

PATIENT CONTACT REQUESTS

NZ Patient Experience Surveys

How-to-guide

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 Internet browser

LOGIN DETAILS AND SUPPORT

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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

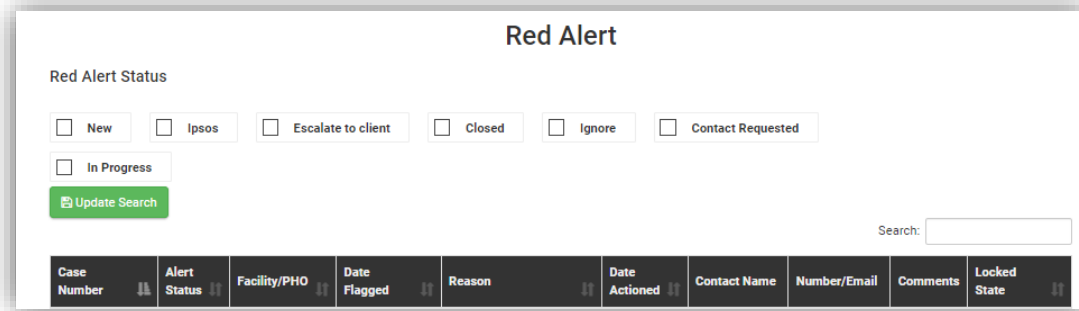
PATIENT CONTACT REQUESTS IN RED ALERTS

Access new contact requests from patients

1) Select “**Red Alerts**” from the top menu.

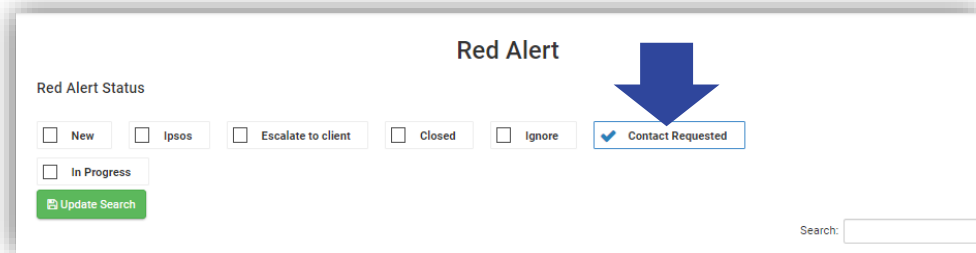


2) You will have a selection of filter boxes on top – when you change the red alert status of the contact request you actioned, it will move the request to one of these boxes so you can refer back to them in the future



Patients can request contact through the survey. These requests are in the **Red Alerts** tab of the data collection portal. The nominated PHO / district / facility patient liaison can access, view and action these requests.

3) For NEW contact requests - Select “**Contact Requested**” and “**Update search**”.



4) To see details of the request, select the case and a pop-up will appear with patient contact details and what the patient wants to be contacted about.

ACTION AND CHANGE STATUS

How to add comments to an alert and change its status

4) Once you have selected a case to review you will see a pop-up with the Red Alert Status details (as shown on the right).

Note: This will lock the case from use by others for 30 minutes to avoid two people contacting one patient – see [Appendix 1](#) for more details on locking.

5) In the “**Red Alert Comment**” box you can add comments related to your call or follow-up with the patient.

NOTE: Please do not include health details in the alert comment field. Only use this feature to assist in tracking communications with the patient (e.g. 15/9/2020: called and left message)

6) Review the “**Red Alert Status**”. If you change and save the status of the Red Alert, it will move it to another filter box.

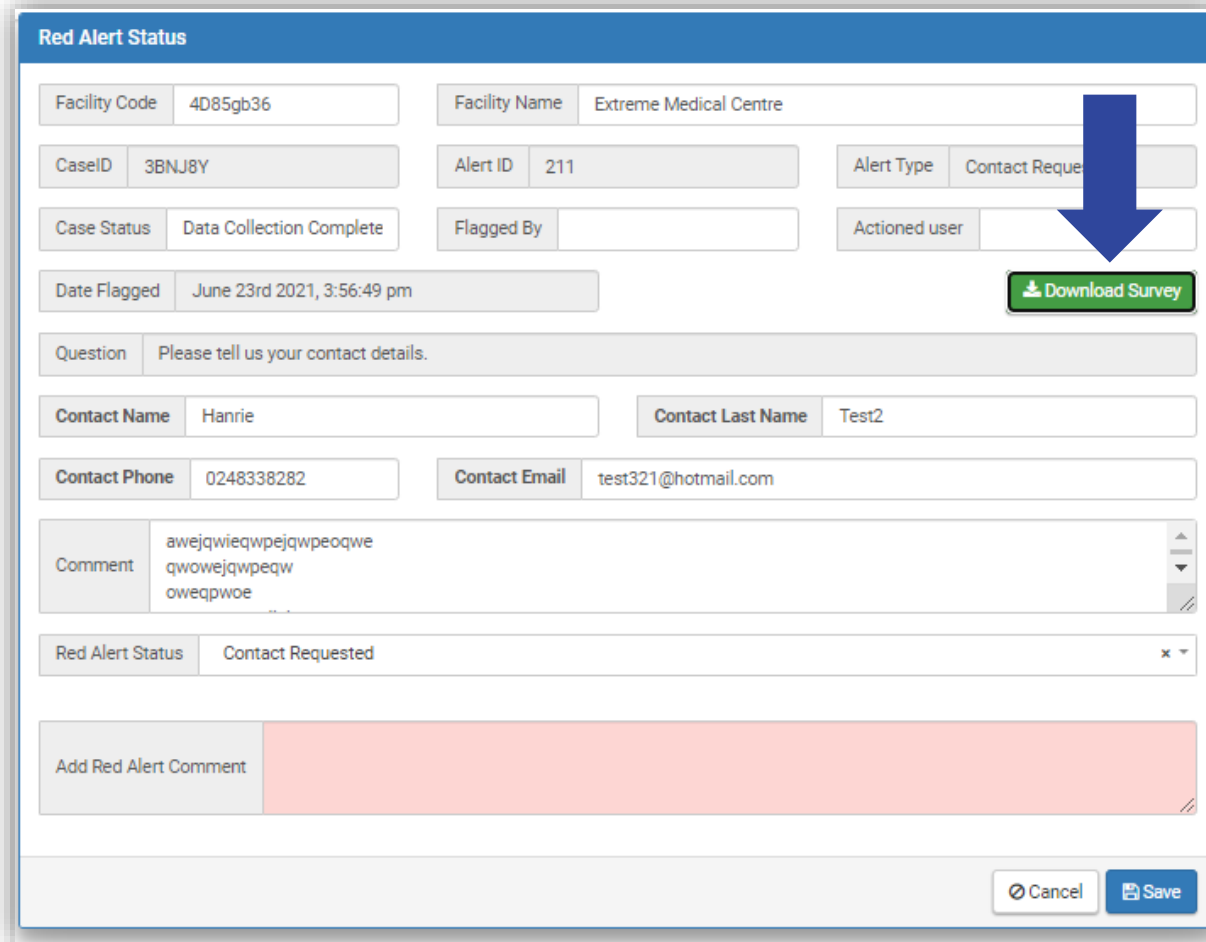
7) Select “**Save**” to save any changes made or “**Cancel**” if you don’t wish to save any changes.

The screenshot displays the 'Red Alert Status' form. At the top, the title 'Red Alert Status' is in a blue header. Below it, there are several input fields: 'Facility Code' (F99997-C), 'Facility Name' (Ipsos Medical Centre C), 'CaseID' (1DOE2N), 'CaseID' (82), and 'Alert Type' (DHPatientContactType). A 'Date Logged' field shows 'August 29th 2020, 12:46:35 pm'. A 'Question' field contains 'Please tell us your contact details.'. Below this are 'First Name' and 'Last Name' fields. 'Phone Number' is 021612264, and the 'Email' field is empty. A 'Comment' field contains '[SYSTEM] - [NO COMMENT PROVIDED BY THE RESPONDENT]'. A 'Red Alert Status' dropdown menu is set to 'Contact Requested'. At the bottom, there is a large red 'Add Red Alert Comment' text box. The form concludes with 'Cancel' and 'Save' buttons.

EXPORT OF PATIENT SURVEY ANSWERS

Download survey answers

The patient can give permission for their survey answers to be shared with the Patient Liaison. If they provided permission through the survey, you will see the option to click on “**Download Survey**”. This will generate an export of the patient’s survey answers to provide context of their experience and the contact request.



The screenshot shows a web form titled "Red Alert Status". The form contains several input fields and buttons. A blue arrow points to a green button labeled "Download Survey" which has a download icon. The form fields include:

- Facility Code: 4D85gb36
- Facility Name: Extreme Medical Centre
- CaseID: 3BNJ8Y
- Alert ID: 211
- Alert Type: Contact Request
- Case Status: Data Collection Complete
- Flagged By: (empty)
- Actioned user: (empty)
- Date Flagged: June 23rd 2021, 3:56:49 pm
- Question: Please tell us your contact details.
- Contact Name: Hanrie
- Contact Last Name: Test2
- Contact Phone: 0248338282
- Contact Email: test321@hotmail.com
- Comment: awejqwiewpejqwpeoqwe
qwowejqwpeqw
oweqpwoe
- Red Alert Status: Contact Requested

At the bottom of the form, there are "Cancel" and "Save" buttons.

If you don't see the green “**Download Survey**” box in the Red Alert then the patient **did not** give permission to share their survey answers.

APPENDIX SECTION

More detailed information

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APPENDIX 1: PATIENT LIAISON COMMENTS

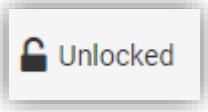
View comments, added by another Patient Liaison, without locking it



Comments have been added to this case by another Patient Liaison. To view the comments without locking this case, you can select this icon to view it.

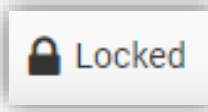
- 1) Select “**Red Alert**” from the top menu.
- 2) Search for the Case Number of the contact or navigate to the case.
- 3) Select the blue speech bubble.
- 4) To exit this screen select “**Cancel**”

Red Alert Actioned Comments		
Username	Date	Comment
1800	28/06/2021 12:54 pm	I will follow-up in 2 days - Patient Liaison for Extreme Medical Centre 280621



Case is available to be reviewed and edited.

3BMH9F	Contact Requested	Infinity Medical Centre	23/06/2021 02:24 PM	nnkjjjhjhkhj		Hanrie	02223435543 Test1234@gmail.com		Unlocked	
3BNJ8Y	Contact Requested	Extreme Medical Centre	23/06/2021 03:56 PM	awejqwiewpejqwpeoqw....		Hanrie	0248338282 test321@hotmail.com			Locked



Case can be reviewed but editing rights are locked to another user (for 30 minutes). If another user added a comment, you can view it by clicking on the speech bubble.



Thank you

For more information go to our
How-to Library

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

GAME CHANGERS

