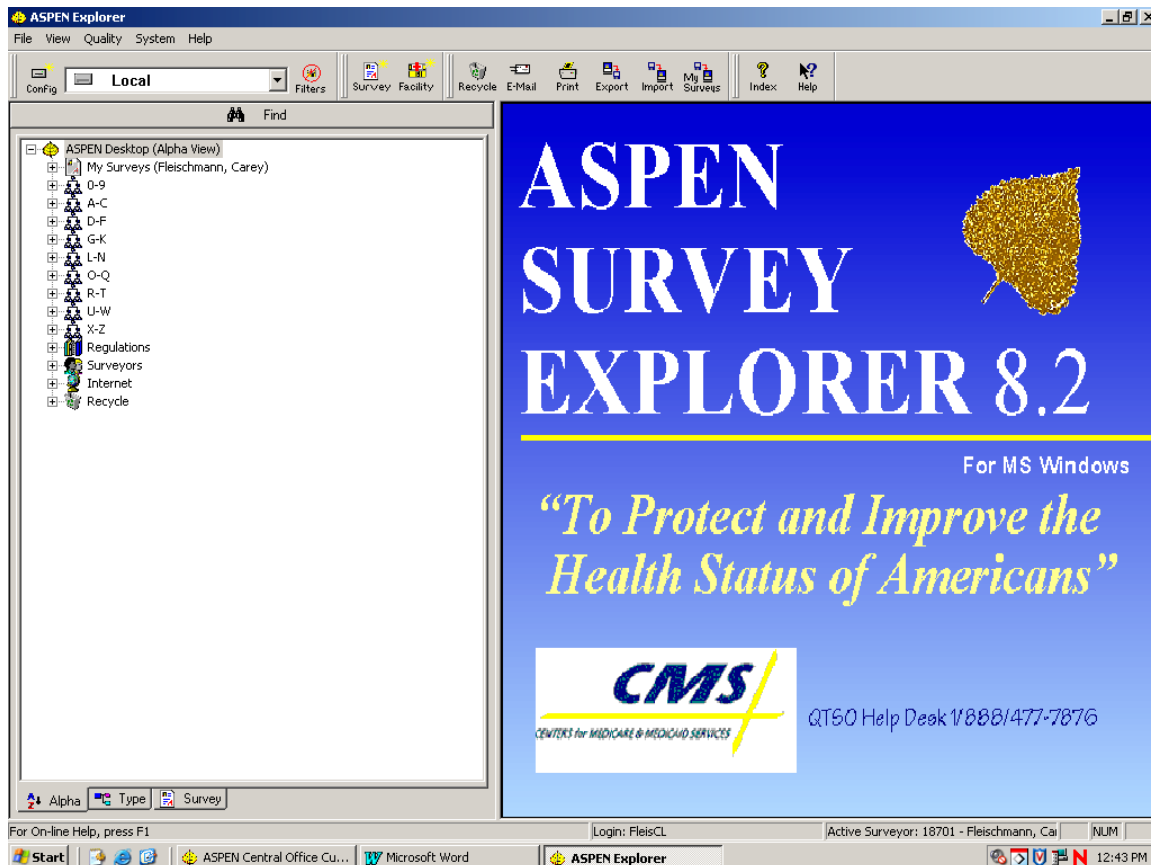


Importing and Exporting Surveys and Complaints Using Aspen Survey Explorer

***ALWAYS USE ASPEN SURVEY EXPLORER FOR
IMPORTING AND EXPORTING**

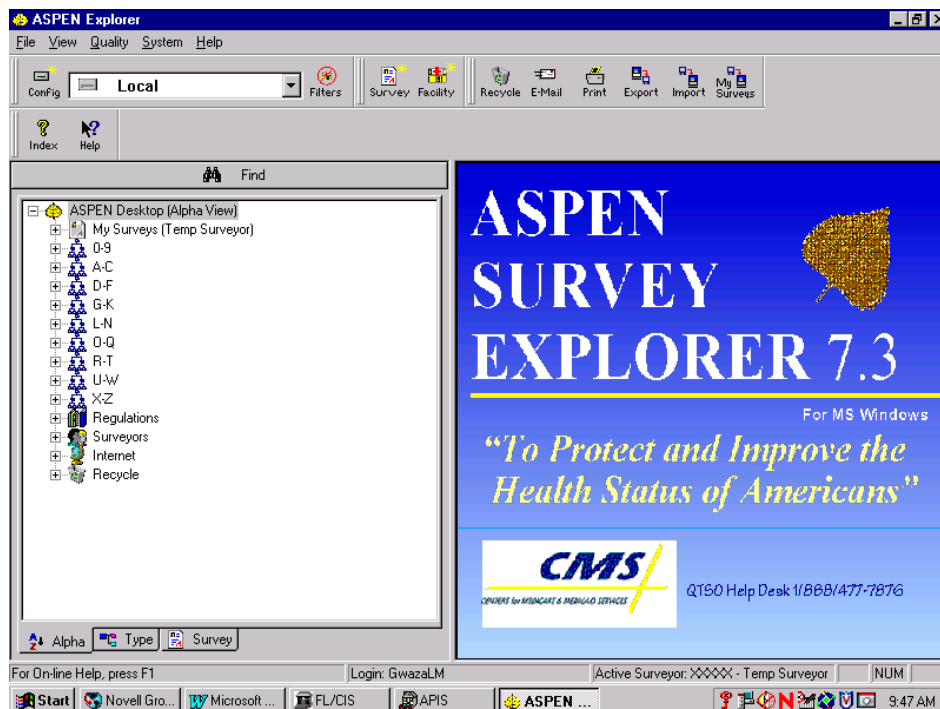


Import Surveys/Complaints To Aspen Survey Explorer From ACO/ACTS

*Connect to the DHFS network.

1. **Create the survey shell in ACO or ACTS, unless someone else has already done so. Recert and Recert/Complaint surveys must be created in ACO. Complaint surveys may be created in ACO or ACTS.**
2. **If the survey is a Recert/Complaint survey or a Complaint survey, use ACTS to link the complaint intake(s) to the survey (unless someone else has already done so).**
3. **Type and print the Identifier Key attached to the survey. If it isn't ready yet, you will have to do this at another time.**
4. **Open Aspen Survey Explorer. IT IS NOT NECESSARY TO OPEN ACO. Import the survey.**

Click the Import button on the toolbar to import the survey shell into ASE from ACO.

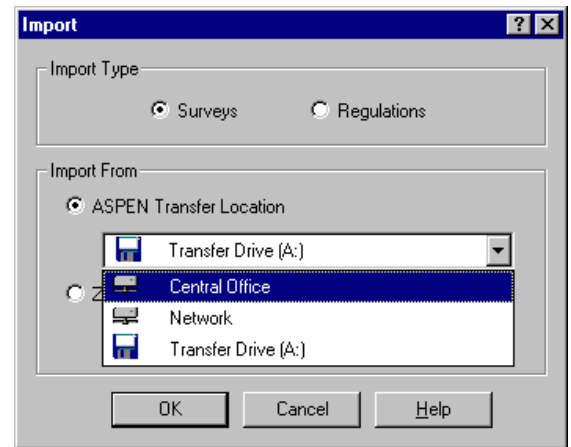


The **Import** window opens.

Select **ASPEN Transfer Location**.

Select **Central Office** from the drop down menu.

Click **OK**.



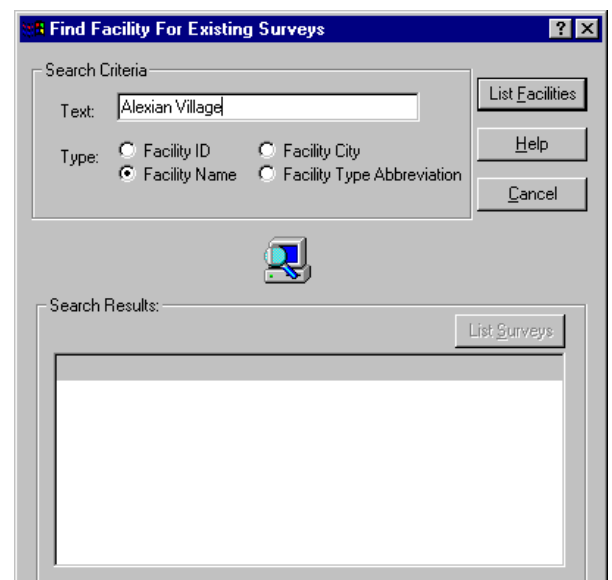
The **Find Facility For Existing Surveys** window opens.

Under **Search Criteria**.....

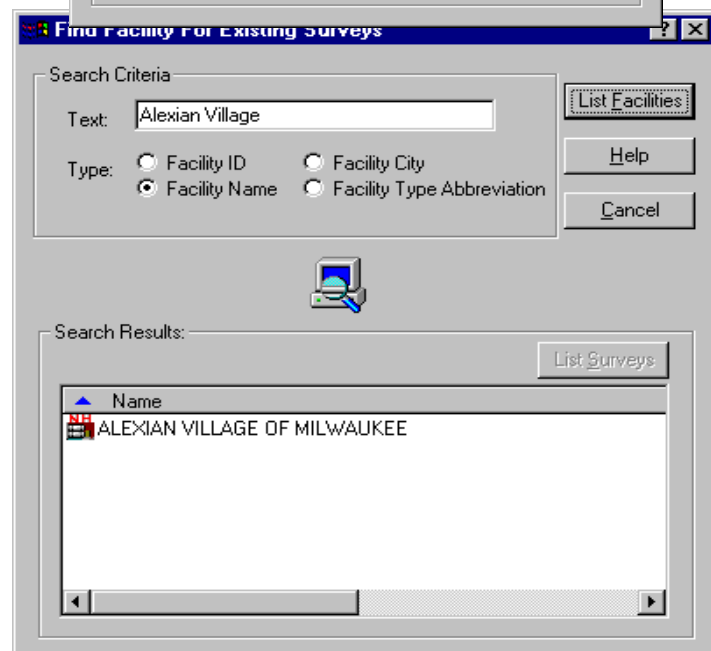
Enter the appropriate information in the **Text** box.

Select the **Type** you wish to search upon.

Click the **List Facilities** button.



The **Search Results** area will display the facility that you searched for.

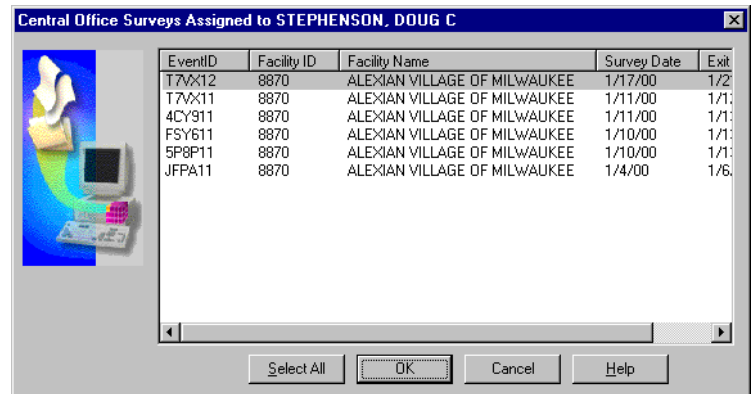


Click on the facility in the *Search Results* area and click on List Surveys for a list of all surveys in this facility.

The *Central Office Surveys Assigned to...* window opens. All surveys for the facility are displayed.

Select the survey you wish to import.

Click *OK*. The message ‘The Aspen transfer file was successfully imported’ will display. The survey will now display in the tree.



EventID	Facility ID	Facility Name	Survey Date	Exit
T7X12	8870	ALEXIAN VILLAGE OF MILWAUKEE	1/17/00	1/2
T7X11	8870	ALEXIAN VILLAGE OF MILWAUKEE	1/11/00	1/1
4CY911	8870	ALEXIAN VILLAGE OF MILWAUKEE	1/11/00	1/1
FSY611	8870	ALEXIAN VILLAGE OF MILWAUKEE	1/10/00	1/1
5P8P11	8870	ALEXIAN VILLAGE OF MILWAUKEE	1/10/00	1/1
JFPA11	8870	ALEXIAN VILLAGE OF MILWAUKEE	1/4/00	1/6

*Disconnect from the DHFS network.

5. Use ASE to write up citations and complaint findings. All complaint work may be done in ASE, except entering the Investigation Completed Date, which must be entered in ACTS.

Export Surveys/Complaints From Aspen Survey Explorer to ACO/ACTS

*Connect to the DHFS network. It is NOT necessary to open ACO for importing/exporting.

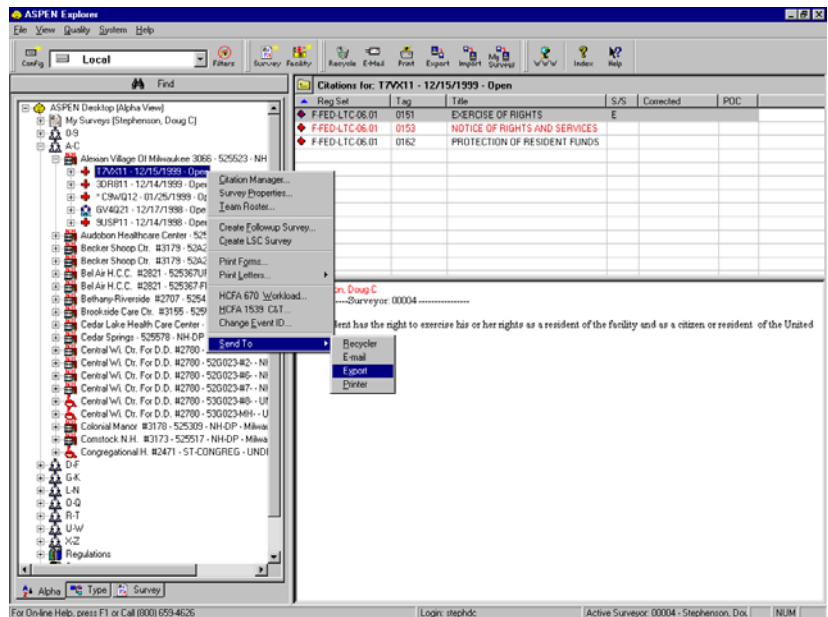
1. After writing up a survey (and complaints, if any) in ASE, export the survey to ACO.

In Aspen Survey Explorer:

Right click on the survey and select **Send To and Export**,

OR

Left click to highlight the survey and click on the Export button.

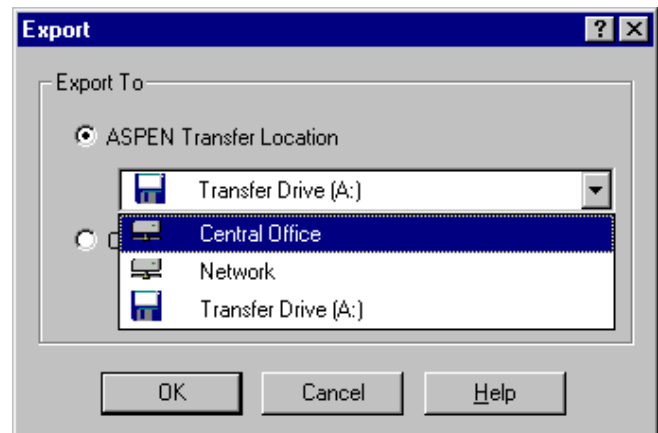


The **Export** window will open.

Choose **ASPEN Transfer Location**

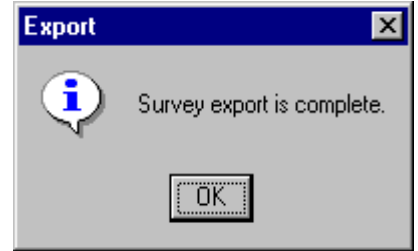
Select **Central Office** from the drop down menu..

Click **OK**.



The *Export message* appears when the file has been exported.

Click the *OK* button. The survey is now updated in ACO.



- 2. Do final editing and printing in ACO and ACTS after all surveyors have finished exporting from Aspen Survey Explorer. The complaint Investigation Completed date must be entered in ACTS.**

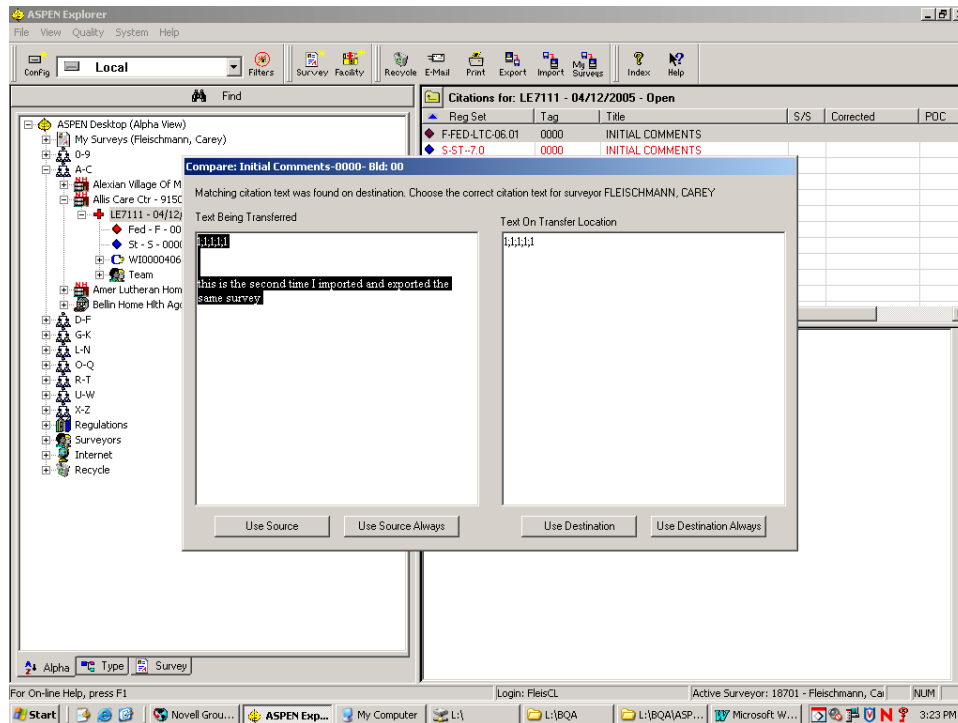
“Comparison” Prompt Screens when exporting to ACO

Exporting to ACO is sometimes complicated with “comparison” screens which are comparing the text stored in ACO/ACTS to the text stored in ASE. These “comparison” screens ask you which version to save.

To avoid the comparison screens, follow these guidelines:

1. Import the survey shell when it is empty, before it has tags in it.
2. Do all citation typing and complaint documentation in Aspen Survey Explorer.
3. Import the same survey only ONCE into ASE, and export it only ONCE into ACO.
4. Do final editing in ACO/ACTS only after everyone has finished exporting.

If one of the team members does not follow these guidelines, you may see comparison screens. Here is an example of a “comparison” screen for a survey citation:



The left side of the screen displays the text in Aspen Survey Explorer, or the SOURCE of the export. The right side of the screen displays the text in Aspen Central Office, or the DESTINATION of the export.

Look at the surveyor name referenced at the top of the screen. If it is your name, you either exported once before, or had typed in ACO originally. Click the button ‘Use Source’ to export the latest version from ASE. If by any chance the version in Aspen Central Office is the best version, then click ‘Use Destination’.

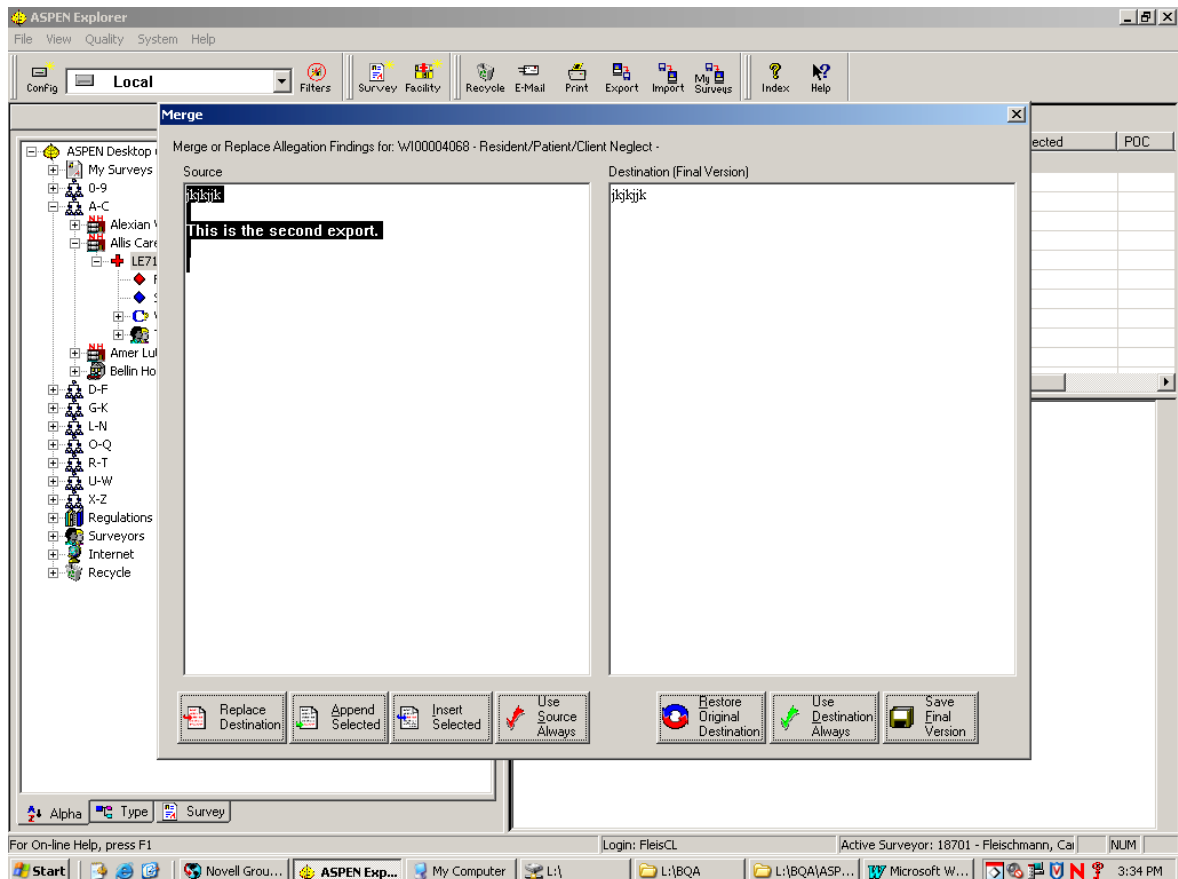
If the surveyor name IS NOT YOUR NAME, click on Use Destination. The Destination, or ACO, would always be the most recent version of another surveyor’s work. Comparison screens for other surveyors would only display if other surveyors typed in ACO or exported to ACO prior to your initial import to ASE, and then they modified their work in ACO after your initial import.

IMPORTANT: Never click on USE SOURCE ALWAYS or USE DESTINATION ALWAYS. These buttons will be used for all cites,

without displaying the screens. You should always look at the left side and the right side for each cite, and then decide which version to keep.

The ACTS complaint has a different comparison screen, shown below:

The left side of the screen displays the findings text in ASE, and the right side of the screen displays the findings text in ACTS. It is very important to



ensure that **the right side contains the final version** before clicking any buttons.

If you are the only surveyor typing findings for this allegation, the final version would probably be on the left side in ASE, and the right side will be blank. Click the ‘Replace Destination’ button to transfer the ASE text on the left side to the right side, and then click the ‘Save Final Version’ button to actually EXPORT the final version to ACTS.

If you are sharing this allegation with another surveyor who has already typed or exported findings on this allegation to ACTS, you may see their work on the right side. You would then click on the 'Append Selected' button on the left side to append your work to their work on the right side. Then click 'Save Final Version' on the right side.

If the left side is blank because you didn't type any findings for this allegation, but another surveyor's findings are displayed on the right side, click 'Save Final Version'. This means that another surveyor has already typed or exported the findings to ACTS.

IMPORTANT: Never click on the Use Source Always button or the Use Destination Always button. It is important to view every screen and select the correct screen.