access to most of the website and are able to run vendor reports such as the Data Submission history report and the Survey Vendor Authorization report. Non-Administrator Users will not automatically receive communications from the PEC Survey team

PEC Survey Website Activity	Survey Administrator	Backup Administrator	Non- Administrator User
Receive vendor communications from PCF PEC Survey team	~	~	×
Complete/Update Vendor Application	✓	✓	×
Update Manage Users console	✓	✓	×
Run/view Survey Vendor Authorization Report	✓	✓	~
Submit Exceptions Request Form	✓	✓	×
Submit Discrepancy Notification Report Form	~	~	×
Submit Quality Assurance Plan	✓	✓	×
View Model Quality Assurance Plan Outline	$\checkmark$	$\checkmark$	✓
Complete/Update Vendor Consent Form	$\checkmark$	$\checkmark$	×
Submit Interviewer Monitoring Documentation	✓	✓	×
Run/View Data Submission History Report	✓	✓	✓
Run/View Data Submission History Report by Upload Date	✓	✓	✓
Run/View Vendor XML Validation Report	✓	✓	✓
View Example Sample File	✓	✓	✓
Download Sample File	✓	×	×
View Schema Validation Tool	✓	✓	✓
Run/View Data Submission Tool	✓	✓	✓
Run/View Data Submission Reports	✓	✓	✓

Please review the table below for a complete list of website activities for each user role:



# How to Update an Existing User:

1. To update the information for an existing user, find their name in the list of users and select the edit button in the left-most column. *Note:* You can also delete users on this screen by selecting the red "X" button.

SIV Ado	l Ne	age Use w <sup>User</sup>	ers				
		Username	First Name	Last Name	Email	Phone	Role
2	X	jenjones	Jennifer	Jones	jjones@surveyshop.com	3015551212	Admin
2	×	Jmjones	John	Jones	jjones@surveyshop.com	3015551212	Admin
2	×	rtivendor2	RTI	Staff	adjangali@rti.org		Admin

- 2. On the "User Details" screen, you will see the selected user's current contact information. You can update all contact information as needed. The Username cannot be changed.
- 3. Update the information in the form as needed and then select the "Update" button to save your changes.



User <mark>D</mark> etail	s
Username	jenjones
First name	Jennifer
Last name	Jones
Email	jjones@surveyshop.com
Confirm Email	jjones@surveyshop.com
Phone	3015551212
Role	Backup Administrator 🗸
Locked out	
Update	Cancel Delete
Date Created: Last Login Date	1/18/2023 3:35:09 PM 1/18/2023 3:35:09 PM



## How to Update the Vendor Application

1. Under the "Vendors" tab in the top menu bar, navigate to "Vendor Application".



2. Select the button at the bottom of the page labeled "Update Application".

#### Instructions for Completing this Form:

Please respond to the questions below by entering the information requested or checking the applicable box. A read-only copy of the vendor application is available here to assist you with gathering the necessary information. All applications must be submitted through the online form.

When completing this Application, note the following:

- You will need to "Save and Continue" each section before moving to the next section. To save a section, click on the "Save and Continue" button at the bottom of the screen.
- In order to "Save and Continue," you must complete all items in the section. You have 60 minutes to complete and save each section before the application times out. If the form times out, you will need to re-complete any section that you did not save.
- When you have completed all parts of the Vendor Application and are ready to submit it, please click the "Submit" button
  that appears on the lower left side of the screen.
- After you submit the Application, you will receive a confirmation e-mail message. You can access your application at any time from your personalized Vendor Dashboard.
- · Each time you access and update your Application, you must submit the Application again.
- All survey vendors must designate a PCF PEC Survey Administrator. This individual must complete, sign, notarize, and submit a vendor consent form, which will be available from your Dashboard once you submit your Application.

Completion and submission of this Application certifies that the Vendor, on behalf of the Organization, has read and met the minimum business requirements and will abide by the PCF PEC Survey participation requirements.







- 3. Update each relevant section of the application form with the new information. Sections to review for changes include:
- 1.2- Applicant Contact Person

1.2 APPLICANT CONTACT PERSO	N
+ FIRST AND LAST NAME	Mary Kline
* TITLE	Survey Manager
DEGREE (e.g., RN, MD, PhD)	BSN
MAILING ADDRESS 1	556 Main Street
MAILING ADDRESS 2	Suite 3
* CITY	Denver
* STATE	Colorado
* ZIP CODE	22027
TELEPHONE (area code, number and extension):	9195551212
FAX	
* EMAIL ADDRESS	mkline@surveyshop.com

- 3.1- List of Key Project Staff
  - o If adding a new person to the Key Project Staff, please remember to provide a Curriculum Vitae (CV) via email to the PCF PEC Survey team at <u>pcfpecs@rti.org</u>.

l be working on the PCF PEC	Survey.	
Role	Email	Telephone
Project Manager	janedoe@surveyshop.com	9195551212
Mail Survey Supervisor	johndoe@surveyshop.com	9195551212
Telephone Survey Supervisor	robertsmith@surveyshop.com	9195551212
Information Systems Specialist/Programmer/ Developer	barbarasmith@surveyshop.com	9195551212
	l be working on the PCF PEC Role Project Manager Mail Survey Supervisor Telephone Survey Supervisor Information Systems Specialist/Programmer/ Developer	I be working on the PCF PEC Survey.         Role       Email         Project Manager       janedoe@surveyshop.com         Mail Survey Supervisor       johndoe@surveyshop.com         Telephone Survey Supervisor       robertsmith@surveyshop.com         Information Systems       barbarasmith@surveyshop.com         Specialist/Programmer/       barbarasmith@surveyshop.com



- 4. Once your updates are complete, you will need to continue to the last page of the application and review *Part 7 Applicant Organization Qualification and Acceptance*.
- 5. Add a reason for the update in the box provided and select the "Submit" button to save your changes.

#### Part 7. Applicant Organization Qualification and Acceptance

I certify that:

- I have reviewed and agree to meet the Rules of Participation for participating in the PCF PEC Survey.
- The statements herein are true, complete and accurate to the best of my knowledge, and I
  accept the obligation to comply with the PCF PEC Survey Minimum Survey Vendor Business
  Requirements.

#### AUTHORIZED REPRESENTATIVE

*	Name	Mary
*	Title	Kline
*	Organization	Survey Shop Practice
*	Date	01/20/2023

If you need help completing this application, please contact the PCF PECS Team by email at pcfpecs@rti.org.

When you have completed this form, hit "Submit."

* Please tell	us which ite	n(s) in which	section(s) y	ou updated on	your application.
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6. Following the successful update to your application, you will receive an email confirmation notice. The same email confirmation will also be sent to the PCF PEC Survey team.

