BrisDoc Patient care by people who care

NHS

Patient Satisfaction Survey process

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3.0	Sarah Pearce Governance Manager	1s June 2021
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Contents

Introduction

The purpose of this SOP is to layout the process in which patients are sent a Patient Satisfaction Questionnaire (PSQ) either in paper format or via a digital link to invite feedback for the benefit of quality assurance and identifying areas where change may be needed.

Background:

PSQ'S offer patients and service users route to provide feedback about the service they have received. Information gathered from the surveys is analysed and used to inform service improvements. Data is reported and monitored via quality meetings and reported to service commissioners.

To offer more choice to patients and potentially appeal to a different cohort of patients, a digital option has been developed and is run alongside the traditional method of a postal survey. Results received via either version will be merged.

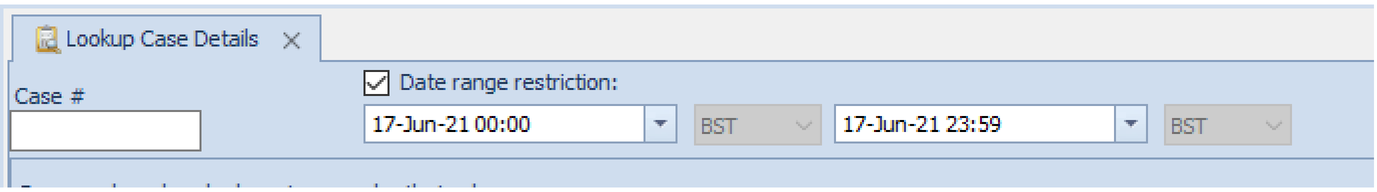
Patients are randomly selected from Adastra to receive a survey. The number of patients selected is set by and monitored by the Quality Board.

Digital Process:

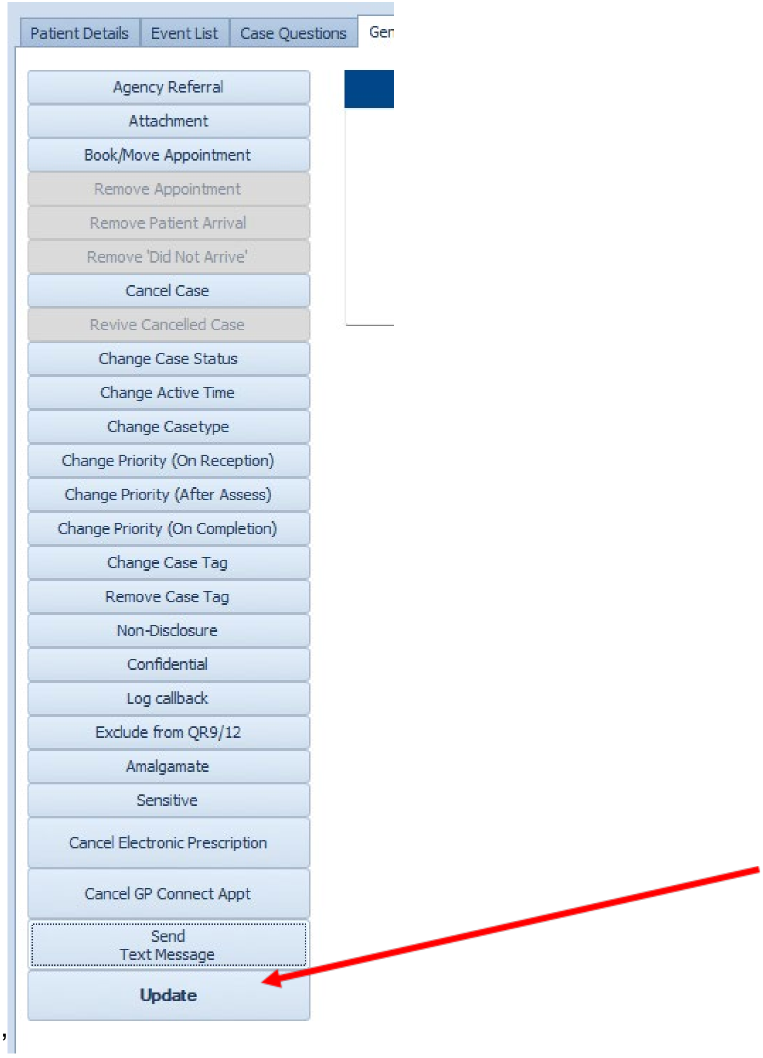
A link to a digital survey is sent via Adastra. The case should be randomly selected using the case search function and entered via case edit.

In Adastra, follow these steps:

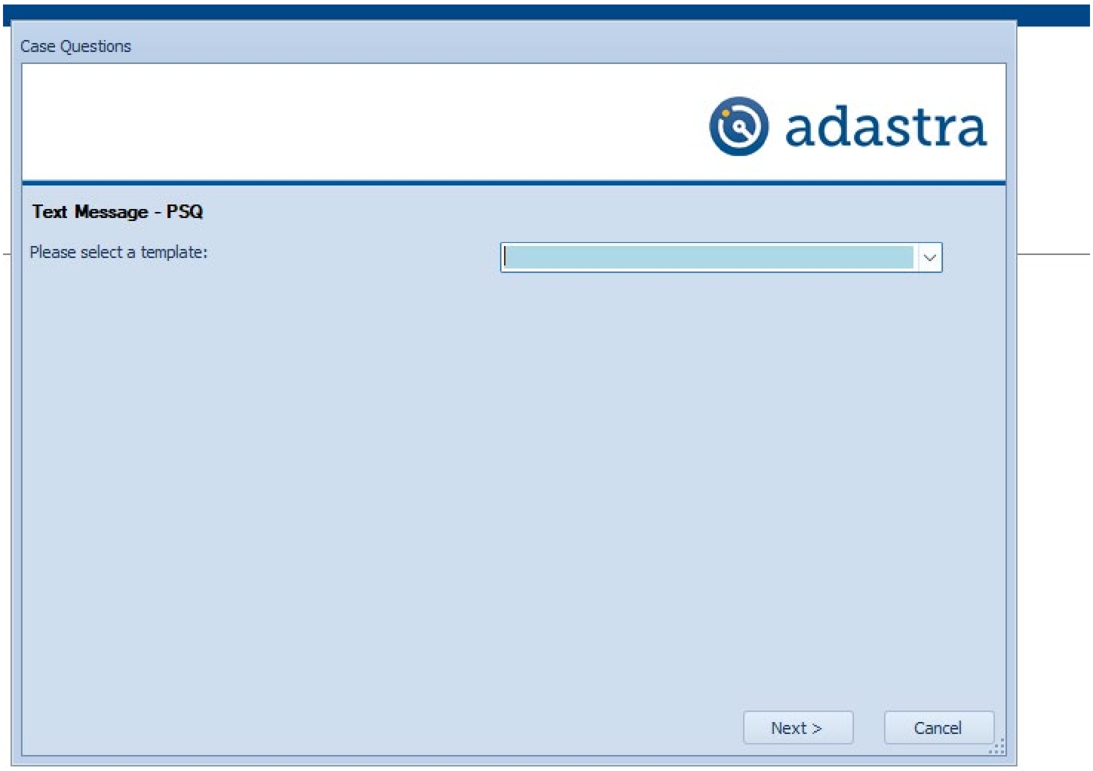
- Select case search and print from the left-hand menu.
- Tick the date range restriction box and enter the date and time frame of the previous 24 hours eg:



- Click search to display the results.
- Randomly select a patient between the age of 18 and 70 with a case type of: Home Visit, Clinician Advice or PCC appointment and open the case.
- On the patient details tab, ensure there is a mobile phone number in the contact field. The mobile phone needs to belong to the patient, if it is not clear who the contact number belongs to, select a different patient.
- When you have identified a suitable patient: select 'send text message'



- and then select the appropriate PSQ template from the drop-down menu.



- Select next
- Select Update
- An entry will be made in the event list to confirm the text message has been sent.

Postal Process:

To get the sample of patients, every other Wednesday the task undertaker will use Adastra to:

- Reporting, Run User Report
- BrisDoc Reports, select QR05 PSQ
- Amend dates to show the previous week, Wednesday – Wednesday
- Percentage cases - amend the sample size to 150 cases
- Select the ‘no filter’
- Run the Adastra report QR05 PSQ
- Export the file as an excel spreadsheet to be saved in the folder: Save the spreadsheet in S:\GOVERNANCE TEAM\CONFIDENTIAL PSQ\ (relevant year) IUC PSQ\Data, and use date as the filename e.g. August 12-18

Open MASTER spreadsheet located: S:\GOVERNANCE TEAM\CONFIDENTIAL PSQ\(relevant year) IUC PSQ and follow these steps:

- Select the ‘Paste new data here’ tab and delete all content
- Select HV tab and delete the **entire tab**
- Select ADVICE tab and delete **entire tab**
- Select PCC tab and delete **entire tab**

- Open the spreadsheet that you have just saved (Adastra results) and copy **all data**
- Go back to MASTER spreadsheet and paste the data in the tab 'PASTE NEW DATA HERE'
- Select 'REFRESH TABLE HERE Home Visit' Tab and right click on the number in the grand total column – select 'refresh' – this will update the figures to reflect the new data pasted onto the first tab.
- Double click on the same number which will create a new sheet automatically called 'sheet 1' – rename HV
- Select 'Clinician Advice' tab and double click on the number in the 'grand total' column – this will automatically generate a new sheet called 'sheet 2' – rename this sheet 'ADVICE'
- Select 'Appointment' tab and double click on the number in the 'grand total' column – this will automatically generate a new sheet called 'sheet 3' – rename this sheet 'PCC'

Note that the naming of the sheets is very important as this will allow the mail merged document to link up to the correct sheet in the workbook automatically to produce letters.

Mail merging

- Open the letter template (See related documents below)'1. PCC PSQ' and select ok to the command message that will appear
- Select mailings tab
- Click finish and merge button – then edit individual documents
- A merge to new document box will appear – select OK
- A message will appear advising of locked fields – select OK
- When the document merges, check the date at the top of the first letter is within the date range you selected for your original data
- Now ready to print
- After printing – there is no need to save the document, just make sure data has been copied into relevant month on PSQ results spreadsheet.

Printing

- Select the printer: Unit 21 Upstairs Kyocera TASKalfa 2551ci on BRISDOC-FS03.BrisDoc.local
- Select printer properties
- On the 'BASICS' tab – select colour and duplex to print double sided
- On the 'finishing' tab select the staple option by ticking the box on the staple diagram, this will automatically select the right position (top left) for the staple. Select 2 from the 'sheets per group' drop down menu
- On the 'layout' tab make sure portrait is selected.

Repeat mail merging and printing steps for the 2 other case types, Advice and Home visit.

Posting

Pass the letters to Operations (NR) who will organise for a member of staff to fold, frank and post.

- Fold letters and envelope the Surveys using the labels provided
- Include a freepost envelope
- Frank and post 2nd class via Royal Mail (Franking Machine is located within Rota Team Office).

Results

A results spreadsheets kept and updated with individual responses throughout the month. Data from the spreadsheet is presented at Quality meetings and shared with staff via individual feedback and newsletters.

The spreadsheet is kept in the S drive: S:\GOVERNANCE TEAM\CONFIDENTIAL - DAC\10. CONFIDENTIAL PSQ\2. IUC PSQ\PSQ data spreadsheet

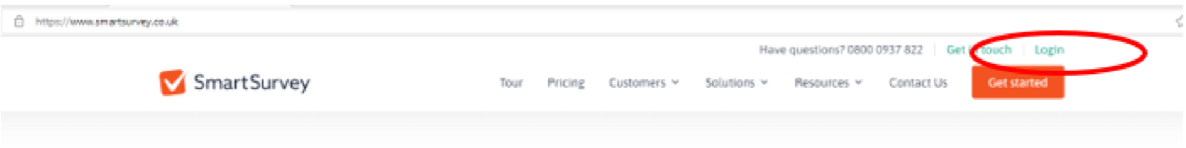
To work out the response rate, enter the amount of digital and postal surveys sent on the relevant tab in the results spreadsheet.

Postal results

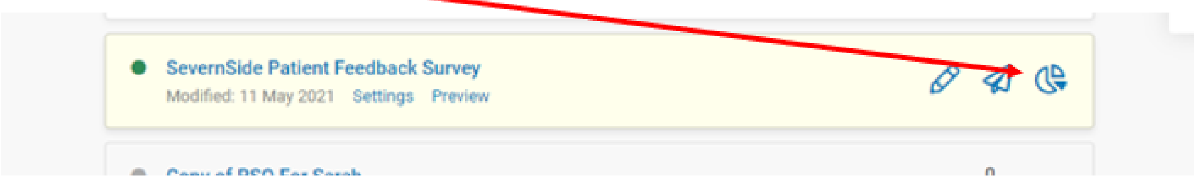
Paper responses are opened, and data is transferred from the form to the spreadsheet, the questions on the spreadsheet are an exact copy of the questions on the paper form. Data should be copied from the form exactly as it is written, including the free text comments.

Digital results

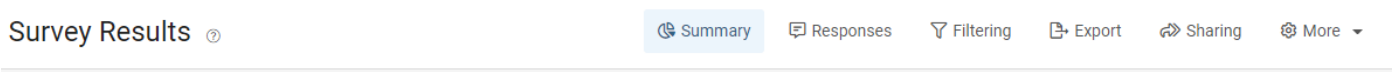
- Go to: www.smartsurvey.co.uk
- Click Login in the top right corner



- Log in using DL email address and password (ask DL if you are unsure of the password)
- Hover over Severnside Patient Feedback Survey form the list of recent surveys and click the results icon (pie chart image)

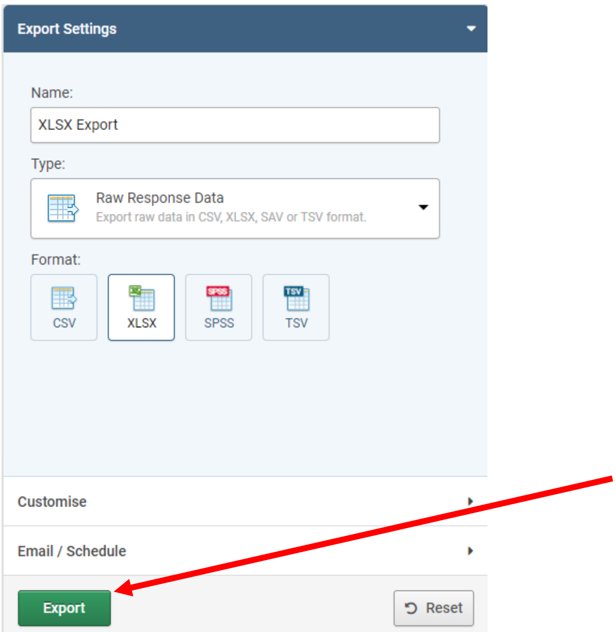


- Click on export near the top of the page

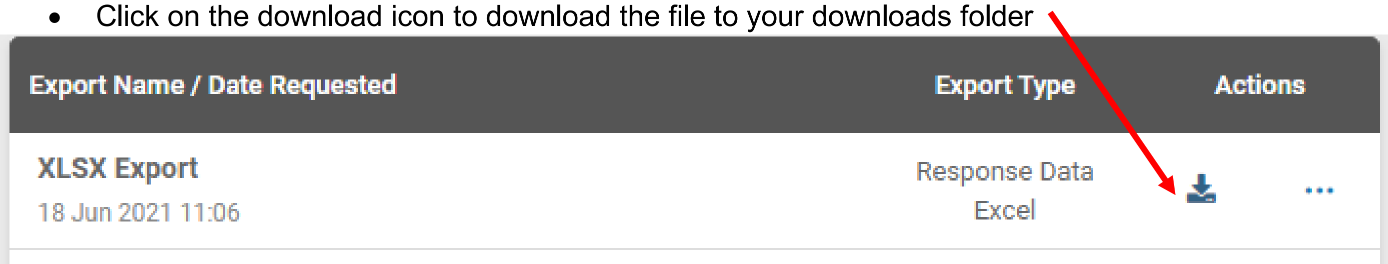


- Under ‘Export Settings’ click on excel which will change the name to: XLSX Export
- Click the green ‘Export button underneath.

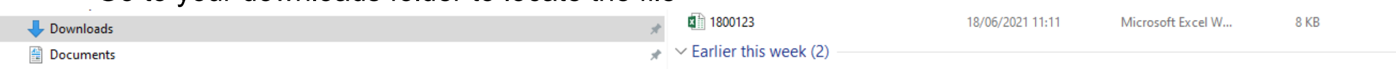
Patient Satisfaction Survey



- When you have clicked export, a new XLSX file will appear in the Exports list on the right, you will note the date and time of the file will be the date and time you have exported the file.
- Click on the download icon to download the file to your downloads folder



- Go to your downloads folder to locate the file



- Move the file from your downloads folder and save in the following location: S:\GOVERNANCE TEAM\CONFIDENTIAL PSQ\Digital PSQ\Digital Results
- Name the file ‘digital results and the date you have completed the process. Eg: ‘digital results 18.06.21’

Change Register

Date	Version	Author	Change
17/06/21	1	SP	New SOP
17/11/21	1	JF	Amendments
23/08/21	2	SP	Merged paper and digital process SOPs

04/09/2024	3	SP	Reviewed and updated to reflect change in text message process.