

# ADD NEW USERS

## NZ Patient Experience Surveys

How-to-guide

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2024

GAME CHANGERS



# TWO PORTALS

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](mailto: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 Internet browser

# SUPERUSERS MANAGE USER ACCESS IN BOTH PORTALS

PHO Superusers manage the access of other PHO users as well as practice level users.  
District Superusers manage access of their district level users.

After each quarter, you will receive an email with a list of inactive users.  
Please remove access for those users who no longer require access or who has left the organisation. You can also encourage those who still require access to log into both portals at least once every three months so they can action key administrative tasks for the survey in the data collection portal and to view their survey results in the reporting portal.



# DATA ACCESS MATRIX – PRIMARY CARE

## Data collection portal

User Type	Comment Moderator	Patient re-contact requests in Red Alerts	Workflow Management	Admin	Reporting Tab - Response Rate Report and Data Exports
Description	Patient comments from the survey. View and edit comments before they are published in the reporting portal.	Patient request contact through the survey. View and action contact requests in Red Alerts.	PHOs select the practices they want to participate in the next survey round during Practice Inclusion Phase.	<ul style="list-style-type: none"> <li>- Manage PHO profile</li> <li>- Manage Facility profiles</li> <li>- Manage Practice Users</li> <li>- Manage PHO Users</li> </ul>	<ul style="list-style-type: none"> <li>- Response rates (RR)</li> <li>- Survey Answer Exports</li> </ul>
PHO Superuser	X	X	X	Edit own PHO profile and all associated facilities, add/manage PHO and practice level users	RR and survey answer export
Facility Administrator – at individual practice level	X	X		Edit own practice profile, add/manage facility level users	RR and survey answer export
PHO Practice Inclusion Representative			X		RR only
PHO Patient Liaison		X			RR only
Facility Patient Liaison – at individual practice level		X			RR only
PHO Comment Moderator	X				RR only
Facility Comment Moderator – at individual practice level	X				RR only

# DATA ACCESS MATRIX – INPATIENT AND OUTPATIENT SURVEY

## Data collection portal

User Type	Comment Moderator	Patient re-contact requests in Red Alerts <i>– no longer *applicable</i>	Workflow Management	Admin	Reporting Tab - Response Rate Report and Data Exports
Description	Patient comments from the survey. View and edit comments before they are published to reporting portal.		PHOs select the practices they want to participate in the next survey round.	<ul style="list-style-type: none"> <li>- Manage Employees</li> <li>- Manage district profile</li> </ul>	<ul style="list-style-type: none"> <li>- Response rates (RR)</li> <li>- Survey Answer Exports</li> </ul>
District Superuser	X	X		Edit own district profile, add/manage district level users	RR and survey answer export at district level
District Upload Representative			X	Edit own district profile	RR only
District Patient Liaison <i>– no longer *applicable</i>		X			RR only
District Comment Moderator	X				RR only

*\* Each district now has a custom 'Thank you' note at the end of the survey directing patients to their website or email address to request contact, the recontact question is not asked in the Inpatient or Outpatient survey.*

# ADD NEW USERS IN DATA COLLECTION PORTAL

## Add a new user in the data collection portal

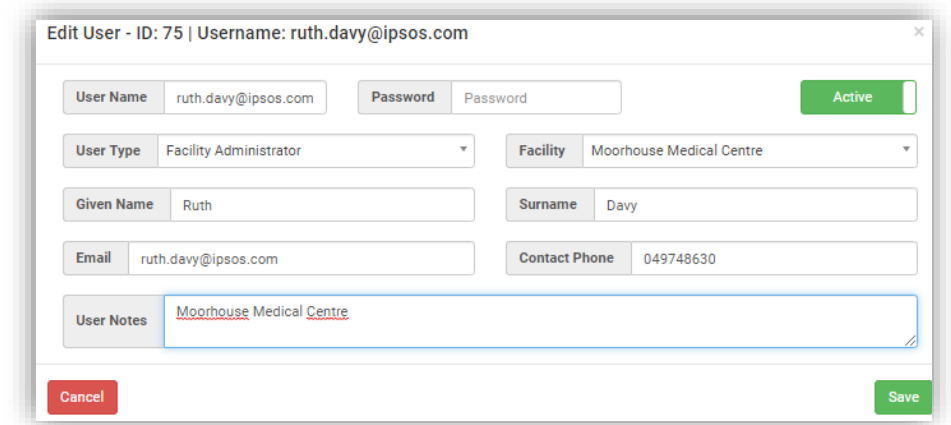
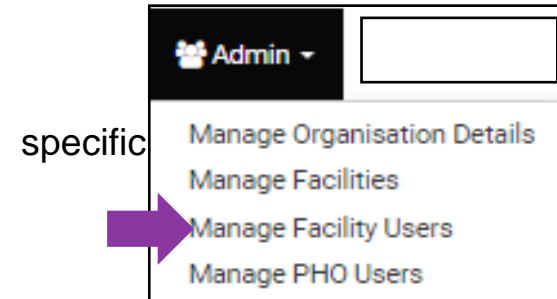
Go to “**Manage Facility/PHO Users**” screen under the Admin header.

Select “**New User**” to add a new record or use the list displayed or search for existing user and select “**Edit**”.

Update or enter information in the following information fields:

The fields with \* marked below are required.

- **Username \*** – Please use the contact’s email address as the username.
- **Password \*** – Assign a password for the user to share with them, they will be able to login and revise this on their own.
- **User Type \*** – Select the type of user you are adding:
- **Given Name \*** – The users first name.
- **Surname \*** – The users last name or family name.
- **Email \* / Contact Phone** – The users email and contact number.
- **User Notes** – We recommend adding the [facility name](#) to the user notes as well to assist with easy identification in the “Manage” screens.

A screenshot of the 'Edit User' form. The title bar reads 'Edit User - ID: 75 | Username: ruth.davy@ipsos.com'. The form contains several fields: 'User Name' (ruth.davy@ipsos.com), 'Password' (Password), 'User Type' (Facility Administrator), 'Facility' (Moorhouse Medical Centre), 'Given Name' (Ruth), 'Surname' (Davy), 'Email' (ruth.davy@ipsos.com), and 'Contact Phone' (049748630). There is a 'User Notes' field with the text 'Moorhouse Medical Centre'. At the bottom, there are 'Cancel' and 'Save' buttons. An 'Active' checkbox is also present.

# SAVE THE LOGIN DETAILS IF YOU CREATE A NEW USER



Please **save** the following information about the nominated delegates in a **spreadsheet** for reference:

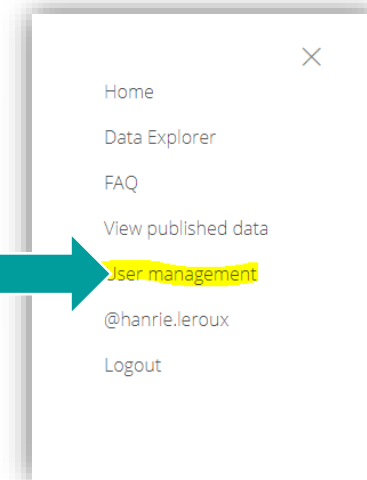
- **Full name**
- **Job title**
- **Email and contact number**
- **Role**
- **Username:** Name and first two letters of last name eg. *Jane Smith* username will be *JaneSm*
- **Password**
- **Excel formula to generate secure passwords:**  
`=RANDBETWEEN(0,9)&CHAR(RANDBETWEEN(65,90))&RANDBETWEEN(10,99)&CHAR(RANDBETWEEN(97,122))&CHAR(RANDBETWEEN(97,122))&RANDBETWEEN(10,99)`

# ADD NEW USER IN REPORTING PORTAL

Only Superusers with “Administration” access and Ipsos can manage and add new users in the Reporting portal

## Add new users within the reporting portal

Click on the drop-down menu icon top right;

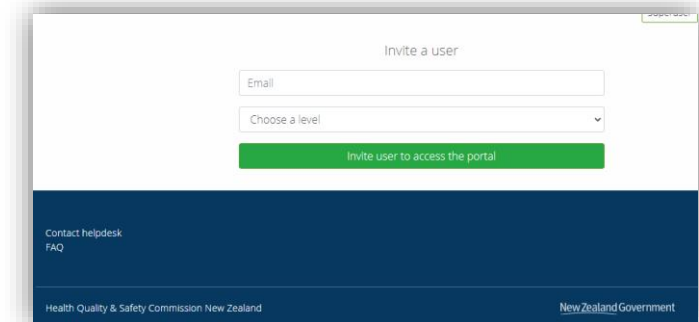


Select “**User management**”;

Scroll down to the bottom of the page, enter the new user’s contact email address, and invite them to access the reporting portal to view the results at the relevant level.

They will then receive an email invitation to create a password. They will not receive any login details from Ipsos. They need to accept the invite within that invitation email and set-up their own password to access the reporting portal.

One user can have access to more than one level with just the one account – follow same instructions to add levels, if needed.



# HOW TO REMOVE USERS IF THEY LEAVE

This forms part of the quarterly user log review

## Data collection portal users

- 1) Go to “**Manage Facility/PHO Users**” screen under the Admin header
- 2) Select “**Edit**”
- 3) De-activate the user and “**Save**”

Edit User - ID: 73 | Username: 0800

User Name: 0800 Password: Password **Active**

User Type: Operator

Given Name: Ruth Surname: Davy

Email: Ruth.Davy@ipsos.com Contact Phone: 9211-4957

User Notes: Test

Cancel

Edit User - ID: 51 | Username: IpsosPHO

IpsosPHO Password: Password **Inactive**

PHO Patient Liaison Primary Health Organisation: Coast and Corner PHO

Surname: Le Roux

Email: Hanrie.LeRoux@ipsos.com Contact Phone: 9211-4957

User Notes: Notes

Cancel **Save**

## Reporting portal users

- 1) Click on the drop down menu icon top right
- 2) Select “**User management**”
- 3) Enter the contact email address of the user you want to remove
- 4) Click on “**Viewer**”. A confirmation message will appear and ask if you want to delete the access for this user. Click “**OK**”



Level & roles

**Viewer** Comments Previewer Superuser Administrator

cx.myexperience.health.nz says

Are you sure you want to delete access for this user?

**OK** Cancel

# Thank you

For more information go to our  
**How-to Library**

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

**GAME CHANGERS**

