eINSIGHT User's Manual



Division of Care and Treatment Services
Bureau of Prevention Treatment and Recovery

P-00887A (02/2024)

Table of contents

The eINSIGHT survey system	3
Logging into eINSIGHT	
Creating a new account	4
Navigating to the main page	5
Submitting a ticket to eINSIGHT	5
Accessing instructional videos	7
Entering completed surveys into eINSIGHT	8
Sending surveys through email	11
Sending a batch of surveys by email	13
Sending surveys by text message	15
Sending a batch of surveys by text message	18
Generating a survey link to share	21
Navigating the survey table	23
Editing surveys on the table	25
Running reports on survey data	27
Exporting survey data	30
Appendix: eINSIGHT email information	32
Initial email invitation	33
Reminder emails #1 and #2	34
Final reminder email	35

The eINSIGHT survey system

The eINSIGHT survey system is an online application for data entry and analysis of participation satisfaction surveys. Refer to the User's Guide for Participation Satisfaction Surveys for details about the surveys and their administration.

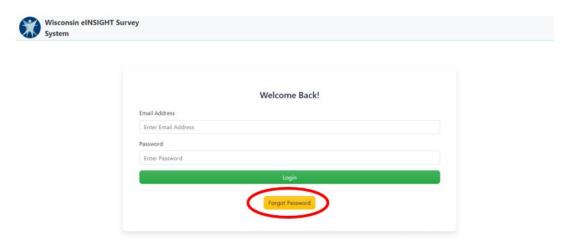
Regardless of the survey administration method, programs must enter their collected survey responses into eINSIGHT. The data is automatically submitted to DHS.

Individual survey results may be entered manually by county agency staff. Surveys also can be sent to participants by email through the eINSIGHT website. A link also can be generated to share with participants. Once a participant completes the survey through the eINSIGHT email or link, the results are automatically recorded in eINSIGHT.

Programs can generate reports with their data in eINSIGHT, examining responses by program, analyzing results across years, and comparing program data to statewide data.

Logging into eINSIGHT

Go to https://ws.einsight.net/app/login to access eINSIGHT. Log in with your email address (using all lowercase letters) and password. If you forget your password, click on "Forgot Password." After you enter your email address, eINSIGHT will provide instructions for changing your password.



Creating a new account

Each staff member who accesses eINSIGHT requires their own account. They can only view surveys from their own tribal nation or county.

It is recommended that programs create a process to approve requests for access from new staff members. For example, one staff member may be designated as the authorized person to approve and request access for new staff. While the survey data is non-identifiable in eINSIGHT, users have access to the data from all the programs (CCS, CST, CSC, and CSP) in their tribal nation or county.

In order to request access for new staff, a current staff member with access to eINSIGHT should submit a ticket through eINSIGHT, following the instructions listed below. If no current staff member in your agency has access to eINSIGHT, contact the Division of Care and Treatment Services at dhs.wisconsin.gov.

If you operate a regional program consortium, one person may request access to multiple eINSIGHT agencies to handle data entry for all agencies in the consortium. Use the instructions below to submit a request through eINSIGHT to create or modify a user's account and list all agency accounts the user needs to access.

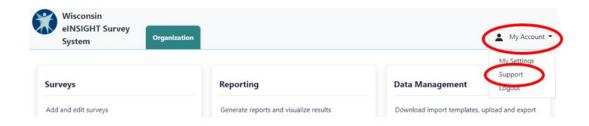
Navigating to the main page

Most functions are accessed from the main page. To navigate to the main page from any other page on eINSIGHT, click on **Organization** at the top of the page.

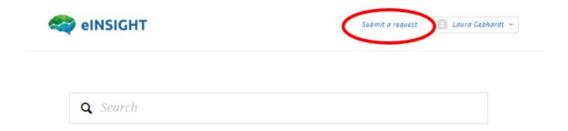
Submitting a ticket to eINSIGHT

To report technical issues with eINSIGHT, suggest an improvement, or request a new user account for another staff member, submit a ticket to eINSIGHT.

1. Click on "Support" in the **My Account** menu in the upper right of the main page.

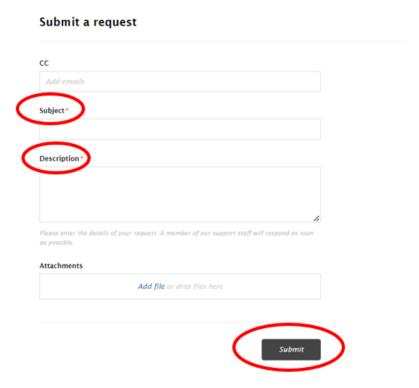


2. On the support page, select "Submit a request" in the upper right.



- 3. Complete the request form, including a description of the issue or suggestion.
- 4. For new user requests, be sure to include:
 - Staff person's name
 - Tribal nation or county(ies)
 - Email address

5. Click "Submit."

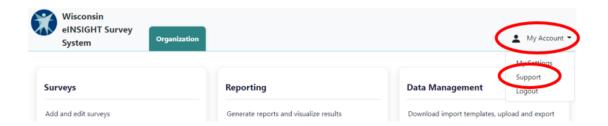


- 6. If you are not getting a response after contacting the help desk or clicking on "Forgot Password", your email system may not be allowing messages from the domains below. To prevent this problem, contact your IT network management staff about allowing emails from the following domains:
 - ecenterresearch.com
 - matchingsolutions.com
 - zendesk.com
 - eINSIGHT.net

Accessing instructional videos

Instructional videos on eINSIGHT provide a demonstration of how to perform certain tasks.

1. To access these videos, click on "Support" in the **My Account** menu in the upper right of the main page.



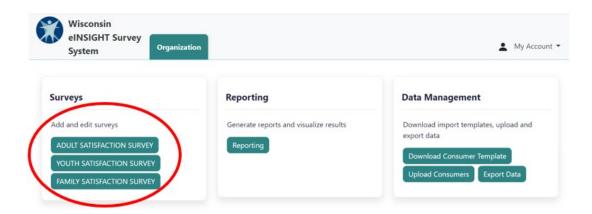
2. The support page will open in a new tab. The videos are located under **Wisconsin Knowledge Base** in the **Forums** section near the bottom of the page. Click on the video that you would like to view.



Entering completed surveys into eINSIGHT

If you have received completed surveys (other than electronically), they will need to be manually entered into eINSIGHT.

1. Log into eINSIGHT and, in the **Surveys** section, click on the type of survey to be manually entered.

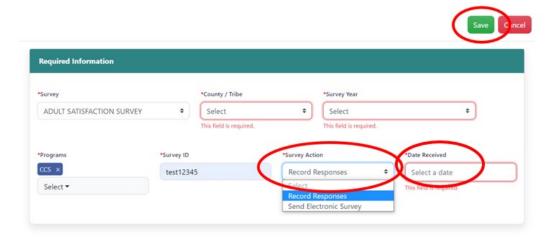


2. Click on "Add Survey."



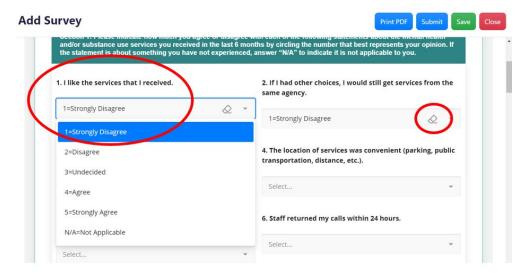
- 3. Complete the **Required Information** pop-up. The **Survey Year** is the year in which the survey should be included for analysis. If the participant is enrolled in multiple programs, include all of them in the **Programs** field.
- 4. The **Survey ID**, which is created by your agency, is required regardless of how surveys are entered or sent. You may want to develop an ID system that helps to track surveys, such as including the year and sequential number of the survey (2023001, 2023002, etc.). **Survey IDs** can be duplicated across tribal nations and counties but not within a tribal nation or county. Two different counties can use the same **Survey ID**.

5. Select "Record Responses" in the **Survey Action** field and then enter the date that the survey was completed or received. Click "Save."

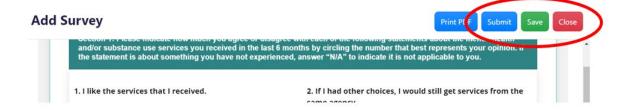


- 6. In the **Add Survey** pop-up, record the survey responses (either by clicking on the dropdown menu or by entering the response number and then pressing tab).
 - Do not enter participant names anywhere in eINSIGHT, even if they were written in the comments section. You can replace the participant's name with "participant" in the data entry process. If names of family members or friends are written on the survey, replace them with a generic term as well.
 - You may enter provider staff names into eINSIGHT; however, all data is
 visible to anyone with access to your agency account. If you have multiple
 sets of program staff with access to your single tribal nation or county
 account, do not enter provider staff names if you do not want staff outside
 your program to see those names.
 - If a participant did not respond to a question, leave the question blank in eINSIGHT by skipping it.

7. Click on the eraser icon in the response text box to delete a response



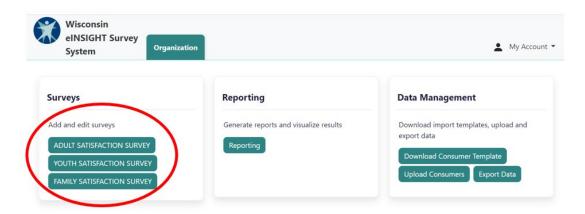
- 8. Click on the "Close," "Save," or "Submit" as appropriate.
 - Click "Close" to close pop-up without saving entered responses.
 - Click "Save" to save entered responses without submitting them.
 - When all responses are entered, click "Submit" to indicate that the survey is finished and ready for analysis.



Sending surveys through email

You can email a survey link to participants to complete electronically through eINSIGHT. Refer to the Appendix for more details about the schedule and content of the emails.

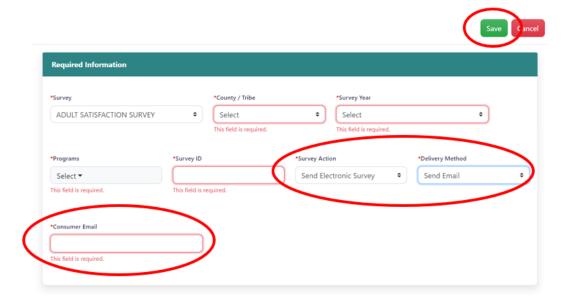
1. Click on the type of survey to be sent in the **Surveys** section.



2. Click on "Add Survey."



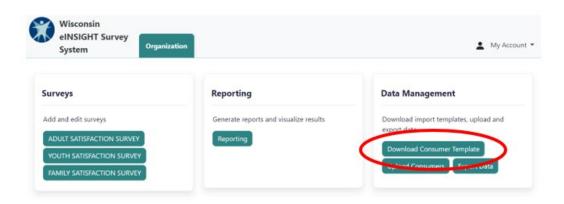
3. Complete the **Required Information** pop-up. Select "Send Electronic Survey" in the **Survey Action** field and "Send Email" in the **Delivery Method** field. Enter the **Consumer Email** and click "Save." The email will then be automatically sent to the participant.



Sending a batch of surveys by email

Instead of sending surveys through email by entering each one individually using the method above, a batch of surveys can be sent by uploading a spreadsheet of participant information to eINSIGHT.

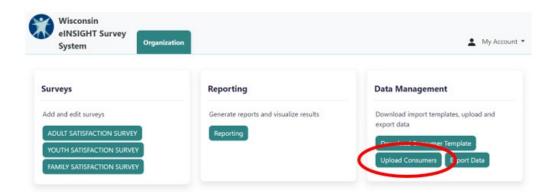
1. Click on "Download Consumer Template" in the **Data Management** section on the main page.



2. Open the downloaded Excel spreadsheet and enter the participant information into spreadsheet. Save the file.



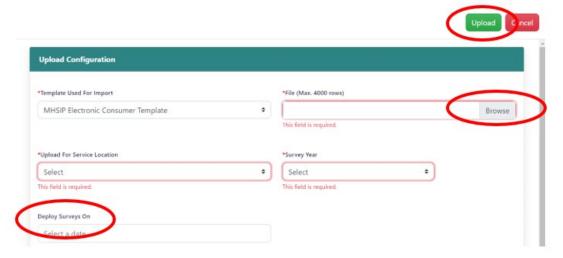
3. Upload the spreadsheet to eINSIGHT by clicking on "Upload Consumers" in the **Data Management** section.



4. On the **Batch Upload** page, click "New Upload."



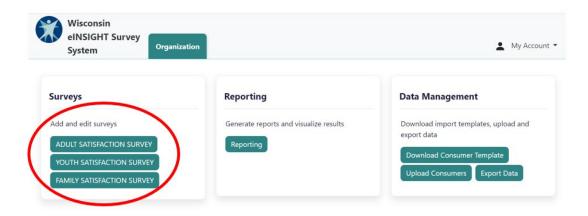
5. Click "Browse" under the **File** field and select the spreadsheet saved on your computer. Complete the other required fields. You can choose a date to have the surveys emailed; otherwise, they will be emailed upon successful upload. Click "Upload."



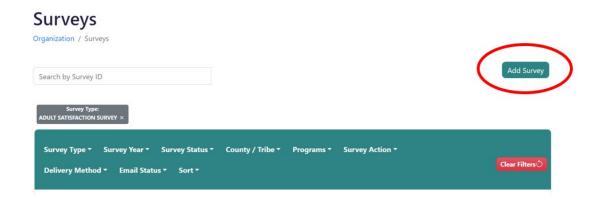
Sending surveys by text message

You can text a survey link to participants to complete on their phone through eINSIGHT. You may need to obtain the participant's consent before sending any text messages. Please consult your local agency's legal counsel for guidance.

1. Click on the type of survey to be sent in the **Surveys** section.

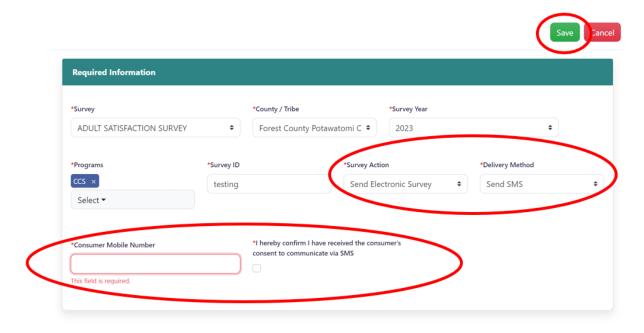


Click on "Add Survey."



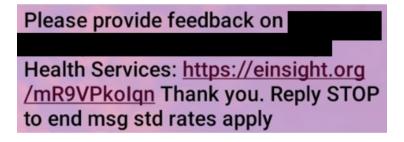
- 3. Complete the **Required Information** pop-up. Select "Send Electronic Survey" in the **Survey Action** field and "Send SMS" in the **Delivery Method** field. Enter the **Consumer Mobile Number** and check the consent checkbox.
 - * Please consult your local agency's legal counsel for guidance on consent regarding text messages.

4. Click "Save". The text will then be automatically sent to the participant.

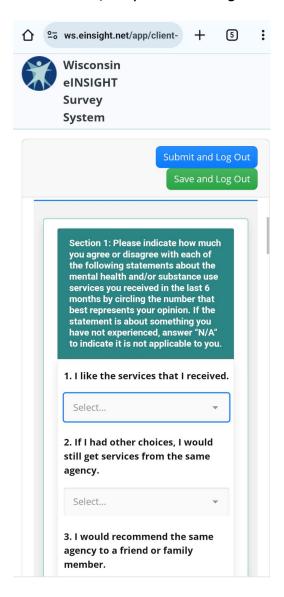


The participant will receive a text with a link to a survey to complete. The name of your agency will be inserted into the text below.

If the participant would like to opt out of receiving further texts, they can reply "STOP" to the text.



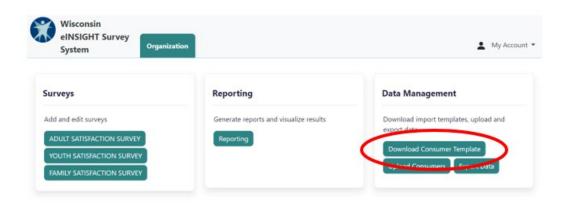
When the participant clicks on the link, they will be brought to the survey:



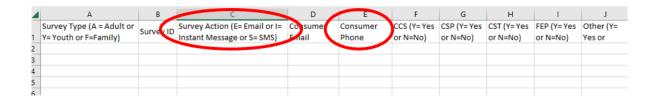
Sending a batch of surveys by text message

Instead of sending surveys through text by entering each one individually using the method above, a batch of surveys can be sent by uploading a spreadsheet of participant information to eINSIGHT.

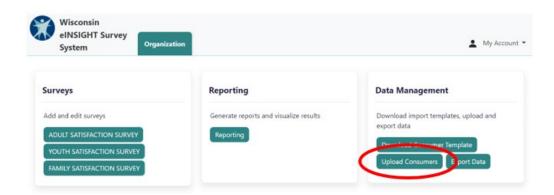
1. Click on "Download Consumer Template" in the **Data Management** section on the main page.



- 2. Open the downloaded Excel spreadsheet, enter the participant information into spreadsheet, and save.
 - a. For **Survey Action**, select enter either "I" or "S" to send by text message.
 - b. Be sure to enter the **Consumer Phone**.



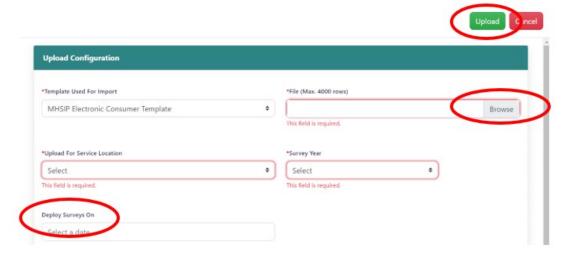
3. Upload the spreadsheet to eINSIGHT by clicking on "Upload Consumers" in the **Data Management** section.



4. On the **Batch Upload** page, click "New Upload."



5. Click "Browse" under the **File** field and select the spreadsheet saved on your computer. Complete the other required fields. You can choose a date to have the surveys sent; otherwise, they will be sent upon successful upload. Click "Upload."



Once the survey is sent, it will appear on the list of surveys with a "SMS-Delivered" indicator.



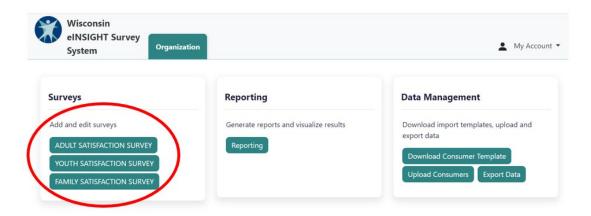
Once the participant completes the survey, the survey will be indicated as "Finished".



Generating a survey link to share

You may also generate a survey link to share with a participant. This may be sent electronically to the participant or used when administering the survey onsite using the agency's IT resources.

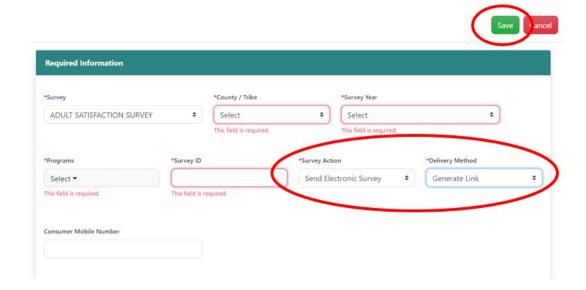
1. Click on the type of survey to be generated in the **Surveys** section.



2. Click on "Add Survey."



3. Complete the **Required Information** pop-up. Select "Send Electronic Survey" in the **Survey Action** field and "Generate Link" in the **Delivery Method** field. In the future, this link may be able to be sent by text message, but that functionality is not yet available; therefore, the **Consumer Mobile Number** is not needed. Click "Save."



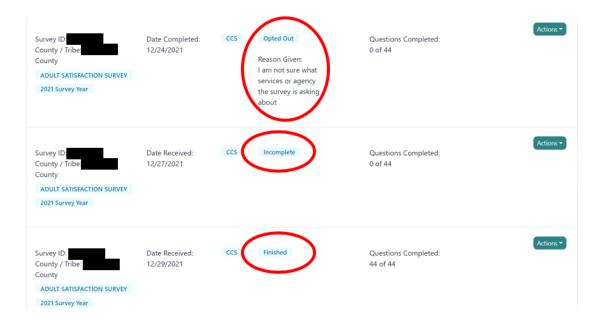
4. A pop-up with the link will generate. You can copy the link by clicking on the clipboard icon and then share it with the participant. This link is individualized for this specific person and should not be used for any other participant.



Navigating the survey table

Once a survey is entered manually or sent electronically, it will appear in the survey table on the **Surveys** page.

- For each survey, the table displays the Survey ID, County/Tribe, Date Completed, Programs, Survey Status, Email Status, Number of Questions Completed, Type of Survey, and the Survey Year.
- 2. The **Date Completed** is either the date entered when manually entering survey responses or the date an electronically sent survey was completed.
- 3. The **Survey Status** displays whether the survey is:
 - "Incomplete"
 The survey was sent electronically but not completed by participant, or the survey responses were entered manually but not submitted (the "Submit" button was not clicked on the survey response page).
 - "Opted Out"
 The survey was sent through email and the respondent selected "Opt Out."
 The Reason Given will also be displayed in the table.
 - "Finished"
 The survey was sent electronically, and the participant completed it, or the responses were manually entered and submitted.



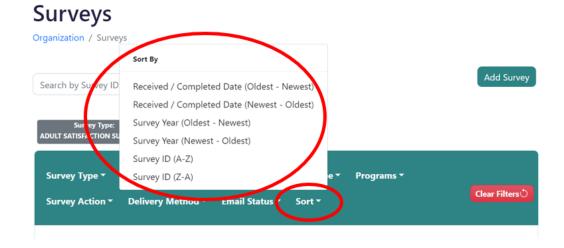
4. The **Email Status** will display "Delivered" when the email has been successfully delivered by the system. It will display "Failed" when the email couldn't be delivered due to an invalid email address or other reason.



5. The list can be filtered using the filter options at the top of the table. After selecting your filter options, click "Apply Filters." To remove a filter, click on the "x" on that filter. To remove all filters, click "Clear Filters."



6. The list of surveys can also be sorted by clicking on "Sort" and selecting a **Sort By** option.

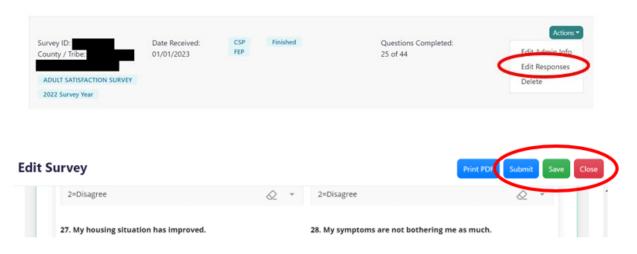


Editing surveys on the table

1. The administrative information, including the delivery method, for a survey can be edited by clicking on **Actions** and selecting "Edit Admin Info." Once a survey is finished, only certain fields can be edited.



2. The survey responses can be edited by clicking on **Actions** and selecting "Edit Responses." Once the responses are edited, click "Save" to save responses without submitting them. Click "Submit" to finish the survey and submit responses for analysis. Click "Close" to close the pop-up without saving.



3. You can resend a survey through email by clicking on **Actions** and selecting "Resend Email."



4. You can view a generated survey link by clicking on **Actions** and selecting "View Survey Link."



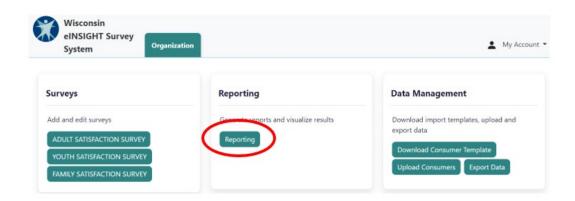
5. Surveys can be deleted by clicking on **Actions** and selecting "Delete."



Running reports on survey data

Various reports that analyze your survey responses can be generated in eINSIGHT.

1. To generate a report, click on "Reporting" on the main page.

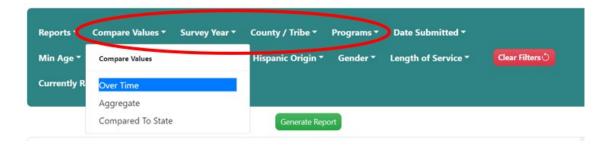


- 2. Click on **Reports** and select the type of report to generate.
 - Domain Scores reports display the average score per domain and per question.
 - **Satisfaction Rates** reports display the percent of participants who responded "agree" or "strongly agree."
 - Respondent reports break down the respondents by various demographic variables.



3. Select values for the required parameters: **Compare Values**, **Survey Year**, **County/Tribe** (if applicable), and **Programs**.

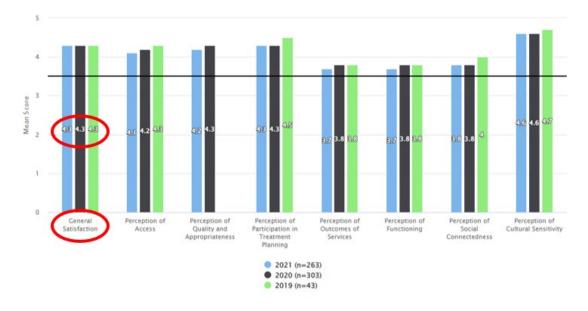
4. Under **Compare Values**, you can compare responses by year, view the data in aggregate, or compare your program to statewide data.



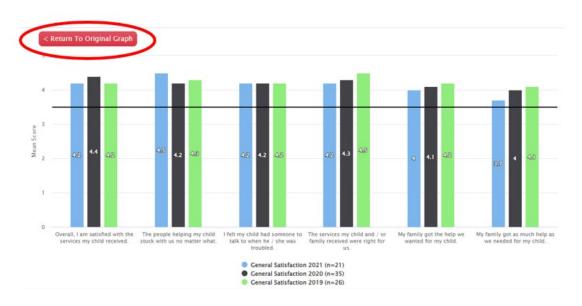
- 5. Optionally, you can select values for other parameters.
- 6. Click "Generate Report." The report may take several seconds to generate.



7. The **Domain Scores** and **Satisfaction Rates** graphs display by domain (or scale). Refer to the Appendix of the "User's Guide for Participant Satisfaction Surveys" for more information on scales. To drill down to the individual questions, click on the score or percent on the bar or on the domain name.



8. To return to the main graph, click on "Return To Original Graph."



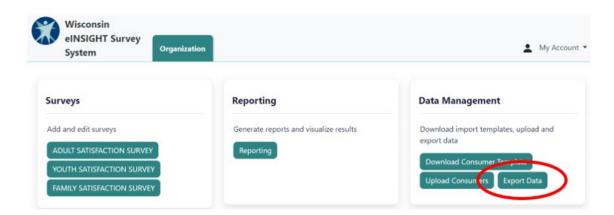
9. The graphs can be printed or exported by clicking on the **Export Options** menu in the upper right of the graph.



Exporting survey data

The survey data can also be exported to an Excel spreadsheet.

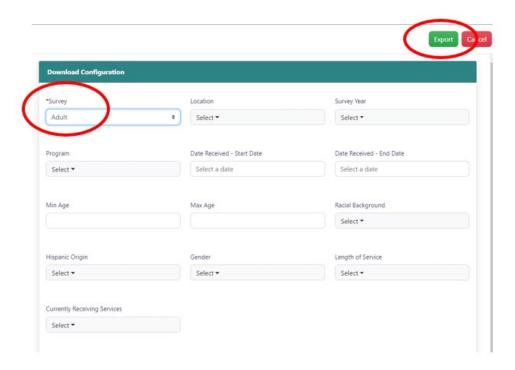
1. Click on "Export Data" in the **Data Management** section on the main page.



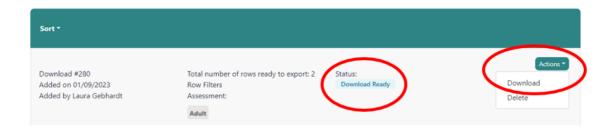
2. On the **Export Data** page, click on "New Export."



3. Select the parameters for the exported data and click "Export."



4. Once the data export is complete, the **Status** will display "Download Ready." Then click on "Download" in the Actions menu.



Appendix: eINSIGHT email information

Below are templates of the emails sent to participants. Your agency name is automatically inserted into the messages using the agency name used for your eINSIGHT account provided by DHS. The message text is generic so that the participant's confidentiality is not violated in case someone else reads the email.

The email will be sent from the address <u>noreply@einsight.net</u> with the subject "[Your agency] Health Services Satisfaction Survey For You." It may be beneficial to notify the participants either in person or with an introductory email that they will be receiving this email with the survey link.

The eINSIGHT system will also send email reminders to your participants 5 days, 12 days, and 19 days after the initial email is sent. The link will be active for one month.

The email includes an option for the participant to opt out of receiving future emails. When they chose to opt out, they can select a reason for doing so. This reason will display on the survey table in eINSIGHT in the record for this survey.

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Initial email invitation

Subject: [Your agency name] Health Services Satisfaction Survey For You

Dear Consumer,

You have been selected to help us improve our services through a brief survey! We would like to hear from you as **your unique perspective and experience matter to us**.

[Your agency name] Health Services would like to know what you think about the services we provide. All information you provide in this survey is **confidential** and **voluntary**.

Please click on the link below to complete the 5-minute survey.

Start Survey

Thank you in advance for filling out this important survey! We greatly appreciate your time and generosity to help improve our services.

Sincerely,

[Your agency name] Health Services

<u>Click here</u> to opt out of receiving future emails about this survey.

Please do not reply to this auto-generated email.

Reminder emails #1 and #2

Subject: [Your agency name] Health Services Your feedback requested

Dear Consumer,

We recently invited you to complete a brief survey about our services. It is important that we hear from you as **your unique perspective and experience matter to us.**

[Your agency name] Health Services would like to know what you think about the services we provide. All information you provide in this survey is **confidential** and **voluntary**.

Please click on the link below to complete the 5-minute survey.

Start Survey

Thank you in advance for filling out this important survey! We greatly appreciate your time and generosity to help improve our services.

Sincerely,

[Your agency name] Health Services

<u>Click here</u> to opt out of receiving future emails about this survey.

Please do not reply to this auto-generated email.

Final reminder email

Subject: [Your agency name] Health Services – Let us know what you think

Dear Consumer,

This is a final reminder about a **brief online survey** in which you provide feedback about our services. By generously giving 5 minutes of your time, you can let us know **how we can better serve you** and your community.

[Your agency name] Health Services would like to know what you think about the services we provide. All information you provide in this survey is **confidential** and **voluntary**.

Please click on the link below to complete the 5-minute survey.

Start Survey

Thank you in advance for filling out this important survey! We greatly appreciate your time and generosity to help improve our services.

Sincerely,

[Your agency name] Health Services

<u>Click here</u> to opt out of receiving future emails about this survey.

Please do not reply to this auto-generated email.