

UPLOAD SAMPLE FILE

NZ Patient Experience Surveys

How-to-guide

for district superusers and upload representatives

2024

GAME CHANGERS



TWO PORTALS – ACCESS THE DATA COLLECTION PORTAL

Please bookmark this one URL: <https://myexperience.health.nz/sector> to access the [landing page](#) with links to both portals.



He ara aupiki, he ara auheke

Aotearoa New Zealand patient experience survey

Welcome to the Aotearoa New Zealand patient experience survey log in page for districts, PHOs and facilities.

The survey programme uses two portals to support the sector in preparing for the survey and looking at the results.



DATA COLLECTION PORTAL LOGIN

In the data collection portal you can:

- Update facility information
- Moderate open-ended comments before their publication to the reporting portal
- Respond to contact requests from patients
- Monitor response rates
- Download raw data in excel

REPORTING PORTAL LOGIN

In the reporting portal you can:

- View survey results
- Use data exploration tool to create customised data tables
- Access to historical data

LOST YOUR LOGIN DETAILS? NEED A NEW PASSWORD?

Please contact your district or PHO Representatives; they can add new users, provide login details, reset a password or remove users who no longer need access. If you are unsure who these contact persons are please contact the NZ patient experience survey team at NZPatientExperienceSurveys@Ipsos.com or 04 974 8630.

Note:

- The system will **time out** if you leave it inactive for 5 minutes. The screen will take you automatically to the patient log in screen if refreshed. To log in you will need to return to the URL above.
- Please use **Chrome** or **Edge** as your internet browser

LOGIN DETAILS AND SUPPORT

2

Two portals

You will have separate login details for each portal

Data collection portal

PHO or district representatives manage user accounts, please contact them for access and login details.

They can:

- Give you access to the data collection portal
- Resend login details
- Reset your password
- Remove users who no longer require access

With the **PHO or district representatives'** permission, you may have access to more than one level. You will need a separate login for each level.

You can't reset your password for the data collection portal, please contact your **PHO or district representatives** to do this.

Who should you contact

Levels of access

Password reset

Reporting portal

PHO or district representatives manage user accounts, please contact them for access and login details.

They can:

- Give you access to the reporting portal
- Give you access to more than one level in the reporting portal
- Give you access to comments from the survey (for your organisation)
- Remove users who no longer require access

With the **PHO or district representatives'** permission, you may have access to more than one level. This can be added to your login, so you won't need a separate one for each level.

You can reset your own password for the reporting portal. Please use the "forgot-my-password" function on the sign-in page.

Ipsos support

Contact Ipsos if you need the contact details or your **PHO or district representatives** or if you have any other questions:

Phone: **04 974 8630** – please leave a voice message and Ipsos will endeavour to get back to you within 2 working days

Email: NZPatientExperienceSurveys@ipsos.com

STEP 1 – IDENTIFYING SAMPLE SIZE

Who prepares and upload the patient sample file each quarter?

Each district is responsible for extracting the patient data for importing into the data collection portal (for sending survey invites, reminders and generating response rate reports).

How many records to include?

There is **no limit** to the number of records you can include.

A census approach is recommended for both the inpatient and outpatient surveys. Sampling can be done across either a 2-week or 4-week sampling period.

The minimum sample size expected is n=400 unless the total number of eligible patients is less than this number. If this is the case for your district, we recommend you sample across a 4-week period to maximise the number of eligible patients.

Contact information type prioritisation by survey type

Invitations will be sent by email or by SMS for those who do not have an email address but do have a mobile number. Email response rates are much higher than mobile, so email should be the primary method of invitation if it is available. To improve response rates in Māori and Pacific people, a paired invitation method is used, so please provide both email and mobile contacts where available for Māori and Pacific peoples.

Only include mobile numbers if there is **no email address** or for **Māori or Pacific peoples**. Example SQL code for this is available in [an excel spreadsheet](#).

Data extract rules	
INPATIENT Appendix 1.1	OUTPATIENT Appendix 1.2

How to improve your participation rate Appendix 2

Hard copy / mail surveys **are not available** – please ensure all your records contain at least an email address or mobile phone number

STEP 2 – FORMATTING THE SAMPLE FILE

Format of file and optional variables

Download the “**File Template**” to ensure the headers in your sample file match exactly before uploading. The sample file must meet these header specifications.

Hard copy / mail surveys **are not available** – please ensure all your records contain at least an email address or mobile phone number

There is the option for your analyst team to identify up to 3 custom variables relevant to your district. The system is formatted to accept them as **TEXT**.

These may include variables such as;

- Ward,
- Admission type,
- Discharge type,
- Length of stay or
- Other internally collected variables that can be connected to a patient record for further subgroup analysis.

We ask that you keep your own record of the variables definitions.

These will be made available in the reporting portal in the data explorer tool and in the data exports.

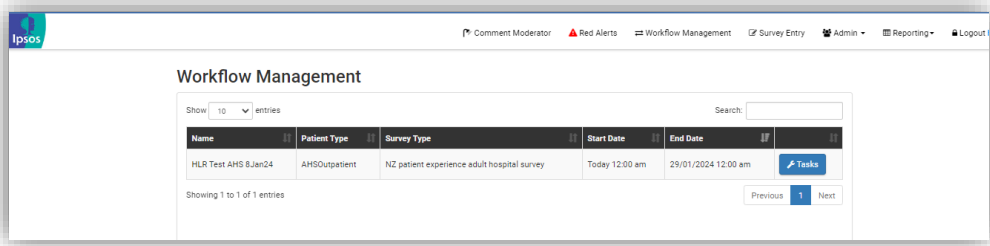
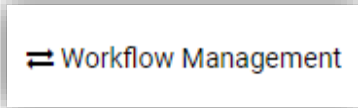
STEP 3 – UPLOAD SAMPLE FILE

Steps to upload file

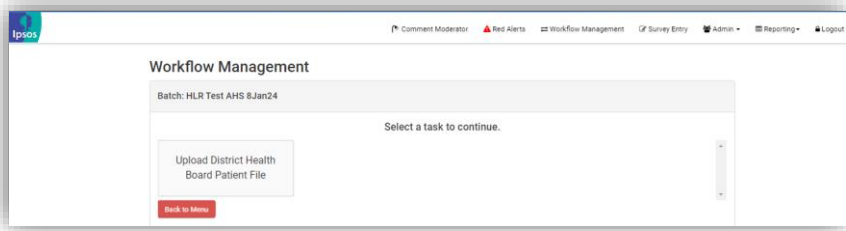
The sample specifications will be consistent with previous waves of the survey.

You can follow the same steps for the **inpatient** and **outpatient** survey

- 1) Click on **“Workflow Management”** in the header
- 2) Click on **“Tasks”** for the upcoming survey wave



- 3) On the tasks menu, select **“Upload District Health Board Patient File”**



- 4) Select **“Upload a New Sample”** and either drag and drop the .csv or .xlsx file or use the “Upload Sample File” button to browse your computer for the file.

STEP 3 – UPLOAD SAMPLE FILE

6) To check any errors that occur in the sample upload, select “**File Errors**” and a .csv list of the errors within the sample will appear.

NOTE: This will include elements like blank contact details (neither mobile phone nor email address), missing name details or other formatting issues.

Common errors:

- **Missing mandatory fields** – check that all fields identified as mandatory are included
- **NHI number duplicate** – there is a duplicate within the file – the most recent discharge date will be kept
- **Date errors** – the format of the date expected may not align with the sample template expectations
- **Wrong survey sample dates** – the discharge or appointment date falls outside the survey sample date period
- **.csv format broken** - by “,” or “.” added to cells, pushing data under the wrong headers

If there are errors that need to be corrected select “**Reject**” and upload an updated file with a new name indicating the version.

7) Once the file with no errors or acceptable errors is uploaded, select “**Accept**”. The system will update and change status to “**Approved**”.

You will receive an automated email to confirm you have uploaded the sample file

File Name	# Records	# Error Records	Uploaded By	Date Uploaded	Status	Approval Status	Approved By	Date Approved
AHS_Test_DHB280720.csv	25	3	IpsosNZDHB	pm	File Errors	Accept Reject	IpsosNZDHB	
AHS_Test_DHB280720.csv	25	0	IpsosNZDHB	28/07/2020 02:41 pm	Failed	Rejected	IpsosNZDHB	28/07/2020 02:54 pm

File Name	# Records	# Error Records	Uploaded By	Date Uploaded	Status	Approval Status	Approved By	Date Approved
AHS_Test_DHB280720.csv	25	0	IpsosNZDHB	28/07/2020 02 pm		Accept Reject	IpsosNZDHB	

Thank you

For more information go to our
How-to Library

<https://cx.myexperience.health.nz/library>

GAME CHANGERS



APPENDIX 1

1.1 INPATIENT DATA EXTRACT RULES

Exclusion rules

- Any patients that have been previously included in an extract file supplied in the last 12 weeks. The districts will exclude these patients using NHI prior to FTP upload.
- Patients who have had less than 1 overnight stay (e.g. Day stay patients excluded) – $[\text{Discharge date}] - [\text{admission date}] > 0$.
- Children under 15 – $[\text{Discharge date}] - [\text{Date of birth}] > 15$ years.
- Any Event End Types other than DI, DR and DS (thus excluding deceased patients, discharged for transfer or change in funder, discharge for organ donation, transfer to other districts etc)
- Deceased patients (based on the date that the extract is run, not the extract date range)
- Patients discharged from, or transferred to or from a mental health inpatient unit (health speciality codes that commence with a “Y”)
- Boarder patients
- Any duplicates in the file: only patients with the most recent discharge date should be included.

The file must be provided in accordance to the file format as provided in the template that can be downloaded from the data collection portal.

Sampling

Ipsos will sample and send invitations to all patients with an email address and/or mobile number.

Each patient invited will receive a unique CASE ID, this ID will also serve as the password for online survey completion to be imbedded in their survey link, allowing direct access for those invited via email or SMS.

APPENDIX 1

1.2 OUTPATIENT DATA EXTRACT RULES (part 1/2)

The patient extract should include all outpatients that satisfy the following rules:

- Frequency – minimum one fortnight per quarter according to the survey timetable. Extracted at approximately 9 am Tuesday (this allows for most public holidays which fall on Mondays).
- Date Range:
 - Patients booked and attended outpatient appointment for 14-day period from Monday 00:01 to Sunday 23:59.
Example: Extract performed on Tuesday 18 August 2020 includes patients discharged from Monday 27 July 00:00 until Sunday 9 August 23:59.
 - Note: A means of generating an extract for a date range may be required in the event that the extract was not run successfully or needed to be re-run.
- The extract file should exclude any patients if they have been previously included in an extract file supplied in the last 12 weeks. The districts will exclude these patients using NHI prior to FTP upload.
- Each patient should only appear once in the extract file – DHBs to check for and remove duplicates.
- Patient visit must have been attended. Exclude patients who did not attend or did not wait.
- Exclude children under 15 – [Discharge date] – [Date of birth] < 15 years.
- Include event type¹ OP only. This will exclude ED events (M05 – emergency medicine), community referred diagnostics.
- Visit was face-to-face or virtual encounter.
- All deceased patients should be excluded from the extract (as at the date that the extract is run, not the extract date range). This includes where the patient was discharged home or elsewhere and the DHB has been notified that the patient has subsequently died.
- Use prioritised ethnicity to select one ethnicity per patient based on level 2 ethnicity.
- Only the patient's most recent event within the extraction period should be included.
- Patients treated by a private hospital (identifiable by the facility code) under a sub-contract with the DHB should be included in the extract.
- Appointment type – preadmission, first or follow up. Community related diagnostics are excluded.
- Exclude sexual health clinic. Check S30 medical termination and miscarriage are excluded.
- Exclude group appointments.
- Exclude mental health HSC.
- Exclude inpatient at time of extract.
- Include validated email addresses only.

¹ <https://www.health.govt.nz/nz-health-statistics/data-references/code-tables/common-code-tables/event-type-code-table>

APPENDIX 1

1.2 OUTPATIENT DATA EXTRACT RULES (part 2/2)

- Email response rates are much higher than mobile, so if an email contact is available, don't also include a mobile contact unless the person is Māori or Pacific ethnic group. To improve response rates in Māori and Pacific people, a paired invitation method is used, so please provide both contacts where available, for Māori and Pacific people. Example SQL code for this is available in an excel spreadsheet.
- It is recommended that an internal report showing the proportion of people with validated email and mobile contacts is generated and shared each quarter.
- Include location where the event took place: 1. Public hospital or 2. Private hospital only. All other event locations should be excluded.
- Check clinic name in the output will make sense to a patient. For example, CASE WHEN(If Clinic = "Outsource" THEN use hospital name (Manuka St Hospital).
- Include HSC at speciality level except for (A) Allied. This should be reported at subspeciality level.

Example SQL code is provided in the below Excel spreadsheet.



OP_code.xlsx

APPENDIX 2

IMPROVE THE PARTICIPATION RATE FOR YOUR DISTRICT

Ways to improve your participation rate:

- Increasing your patient file size:
 - Extending reference/sampling period (four weeks), particularly for Māori and Pacific patients
 - Removing the n=400 patient cap (you can give us all your patients within the survey reference period)
- Patient contact details
 - Have email addresses (primary) and phone numbers (secondary) – allows for paired sampling
 - Accuracy of contact details – check your bounce rates
- Prioritise paired sampling for Māori and Pacific peoples – important for equity
- Use flyers & posters – display information about the survey for patients

