

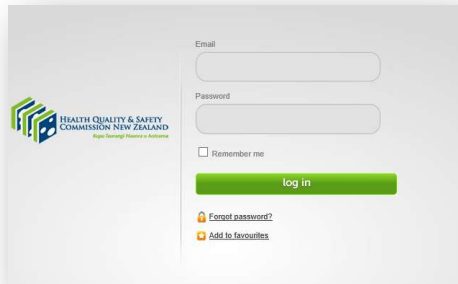
Primary care Patient experience survey



Reporting portal quick guide

Welcome to the primary care patient experience survey (PES) Reporting Portal. This quick guide will get you started and also covers the key aspects of recent improvements in this portal.

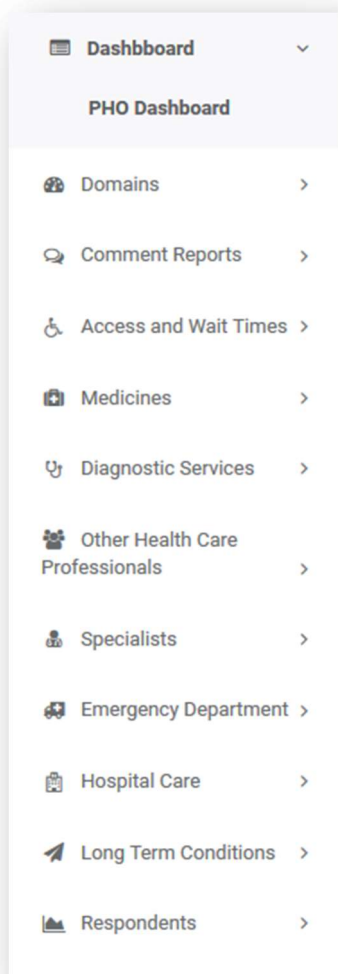
Accessing the Survey Results



Type <https://cx.myexperience.health.nz/pes> in your internet browser. Click on 'Add to favourites' to bookmark this page.

Enter your email and password and click the green 'log in' button. If you cannot remember your password click on 'forgot password', enter your email address and you will be sent a new password.

If you are a new user, you can set your new password using the forgot password link. Once you enter your email a link will be sent to you to set the new password to your registered email address.



Opening your Reports

Once you are logged in the front page will show your 'Dashboard'. This has filter options at the top and menu options on the left.

View survey feedback by clicking on the survey headings on the left-hand menu. This menu closely matches the survey structure.

Each section will open to show the sub-menu and question identifiers where individual reports can be selected.

Reporting Views

There are three main types of reporting in the patient experience survey.

1. *The Dashboard:* This is the landing page when you log in. It provides a snapshot of key metrics from the survey.
2. *Per Questions Reports:* These reports are designed to show responses over time and to enable comparisons at practice-, PHO- and national levels (*Note: Practice Users will only be able to see themselves compared with their own PHO and national average.*)

You can select your desired report by the new menu drop down on the top right-hand side of the screen for each question.

3. *Comments Report:* This shows all comments in one place and can be filtered by question.

Accessing the refreshed reports

There are different level of user access in order to display only relevant data to the users – each designed to work faster and to allow users to get the information they need most. Here's what the different users can see:

Practices: responses from patients registered with the practice and National and PHO averages. Trend Reports and By Practice Reports

PHO Users: Practices from PHO. Trend Results, By PHO and By Practice reports

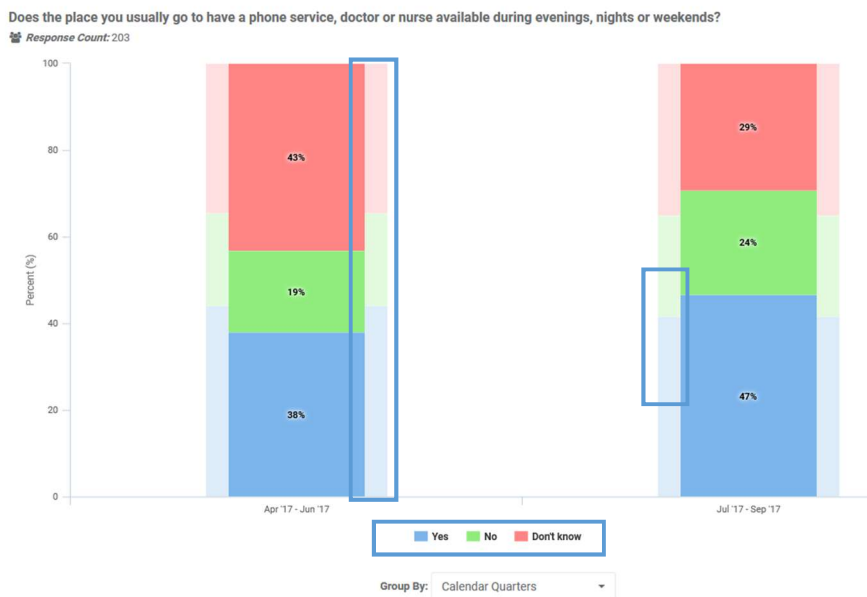
DHB Users: Practices from DHB & average from other DHBs. Trend Results, by DHB and By PHO reports

HQSC Users: All Practices data. Trend Results, by DHB, By PHO and By Practice reports

The Comments report can be accessed via the Navigation Bar (just below Dashboards). This report provides the comments to up to 22 qualitative questions into a single report so users can easily access all free text responses in one place. Each question can be selected as a separate filter. Text search is also available. You can decide which questions (and areas) to focus on using the drop down list called "Chart Config" at the top right hand-side of the screen.

National Results Shown in Background

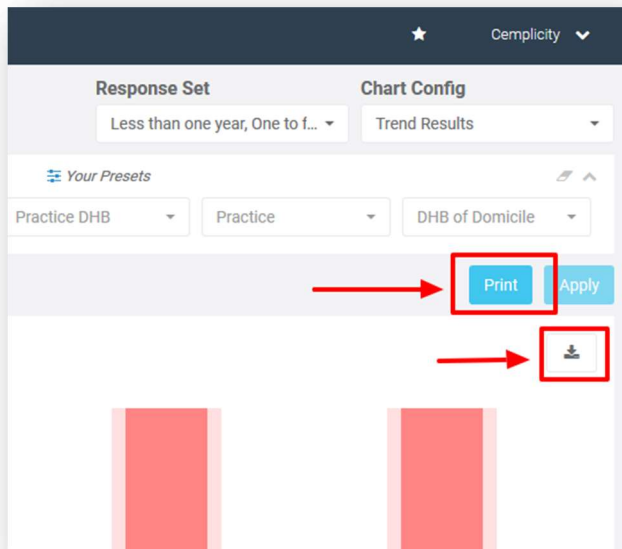
Updated 'by question' reports incorporate a background shading feature that reflects the National Average responses for each practice (or PHO/DHB) to compare themselves against.




Background Shading represents national averages for the chosen filter set so you can easily benchmark your results nationally.

You can remove the responses that you want to hide by clicking on their icon, eg, clicking 'don't know' will remove those answers from the bar.

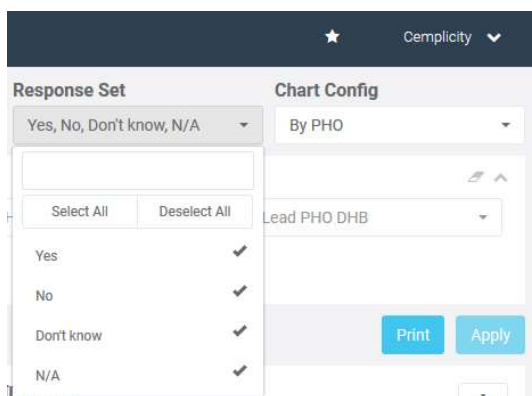
Printing / Exporting Reports



You can print reports by clicking on the 'Print' button to the top right of each graph. This will generate an image of the report, along with any filters you currently have applied.

Alternatively, you can click on icon  on each report. This gives you the options to export graphs as images and data or qualitative comments into excel or text format. This download can take a few seconds but a message will pop up at the top of the screen which initially recognises a downloading is occurring and then tells you when it is ready.

Isolating Specific Answers



For some reports you might want to be able to see the charts with only one or some of the response options on it. Response Set allows you to do that: filter out options that aren't relevant for what you are looking for and show you details compared to the national average. This is one way to identify outlying results.

The Response set dropdown is displayed on the top right corner where you can select which answers to show (these selections can also be saved as part of a Report 'Favourite'). Alternatively, you can also toggle responses on and off via the legend on the graph itself.

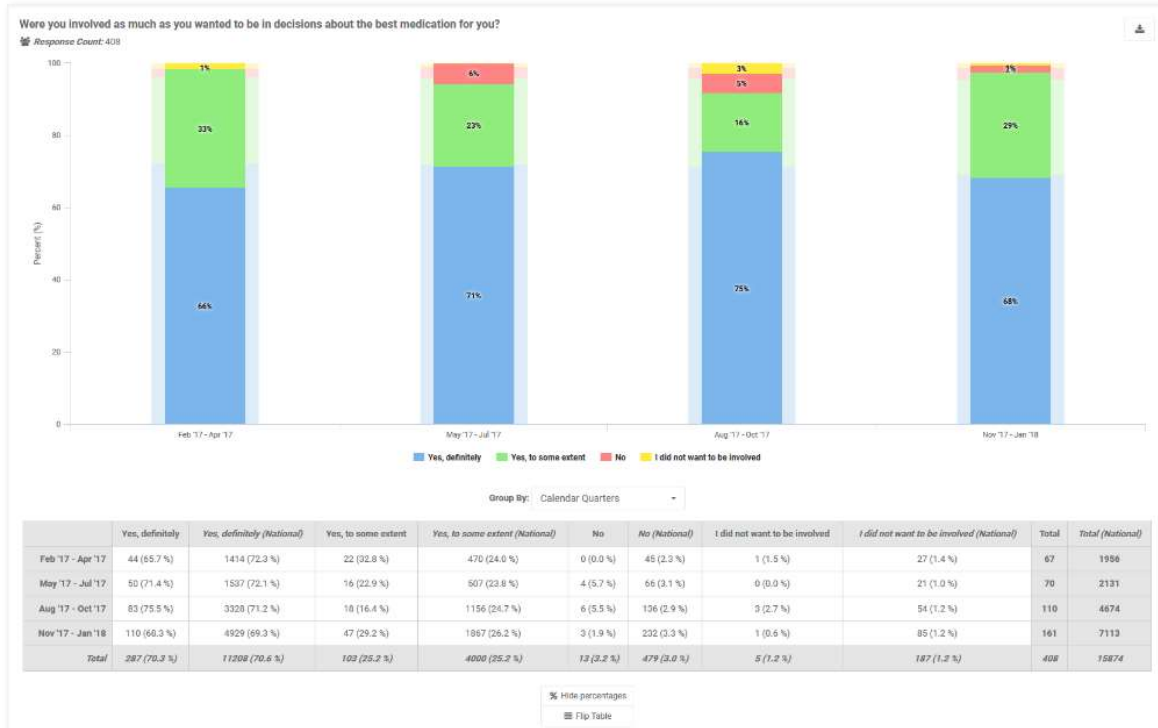
HOT TIP!

YOUR FILTER AND RESPONSE SET SELECTIONS CAN BE SAVED AS PART OF YOUR FAVOURITE REPORTS.

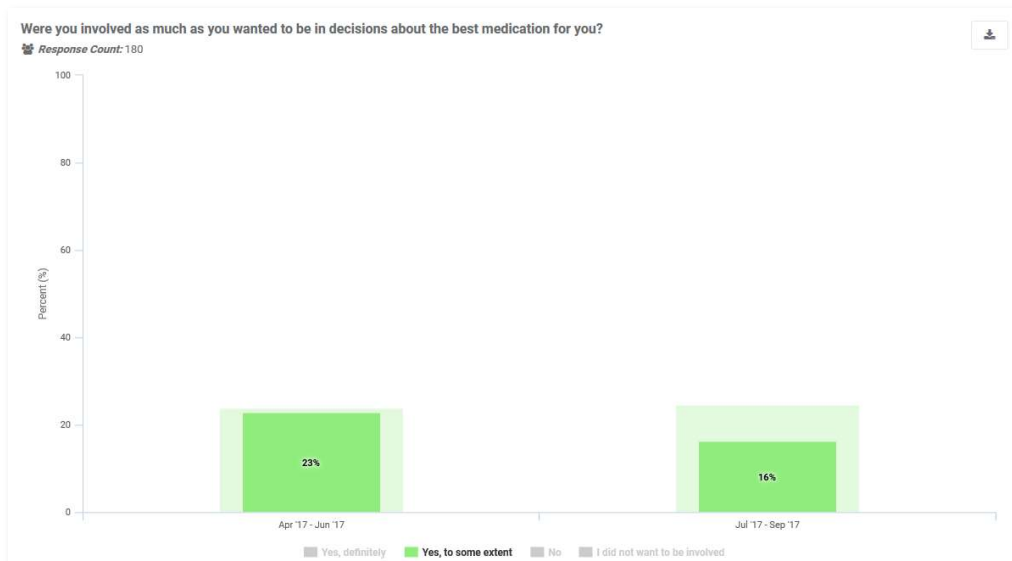
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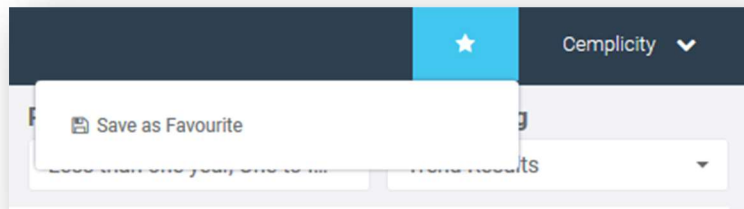
The initial chart will show all the available responses.



You can then 'deselect' the answers you don't want to see and the graph will show only the remaining selected answers and the national average behind. This means you can very quickly assess which practices/PHO's/DHBs are doing better or worse than the national results for the given demographics. In the example below, having de-selected "Yes, definitely", "No" and "I don't want to be involved", you can see only "Yes, to some extent" remains, showing the practice response against the national average.

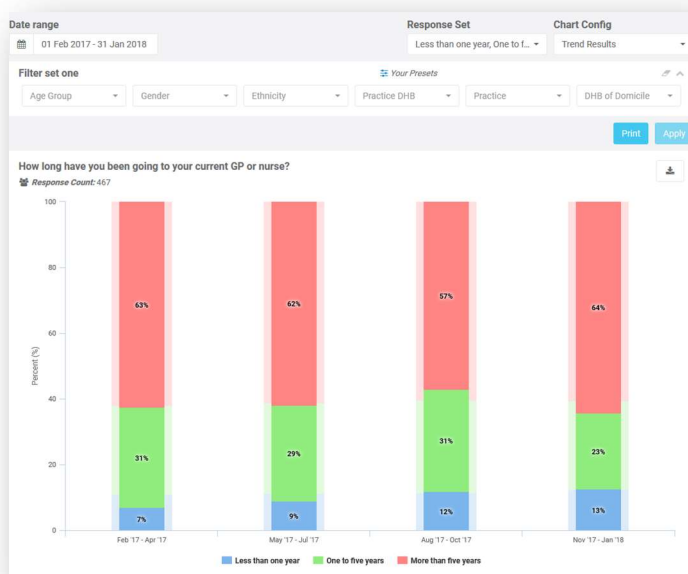


Saving Report Favourites



You can save your favourite reports by clicking the star on the top right corner near your name. Once there you will be able to see the reports that you have previously saved for easy access and save a new one.

Note: The saved reports will save all the filters (incl date ranges) that you had in place at the time the report was saved to you 'Favourites'. If you are constantly looking at a specific report for a certain ethnicity or age group it can be saved for next time when all you may need to do is change the date range.



Using the Filters

There are a number of filters available that allow you to interrogate your results based on demographic groupings or to make comparisons between general practices, PHOs, DHBs and nationally.

For example, using the ethnicity filter we can view how the Māori population has answered a question compared with the national result.

The National bar in the background reflects the demographic filter selections i.e. if you choose to view "Females", then both the National background and the main bar are filtered to only show responses from females for the given date period.

The full system manual is available by going to the reporting portal (<https://cx.myexperience.health.nz/pes>) and clicking on "View the Reporting Guide" under the Useful Links section on each page.