

CIVICA



Civica Experience Super User Guide – Version 7.3

Contents

Introduction.....	5
1. User Accounts.....	5
How to Login.....	5
I've forgotten my password.....	5
What are the access levels on the platform?	6
View Accounts	7
Add Account	8
User Account Customisation	9
Report Permissions.....	10
Access Permissions.....	10
Hierarchy Permissions	11
Automatic User Account Locking	12
Password Reminder	12
2. Dashboard	13
How to customise your own Dashboard.....	14
How to edit a tile's settings	16
How to remove a tile	17
How to Update the Noticeboard Message.....	18
3. Survey Delivery	19
Pre-Survey Options	19
Survey Distribution Methods.....	20
Online.....	20
Kiosk	20
Email	20
Text Message/SMS.....	21
Print PDF	21
4. Reports	23
Reports Zone.....	23
How to Filter Reports	23
Multi-Survey Reporting	25
Main Report Types	25
Survey Analysis	25
Comment report.....	26
Heat Map	27
Heat Map Scoring Methodology	27
Trend Graph.....	29
Feedback Poster.....	29
Build Your Own Report.....	30
How to build a new report template	31

- Cross Tab 32
- Stacked Bar Chart..... 33
- Bar Chart..... 34
- Stacked Column Chart..... 34
- Column Chart..... 34
- Line Chart 35
- Pie Chart 35
- Donut Chart..... 35
- Filtering Reports 36
- Push Reports and Survey Alerts 36
 - Push Reports 36
 - Survey Alerts..... 38
- Comment Analysis (Akumen)..... 40
 - Theme Bar Charts..... 41
 - Theme Trend Graphs 42
 - Emotions Trend Graphs..... 43
 - How to Analyse Akumen Data 44
- 5. Surveys 48
 - Manage Surveys..... 48
 - How to Amend Survey Questions..... 49
 - How to Change the Survey Pagination..... 50
 - How to Change the Question Scoring and Survey Benchmarks..... 51
 - How to change the Survey Logo..... 52
 - Create New Survey 53
 - Copy Existing Survey..... 54
 - Creating a new question 55
 - Question Categories..... 56
 - Question Formatting..... 58
 - Adding an existing question..... 59
 - Adding Themed Questions 60
 - Adding Block Text..... 61
 - Question Markers..... 62
 - Short Question Text..... 63
 - Add Survey Translations..... 64
 - Main Survey Information 65
 - Survey Questions and Responses..... 66
 - Translated Survey PDFs 67
- 6. Editing and Deleting Responses..... 69
 - Edit Responses 69
 - Delete Responses 69
- 7. Comment Flagging..... 71

- 8. Survey Data Entry 72
- 9. Action Manager 73
 - How to Add a New Action 73
 - Progress Updates 75
 - Completing an Action 75
 - Action Manager Filtering and Exports 75
 - Action Manager Exports 76
 - Customising the Action Manager 76
 - Automated Actions 77
 - Feedback Posters 77
 - Reports 77
 - Comment Flagging 78
- 10. Link Creation 79
 - Fixed Links 80
 - Location Links 82
- 11. Data Extract Tool 85
 - How to download last month's data 85
 - How to download specific data 86
 - Additional Data Extract Options 86
 - Push Report Activity 86
 - SMS Reporting 87
- 12. Device Management 88
 - How to activate a new tablet 88
 - How to customise the App content 89
 - Password Access 89
 - Password Changes 90
 - Default Survey 91
- 13. Promotional Materials 92
- 14. Frequently Asked Questions 92
 - 1. How do I log in? What if I forget my password? 92
 - 2. My user account has been locked, how can I unlock it? 93
 - 3. How do I add a new user account? 93
 - 4. How do I filter a report? 93
 - 5. How do I send surveys by email? 94
 - 6. How do I edit responses? 94
 - 7. How do I view an individual survey response? 95
 - 8. Can I do my data entry in the platform? 95
- Copyright Notice: 96

Introduction

Welcome to Experience. This user guide is here to help you get the most out of the platform and to provide a step-by-step guide to using the system.

This User Guide shows all the functionality available on Experience. You will have chosen your specific configuration during the set-up process, but if there is anything you see that you want, please get in touch with the Civica Customer Experience team.

1. User Accounts

How to Login

To login to Experience you will first need your username and password; this will be provided to you during set up by your Civica project manager. Your platform is accessible on any computer with an internet connection – just go to

<https://secure.membra.co.uk/ExperienceELFT>

At this point you will see the login screen as below. Enter your username and password and then complete the captcha code. Only the password is case sensitive.

NHS
East London
NHS Foundation Trust

Email Address:

Password:

[Generate new code](#)

[Get audio code](#)

Enter Code:

Forgot your Password? [Click here to reset it.](#)

Application Build: 7.3.2 (28/09/2023)

I've forgotten my password

Your password is only known to you, for security reasons Civica staff cannot remind you of your password if you ever forget it. Therefore, if you have forgotten your password you will need to reset it using the link on the login page.

Once you have clicked the reset link enter your email address and you will be sent a link via email which will allow you to create a new password. This email can take up to 10 minutes to arrive.

What are the access levels on the platform?

Each user of Experience is assigned to one of a number of different access levels which will determine what parts of the platform they can use. This access level will therefore determine whether they would be able to create new surveys, send out SMS messages, which results they could access etc.

The default levels of access on Experience are –

- Administrator
- Report User
- Reports and Data Entry User
- Data Entry User

In addition to the specific user access level each individual account can be further restricted. So, a user's access to reporting can be restricted to specific reports, whilst survey distribution can be restricted to specific methods (SMS, Email, etc)

User Account Type	Dashboard (including Settings)	Survey Delivery	Reports Zone (incl. Akumen)	Administration	Data Entry
Administrator	✓	✓	✓	✓	✓
Report User	✓		✓		
Reports and Data entry user	✓		✓		✓
Data entry User					✓

View Accounts

User Accounts

Search Filter: Type:

Double click to select a user account.

Forename	Surname	Email	Position	Type	Status	Locked	View
Aakash	Mehta	Aakash.Mehta@civica2.com	Test Analyst - TA	Administrator	Offline	Active	Select
Andrew	Jolly	ajolly@zedcore.com	Trac	Administrator	Offline	Active	Select
Andy	Crouch	andy@pantabulous.co.uk	Pansensic	Administrator	Offline	Active	Select
Bartosz	Buda 2	Bartosz.Buda@civica.co.uk	Test Account	Administrator	Offline	Active	Select
Bhargav	Thaker	Bhargav.Thaker@civica2.com	Developer	Administrator	Offline	Active	Select
Mateusz	Buda	Mateusz.Buda@civica.co.uk	DEVELOPER	Administrator	Offline	Active	Select

To view all the existing user accounts in the platform you should go to the User Accounts > View Accounts page. From this page you can see a list of all user accounts currently listed on the platform, both active and inactive. From this page, Administration users can update user permissions on individual user accounts.

To view a user account simply choose the Select button next to the corresponding member of staff.

Simon Kimber Back

User Account Information

Title: Mr

Forename: Simon

Surname: Kimber

Position: Product Manager

Email: simon.kimber@civica.co.uk

Account Type: Administrator

Account Status: Account Active

User Permissions

Patient Surveys Staff Surveys

Surveys: All items checked

Reports: - Restrict Reports -

Access Permissions

Select from Access Features

- Dashboard
- Survey Delivery
- Reports
- Administration
- User Accounts

Delete User Save changes

+ Add Hierarchy Permissions

Using the various text fields and drop-down boxes you can update –

- Title
- First Name
- Surname
- Job Title
- Email Address
- Account Access Level
- Account Status
- Access Permissions

A change is made by either rewriting the text in the relevant box or by choosing an alternative option in the drop down list. Once you are happy with the changes you have made select the Save Changes button and then the Back button to return to the list of users.

Add Account

Administration users of the platform can use this section to grant new members of staff access to the platform.

Create New User Account
Back

User Account Information

Title

Forename

Surname

Position

Email Address

Account Type

User Permissions

Patient Surveys Staff Surveys

Surveys Group

Surveys

Create Account

* Note: Email addresses that are used to set up account's cannot be used on more than one occasion.
 * Note: Upon successful creation of an account, the User will automatically receive an email asking them to complete the set up process by creating a password.
 * Note: User Access Restrictions can be set in the 'Modify User Account' section. Restrictions and Rights will automatically default to 'Basic' level for the Account type upon account creation.

Step 1. Select a title from the drop down menu

Step 2. Type in the member of staff's first name and surname into the relevant fields

Step 3. Add the members of staff's job title

Step 4. Add their email address. This will be the address they use to login and any emails from the platform (such as password resets or automatic alerts) will be sent to

Step 5. Choose the level of access they should receive

Step 6. Choose whether the user should have access to patient and/or staff surveys, or if you wish to restrict to specific surveys select from the survey dropdown box.

Please note, given the large majority of surveys on the platform are patient in nature, by default when creating new user accounts, the Patient Surveys option will be pre-selected. You can also give users access to both sets of surveys if you wish.

Step 7. Select the Create button

At this point the newly created user will be sent an email with details on how to login and create their password. This email can take up to 10 minutes to arrive.

User Account Customisation

Once you have created a user account you are able to then customise the user by updating their access permissions in three ways – hierarchy, reports, and access permissions.

Report Permissions

The screenshot shows the user profile for Simon Kimber. It is divided into three main sections: User Account Information, User Permissions, and Access Permissions. In the User Permissions section, the 'Reports' dropdown is highlighted with an orange box, and 'Survey Summary' is selected. The Access Permissions section on the right shows a list of features with checkboxes: Dashboard, Survey Delivery, Reports, Administration, and User Accounts. At the bottom right, there are buttons for 'Delete User' and 'Save changes'.

Through Report permissions you have the option to restrict users to access only the specific reports that are relevant to them. This may be useful where you have reports for specific audiences that are not required for additional users.

To add a restriction simply select the Reports dropdown (highlighted above) and choose the reports the user should have access to. If you leave this unselected the user will have access to all current and future reports.

Access Permissions

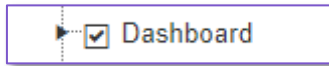
When viewing a user account, you will find the Access Permissions matrix (as shown below) on the right hand side of their user profile. This series of dropdowns, which mirrors the main platform menus, allows you to select individual functions and either add or remove that function from the specified user.

The screenshot shows a close-up of the 'Access Permissions' section. It features a dropdown menu titled 'Select from Access Features' with a list of items: Dashboard, Survey Delivery, Reports, Administration, and User Accounts. Each item has a checkbox next to it, indicating whether the user has access to that feature.

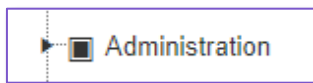
So, for example, if you would like to make a user an Administrator but don't want them to have the Edit Responses function you can now simply selection that option from the Administration menu and this will remove it from that user's profile.

When looking at a user's profile you can tell which permissions they have access to by looking at the following

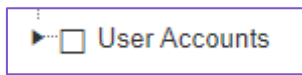
- Where a menu item has a tick as per this example this means the user has access to all the permissions in this section



- Where a menu item has a black box within it this means that the user has some of the permissions, but at least one has been removed



- Where a menu item is blank this means the user has no current access to any of these features



If you choose to upgrade a user account's overall access level (e.g. changing a Report User to an Administrator) it will also automatically assign that user the default user permissions as per the table above. It is also worth noting that when a user is logged in to their own account, they will not be able to assign user rights to functions that they themselves do not have permission to access.

Hierarchy Permissions

With Experience you have the option of adding hierarchy restrictions to individual user accounts, giving you the ability to set a user to only see data for the locations that are relevant to their role. Any user that has no hierarchy restrictions would be able to see Trust wide data for the reports that they have access to.

When you come to add restrictions, you will see a set of tier dropdowns that match the Trust hierarchy. You can make a selection from any level of the hierarchy, with each dropdown also being multi-select. It's worth noting that once you have made a selection in one dropdown, the available options in the dropdowns below are then restricted to just the relevant options.

User Hierarchy Permissions

Directorate	<input type="text" value="- Select Hierarchy -"/>	▼
Service Type	<input type="text" value="- Select Hierarchy -"/>	▼
Service	<input type="text" value="- Select Hierarchy -"/>	▼

↻ Clear
+ Add Restrictions

Once you have clicked the Add Restrictions button all those selected locations will be added to the user account profile and will be shown at the bottom of the screen. These are then the locations that you will be able to select when running reports or accessing functions such as the Data Extract tool. If you wish to remove locations from a user's account profile, you can do this by selecting the tick boxes next to the relevant location (or indeed the tick box at the top of the table to select all) and then click the Remove Selected Permissions button.

×
 New hierarchy restrictions applied

Directorate	Service Type	Service	
Forensics	John Howard Centre - Medium Secure	Aldgate Ward	<input type="checkbox"/>
Forensics	John Howard Centre - Medium Secure	Bow Ward	<input type="checkbox"/>
Forensics	John Howard Centre - Medium Secure	Broadgate Ward	<input type="checkbox"/>
Forensics	John Howard Centre - Medium Secure	Clerkenwell Ward	<input type="checkbox"/>
Forensics	John Howard Centre - Medium Secure	Limehouse Ward	<input type="checkbox"/>
Forensics	John Howard Centre - Medium Secure	Moorgate Ward	<input type="checkbox"/>
Forensics	John Howard Centre - Medium Secure	Morrison Ward	<input type="checkbox"/>
Forensics	John Howard Centre - Medium Secure	Shoreditch Ward	<input type="checkbox"/>
Forensics	John Howard Centre - Medium Secure	Stratford Ward	<input type="checkbox"/>
Forensics	John Howard Centre - Medium Secure	Victoria Ward	<input type="checkbox"/>

◀ 1 2 ▶
Page size: 10 ▼
18 items in 2 pages

↓ Extract Hierarchy Permissions

 − Remove Selected Permissions

Automatic User Account Locking

In the Experience system, a user account is locked if they enter the wrong password multiple times or if an Administrator manually locks the account and makes the account inactive. With this feature, an additional option is available to automatically lock an account that has become inactive. This includes scenarios where there have been no logins or push reports opened for a specified period.

The system runs a daily check on user account activity to determine if the user is still active. If an account has remained inactive (not manually locked) for the last 90 days (default setting), it will automatically be locked. When an account is locked due to inactivity, an email notification will be sent to a designated administrator confirming the locked account(s).

You can define the period of inactivity that will trigger the automatic account locking. Additionally, you can choose the user who will receive daily confirmation emails regarding locked accounts.

Please note that this feature is a customer setting and therefore not enabled by default in the Experience system. If you wish to start using the Automatic User Account Locking feature, please contact our Customer Experience team to assist you in configuring the feature according to your preferences.

Password Reminder

With this feature, you can provide your users with advanced notice of their password expiry date through scheduled emails. This proactive approach will ensure that your users stay informed and can update their passwords in a timely manner.

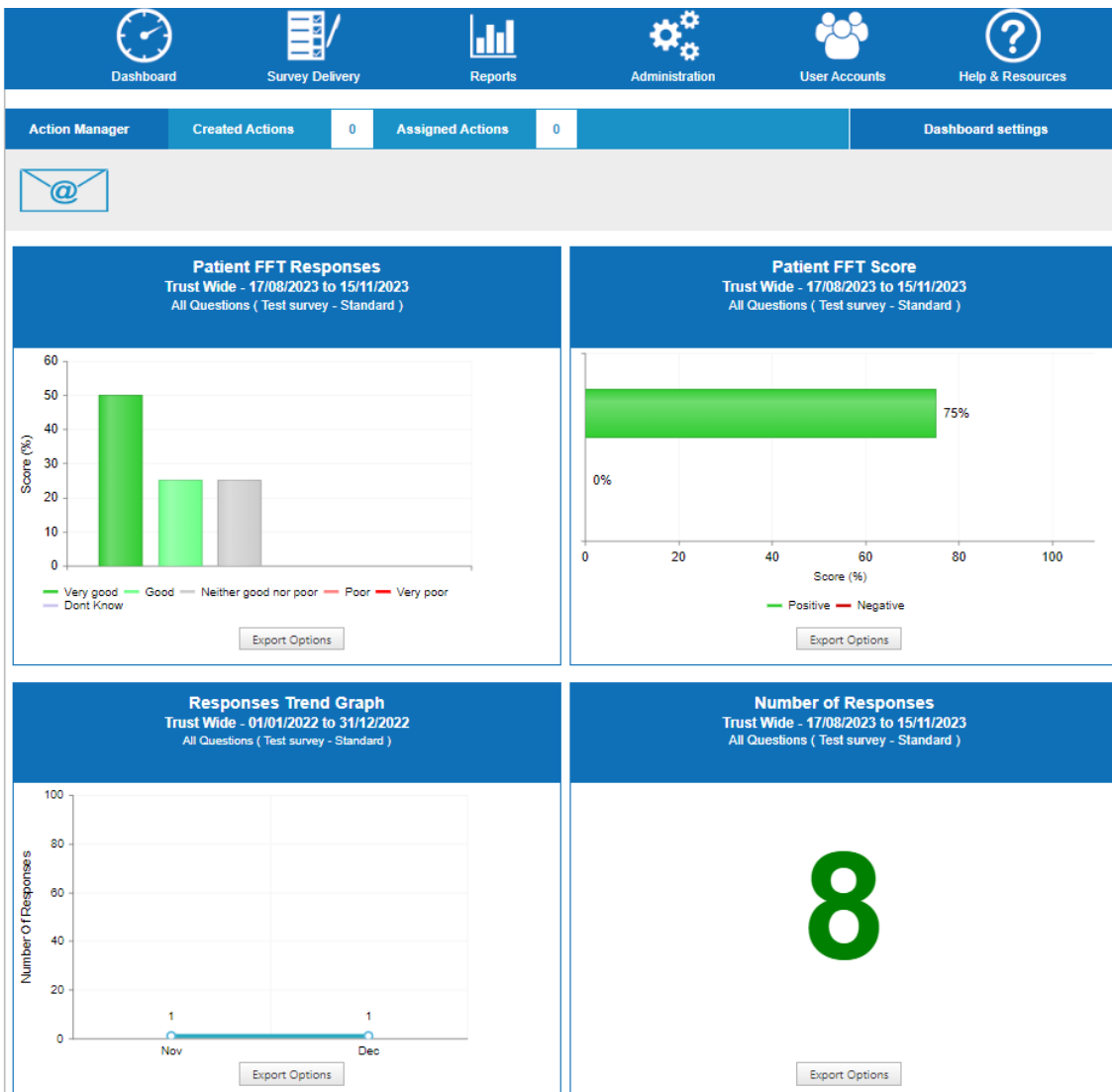
The Automated Password Reminder Emails feature allows you to schedule up to two reminder emails to be sent to your users. The emails are sent in advance of the password expiry date to ensure that users have ample time to update their passwords. The schedule for reminder emails is as follows:

- First Reminder: This email is sent five days before the password expiry date.
- Second Reminder: This email is sent one day before the password expiry date.

Please note that the Automated Password Reminder Emails feature is a customer setting and therefore not enabled by default in the Experience system. If you wish to start using this feature, please contact our Customer Experience team to assist you in configuring the feature settings.

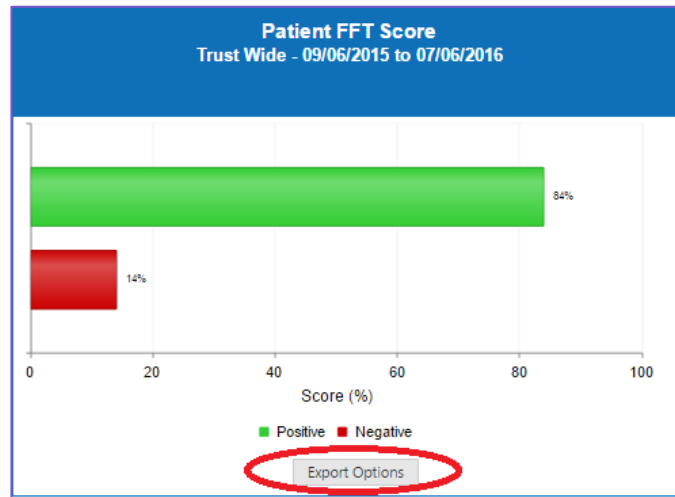
2. Dashboard

When you first login to Experience the first screen you will see (unless your account is set to Data Entry User) is the Results Dashboard showing a series of mini-reports (called 'Tiles'). These reports give you a snapshot view of your survey results in real time. The dashboard can show up to six tiles at any one time and each tile can be customised to each users' personal preferences.



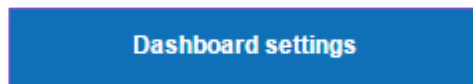
When you first login to Experience you will be shown the default dashboard set up. This configuration has been agreed with the organisation before rollout, so everyone has something to review prior to setting up their own Dashboard preferences.

Each of the report tiles can be downloaded quickly, so you can add them into your own reports. Below each tile there is a button that allows you to download the report as an image file.

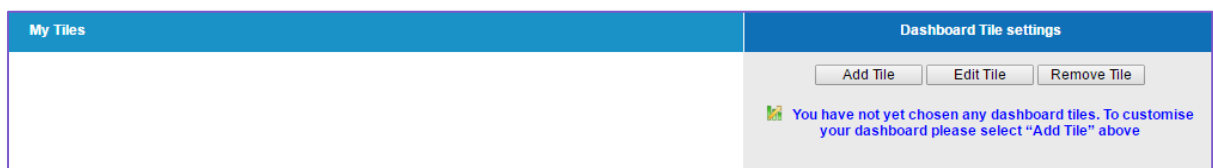


How to customise your own Dashboard

The benefit of this dashboard is the ability for every user to customise their individual dashboard view to show the survey results they're most interested in. To do this, each user will need to go to the Dashboard Settings page which can be reached by selecting the button at the top right of the screen.



After clicking this you'll find the following page:



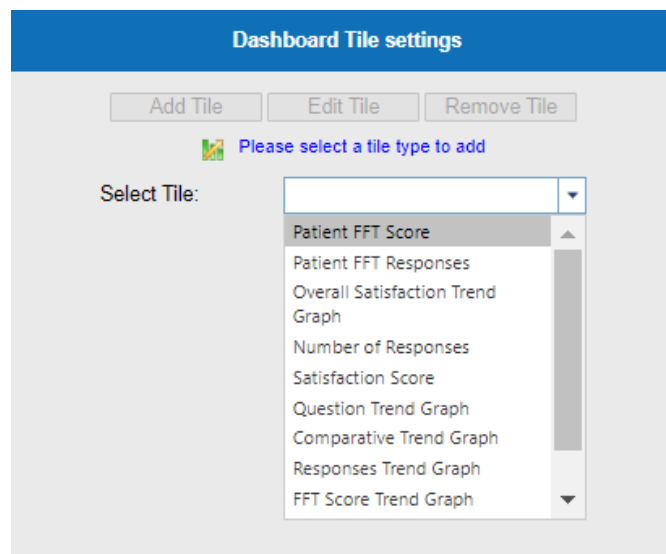
As you have not yet set up your own dashboard the section called "My Tiles" will be empty. The first step is to therefore choose which tiles you want to display on your dashboard. In the initial roll out there are five tiles to choose from and you can choose up to 6 to display at any one time (tiles can be repeated). The available tiles are –

- FFT Score
- FFT Responses
- Overall Satisfaction Trend Graph
- Number of Responses

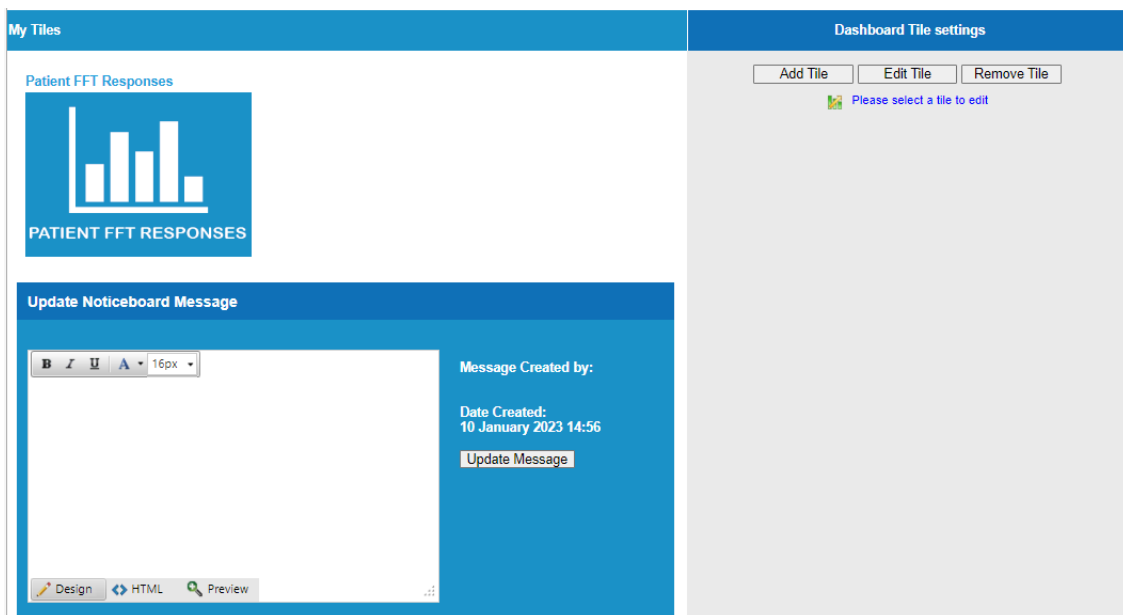
- Satisfaction Score
- Question Trend Graph
- Comparative Trend Graph
- Responses Trend Graph
- FFT Score Trend Graph
- Combined Surveys Trend Graph

Step 1 – Press the Add Tile button

Step 2 – From the drop-down menu choose which of the five tiles you would like to add to your dashboard



Step 3 – To add the tile with its default settings, simply press Done Editing. You will see that the tile is now represented on the left-hand section of the screen (My Tiles)



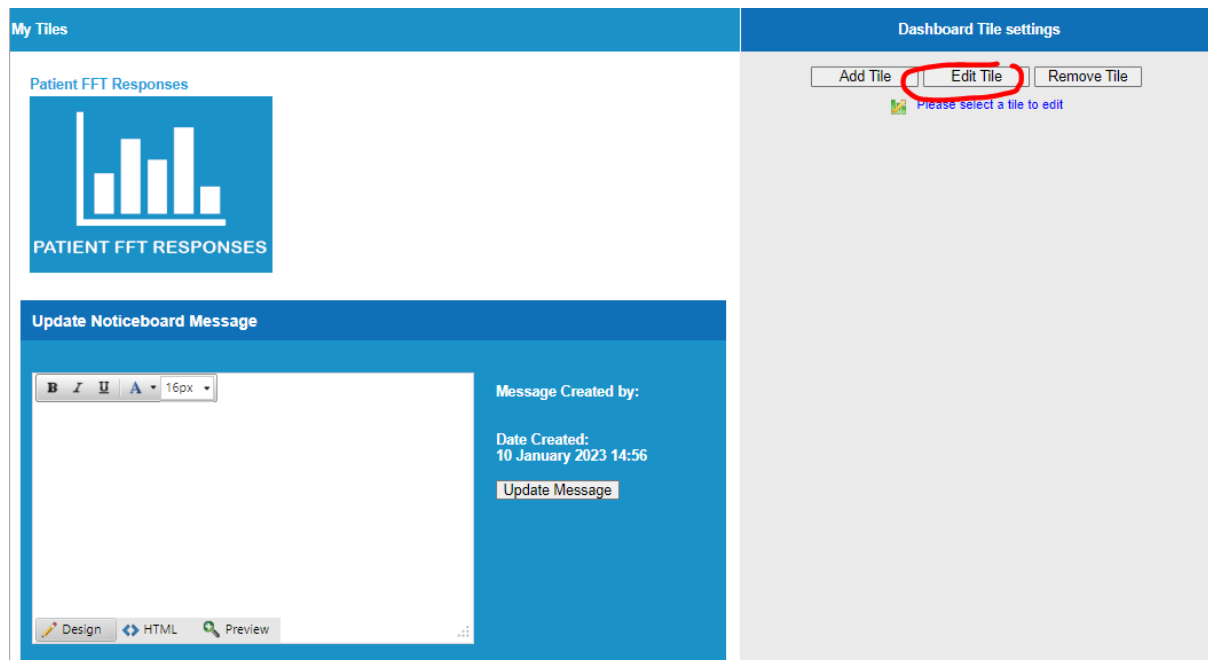
Step 4 – Repeat Steps 1-3 as required to display up to a total of six tiles

How to edit a tile's settings

To edit an individual tile and change the information that the tile looks at simply follow these steps;

Step 1 – From the Dashboard Settings page select the tile you wish to edit from the selection on the left hand side of the screen (My Tiles). The tile should now be highlighted

Step 2 – Select the **Edit Tile** button on the right hand side



Step 3 – You can now change any of the settings that appear on screen.

a) Optional Tile Name – To rename the Tile you can do this here

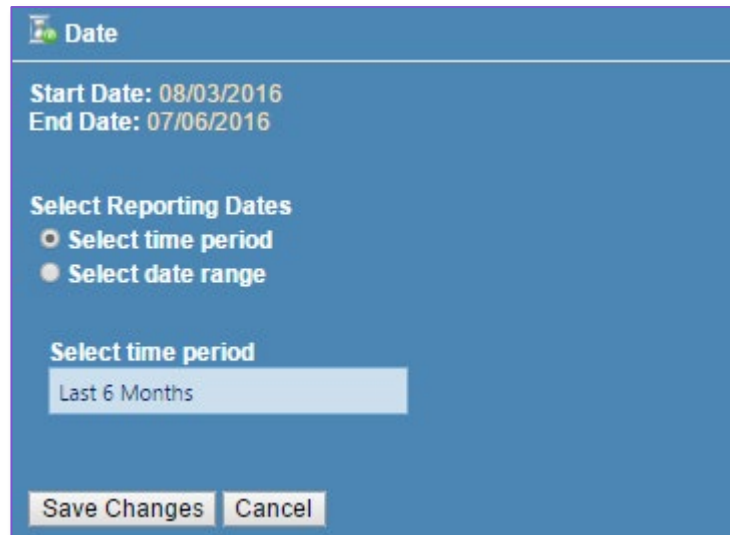
b) Hierarchy Settings – To restrict where the data comes from in your Tile use the hierarchy filters here

c) Survey – To choose which survey(s) or question(s) the tile uses, change the filters here.

d) Date – You can choose to show results for either a selected date range (e.g. 01/01/2016 – 01/05/2016) or a pre-defined period (e.g. last week, last month, last year).

e) Position – The final option is to choose the order the tiles appear on screen

Step 4 – Once you have changed one of the settings make sure to select the Save Changes button



Step 5 – When you have made all the changes you require, press the Done Editing button at the bottom of the page.

As of early 2021, you can now also run Dashboard tiles across multiple surveys, rather than for just one survey at a time. This functionality is a customer setting and so if you would like to use this, please contact the Customer Experience team to turn this on.

Once you have set up your own tiles and chosen your personal preferences, Experience will make this your personal dashboard which you will see each time you login. If you want to change what your dashboard is displaying, you can easily update the page by following the steps above.

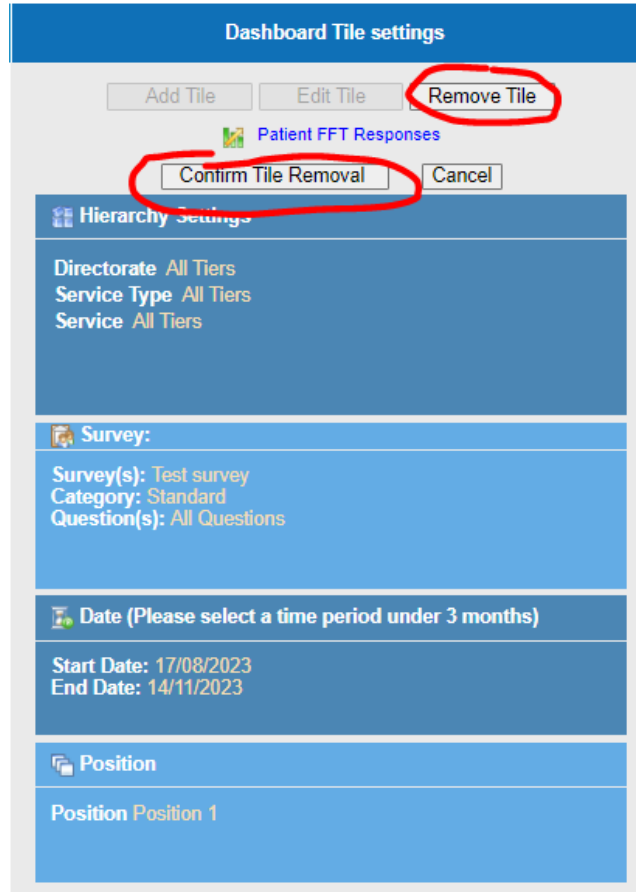
How to remove a tile

If you decide you would like to remove one of the tiles you have added this can be done in the Dashboard Settings page.

Step 1 – Select the tile you would like to remove from the section called “My Tiles”

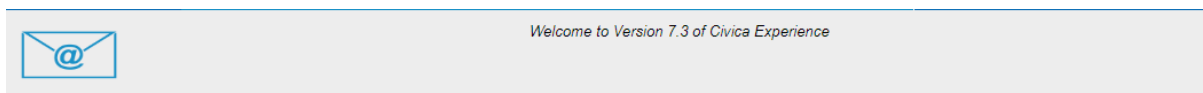
Step 2 – In the section called “Dashboard Tile Settings” select the Remove Tile button

Step 3 – Confirm you would like to remove the tile by selecting the Confirm Tile Removal button



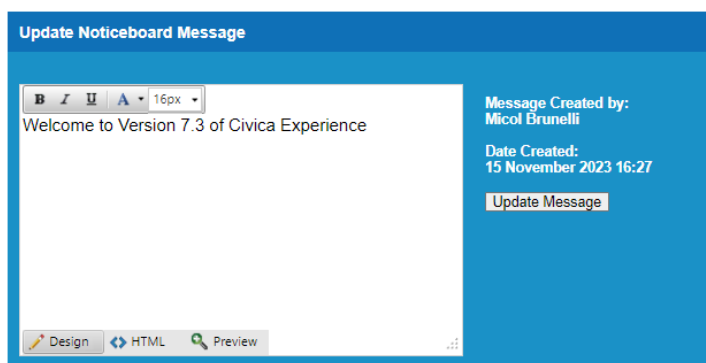
How to Update the Noticeboard Message

One of the additional features of the Dashboard is the Noticeboard. This feature appears on all users' Dashboards and cannot be removed.



This is where a small number of designated users are able to add a message to appear on the Dashboard of all users and keep them up to date with key news/messages.

If you have been given the relevant permission to add a message to the Noticeboard you will find the relevant function on the Dashboard Settings page, shown in the image below.



On this page you will see the current message, as well as details of which user added the message and the date it was created.

If you would like to update the Noticeboard, simply replace the existing message with your new one and select Update Message. This will then display automatically on all others users' dashboards.

3. Survey Delivery

This part of the patient experience tool lets you distribute surveys through a range of methods such as email, online and SMS. Surveys can also be set up in Kiosk mode through this page for completion in a kiosk/tablet.

NHS East London NHS Foundation Trust

Dashboard Survey Delivery Reports Administration User Accounts Help & Resources

Survey Delivery

Step 1: Select Questionnaire and the Survey Type

Survey Group

Survey *

Survey Type *

Step 2: Select related Departments

Directorate *

Service Type *

Service *

Step 3: Select the Method of Delivery and Language Options

Method of Delivery *

Language *

Pre-Survey Options

Step 1. Survey and Survey Type: In the “Survey” and “Survey Type” drop downs, select the appropriate questionnaire, and survey version (such as Standard, Easy Read) that you wish to distribute/complete.

Step 2. Select related Departments: Select the appropriate options in the hierarchy drop downs. If sending surveys out to patients you should select the levels where they received treatment, if setting up in kiosk mode choose the location where the kiosk will operate. All levels of the hierarchy must be selected to carry on.

Step 3. Select the method of delivery: Choose how you would like to distribute your survey from the following options;

- *Online (single)* - fill out a single online survey. Upon completion it will bring you back to the Pre-Survey options page
- *Kiosk* – set the patient experience platform to Kiosk to fill in multiple surveys (for use through a kiosk or tablet based in one location). This will lock the platform into completing the selected survey with data all recorded against the chosen hierarchy entry
- *Email* – Distribute surveys via email. This will send a unique link to uploaded email addresses that can be completed once
- *Text Message (SMS)* – distribute surveys via text message
- *Print (PDF)* – Download an automatically generated PDF of your survey that can be printed

Survey Distribution Methods

Online

To fill out a single online survey chose Online (single) as your method of distribution and select the continue button. You will then be able to fill out the selected survey with data recorded against your chosen hierarchy selections. Upon completion of the survey, you will then be redirected to Pre-Survey options page as show in Section 3.1

Kiosk

To fill out multiple surveys in one session select Kiosk as your method of distribution and select the continue button. You will then be able to fill out multiple surveys without being redirected to the Pre-Survey options page. This means that whatever options you selected before running your first survey would apply to all surveys in this session. This is useful is completing surveys via a kiosk or tablet in a static location.

Email

To distribute surveys by email, select this option as your method of distribution and click continue. You will be able to upload an Excel spreadsheet of email addresses and send out single use survey links. All emails in your spreadsheet will be sent a unique, single use survey link with all data recorded against the chosen hierarchy filters. This link expires once the survey has been completed so cannot be used more than once.

Send survey by E-mail

Your chosen survey: FFT Home birth

Your chosen hierarchy: At Home, At Home, At Home, At Home, Obstetrics,

Choose your template:

Email subject line: MES Experience Platform

Senders domain: no-reply@membra.uk

Send to: **Option 1: Send Sample**

Option 2: Upload attachment

Upload File (Types: xls,xlsx, csv; Maximum size: 250kb)

Step 1. To use this distribution method, you will need your respondent email addresses in an excel spreadsheet (.XLS or .CSV file formats are accepted).

Step 2. Before sending your email, you will have to select which of the pre-written email templates you would like to use from the available drop down list.

Step 3. To send a sample of the email and make sure you're happy with the content, enter an email address into the text box marked Option 1: Send Sample

Step 4. If you are happy with your sample email, upload your spreadsheet of email addresses by selecting Browse under Option 2: Upload attachment and choosing the file you have created

Text Message/SMS

To send out a survey via text or SMS select the text message (SMS) as the method of delivery and select continue. Choose from the Broadcast Method or Question and Answer Method.

The Broadcast Method allows you to send a generic SMS to all chosen recipients. The message will include a link to the survey so that recipients will be able to complete the survey using their smart phone.

The Question and Answer method enables you to conduct the entire survey through SMS each Question and its responses will be sent as a separate text message.

Enter the recipients in the "To" box and select next. Once you are happy with the message that is going out select confirm.

Print PDF

To download a Printable PDF, you can select the method of delivery "Print (PDF)". If a survey has been translated, you will be able to select a language to download that PDF in as well. If the survey is only available in English this option will be greyed out.

Step 3: Select the Method of Delivery and Language Options

Method of Delivery

Language

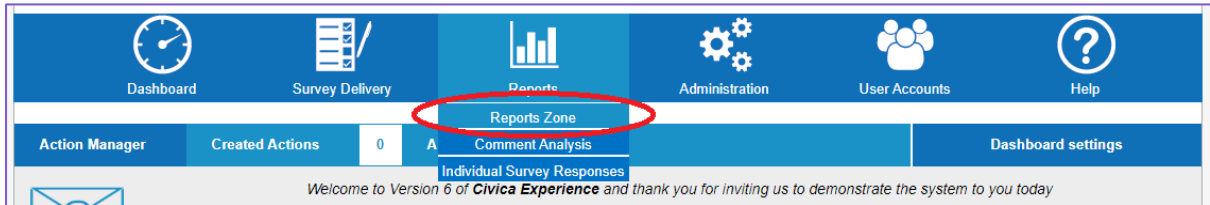
The downloaded survey will have the hierarchy information populated at the top of the first page and in the top left hand corner of the survey you'll find the name of the survey language in English for those that may not be familiar with the language once downloaded.

4. Reports

The reporting element of the Experience platform is the most customised section for each organisation. This section will give a general overview of the main reports that appear in your configuration.

Reports Zone

To access your main body of reports, go to the Reports menu and select the option Reports Zone.



From this page you will then find a drop down with all your available reports. Below in Section 4.2 is a summary of each report and how to use them.

How to Filter Reports

All reports in Experience work on a basis of filtering, allowing you to customise the data you view when running a report. These filters allow you to choose your reporting locations, the surveys, and the reporting time period (the exact filters available will vary slightly depending on each report).

Step 1: Choose your report

Report Options

All comments from selected survey and area including FFT score for specified date period.

Step 2: Select filter options

<p>Hierarchy Filters</p> <p>Directorate <input type="text" value="- Select -"/></p> <p>Service Type <input type="text" value="- Select -"/></p> <p>Service <input type="text" value="- Select -"/></p> <p><input type="button" value="Clear hierarchy filters"/></p>	<p>Survey Filters</p> <p>Survey Group <input type="text" value="Default"/></p> <p>Survey * <input type="text" value="- Select -"/></p> <p>Category <input type="text" value="- Select -"/></p> <p>Question <input type="text" value="- Select -"/></p> <p>Response <input type="text" value="- Select -"/></p>	<p>Date Filters</p> <p>Start Date <input type="text" value="Start Date"/></p> <p>End Date <input type="text" value="End Date"/></p>
---	---	--

*Note. Departments are filtered according to the Reporting Restrictions specified. Reports can take in different parameters which may differ from the available options above

Step 3: Run the report

Run Report

To filter a report -

Step 1. Choose your report from the Report Options drop down box.

Step 2. This will display all the possible filters that can be run on this specific report. If a filter does not appear, that means it is not compatible with this report.

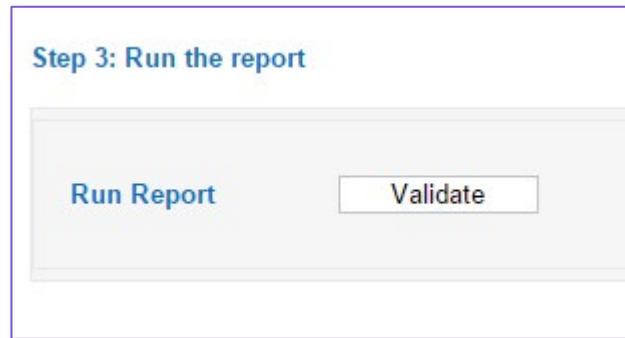
Step 3. Choose the location you want to run your report for, by selecting from the Hierarchy Filters. You do not need to select from all the tier options; if none are selected it will show results for the entire organisation (or all the locations that your account settings permit).

Step 4. Using the Survey Filters choose the survey(s) and category(s) that you wish to run the report for. Where this filter appears, it is mandatory for a survey to be selected. If no survey filter appears, the report you are running will have the surveys pre-selected.

Step 5. Select the date range you would like to view results for by selecting the Date Filters. Leaving the date filters blank will show you all the available data for that survey.

Step 6. Once you are happy with the selected filters, hit the Validate button. If you have incorrectly applied the filters (or not applied one that is required) an error message will appear advising of the action required.

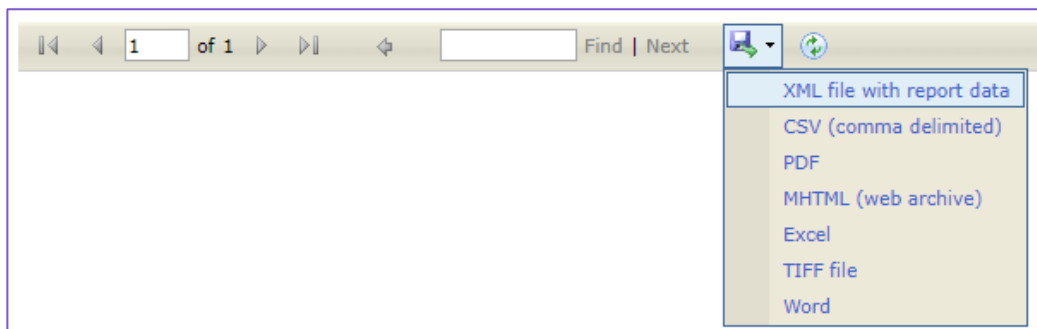
Step 7. If the filters are correctly applied the Validate button will update to say Run Report. Hit the button and the report will open in a new window.



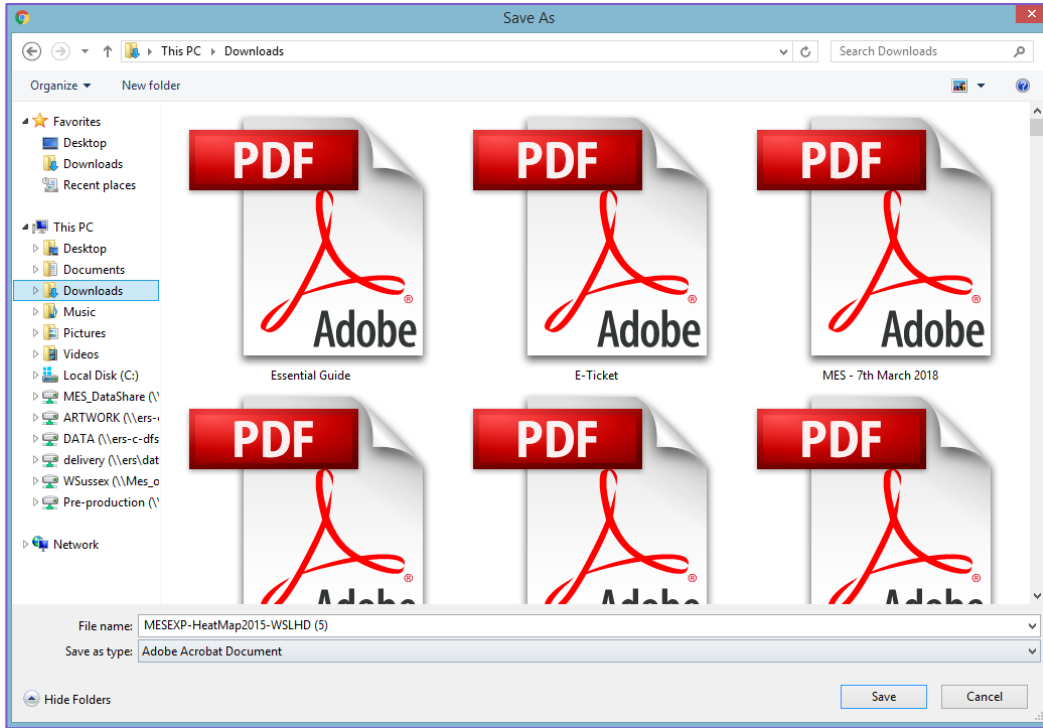
To download a report –

Step 1. – At the top of the report window select the blue floppy disk icon, this will reveal a list of available download formats.

Step 2. – Select your preferred download format (Word, PDF and Excel are generally the most appropriate)



Step 3. – Once you have selected your preferred download format this will then give you the option to name your download and select the file location



Multi-Survey Reporting

By default, when filtering reports you can select one survey at a time. However, the system does have a multi-Survey functionality that can be turned on. This allows the report to be run against more than one survey at a time by selecting the checkbox below and then choosing which survey(s) you want to report on in the dropdowns.

Survey Filters	Enable Multiple Survey Selection <input type="checkbox"/>
Survey Group	- Select -
Survey	- Select -
Category	- Select -

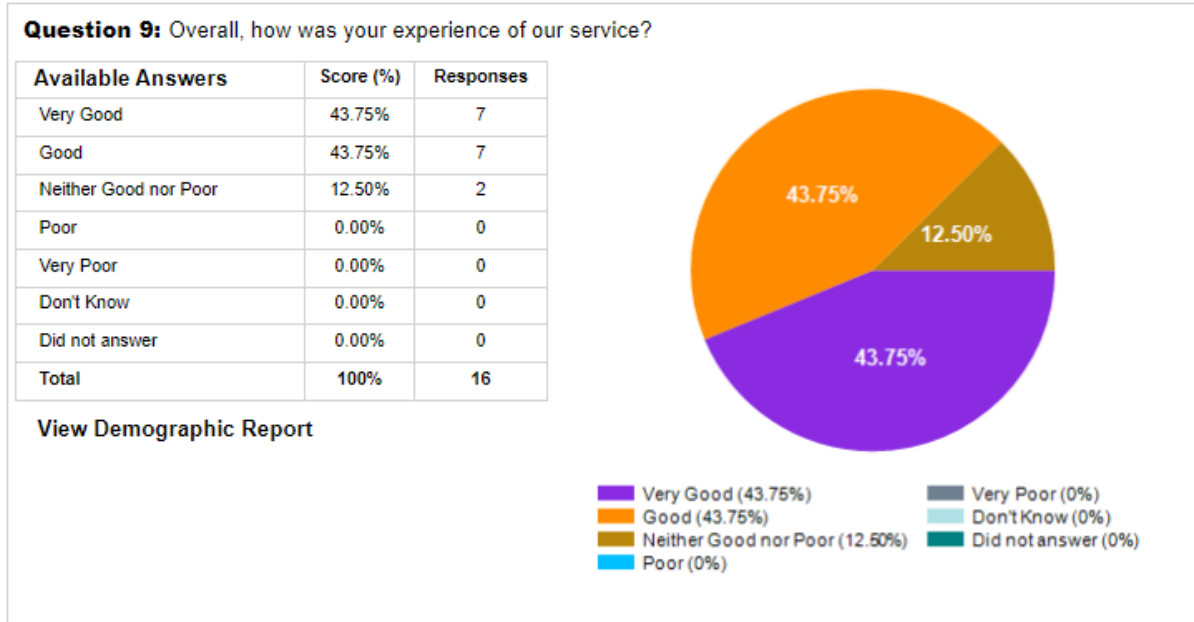
Where multi-survey reporting is selected, the subsequent report will seek to combine any Shared Questions across the surveys. This therefore makes it a valuable feature where your organisation has common core questions in use across a range of different surveys but may want to report on them as a single data set across the organisation.

If you're not currently using the Multi-Survey Reporting functionality but would like to, please raise this with your project manager in the Customer Experience team and we can look at configuring this on your system.

Main Report Types

Survey Analysis

The survey analysis report is one of the standard reports that appears on every platform and can be run against any survey held on the platform (including those that are user created).



The report provides a response breakdown of each question available on the chosen survey (with the exception of qualitative questions) and presents results in two ways – a data table, and pie chart (a bar chart can also be used if preferred).

Comment report

Comments Report

Showing: Breakdown of comments by hierarchy
 Survey: Test survey
 Start Date: 2022-11-05 00:00:00 End Date: 2023-11-16 23:59:59



Results for: All Tiers

Total Comments: 25

Date	Directorate	Service Type	Service	Survey Ref:	FFT Response	Please can you tell us why you gave your answer?			What could we do better?		
15/12/2022	Additions	Additions	P2R Additions	0654207 / 2022-12	Good	Create new action	Publishable	The attention we got from the start everybody was very helpful and very kind showing us the way to go and where to be both the staff who were in the department where we were going to and the rest of the hospital were helpful.	Create new action	Publishable	It took a bit longer than usual.

This report takes all comments from a selected survey and presents them in a spreadsheet. The report can be filtered to show results over a given time period and for specific wards/locations.

In addition to the comments the report also provides date of survey completion, location, survey details and it can also be linked to the FFT result if required. If the survey you are reviewing has more than one comment question each question will be displayed as a separate column in the report.

Additionally, since Version 6 the Comment Report will also now include the option to add a specific comment to the Action Manager by selecting the “Create New Action” link. For more detail on this see the Action Manager section of the user guide.

Heat Map

Heat Map

Showing: Survey results for chosen service, broken down by CCG, Resource Base and Cluster.



- Above benchmark
 - 1-5 points below benchmark
 - More than 5 points below benchmark
- Survey: Test survey
Start Date: 05/11/2022
End Date: 16/11/2023

Directorate	Responses	Service Type							Overall
		The service I used was easy to access	The service was some of my/relevant personal, medical and social history	I felt listened to and understood by the people involved in my care and treatment	There was good collaboration between people involved in my care and treatment	I was given all the information I need about my care and treatment	I know who to contact to speak about my care	I feel safe to raise concerns about my care	
Directorate Score	16	88	89	86	83	83	81	78	84
Benchmark		85	85	85	85	85	85	85	0
Addictions	1	100	100	100	100	100	100	75	96
CAMHS	3	100	75	92	75	75	75	83	82
City & Hackney Mental Health	2	88	100	100	100	100	88	63	91
Forensics	1	100	75	75	75	50	100	0	68
Newham Mental Health	9	81	92	81	81	84	78	89	83

The Heat Map report shows you the performance scores of your quantitative survey questions. Each question has been given a target (or benchmark) and is then scored against it. The heat map report shows these results as a RAG rating (red, amber, green).

- **Red** – Target has been missed by more than five
- **Amber** – Target has been missed by up to five
- **Green** – Target has been achieved

Each question has a maximum score of 100 and the benchmarks are set by the Trust to assess performance against. The scoring thresholds for this report can also be set at a Trust level, so if you would prefer to have the amber threshold triggered by more or less than five this can be changed.

Heat Map Scoring Methodology

The result for each question is displayed in a heat map as a score between 0-100 and is colour coded based on that score performance against the pre-determined benchmark. To calculate the question score we use a standardised scoring methodology. The scoring methodology used by the Heat Maps is -

- What is the **MAXIMUM POSSIBLE** score for this question?
- What is the **ACTUAL** score for this question?

Once we have both the maximum possible score and the actual score, we can divide the two together for the overall score. The final calculation is therefore –

ACTUAL SCORE/MAXIMUM POSSIBLE SCORE x 100 = OVERALL SCORE

To set up a survey for the heat map, each question must therefore have its responses given a value (called response weight). In the example below we have a question with a total of six possible answers. All the answers are given a response weight between 0 (for the worst possible answer) and 10 (for the best possible answer). All the responses between these two are equally divided. Typically, each question might also include what is called a Non-Scoring answer which is not used in the score calculation – this might be a response such as Don't Know.

Question Text	Response (weight)	Number of responses
I was involved in planning my care and treatment	Agree strongly (10)	5
	Agree (7.5)	2
	Neither agree nor disagree (5)	0
	Disagree (2.5)	2
	Disagree strongly (0)	2
	Don't know (-)	1

Once the responses are given their individual weights, we can start to calculate the score. In the example above we can see that there were a total of 12 responses for this question, but one of them (“Don’t Know”) is classed as a non-scoring answer, so the maximum number of scoring responses that can be used is 11.

The **MAXIMUM POSSIBLE** score is therefore 11×10 (10 being the weight for the response “Agree Strongly”) = 110

If everybody had answered “Agree Strongly” to this question, the **ACTUAL** score would also be $11 \times 10 = 110$

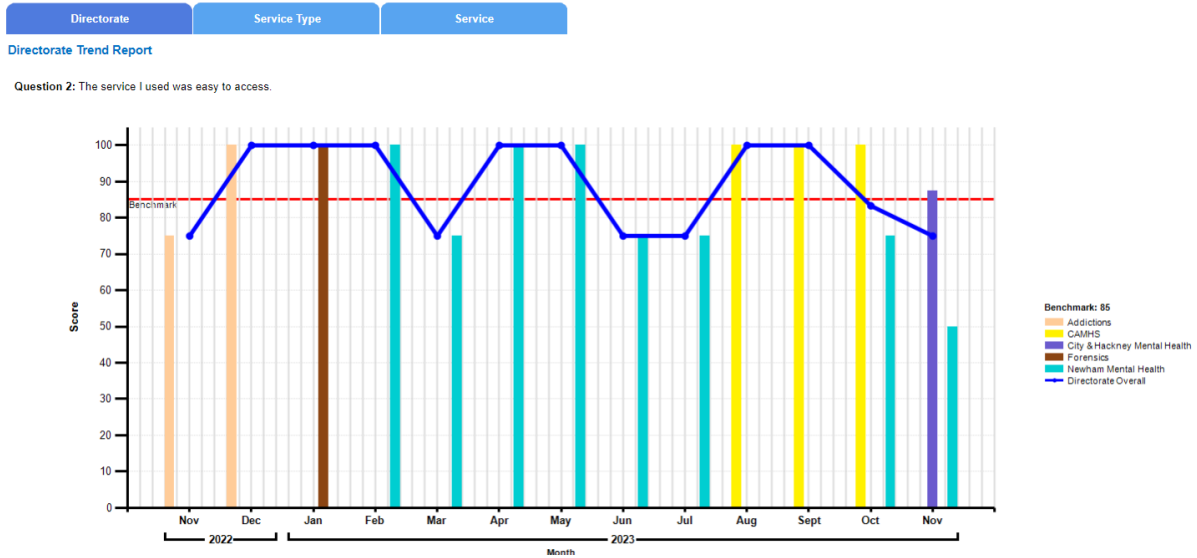
However, in this case the **ACTUAL** score is:

$$\begin{aligned}
 &5 \times 10 \text{ (5 respondents scoring 10) +} \\
 &2 \times 7.5 \text{ (2 respondents scoring 7.5) +} \\
 &2 \times 2.5 \text{ (1 respondent scoring 2.5) +} \\
 &2 \times 0 \text{ (2 respondents scoring 0)} \\
 &= 50 + 15 + 5 + 0 = 70
 \end{aligned}$$

The **OVERALL** score would therefore be $70 \text{ (ACTUAL)} / 110 \text{ (MAXIMUM POSSIBLE)} \times 100 = 64$

Trend Graph

This report allows you to assess your survey results over time by looking at trend lines. This report can work for any survey, but require the customer to provide benchmarks for each question prior to application. These would typically be provided during the set up phase of your project.



The report shows your results for a chosen survey and date range and shows the results at each level of the organisation’s hierarchy. Therefore, this report gives you the ability to choose at what level you view your results. Once you have selected the level at which you want to see the results the report gives you a trend graph for each survey question

Feedback Poster

This report is designed to give the Trust a way of presenting survey results back to patients as well as letting patients know this data has been used to make improvements, in the style of a “You Said, We Did” section. The report, which has been designed to match the Trust’s style, runs a little different from standard reports. To do this follow the steps below –

Step 1. Choose your Feedback Poster report from the *Report Options* drop down box.

Step 2. Choose the location you want to run your report for, by selecting from the **Hierarchy Filters**. As the report is intended to be run for a single location at a time you can only select a location from one of the dropdowns. Once you have made that choice the other hierarchy dropdowns will be unavailable.

Step 3. Using the **Survey Filters** choose the survey and category that you wish to run the report for.

Step 4. Select the date range you would like to view results for by selecting the **Date Filters**. We generally recommend Feedback Posters to be run monthly, but you can choose any period you wish.

Step 5. Once you are happy with the selected filters, hit the **Select Comments** button.

Step 6. Most Feedback Posters include a section for positive comments and negative comments, and these can be selected here. All the comments that match your filters will be displayed on the left hand side of the screen, and once you have selected a comment you can add it to either the positive or negative section by selecting the relevant button in the middle of the screen. (The number of comments per section will depend on your specific report)

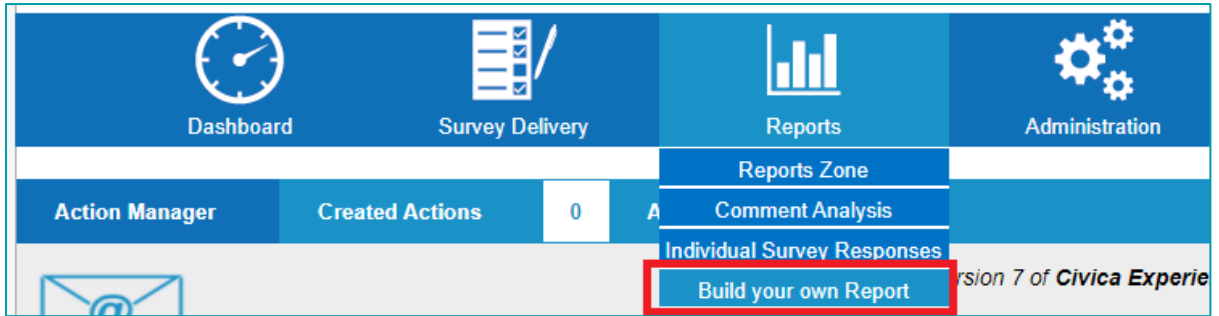
Step 7. The final option is the “You Said, We Did” section. Each text box is a free field where you can write an example of previous patient feedback and then what was done to address this issue. Whatever you write in this section will also be added to the Action Manager as a record of the “You Said, We Did” actions.

Step 8. If the filters are correctly applied the Validate button will update to say Run Report. Hit the button and the report will open in a new window.

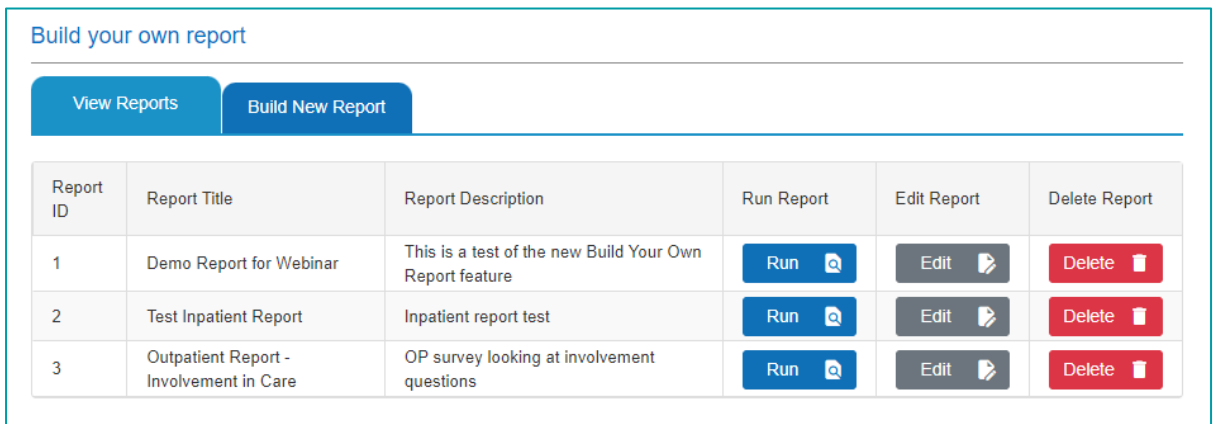
Build Your Own Report

In addition to the pre-built reports available through the Report Zone, with Version 7 we have introduced the first version of our new reporting engine which will allow users to create their own report templates within the Experience system. These templates can then be filtered by hierarchy and date and saved

for future use by other users. This new reporting tool can be found in the Reports menu as shown below.



When you first open the Build Your Own Report tool, you'll find a table containing the report templates you have already created, with the option to run a report, edit the report options or delete a report template.



How to build a new report template

When creating a new report template the first step is to select the “Build New Report” tab and then enter some basic details for your template. This includes giving your report a title, description (optional) and then assigning logos to your report header. The logo selection mirrors that of your survey selection, so any new logos that are added to your surveys are also available to these new reports.

Build your own report

View Reports
Build New Report

Report Title

Report Description

Report Logo Right

MES Logo ▼

Report Logo Left

Leave Blank ▼

Save Report

Once you have saved the initial report template you are then able to build the report by adding a number of reporting components, there are 8 different components for you. Depending on feedback and future assessments we aim to add additional components with future Experience upgrades.

Report Components - Simon Test Report 1

+ Add New Component
← Back

Component ID	Component Name	Survey Name	Component Type	Order	Edit Report	Delete Report
14	FFT vs Confidence in Staff Trend Graph	Inpatient Survey	Line Chart	+ -	Edit	Delete
15	FFT vs Confidence in Staff Cross Tab	Inpatient Survey	Cross Tab	+ -	Edit	Delete
12	FFT vs Confidence in Staff	Inpatient Survey	Stacked Bar Chart	+ -	Edit	Delete
13	FFT Analysis - Inpatient	Inpatient Survey	Donut Chart	+ -	Edit	Delete
16	Food Rating	Inpatient Survey	Bar Chart	+ -	Edit	Delete
17	Involvement in Care and Kindness and Understanding	Inpatient Survey	Column Chart	+ -	Edit	Delete
18	Noise at Night	Inpatient Survey	Pie Chart	+ -	Edit	Delete
19	FFT vs Confidence in Staff	Inpatient Survey	Stacked Column Chart	+ -	Edit	Delete
21	Inpatient Survey - Involvement in Care	Inpatient Survey	Column Chart	+ -	Edit	Delete

Cross Tab

A key feature of the new reporting tool is the Cross Tab component. While at present we can have cross-tab functionality in reporting such as the Demographic Reports this is a static offering in that we have to agree in advance which questions which you wish to analyse together. This reporting component allows you to select your survey of choice and then generate a cross tab report against any two selected questions. When reviewing a report in the Cross Tab Build Your Own tool you will now be able to choose either Percentage only or a combined Percentage & Response Count.

Inpatient Survey - FFT vs Confidence in Staff Cross Tab

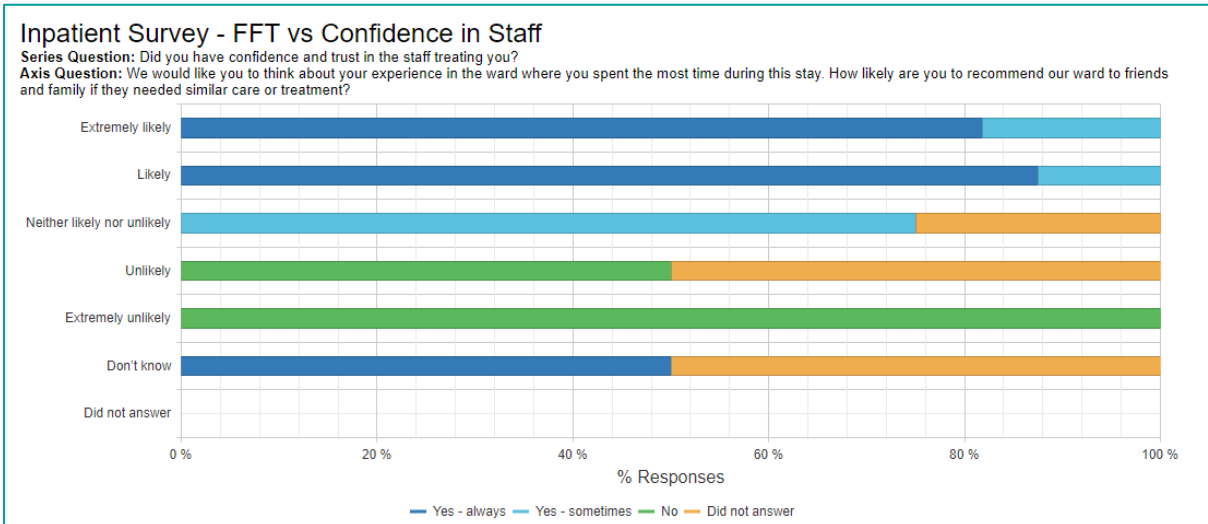
TotalResponses Did you have confidence and trust in the staff treating you? ▼

We would like you to think about your experience in the ward where you spent the most time during this stay. How likely are you to recommend our ward to friends and family if they needed similar care or treatment? ▼

	Yes - always	Yes - sometimes	No	Did not answer	Grand Total
Extremely likely	81.82%	18.18%	0.00%	0.00%	100.00%
Likely	87.50%	12.50%	0.00%	0.00%	100.00%
Don't know	50.00%	0.00%	0.00%	50.00%	100.00%
Neither likely nor unlikely	0.00%	75.00%	0.00%	25.00%	100.00%
Unlikely	0.00%	0.00%	50.00%	50.00%	100.00%
Extremely unlikely	0.00%	0.00%	100.00%	0.00%	100.00%
Grand Total	58.62%	20.69%	10.34%	10.34%	100.00%

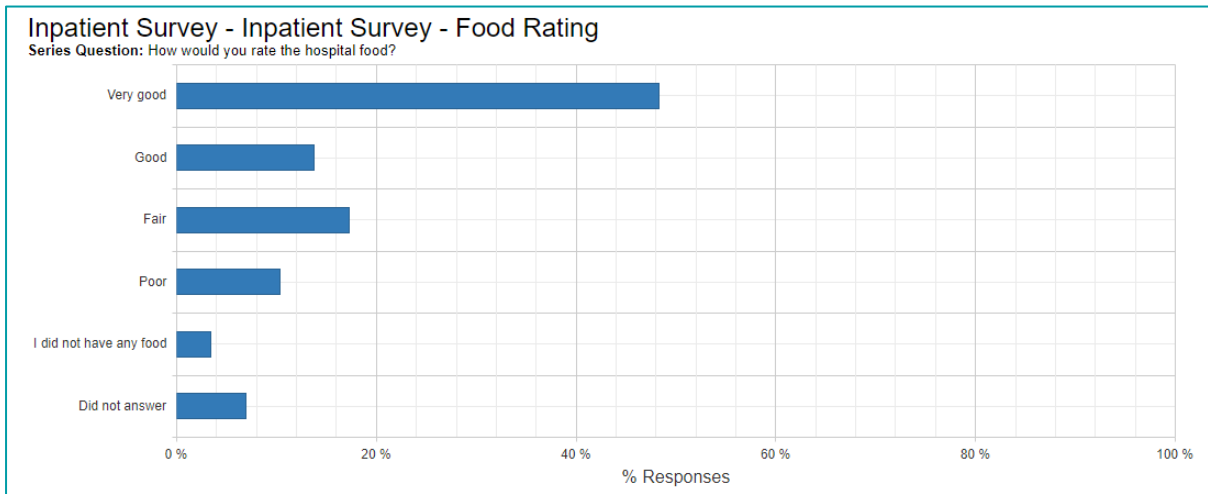
Stacked Bar Chart

A stacked bar chart is another way to view cross-tab analysis, but in a way that is more visual. As with the cross-tab component, the Stacked Bar chart allows you to select a survey and then two questions. Given their differing reporting output you may opt to add both the Cross-Tab and Stacked Bar chart components into one report.



Other components included in the Build Your Own tool include -

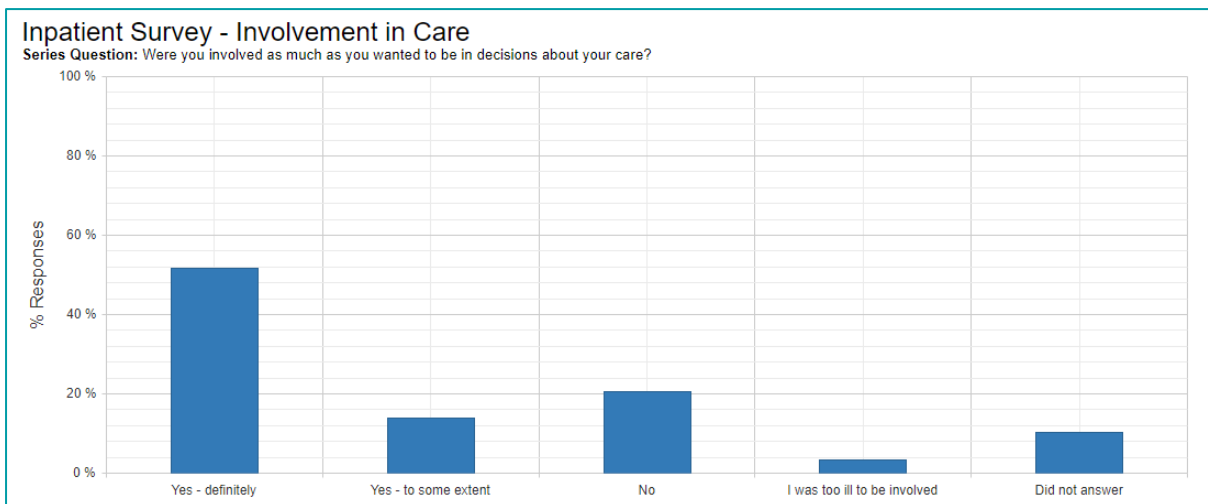
Bar Chart



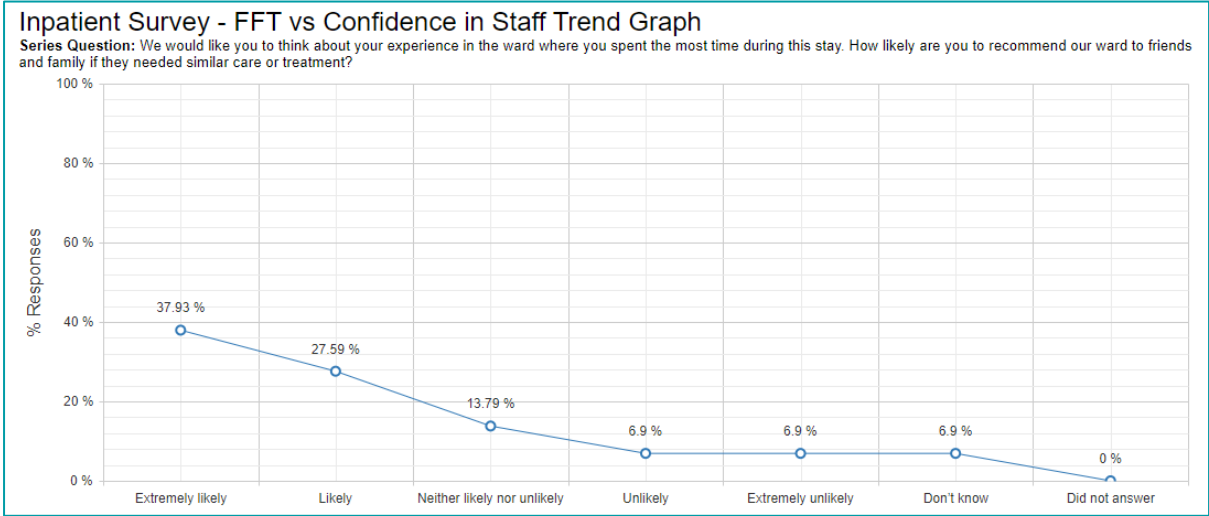
Stacked Column Chart



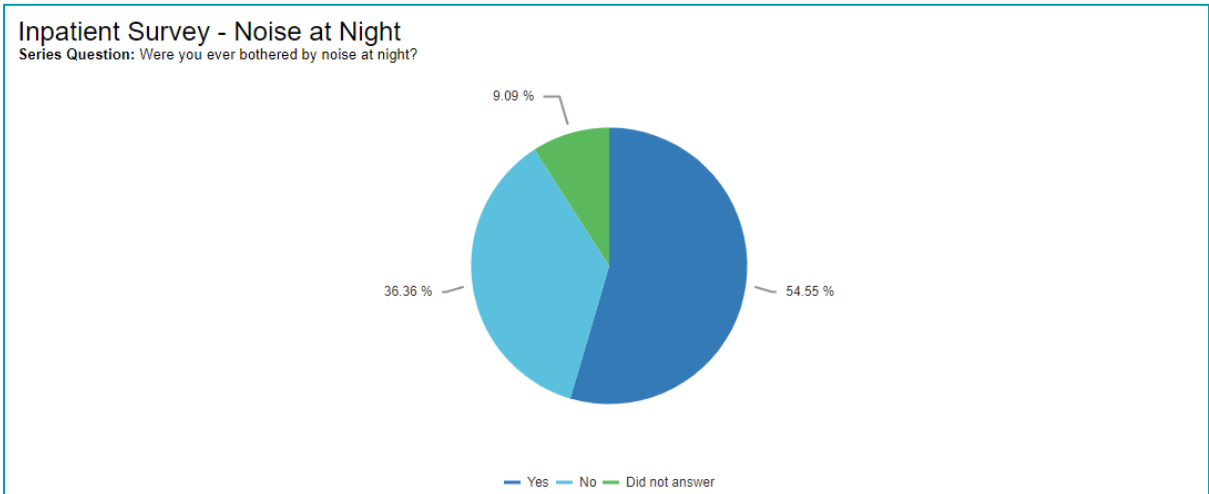
Column Chart



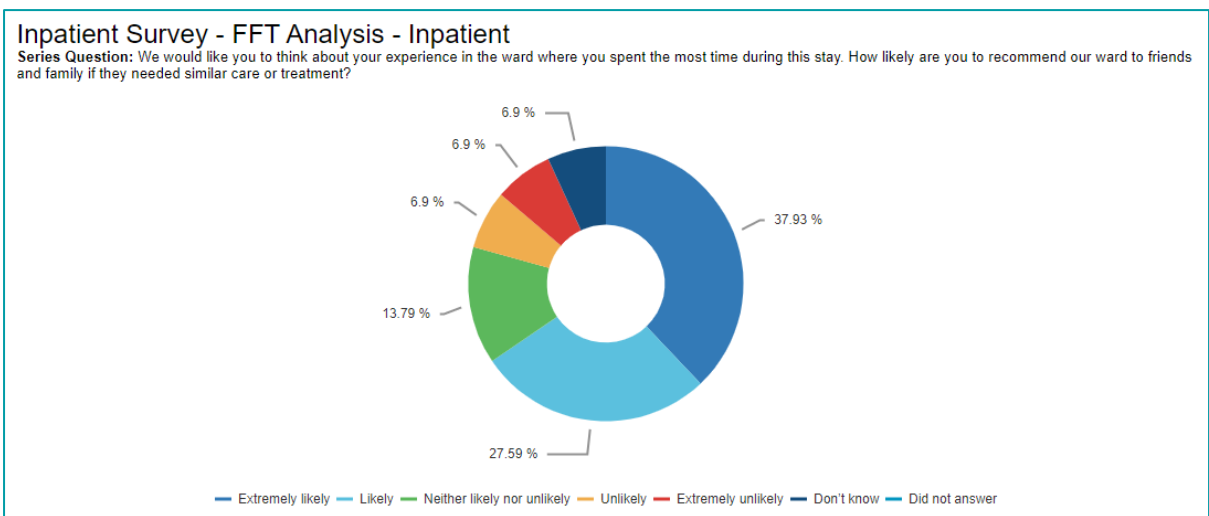
Line Chart



Pie Chart



Donut Chart



Filtering Reports

When you create a report in this new tool you only apply survey settings against the template to give it broad potential usage for your users. When you first go to the run the report it will always default to show data for the Last Calendar month. However, you can quickly and easily update the report filters to apply any hierarchy restriction or to show data for a different time period.

Directorate:
 Start Date:

Service Type:
 End Date:

Service:

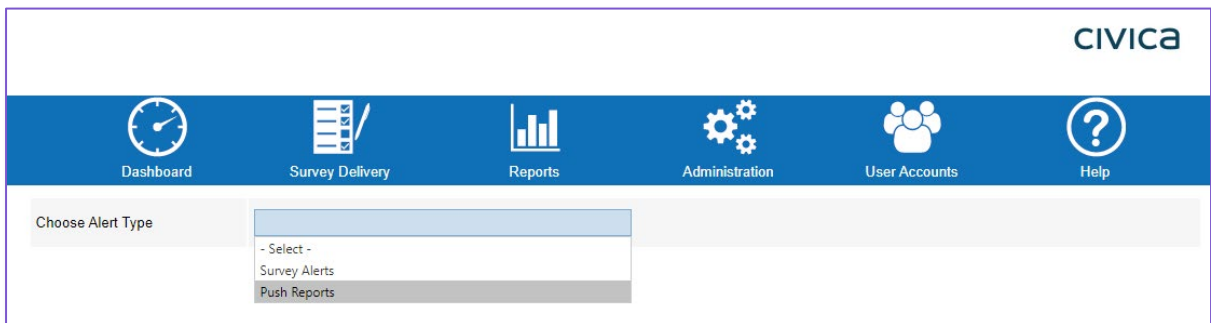
Push Reports and Survey Alerts

The Experience platform includes a Push Reporting tool that allows users to set up scheduled reports to be distributed by email. This allows you to receive data without having to login to the platform. Additionally, survey alerts can be set up to receive real-time emails based on pre-determined criteria such as specified survey responses. Please note that to receive push alerts or reports you must first be set up as a user of the platform.

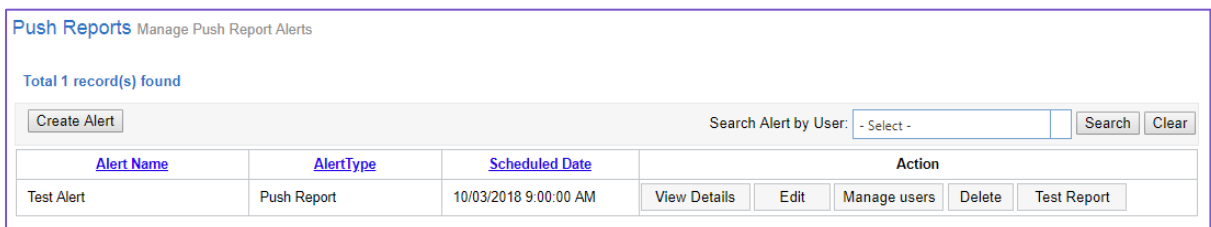
Push Reports

Step 1. To access the push reporting functionality first go to the **Administration** menu and select **Alert Management** from the list of options.

Step 2. You will be asked to choose an **Alert Type**, select the option **Push Reports** from the drop down menu.



Step 3. Select **Create Alert** to add a new push report



Step 4. From the **Choose Report** dropdown select the report you would like to be sent out automatically.

Step 5. Give the Push Report a name in the **Alert Name** field – please note this will be used to name the file that your users will receive so it should clearly describe the report and frequency (e.g. Survey Summary Weekly Report)

Step 6. Reports can be sent in either PDF, Excel or Word format so select your preferred option in the **Report Download Format** dropdown

Step 7. Finally, in this section choose the users that you want to receive the push report. This dropdown is multi-select so you can send it to as many people as you want. To receive a push report, you must be a user of the Experience platform

Step 8. In the **Report Filters** section, you can then customise the specific report that the users will receive. You can do this by selecting from the **Hierarchy filters** (optional), the **Survey Filters** (Survey and Category are mandatory) and the **Time Period** (Mandatory).

Step 9. When selecting Time Period, you will be given a range of options from Last 7 Days to Last Calendar Year. As each push report is sent out in the morning, they should be set up to be sent out the day after the period you wish to review (e.g. on a Monday to see data for the previous week).

Step 10. The final section is where you can select how often the users will receive this report. First select an option from the Recurrence Pattern list – Daily, Weekly, Monthly or Quarterly.

Step 11. Each recurrence option will present you with a range of choices. For instance, selecting Weekly will allow you to choose which day of the week the report should be sent out and whether you would like it distributed every 1 week, every 2 weeks etc.

Step 12. When you have made all the selections press the Submit button

Step 13. If you would like to test a push report to see what your users will receive, you can simply go to the list of Push Reports where you will find an option called Test Report. This will send an email to your email address (as per your user account) like the version below.

Patient Experience TEST push report

Dear Micol Brunelli,

Here is the latest report with your patient feedback from Civica Experience.

Please click on the link below to access your scheduled report.

[Click here](#)

Many thanks,
Quality Assurance Team

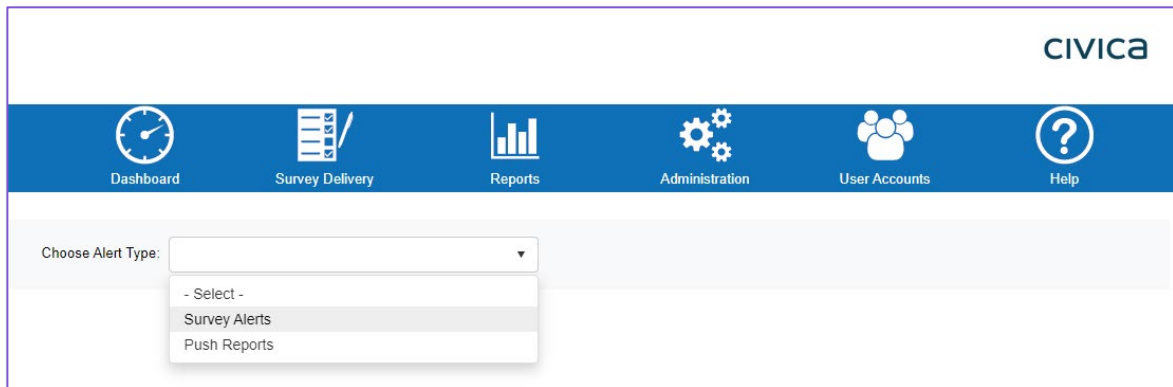
Step 14. These emails (both as tests and as sent to users) have two options for how you access the report. This is an organisation wide setting meaning that all Push Reports will use one of the options below -

- **Password** – Clicking on the survey link opens the users web-browser and requests their email address before allowing to view the report
- **No Password** – Clicking on the survey link will open the users web-browser and automatically download the report into the format requested at the time of set up (PDF etc). This is the default setting.

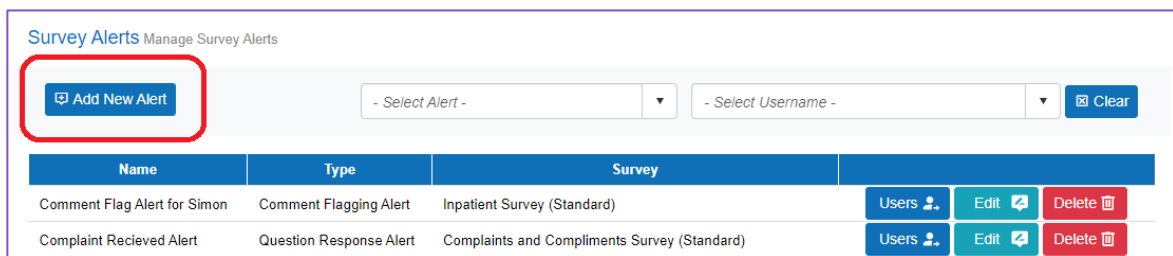
Survey Alerts

Step 1. To access the survey alerts functionality first go to the Administration menu and select Alert Management from the list of options.

Step 2. You will be asked to choose an Alert Type, select the option Survey Alerts from the drop down menu.



Step 3. Select Add New Alert to add a new survey alert



Step 4. Give your alert a name – please note this will be used to name the email that your users will receive so it should clearly describe the content.

Step 5. From the Alert Type dropdown select the alert that you would like to be sent out automatically. There are three to choose from –

- **Completed Survey Alert** (this will send an alert for every single response collected)
- **Question Response Alert** (this will send an alert when a specific survey response is given)
- **Comment Flagging Alert** (this will send an alert when a free-text response is left that includes a flagged term – such as profanity).

Step 6. Finally, in this section choose the users that you want to receive the alert. This dropdown is multi-select so you can send it to as many people as you want. To receive an alert, you must be a user of the Experience platform

Step 7. In the Add Alert Details section you can then customise the alert parameters by selecting the survey, the hierarchy, and the question/response (where appropriate).

Step 8. Finally, you can choose to have this alert also generate a new action in the Action Manager tool. To do this you tick the box that reads “Create Action if alert is triggered”. Doing this will then give you the option to create a threshold for that action (rather than one being created every single time the alert is triggered) and to then set the number of times the alert needs to be triggered before it generates an action for review.

Step 9. When you have made all the selections press the Add button

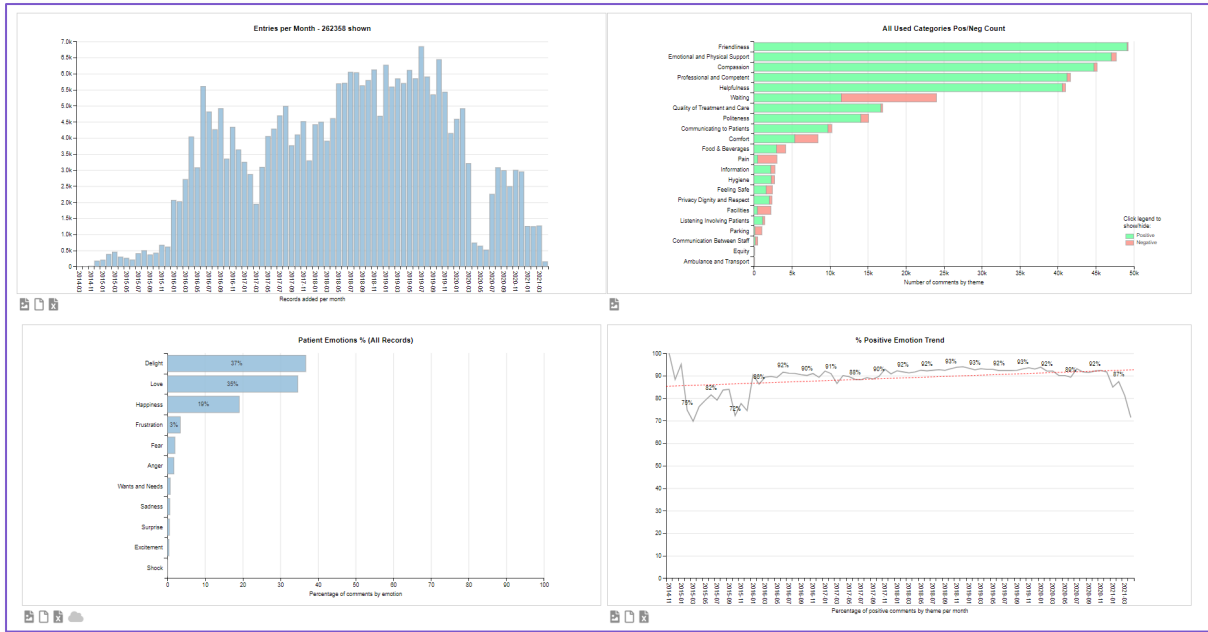
Comment Analysis (Akumen)

One of the unique elements of Experience is the inclusion of Akumen for carrying out comment analysis for your free text comments. We recognise that these narrative comments are where the most valuable data is often held, but it can be difficult to properly assess this information without the right tools.

Akumen is designed to help you take your comment data and identify specific and in context patient insights, giving you the confidence to make meaningful change. Currently Akumen works on a daily cycle with all of your FFT comments reviewed and analysed at the end of each day (at midnight to be precise).

To view this feature, go to the Reports menu and select the Comment Analysis option, you will then be shown the screen below.





There are six theme groups available to analyse your comments. These are:

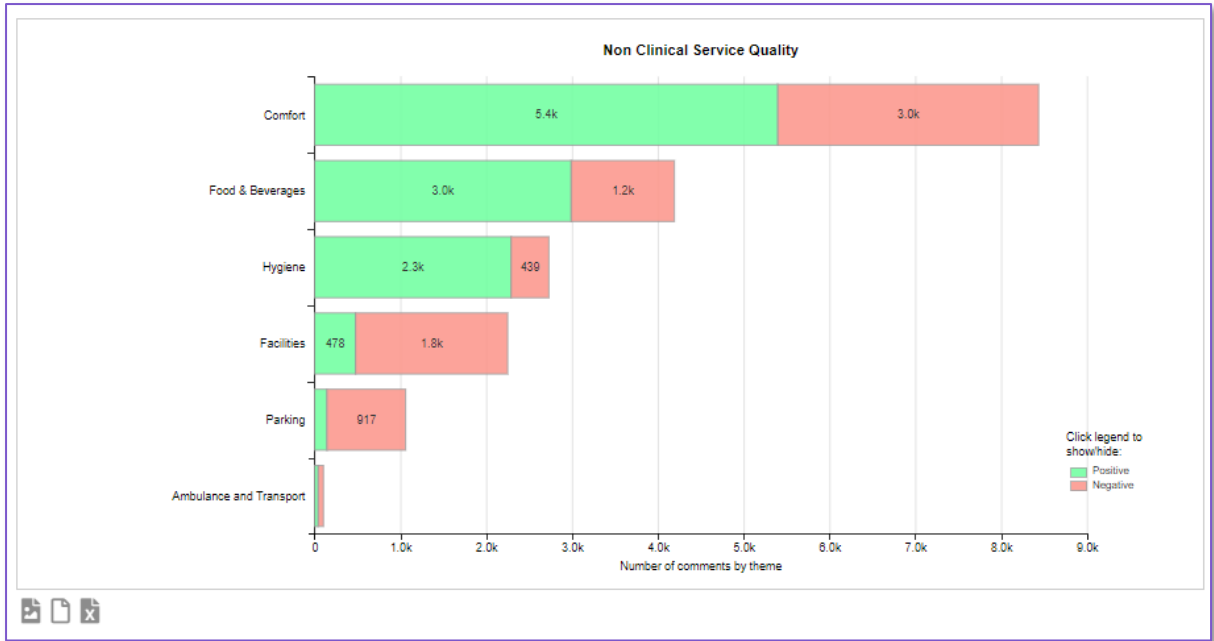
- Patient Emotions
- Non-clinical
- Clinical
- Communication
- Staff Attitude and Capability
- Coordination

In addition to the six theme groups, you also have the option of viewing all theme groups in one go by choosing the All Themes icon.

For each theme group you are provided with a bar chart (with comments broken down by key themes) and monthly trend graph. Both of these can be downloaded by clicking the Export Data to CSV link beneath either chart. You can also save the charts as images by right clicking with your mouse and this will give you a number of options including the ability to save as a JPG or PNG image file.

Theme Bar Charts

Each Theme Group has a bar chart like the one below which shows you the number of positive, negative, and neutral comments by the available Individual Themes (these differ by Theme Group).

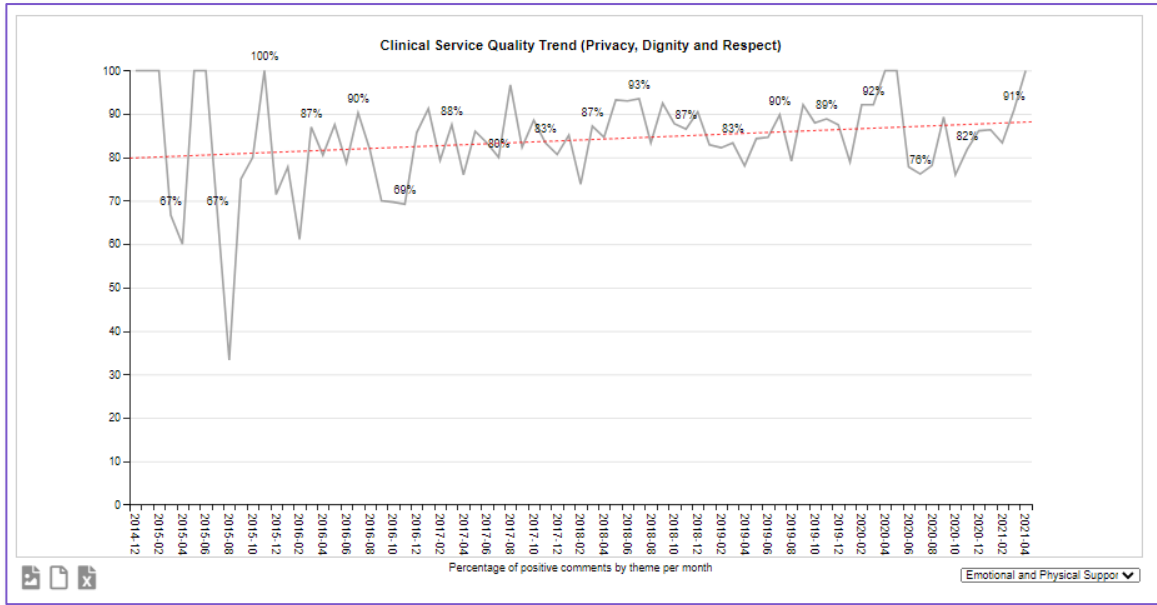


In the example above the Individual Themes for the Non-Clinical Theme Group are –

- Comfort
- Hygiene
- Food & Beverages
- Facilities
- Ambulance & Transport
- Parking

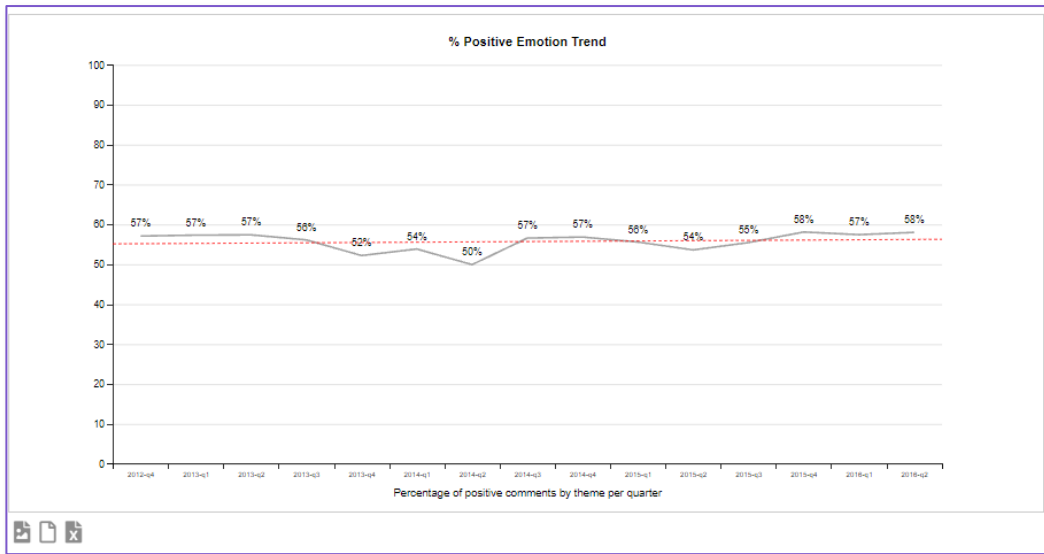
Theme Trend Graphs

Additionally, each of the Theme Groups has a trend graph next to it. Trends can be analysed for each individual theme simply by choosing the relevant option from the drop down box. The trend graph will then show you the percentage of positive comments as a quarterly trend menu. In the example below we can see how the Individual Theme of Emotional and Physical Support has been displayed.

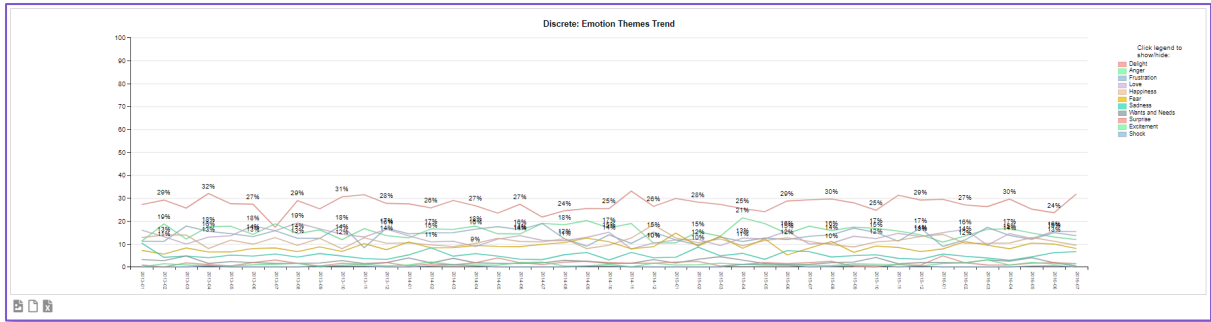


Emotions Trend Graphs

The Patient Emotions theme can be viewed two ways as a trend. The first is called the % Positive Emotion Trend graph and this takes all of your emotion analytics and shows you the total percentage that are classed as positive.



The second available trend graph for the Emotion Analytics is the option below which allows you to see a trend line for each individual emotion. The trend is also interactive in that you can use the trend graph legend to add or remove specific emotions from the chart.

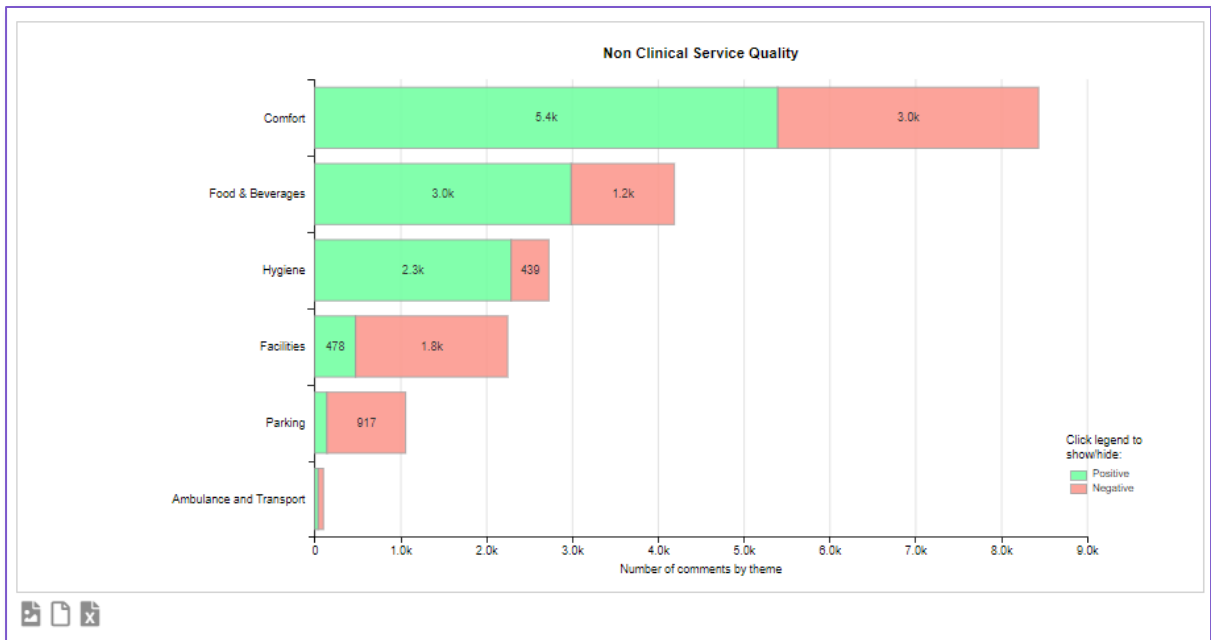


How to Analyse Akumen Data

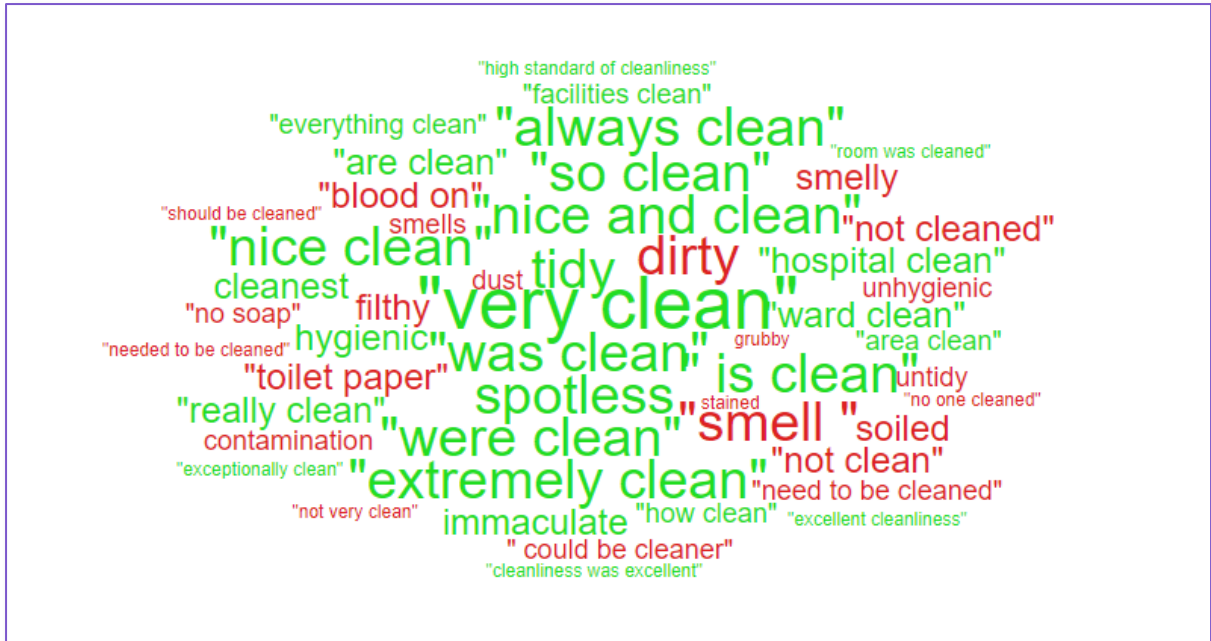
It is possible to further analyse Akumen data through methods like word clouds and this is illustrated in the two examples below.

Example 1: Facilities

Let's start by looking analysing the Facilities theme in the Non-Clinical Theme Group:



To see what people are commenting about the most in relation to this theme you can generate a **Word Cloud** by selecting the Facilities bar in the above chart.



In the resulting word cloud, you can see that the keywords are colour coded to indicate a negative or positive sentiment. In the example above you can see that there are a number of red comments around chairs and seating.

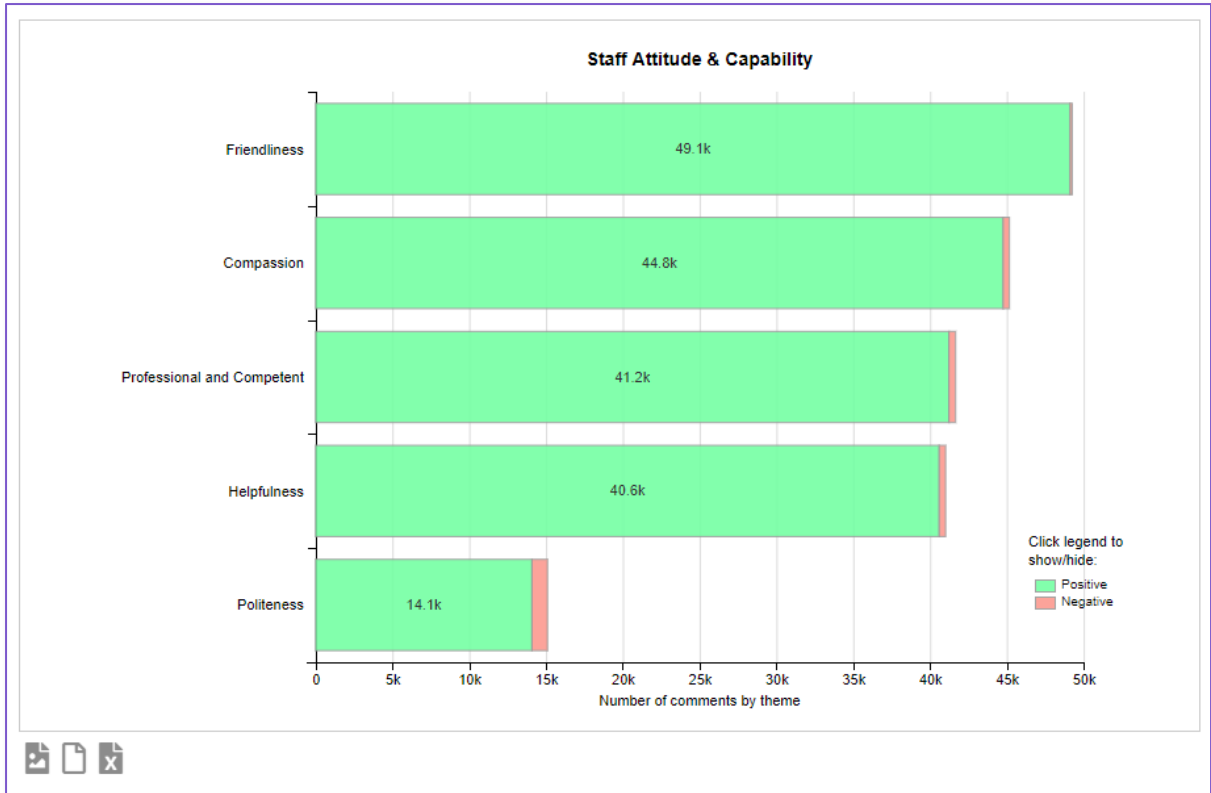
To see relevant comments linked to these keywords you can click on one of the examples such as 'not enough seats'. This will then open up a new tab where you can see the actual comments given by patients, the ward they were recorded against, as well as their reply to the FFT question (if applicable):

Comment
o seems to be permitted meaning there's food packets and spillages everywhere. not enough seats or seats all taken up with small children so pregnant women have to stand. a
area is shoehorned in a windowless area in front of the reception. there were not enough seats for the patients some were standing in the corridor. there are many untidy
t that seems to be not done any longer. the waiting area is tiny and there are not enough seats for everyone. it gets very stuffy and claustrophobic. i dread having to go
a bucket of sick on the floor people sitting on floor in corridor as there was not enough seats . when i finally got seen i explained all to the doc who took my bp checked i
fracture clinic dirty not enough seats x-rays from st mary's `not on the system` when i spoke to a radiographer i was
ltants shortest wait time was an hour longest was 4 hours! far too many people not enough seats always baking hot in there plenty of health tourists though! staff do not

This gives you actionable insights and you can now make an action plan based on this feedback.

Example 2: Compassion

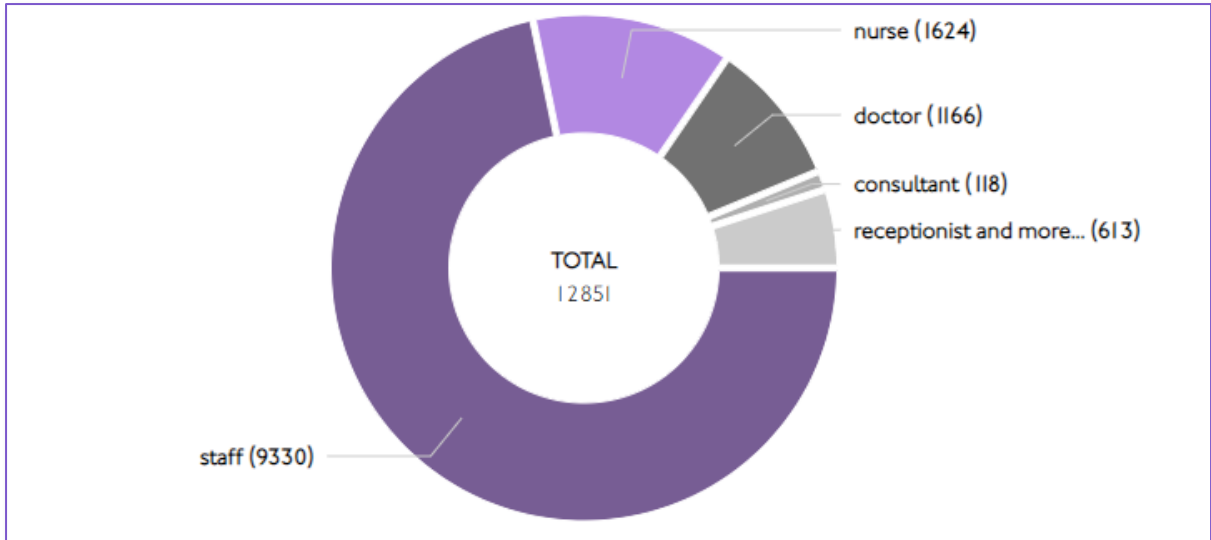
In this second example we are looking for positive feedback from patients that can be fed back to nurses. To start with we open the Staff Theme Group and view the theme bar chart as below



From this theme group bar chart, we can generate a Compassion word cloud by selecting that individual theme from the bar chart.



As Caring is one of the most prominent words used, we can go ahead and click on that keyword. As all of the comments in this case will be about staff's levels of compassion you are also presented with a pie-chart that shows the context of the comment, i.e. for which staff group that patients have used the word 'caring':



In the example above 1624 of the comments (where a staff group is referenced) are about nurses being 'caring'. So, if you want to send the relevant comments to the Director of Nursing for example you can click on the Nurse segment of the Pie-Chart and be shown a list of matching comments.

Comment
the nurses were so caring and helpful i wished i could have stayed longer i felt so w
as greeted by a very friendly nurse who was sympathetic and caring and quickly arranged for another very kind nurse to scan ag
ters sister and i witnessed what was the most compassionate caring and uplifting nursing that we have ever seen in aau I wedne
ters sister and i witnessed what was the most compassionate caring and uplifting nursing that we have ever seen in aau I wedne
e nurses that took my daughters blood were kind patient and caring
asions the children were assessed quickly by a friendly and caring team of nurses
an hour or so and i found my nurse to be genuinely friendly caring and interested in me

5. Surveys

Manage Surveys

This section of the Administration area is where you can manage your survey library, take surveys online/offline, amend survey questions or update survey details.

The screenshot shows the 'Survey Management' page. At the top right is a search bar with 'Search' and 'Clear' buttons. Below is a 'Statistics' section with a table:

Total Surveys	Active	Closed	Archived	Responses (All-Time)	Responses (Week)	Responses (Month)	Responses (Year)
116	43	29	44	61367	2	10	27

Below the statistics are three tabs: 'Active Surveys', 'Closed Surveys', and 'Archived Surveys'. Underneath are filter icons for delivery methods: Online, Kiosk, Email, PDF, SMS, IVR, and Paper Sent Home. The main part of the page is a table listing surveys with columns for Survey Title, Created Date, Expiry Date, Delivery Methods, App Survey, Survey Group, Survey Type, Category, Language, and a Select button.

Survey Title	Created Date	Expiry Date	Delivery Methods	App Survey	Survey Group	Survey Type	Category	Language	Select
A&E Children's Friends and Family Test Survey	24/11/2016	N/A	Online, PDF	No	Default	Patient	Childrens	- View -	Select
A&E Friends & Family Test	13/09/2016	N/A	Online, PDF, SMS	Yes	Default	Patient	Standard	- View -	Select
Demo Sign Language Survey	25/05/2023	N/A	Online	No	Demo Surveys	Patient	Standard	- View -	Select
Family Nurse Partnership	16/09/2016	N/A	Online, PDF	No	Default	Patient	Standard	- View -	Select
Friends and Family Test Example	03/01/2023	N/A	Online, Kiosk, Email, PDF, SMS, IVR	No	Demo Surveys	Patient	Standard	- View -	Select
Haematology Day Unit	15/09/2016	N/A	Online, PDF	No	Default	Patient	Standard	- View -	Select
Haemophilia Centre Visit	15/09/2016	N/A	Online, PDF	No	Default	Patient	Standard	- View -	Select

Each survey that is stored on the Platform is listed on this page, together with some basic details such as –

- Survey Created Date
- Survey Expiry Date
- Survey Delivery Methods
- Survey Category
- Survey Translations
- Survey Group
- Survey App Status (only applicable if you use the Civica Experience App)

Surveys are collated together into three status groups, each represented by a separate tab in the Survey Management page –

- **Active** – Surveys that are currently available for responses. Changes cannot be made to active surveys.
- **Closed** – These surveys cannot accept new responses but are available in reports and can accept survey changes.
- **Archived** – These surveys cannot accept new responses and will not appear in reports. Changes can be made to the survey content.

If you would like to see more information about a specific survey, just choose the Select button next to your required survey. You will only be able to select those surveys which you have the appropriate access permissions to view. From this page you can make a number of changes to the survey while it is still in operation. You can change the survey information, survey conditions like method delivery and estimated time of completion, survey settings like PDF footnote, as well as edit and add survey questions.

To make changes to the survey itself you first need to close (Closed/Archived) the survey as no question changes can be made whilst a survey is live (Active). You can change the status of a survey by selecting the survey status field and changing it from Active to Inactive.

The screenshot shows the 'Modify an Existing Survey' page. At the top right, there is a dropdown menu set to 'Archived' and a 'Back' button. Below this is a navigation bar with four tabs: 'Survey Information', 'Survey Conditions', 'Survey Settings', and 'Survey Questions'. The 'Survey Information' tab is currently selected. The main content area is titled 'Survey General Information' and includes the following fields:

- Survey Title:** A&E Children's Friends and Family Test Survey
- Organisation Title:** Demo System
- Organisation Description:** (Empty text area)
- Survey Description:** A rich text editor containing the text: "Welcome to Guy's and St Thomas' NHS Foundation Trust's A&E Children's Friends and Family Test patient survey. Your feedback will help us to improve existing services and influence our future plans. Please complete this survey to tell us what you think about your most recent experience at the Trust. Your answers are confidential. Thank you for your time." Below the text is a toolbar with 'Design', 'HTML', and 'Preview' options.
- Survey Finish:** A rich text editor containing the text: "All the survey results and feedback are reported every month to staff at all levels – from nurses and doctors to Governors and Commissioners – so they can decide how to make improvements. We also share this feedback and comments with our patients and the public on posters across the Trust and in our monthly updates." Below the text is a toolbar with 'Design', 'HTML', and 'Preview' options.
- Thank you message:** (Empty text area)

At the bottom right of the form, there are 'Save' and 'Delete' buttons.

How to Amend Survey Questions

Once the Survey status has been set to Inactive (Archived/Closed) you can select the Survey Questions tab to update the questions.

The screenshot shows the 'Modify an Existing Survey' page with the status set to 'Active'. The 'Survey Questions' tab is selected in the navigation bar. Below the navigation bar, there is a section titled 'Manage a Survey' with the subtitle 'Add your questions and responses'. Underneath, it says 'Showing Questions for: Accessibility Test Survey'. At the bottom of this section, there is a row of buttons: 'Translations', 'Question Scoring', 'Question Logic', 'Paginate Questions', 'Short Question Text', 'Add Existing Question', and 'Create New Question'.

Step 1. Choose the question you would like to edit and click on the pencil icon on the right hand side



Step 2. From this page you can either edit the question category, title and text, or the response options

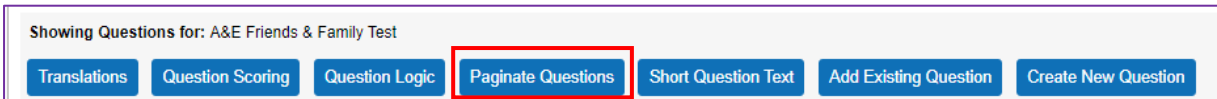
Step 3. To amend a survey response, click either Delete to remove the response or Edit to update the response text

Step 4. You can also use the Up and Down buttons to change the order in which the responses appear.

Step 5. Once you are happy with the changes you have made, click Save to update the question.

Step 6. Select the Back button to head back to the main survey page where you will need to Reactive the survey before it can be used again.

How to Change the Survey Pagination



By default, your surveys are set up to have all questions on one page (with the exception of theme surveys), however there may be instances where you would prefer to split the survey across multiple pages.

Step 1. From the survey management page, choose your survey and then select View Questions

Step 2. Select the Paginate Questions option from the top of the page

Step 3. Wherever you would like a question to start on a new page make sure to tick the New Page box next to the corresponding question.

Step 4. If you would like all questions to appear on one page, make sure all New Page tick boxes are left unticked.

Create a Survey Sort your questions by page Undo Changes Back Save

Showing Questions for: Testing Surveys

Title	Question	Sort Question	New Page	Page
1 A little bit about you	Are you a boy or a girl?	↑ ↓	<input type="checkbox"/>	1
2 After Care	Did a member of staff explain to you about stopping certain medications before your procedure?	↑ ↓	<input type="checkbox"/>	1
3 After Care	Did a member of staff explain to you about the after-care you would receive?	↑ ↓	<input type="checkbox"/>	1
4 After Care	Did a member of staff explain to you the estimated length of your stay in hospital?	↑ ↓	<input type="checkbox"/>	1
5 After Care	Overall, how would you rate the care you received from the Neuro Admission Lounge?	↑ ↓	<input checked="" type="checkbox"/>	2
6 Your care and treatment	Did the doctors and nurses that you saw explain what they were doing in a way you could understand?	↑ ↓	<input type="checkbox"/>	2
7 Date of visit	Date of visit	↑ ↓	<input type="checkbox"/>	2
8 A & E Survey	Do you think the hospital staff did everything they could to help your pain?	↑ ↓	<input type="checkbox"/>	2
9 A little bit about you	This is my age group	↑ ↓	<input type="checkbox"/>	2
10 Appointments	Was your appointment on time?	↑ ↓	<input type="checkbox"/>	2

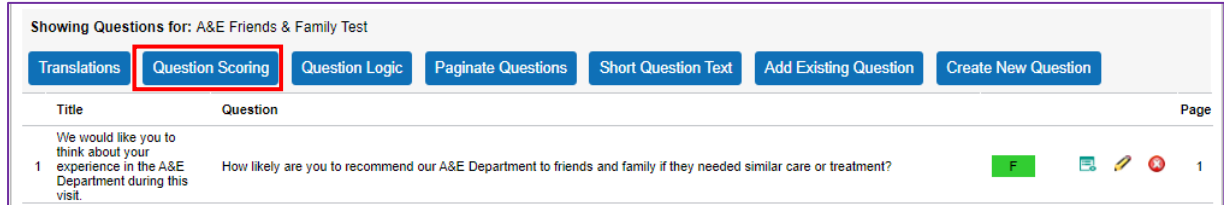
Showing: 10 Question(s)

Step 5. Once you are happy with the page order select the Save button and then the Back button to return to the Survey Management page.

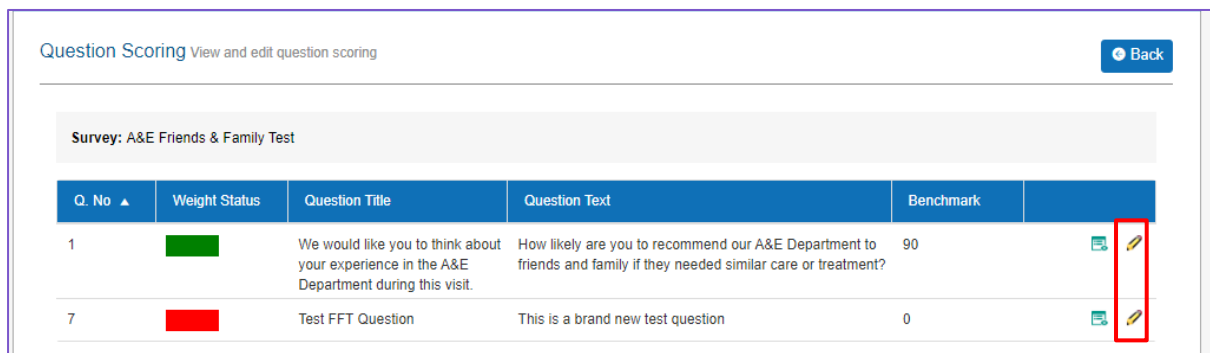
How to Change the Question Scoring and Survey Benchmarks

From the view questions page, you can also update the question scoring used within reports such as the Heat Map and Trend Graph.

Step 1. From the view questions page select the “Question Scoring” option



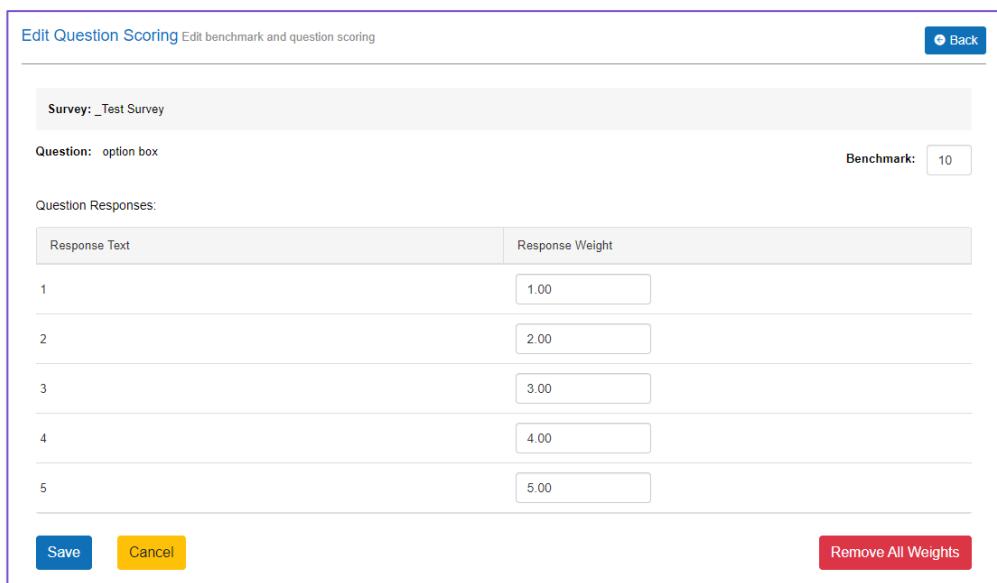
Step 2. Choose the question you want to amend and press the pencil icon on the right hand side



Step 3. To change the benchmark for the question, update the figure in the top right hand corner of the screen. Please note the maximum score here is 100.

Step 4. To change the response weights, update the figures next to each response as required. Please not the maximum score to be given here is 10.00 (to the best response) and the lowest response is 0.00 (to the worst response)

Step 5. When you are happy with your changes press the Save button at the bottom of the screen



How to change the Survey Logo

Main Survey Logo	Civica Teal
Secondary Survey Logo	Civica Black

When creating or editing a survey you will find in the Survey Conditions tab the option to add two logos onto the survey, the main logo in the top right hand corner, and the secondary logo in the top left hand corner. This function allows you to use different logos on different surveys if required. Additionally, if you would like to upload a new logo not already in the system you can do this through the main survey logo dropdown.

When selecting a logo from the Main Survey Logo field you'll find an option **called Upload New Logo** as shown below. Once this option has been selected the new functionality will appear. From here you can choose a file from your computer, give the file a name and upload it. Any files uploaded here will be available for all your system surveys and will appear in both logo fields.

Main Survey Logo	Upload New Logo
Select Image:	Choose File No file chosen
	File can be a JPG or PNG format. Maximum file size 5mb
Display Name:	Logo display name
	Submit

This functionality will support either JPG or PNG format images with a maximum file size of 5MB. Additionally, to ensure the logo fits within the given space on the survey page the Experience system will automatically rescale any images on your behalf.

 
<h3>Demo System</h3> <h4>Antenatal Friends and Family Survey</h4>
<p>Your 36 week appointment...</p> <p>Please tell us what you think and help us improve our service?</p> <p>Your feedback is important to us and will help us improve our services</p> <p>This Survey consists of 5 Question(s) , and should take only few minutes to complete.</p>
<p>Continue</p>

Create New Survey

This feature enables administration users to create new surveys. When creating a new survey on Experience first select “create new survey” within the Administration tab. You will then be able to either create a new survey or copy an existing survey saved in the system.

To create a new survey, you will then need to fill in the below fields:

- **Survey title:** Enter the title of your survey with no special character or space before the alphanumeric character
- **Organisation Title:** The name of the Trust or Organisation
- **Organisation Description:** This will show the default description for your organisation, but this can be edited here
- **Survey Description:** Enter a description of the survey. This information will be shown to all survey participants
- **Survey Finish:** This is the first of two blocks of text that can be added to the Survey Completion page shown to patients when they finish a survey. This will show the default wording for your organisation, but this can be edited here
- **Thank You Message:** This is the second block of text that can be added to the Survey Completion page. This is optional.

- **Main Logo:** The default logo will be set to your organisation logo, but this dropdown will allow you to choose from any logo stored in your system. Additionally, you can also use this menu to upload a new logo.
- **Methods (of delivery):** Select the method you would like your survey to be available for out of
 - Online
 - Kiosk
 - Email
 - Print (PDF)
 - Text message
 - SMS
- **Themes:** If you would like to use one of the Children's or Easy Read Survey themes (e.g. Emoji or Bear, these can be added here). If you only wish to create a standard survey, simply select the standard theme
- **Category:** Select if your survey is to be Standard, Easy read, Parents/Carers or Child. In the majority of cases this can be left as Standard.
- **Staff Survey:** If the survey you are adding is to be used by staff instead of patients please select Yes here. This will ensure the survey uses the staff hierarchy and is only available to those with the necessary permissions.
- **PDF Footnote:** You have an option to show or hide and edit the text of the PDF footnote on a survey-by-survey basis. Once the feature is turned on in the system, the message you have set in the PDF Footnote Message will appear on the output files at the end of the survey. This text field only applies to the PDF versions of surveys and will not appear in online versions.

Once these fields have been completed select start. Your survey will automatically be set as Archive status.

Copy Existing Survey

If you would rather duplicate an existing survey in the system including all questions, settings, weights, translations, and more, you have the option to select any survey (active/archived/closed status) from the list of surveys already created in the system. However, you will still be able to make changes to the survey as though you are creating a new survey, the survey information, survey conditions like method delivery and estimated time of completion, survey settings like PDF footnote, as well as edit and add survey questions.

Create a survey or duplicate an existing survey

Create Survey
Copy Survey

Copy from existing survey

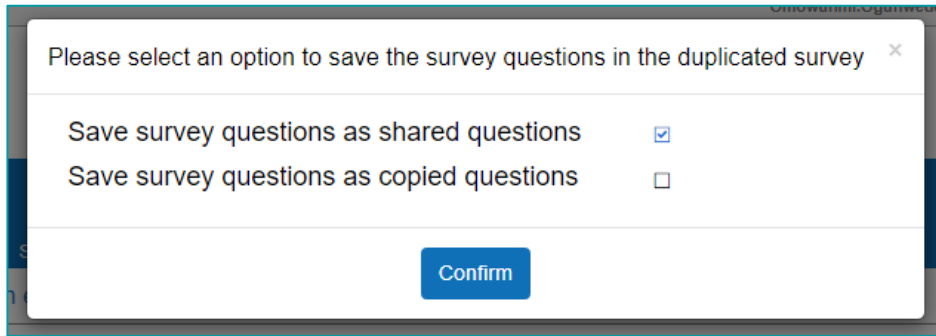
Please select a survey from the list below:

Select Survey ▼

Please note that this will copy all questions and settings from your selected survey, you will be able to make edits to survey settings, conditions and questions if you wish

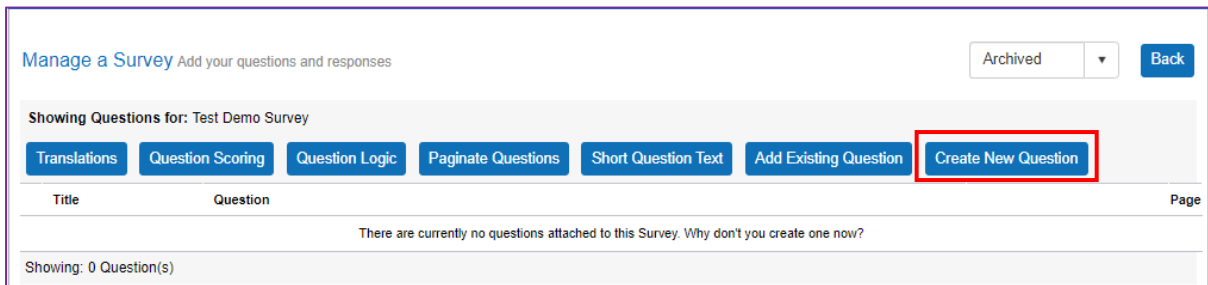
Copy Settings

Once you select the survey to copy, you will be able to save the survey questions as shared or copied questions. If you select the save as shared questions option, the survey questions will be linked to the existing survey. Therefore, any changes to these questions would apply to both surveys.

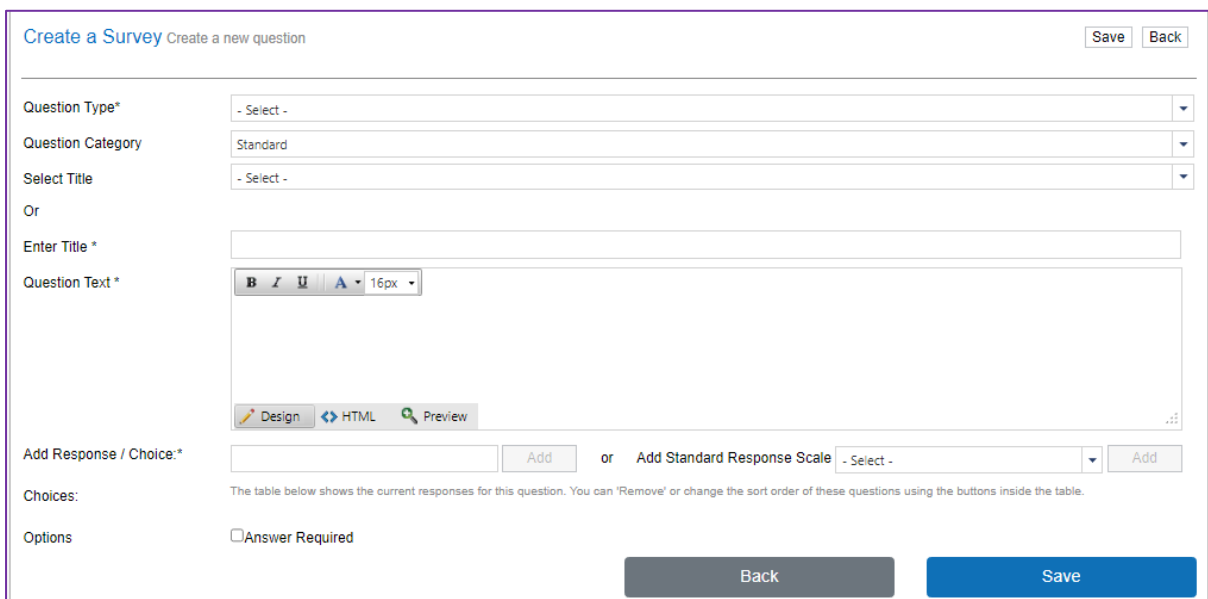


The new survey will automatically be given a title in the format "Original Survey Title_copy." This title will be displayed on the "Modify an Existing Survey" page where you can change/update the copied survey's general information including the survey title that has 'copy' as part of the wording. You can also easily modify the survey settings, conditions, and questions of the newly created duplicate. The duplicate survey will set to a status of Archived, allowing you to make any necessary edits before making the survey Active.

For "Create new survey" option, there will be no questions in your survey, you can then begin adding your questions. You can choose to either add an existing question that has been used in a previous survey or create a new question. For the "Copy Survey" option, you will have survey questions copied but you can edit these or add new questions.



Creating a new question



To create a new question, select the “create a new question” button then fill out the following field

- **Question Type:** Select the type of question you would like. You can choose from
 - Checkbox choice – (Single Answer)
 - Checkbox choice – (Multiple Answer)
 - Option box choice - (Single Answer)
 - List Choice – (Drop Down Menu)
 - Open Text – (Single Textbox)
 - Open Text – (Paragraph)
 - Open Text – (Positive Number Single Textbox)
 - Open Text – (Date Single Textbox)
 - Open Text – (Paragraph without Tick box)
 - Matrix Question – (Single Answer)
 - Matrix Question – (Multiple Answer)
 - Block Text
- **Question Category:** For most questions you can select Standard, however if you are adding an FFT question or a Demographic question you must select the relevant option here for the question to appear in standardised reporting for these two elements.
- **Question Title:** Enter a title for your question. This can be something such as “Friends and Family test” or “a little about you”
- **Question Text:** Enter in the text of your question
- **Add Response/Choice:** Add the responses to your question or you can choose from the standard response scales within the system, from Likert scales to the NHS Friends and Family Test scale each response scale selected will populate the response section with the relevant options. You can reorder the list of responses by using the up and down buttons, Edit and/or Remove responses by selecting the respective delete and edit icons for each response.
- **Options:** Select the tick box if you want to make it mandatory to answer a question.

Question Categories

When adding a new question to your survey you must select a question category, in most cases this will be standard. However, there are a number of additional question categories to choose from some of which have connected actions. Below is a quick summary of all current Question Categories and any connected functionality associated with each.

The screenshot shows a form titled "Modify an Existing Question" for "A&E Friends & Family Test". The "Question Type" is set to "Open-Text-Paragraph". The "Question Category" dropdown is highlighted with a red box and shows "FFT Comment Question" selected. Other options visible in the dropdown include "Standard" and "Pansensic Question". The "Question Title" field contains "Department during this visit." and the "Question Text" field contains "How likely are you to recommend this service to friends and family?".

- **Standard** – This will apply to the majority of your survey questions and has no additional functionality associated with it.
- **FFT Question** – If your organisation uses the Friends and Family Test and has associated reporting, you must use this question category for this question. Doing so will mark this question as an FFT question and make it available to your associated reporting. Any question that doesn't include this category will not appear in that reporting.
- **FFT Comment Question** – This category is only available when adding comment questions to your survey and when adding this you must link it to the associated FFT question (see above). This is so that in reports we are able to display the FFT response alongside the relevant FFT comment. Additionally, any comment question marked with this category will automatically be pushed to Akumen.

The screenshot shows a form with "Question Type*" set to "- Select -". The "Question Category" dropdown is highlighted with a red box and shows "FFT Comment Question" selected. Below it, the "Select Related FFT Question*" dropdown is also highlighted with a red box and shows "How likely are you to recommend this service to friends and family?" selected. Other options in the dropdown include "- Select -".

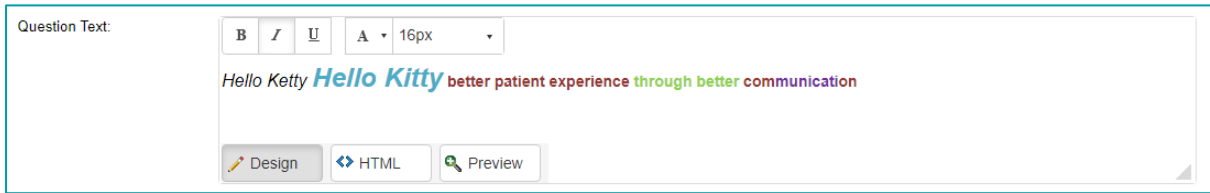
- **Demographic Question** – If adding demographic questions to your survey such as Age, Gender, or Ethnicity you should be selecting this question category. When you select this category, you will then be able to assign an overall demographic characteristic to the question. This is to ensure where the question is used for demographic analysis, we know which category the question is collecting data against.

The screenshot shows a form with "Question Type*" set to "- Select -". The "Question Category" dropdown is highlighted with a red box and shows "Demographic Question" selected. Below it, the "Demographic Category*" dropdown is also highlighted with a red box and shows "Age" selected. Other options in the dropdown include "- Select -", "Gender", "Sexual Orientation", "Disability", "Ethnic", and "Religion".

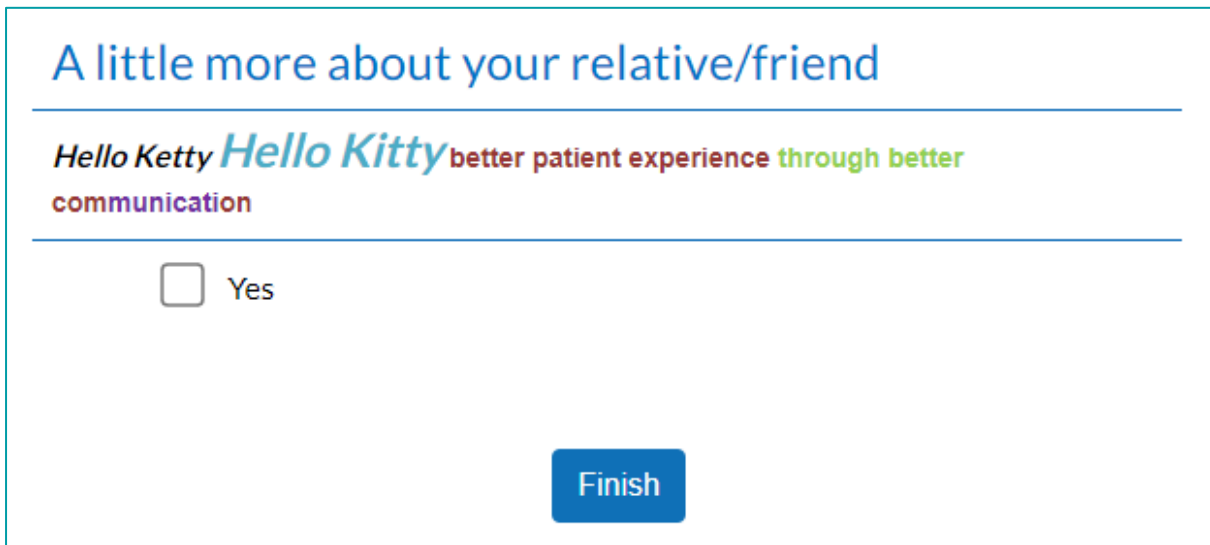
- **Pansensic Question** – If you have a comment question that you would like to automatically feed into Akumen, but is not considered an FFT Comment Question, use this category. It has no other associated action but will automatically feed into the comments analysis dashboard.

Question Formatting

This function allows you to add formatting options when creating new survey questions. This will allow you to introduce paragraphs, different fonts etc into the question text should you require it.



When adding a new question to a survey you can of course add it in exactly the same way you do now, but if you'd like to make any changes you can use the new editing tools to configure your question text as you choose.



Please note, for Trusts using an older version of the Civica Experience App, this feature will not be supported and will require an App upgrade.

Adding an existing question

Create a Survey Add Existing Question(s) to your Survey Back

Survey: _Test Survey

[Add Standard Demographic Questions](#)

Choose your Question Category Friends and Family Test

* Note: Questions that are already part of your Survey will not appear in the selection below

Q. No	Question Title	Question Text
1	Friends and Family Test	We would like you to think about your experience in the ward where you spent the most time during this stay. How likely are you to recommend our ward to friends and family if they needed similar care or treatment? Show Responses Add as Shared Question Copy Question
2	Friends and Family Test	How likely are you to recommend our emergency department (A&E) to friends and family if they needed similar care or treatment? Show Responses Add as Shared Question Copy Question

To add an existing question, select “Add Existing Question” then select your question category from the dropdown, this will display all the questions in your platform that have been created under that category. The dropdown is also searchable so as well as scrolling through the list, you can also type something into the dropdown and all matching question categories will be displayed.

Create a Survey Add Existing Question(s) to your Survey Back

Survey: A&E Friends & Family Test

[Add Standard Demographic Questions](#)

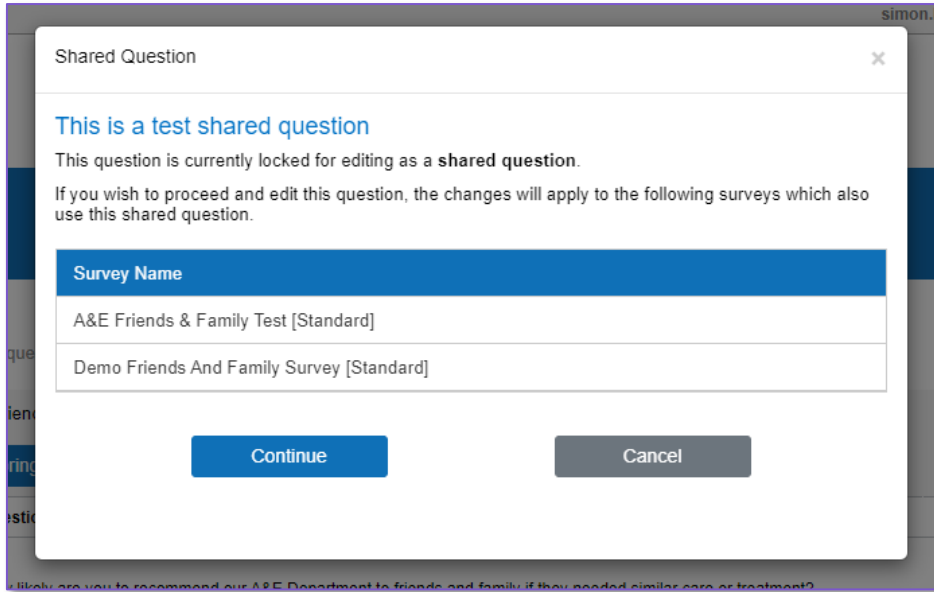
Choose your Question Category Friend

* Note: Questions that are already part of your

- A little more about your relative, **friend**
- Friendly** and Family Test
- Friends** and Family Test
- Your experience as a relative, **friend** or carer
- Your relative or **friend's** care

Once you have identified the question you wish to add to your survey you have two options

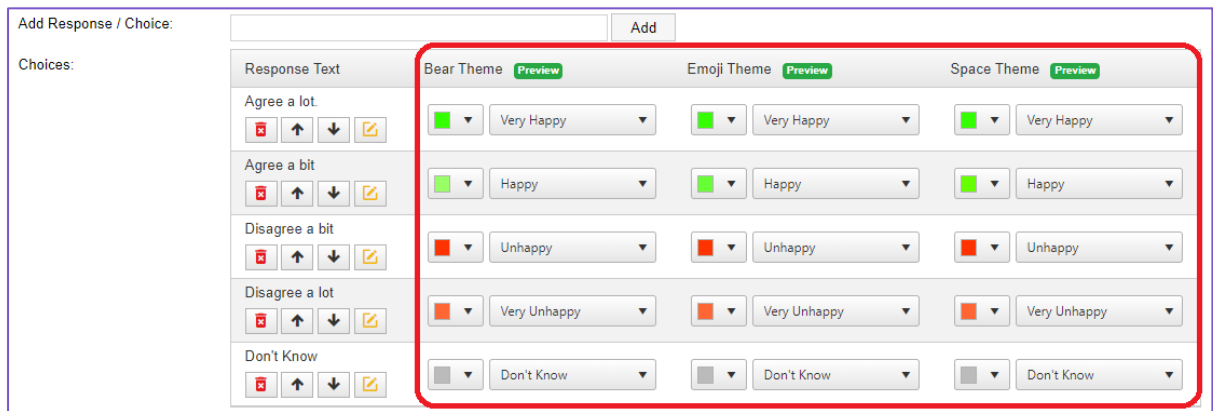
- Add as Shared Question** – This option creates an exact duplicate of an existing question and essentially links the two versions of the question across your surveys. This is useful if you wish to do combined reporting across surveys. Please note that if you edit a shared question in one survey, you are also editing that same question in all other surveys that include it. You will be notified of this prior to making any question edits.



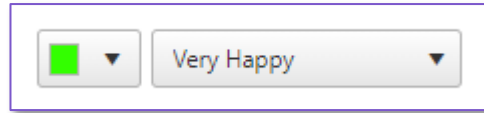
- Copy Question** – This option creates a new version of the question but using the exact same wording of the question and responses. This is a great way to save time when building surveys and allows you to edit the question to customise it in your new survey settings. However as this is not a Shared Question it won't necessarily combine together with the other surveys/versions when running combined reporting.

Adding Themed Questions

When first adding your survey one of the options you will have selected is whether you wanted to use any of the survey themes (Easy Read, Fish, Bear, Space, Emoji). If you selected at least one of these, you would need to follow a few additional steps when adding questions to your survey.



Once you have added your question text and your response text, you'll find in addition to the usual responses section you now have a separate column for each theme you have added to your survey. In this example the survey has three themes, so we see a column for the Bear responses, the Emoji responses, and the Space responses. Because the themes are a more visual way of completing the survey you need to select which images/colours should apply to each response. Therefore, next to each response you'll find two drop down boxes for each response.



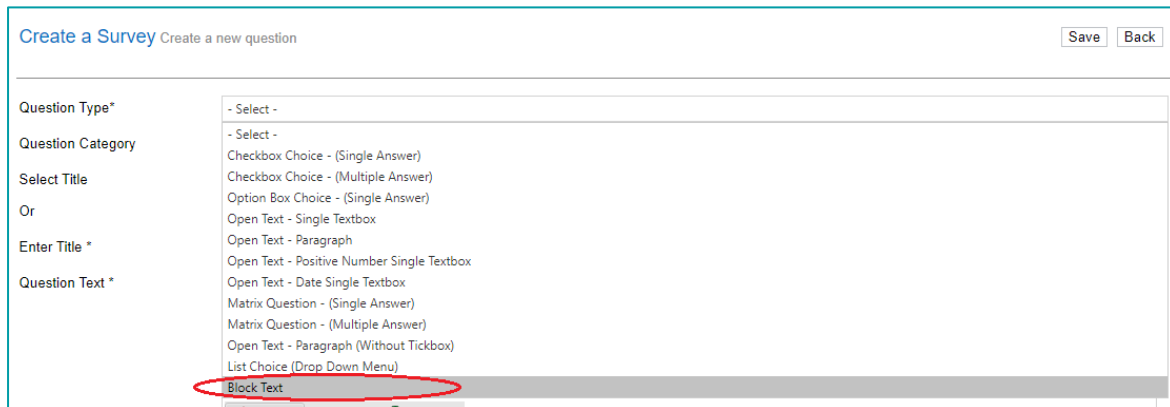
The first option allows you to select the border and background colour for the response. Once you have selected the colour for the first theme the same colour will be replicated for that same response across all themes. The second dropdown allows you to select the image that will be displayed alongside the response text you have entered. Each theme has a range of images to choose from.



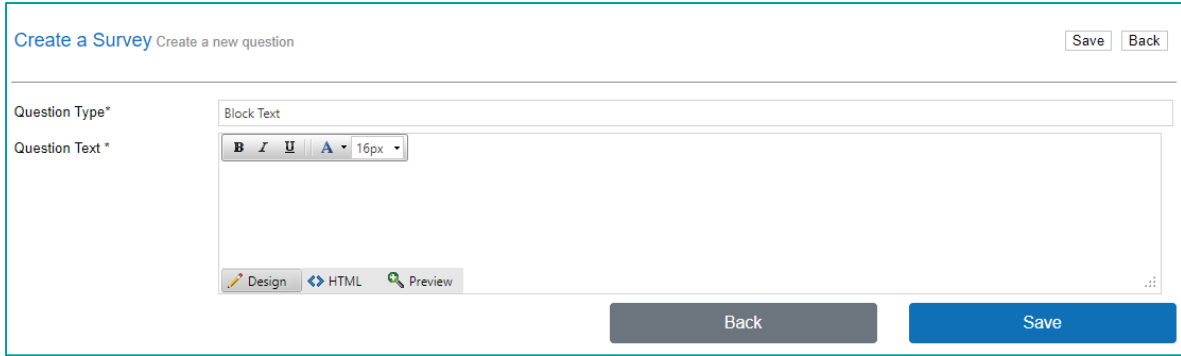
Adding Block Text

Block Text is a new way to insert text into your survey without it needing to be part of a question. This means that it won't appear in reports and get in the way of your data results. It's a great way to add signposts into your surveys or to provide added context ahead of a set of questions. For example, a number of current users like to add some pre-ambule text before demographic questions explaining why these are being asked, this would be a perfect use of the new Block Text feature.

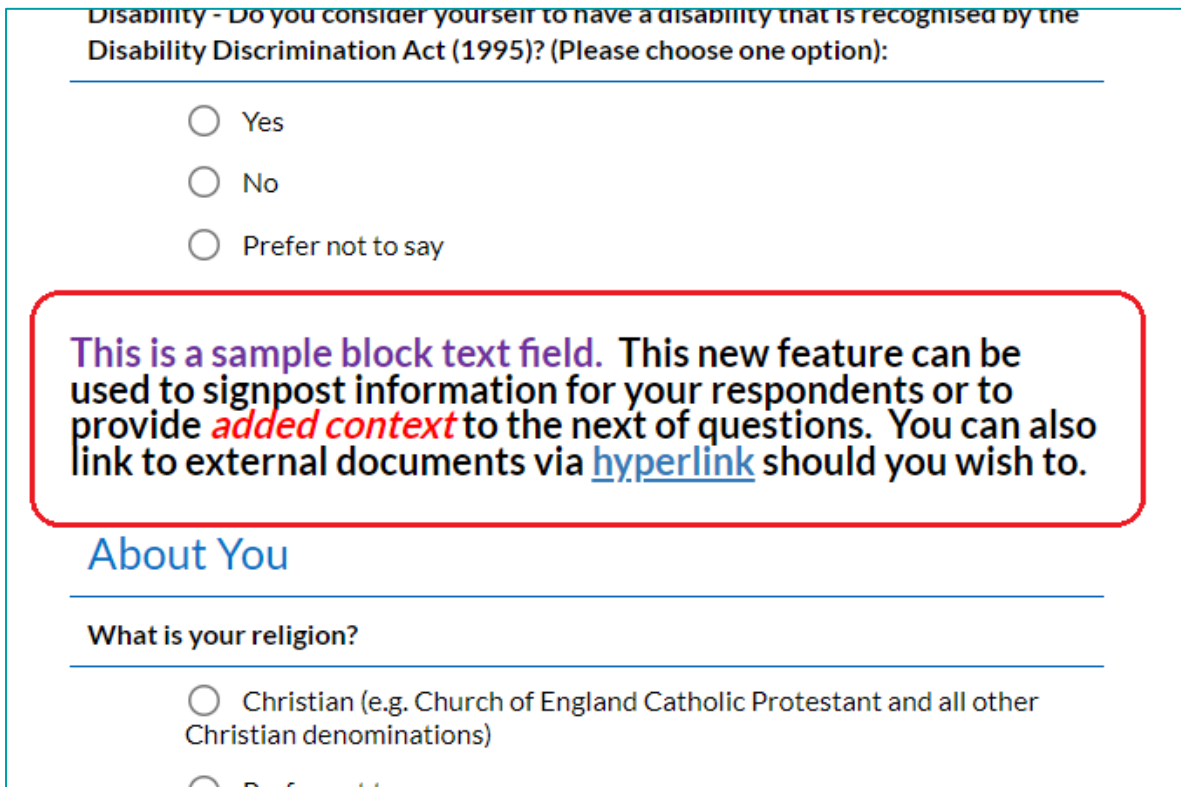
The new Block Text function can be found in your list of survey question types when building your surveys



Adding block text to a survey is the same process as adding any question text to a survey, but with just a single text input field. Once added you can then change the placement of this block text in the same way you can with any question.



As with the question formatting feature you will be able to control the appearance of this block text by applying styling to the text such as font colour, font size etc.



Please note, for Trust's using an older version of the Civica Experience App, this feature will not be supported and will require an App upgrade.

Question Markers

When you have added your survey questions, you may notice that certain questions have small markers next to them, such as the examples highlighted below. These markers are designed to indicate that there is something of note about this particular question.

Manage a Survey Add your questions and responses Archived Back

Showing Questions for: A&E Friends & Family Test

Translations Question Scoring Question Logic Paginate Questions Short Question Text Add Existing Question Create New Question

Title	Question		Page
1 We would like you to think about your experience in the A&E Department during this visit.	How likely are you to recommend our A&E Department to friends and family if they needed similar care or treatment?	F	1
2 We would like you to think about your experience in the A&E Department during this visit.	Please can you tell us the main reason for the score that you have given?	FC	1
3 About you (optional)	When were you discharged from A&E?		1
4 About you (optional)	What is your gender?	D	1
5 Pansensic Question	This is a comment question that will be pushed to Pansensic	PC	2
6 Comment Question (No Tickbox)	Test question	C	2
7 Test FFT Question	This is a brand new test question	W	2

Showing: 7 Question(s)

In the system we have the following markers –

- F = Friends and Family Test Question (this is taken from the Question Category, not the question wording)
- FC = Friends and Family Test Comment Question (this is taken from the Question Category, not the question wording)
- W = Weighted/scored question
- D = Demographic Question
- C = Comment Question
- PC = Akumen Comment

While these markers are purely for information, they do also indicate how the question will be treated. Weighted questions for instance will be visible in reports such as Trend Graphs and Heat Maps, whilst Demographic Questions will naturally be used in demographic reporting.

In addition to telling you about the type of question, most of these markers now have colour coding associated with them. This colour coding of red or green will indicate if the question has been properly setup. So, if you see one of these question markers in red this means either –

- A weighted or FFT question has been added but is missing a benchmark or response scoring. This will need updating in the Question Scoring section before it can appear in reporting
- An FFT Comment question has not been linked to the corresponding FFT question

Short Question Text

Within a number of our reports, we include the option to use something called Short Question Text, rather than displaying the full question wording. This allows reports to be displayed in a clearer fashion where question texts are especially long.

Site	Directorate	Speciality													Ward/Clinic	Speciality Group			
Ward/Clinic	Responses	Kindness	Speak	Involved	Share Sleep New	Clean Ward	Clean Toilets	Hospital Food	Help Eating	Know Enough	Pain Control	Privacy - Exam	Confidence	Work Together	Noise	Respect/Dignity	How would you rate the information that you were given by the STS Team?	Were you offered a follow up appointment?	Overall
Trust Score	30	80	75	81	19	85	88	88	81	86	86	89	89	58	50	50	70	94	78
Benchmark		90	85	80	90	90	85	60	80	85	85	90	90	85	71	90	85	85	85

With the Version 7 release we have introduced a new function in Survey Management to allow the user to create and edit short question text, so you have full control of this. Now, alongside the option to enter translations and update question scoring you'll now find an option to enter short question text.

Manage a Survey Add your questions and responses Survey Inactive Back

Showing Questions for: Friends and Family Test (FFT survey)

[Translations](#)
[Question Scoring](#)
[Question Logic](#)
[Paginate Questions](#)
[Short Question Text](#)
[Add Existing Question](#)
[Create New Question](#)

Title	Question	Page
1 Thinking about your recent visit...	Is the person completing this form a:	1

From here you'll find a list of all survey questions and then any short question text in use. If you wish to add new/update short question text, simply use the Edit button to enter your new text. If the question you are editing is a Shared Question and used in other surveys this will be alerted to you before you make any edit.

Create a survey Set short question text for reports Back

Survey: _Test Survey

Q. No	Question Title	Question Text	Shortened Question Text	
1	test	single checkbox	Disability Discrimination Act (1995)	Save Cancel
2	test	multiple checkbox	tested millsss mil	Edit
3	test	option box		Edit
4	About you (optional)	What is your age?		Edit
5	Helping us to understanding more about the patients and the community we serve	Sexual orientation (please choose one option):		Edit

Please note if you are not currently using this function, your reports will need updating to support the use of short question text. Please do get in contact to have this arranged.

Add Survey Translations

When building a survey, you'll find a translations button in the Survey Management section of the system above the list of survey questions.

Manage a Survey Add your questions and responses Active Back

Showing Questions for: A&E Friends & Family Test

[Translations](#)
[Question Scoring](#)
[Question Logic](#)
[Paginate Questions](#)
[Short Question Text](#)
[Add Existing Question](#)
[Create New Question](#)

Main Survey Information

The translations tool is split into two sections, the first is where you can add languages to your survey and translate the text found on the Introduction and Finish pages. This is called the Survey Information tab.

The screenshot shows the 'Survey Translations' interface. At the top, there are two tabs: 'Survey Information' (selected) and 'Questions and Responses'. Below the tabs, the survey title 'Antenatal Friends and Family Survey' is displayed. There is a dropdown menu for 'Available Languages' currently set to '- Select -' and a green '+ Add' button. Below this is a table with columns for English, Arabic, Chinese, and an 'Edit' button. The table contains the following data:

	English	Arabic	Chinese
Survey Title	Antenatal Friends and Family Survey	مسح الأصدقاء والأقرباء قبل الولادة	产前朋友和家人调查
Organisation Title	Demo System	نظام تجريبي	演示系统
Survey Description	Your 36 week appointment... Please tell us what you think and help us improve our service? Your feedback is important to us and will help us improve our services	موعدك لمدة 36 أسبوعًا... يرجى إخبارنا برأيك ومساعدتنا في تحسين خدماتنا؟ ملاحظتك مهمة بالنسبة لنا ومساعدتنا على تحسين خدماتنا	您36周的约会... 请告诉我们您的想法，改善服务质量？ 您的反馈对我们很有帮助，我们将根据您的反馈改善服务质量
Survey Finish	All the survey results and feedback are reported every month to staff at all levels – from nurses and doctors to Governors and Commissioners – so they can decide how to make improvements. We also share this feedback and comments with our patients and the public on posters across the Trust and in our monthly updates.	يتم الإبلاغ عن جميع نتائج الاستطلاع والتعليقات كل شهر للموظفين على جميع المستويات - من الممرضات والأطباء إلى المحافظين والفقوضين - حتى يتمكنوا من تحديد كيفية إجراء التحسينات. نشرك أيضًا هذه التعليقات والتعليقات مع مرضانا والجمهور على الملصقات عبر Trust تحديثنا الشهرية	所有调查结果和反馈每月都会报告给人员，从护士和医生到州长和专员。我们还将在整个海报和每月更新中与患者和公众分享。
Hierarchy Level 1 Label	Hospital Site	مستشفى	Hospital Site
Hierarchy Level 2 Label	Directorate	نوع الخدمة	Directorate
Hierarchy Level 3 Label	Speciality	مركزنا	Speciality
Hierarchy Level 4 Label	Clinic Location	اسم الخدمة	Ward/Clinic
Hierarchy Level 5 Label	Speciality Group	فرق التخصص	Speciality Group

At the bottom of the table, there are two red 'Delete Language' buttons.

The Experience system can support more than 100 different languages. However, before you can turn on a language for a specific survey, we first require something called the **Resource File** to be translated. While the majority of the survey content can be translated directly within the system the Resource File contains all the generic text, we need to support this. This includes things like button text, error messages, pop up message text etc. The resource file text applies to all surveys and therefore only needs to be translated once per language. So, when you want to start using translated surveys, we will first ask you to provide a resource file for each of the languages you wish to use. Once that resource file has been uploaded to the system those languages can be applied to any survey you wish.

From the Survey Information tab, the first option you'll find is an Available Languages dropdown and this is where you select which languages this survey will be available in. This dropdown will only show those languages for which we have your translated resource files.

This screenshot shows the 'Survey Information' tab of the translations tool. It features the same survey title 'Antenatal Friends and Family Survey' and the 'Available Languages' dropdown menu set to '- Select -'. A green '+ Add' button is visible to the right of the dropdown.

Once you have selected the languages you wish to use and press the Add button a new column will be added to the table below for each language you have selected. This will also add a corresponding language column in the Question and Responses tab of the translations tool.

	English	Arabic Edit	Chinese
Survey Title	Antenatal Friends and Family Survey	مسح الأصدقاء والأقرباء قبل الولادة	产前朋友和家人调查
Organisation Title	Demo System	نظام تجريبي	演示系统
Survey Description	Your 36 week appointment... Please tell us what you think and help us improve our service? Your feedback is important to us and will help us improve our services	موعدك لمدة 36 أسبوعًا ... يرجى إخبارنا برأيك ومساعدتنا في تحسين خدماتنا؟ ملاحظتك مهمة بالنسبة لنا ومساعدتنا على تحسين خدماتنا	您36周的约会... 请告诉我们您的想法: 改善服务质量? 您的反馈对我们很重要 我们改善服务质量

By pressing the edit button next to each language, you will then be able to enter the translated text against each field in the Survey Information tab. When entering your translations against the different fields if there are any that you don't have translations for the system will default to the English text to ensure no survey contains gaps.

	English	Arabic Save Cancel
Survey Title	Antenatal Friends and Family Survey	مسح الأصدقاء والأقرباء قبل الولادة
Organisation Title	Demo System	نظام تجريبي
Survey Description	Your 36 week appointment... Please tell us what you think and help us improve our service? Your feedback is important to us and will help us improve our services	... موعدك لمدة 36 أسبوعًا يرجى إخبارنا برأيك ومساعدتنا في تحسين خدماتنا؟ ملاحظتك مهمة بالنسبة لنا ومساعدتنا على تحسين خدماتنا

If you ever decide you would like to remove a language from a particular survey, you'll find a **Delete Language** button underneath each language column. This button will only apply to the survey you are currently working in.

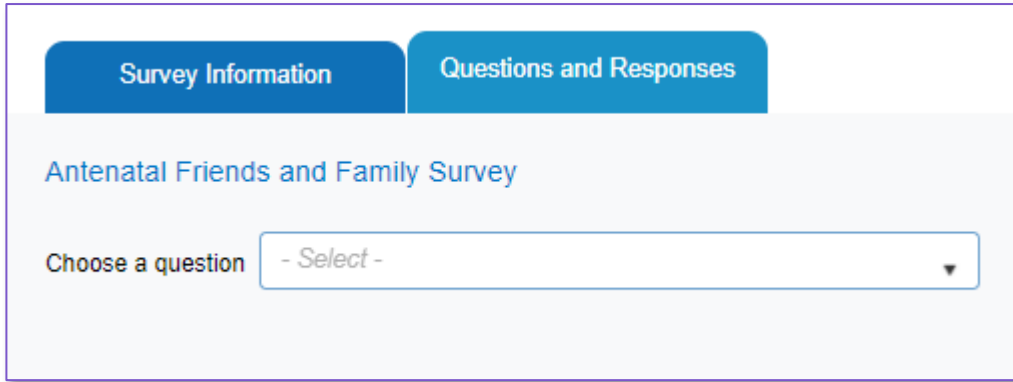
اسم الخدمة

تِيَار السَّرِيرِي

Delete Language

Survey Questions and Responses

The main body of your translations will be the questions and responses that make up your survey. The second tab of the Translations tool is where these will be entered. Your first step will be to select the question you wish to translate by selecting from the Question dropdown. This will display your questions in survey order.



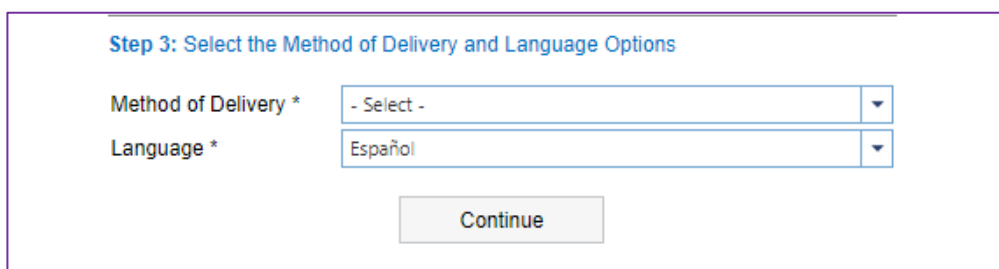
As with the Survey Information tab you'll find a column for each language that you have selected and pressing the edit button allows you to enter the translated text for each field in the question.

	English	Arabic	Edit	Chinese
Question Title	Your experiences of our antenatal service during your pregnancy	خير انك في خدمة ما قبل الولادة أثناء الحمل		
Question Text	We would like you to think about your experiences of our antenatal service during your pregnancy. Overall, how was your experience of our service?	نود منك أن تفكر في تجاربك مع خدمة ما قبل الولادة التي نقدمها خلال فترة الحمل. بشكل عام ، كيف كانت تجربتك مع خدماتنا؟		
Response	Very Good	جيد جدا		
Response	Good	حسن		
Response	Neither good nor poor	لا جيد ولا فقير		
Response	Poor	مسيكين		
Response	Very Poor	فقير جدا		
Response	Don't know	لا أعرف		

If your survey includes **Shared Questions** (e.g. those that are copied from other surveys and are locked for editing) and these have been translated in other surveys, once you have added the corresponding language to your current survey the translation will be automatically pulled across saving you from translating it twice.

Translated Survey PDFs

Within the Experience system, the survey translation for PDF is autogenerated and this is available to download through both the Survey Delivery and Survey Management pages. Once you have a survey translated in the system, the option to download PDF can be found in the survey settings or survey delivery as a download option. The translated languages for a survey will appear in the dropdown, and each option can be selected for download.



Survey Information Survey Conditions **Survey Settings** Survey Questions

Survey Settings

Default Font Size:

Created On:

Ends on:

Reusable Link: [Right Click - Copy Link Address](#)

Survey Group:

PDF Output: [Download PDF version](#)

Show PDF Footnote ?

PDF Footnote Message

Allow Patient Experience App to access this survey

6. Editing and Deleting Responses

Within the Administration menu you'll find two options that are very useful when using Data Entry - Edit Responses and Delete Responses.

Edit Responses

This feature, which is restricted to Administration users only, allows you to edit specific responses collected through the Experience platform. This is particularly useful as a way to amend surveys for any data entry errors.

Edit Responses

Use this section to edit responses submitted by a participant. All modifications are recorded and can be reverted on request.

Survey ref.

Survey: Please enter a survey reference

Select question:

User response: Please select a question.

Step 1. First you need to enter the Survey Reference number for the response you would like to edit. This can either be found on the survey completion page or can be searched for in the Individual Responses section of the Reports.

Step 2. Select the Search button and this will find your survey response.

Step 3. From the Select question drop down menu select the question you would like to amend

Step 4. Amend the question response by either selecting an alternative response from the available drop down menu, or for free text questions, by updating the text.

Step 5. Select the Update button to make the change. You will be asked to complete a Captcha code before the change is accepted.

Delete Responses

As the name suggests this feature allows an Administrator user to remove survey responses from the system. This can be done either by searching for an individual response, or for all responses in a given time frame.

Delete Responses

1. Surveys

Survey Ref

2. Import from Excel

No file chosen

3. Search options

Survey * Category * Date From * Date To *

Where you know the survey response that you wish to delete you will have the Survey Ref for that response (e.g. 012345d / 2001-02); this can be found in a number of reports and is also shown at the completion of all surveys (including those completed through data entry). If you enter this reference in the top field and hit search the response will be shown in a table at the bottom of the page.

If you don't have the survey reference, you can use the search and import options in the second and third steps to select the survey and dates to find all the surveys that match your criteria. In either case once you have searched for your responses they will be shown in a table at the bottom of the page

<input type="checkbox"/>	<u>Survey Ref</u>	<u>Survey</u>	<u>Category</u>	<u>Created</u>	<u>Completed</u>	<u>View</u>
<input type="checkbox"/>	AAD850D6 / 2021-03	A&E Friends & Family Test	Standard	12/03/2021 16:59:17	Complete	Select

From this table you can

- Clear the table and start the search again by pressing the round arrow key
- See the full survey response(s) by selecting the second button from the left. This will only show for those responses that you have selected the checkbox for
- The open book button will remove any response that you haven't selected the checkbox for.
- The final button, the red X will delete all the responses that you have selected the checkbox for. You will be asked to confirm the deletion again after pressing this button.

7. Comment Flagging

As a way of ensuring that comments are not published with sensitive content the Experience platform comes with a comment flagging tool allowing you to identify those survey responses that may need reviewing prior to publication.

Comments can be reviewed for a number of different areas, but currently the available flags are –

- Bad language
- Staff Identifiers (job titles)
- Phone Numbers
- Postcodes
- Legal
- Religion
- Sexuality
- Safeguarding

For most of these the Experience platform includes a master list of words that would result in the comment being flagged and this is routinely reviewed and updated. Customers can also add custom words to each of these lists if there are specific words they wish to flag. The Postcodes and Phone Number Flags search comments for standard postcode formats or numerical strings to identify possible issues.

The screenshot shows a table with the following content:

Case Ref.	Flagged Comment
	<p>Question: Do you have any further comments about your experience with the service?</p> <p><small>Survey: My Experience Matters Inpatient Survey , Recorded: 15/08/2018 11:02:22 AM , Survey Ref: F88B913D / 2018-08</small></p> <p><input type="checkbox"/> 6939 <i>Flagged Comment: The care was so bad I'm actually taking legal action</i></p> <p>Reason: Legal</p> <p>Release - Edit comment - View full results - Create new action</p>

Each comment that is flagged up appears on this page with details of the survey, the full recorded comment and then in red the reason the comment has been flagged for review. All comments that are flagged are restricted from appearing in any reports until they have been reviewed. With each comment you have two options on how to proceed – release the comment, or edit the response.

If you are satisfied that the comment can be published and needs no changes you can go ahead and select the Release option listed below the response. Once you have clicked this a pop up will appear asking you to confirm you are happy to release the comment. If you select Yes at this point the comment will disappear from the Comment Flagging page and is made available to all relevant reports.

If however the comment contains information you do not want published (such as personally identifiable data) you can select the option Edit Comment. This will allow you to make any required to the comment before selecting the Save and Release option, which make the response available to all relevant reports.

In Version 6 we introduced the ability to add a flagged comment to the Action Manager by selecting the Create New Action button. This will copy the text of the comment and any relevant fields and add to a new action for review.

8. Survey Data Entry

This section of the platform is where you can carry out data entry for surveys you might have collected in paper form.

Survey Data Entry

Step 1: Select Questionnaire and the Survey Type

Survey *

Survey Type *


Step 2: Select related Departments

Directorate *

Service Type *

Service *

Step 3: Select Survey Date

Select Date * 

Select Delivery Method *

Once you have selected the data entry option from the Administration menu you will be presented with a screen like the one above.

Step 1. Select the Survey and Survey Type that you would like to carry out data entry for

Step 2. Use the next set of drop downs to select the hierarchy that the data entry should be collected against. All these drop downs must be selected before you can proceed.

Step 3. Enter the date on which you want the data to be recorded against – this allows you to back date your data entry, so all results are shown on the date they were collected.




Step 4. Click on the continue button to fill out the survey.

Once you have completed filling out a survey you will be brought back to Survey Data Entry set up page where you can fill out any additional surveys. The drop down menus will have retained your previous selections so if you have a number of forms to enter for the same survey and location there's no need to make the selections more than once – just select continue at this point to start a new survey.

9. Action Manager

This feature allows staff to record and monitor actions that results from data collected in your surveys. Actions are recorded against a survey and location and are assigned to a member of staff for completion.

Action Manager

Current Actions Closed Actions   

Search Filters

Search by: Options:

Hierarchy Filters

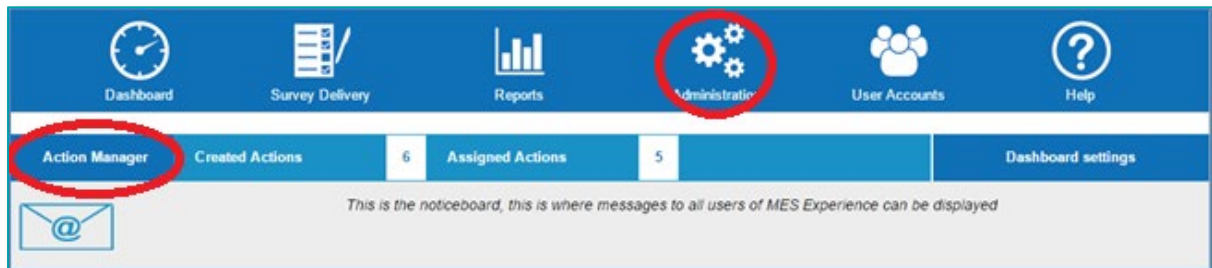
Directorate:
 Service Type:
 Service:

[Clear hierarchy filters](#)

Apply Filters

ID	Action Title	Status	Priority	Category	Created by	Assigned to	Created	Due Date ▲	
5	- Survey Results Test survey	Pending	Low	Survey Results	Micol (membra Brunelli)	Micol (gmail Brunelli)	15/11/2023	15/12/2023	Update

The Action Manager can be accessed in two ways – directly through the Dashboard, or from the Administration menu.



Dashboard Survey Delivery Reports Administration User Accounts Help

Action Manager Created Actions 6 Assigned Actions 5 Dashboard settings

This is the noticeboard, this is where messages to all users of MES Experience can be displayed

Using the Action Manager feature to create a new action (or amend an existing one) triggers an automatic email to the assigned staff member letting them know an action has been assigned to them. Additionally, if an action becomes overdue this will trigger a further email. Overdue emails will be sent every five days until the Action is completed (this period can be set to different intervals per customer). The Action Manager tool also allows the staff member to record notes for any activity undertaken to complete the action.

The Action Manager also links through to the Dashboard by letting an individual user know how many actions they have outstanding (that either they created, or have been assigned to them).



Action Manager Created Actions 0 Assigned Actions 1 Dashboard settings

How to Add a New Action

The first fields that you are able to complete are –

- Action Name

- Action Summary
- Proposed Resolution (this is a new field)

Create New Action
Back

Action Name

Action Summary

Proposed Resolution

Each Action can then be linked to the organisational hierarchy (this is multi-select and can be left at any level of the hierarchy), assigned a created and due date, and then assigned to a user of the platform for resolution. This remains the same from the current version. You are then also able to assign a number of other fields against the action, namely

- Category
- Priority Level
- Status

These fields can now also be customised through the Action Manager settings so in addition to the default options you are able to add additional options that may be more relevant to your organisation.

Hierarchy Selection

Directorate

Service Type

Service

Action Details

Category

Priority Level

Status

Assigned to

Created by

Key Dates

Action Created

Due Date

Finally, when creating a new action, you are also now able to link the Action to a specific survey (though as with the hierarchy fields, this is optional). So, you can now add the following fields

- Source (also a customisable list)
- Survey
- Survey Category
- Question
- Question Score

Progress Updates

Once an action has been created, we have now introduced the ability to add Progress Updates to an action, allowing you to keep track on activity carried out against the Action rather than simply having the ability to mark it as complete.

All recorded progress updates are listed at the bottom of the Action record, together with the user who has added the progress update and the date they did this. When adding a Progress Update you also have the option to have this update trigger an email to the original creator of the Action.

Completing an Action

When you are ready to close an action, you simply update the status dropdown to Completed. This will then allow you to record a final progress update stating how the action has been resolved. Marking an action as complete will do two things

- Move the action to the Completed Actions tab
- Trigger an email to the original creator of the action informing them of the completion

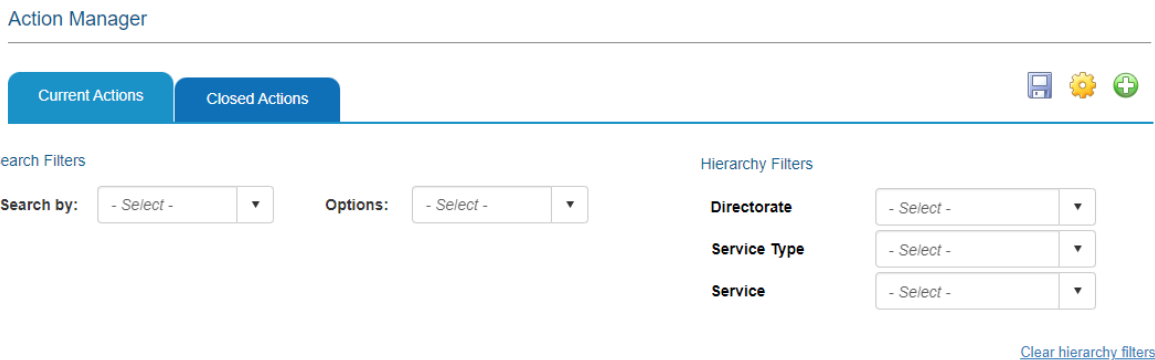
Action Manager Filtering and Exports

When using the Action Manager, you have a number of search filters that can be applied –

- Action Title

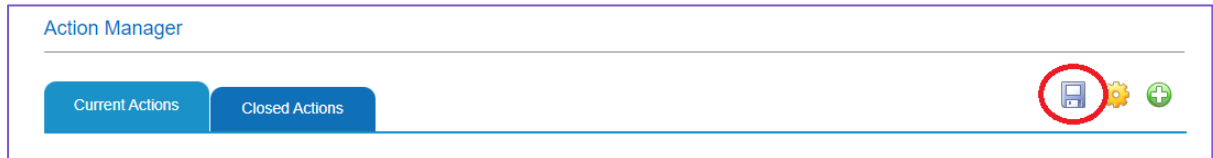
- Status
- Priority
- Category
- Created By
- Assigned to
- Created date
- Due Date

You are also able to add hierarchy filters on top of these search filters. These work in the same way as the report zone in that they are multi-select filters and can be selected at any level you choose.



Action Manager Exports

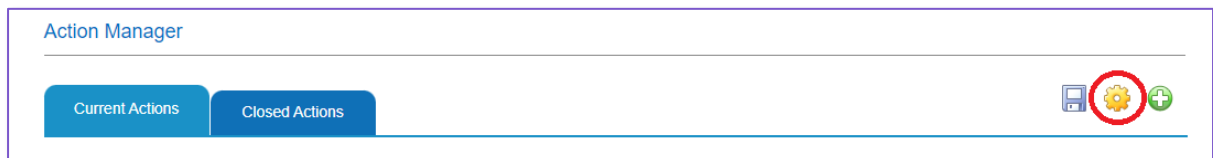
As with most reporting tools there is also an export function on the Action Manager. To download an export from the action manager you simply need to select the save icon.



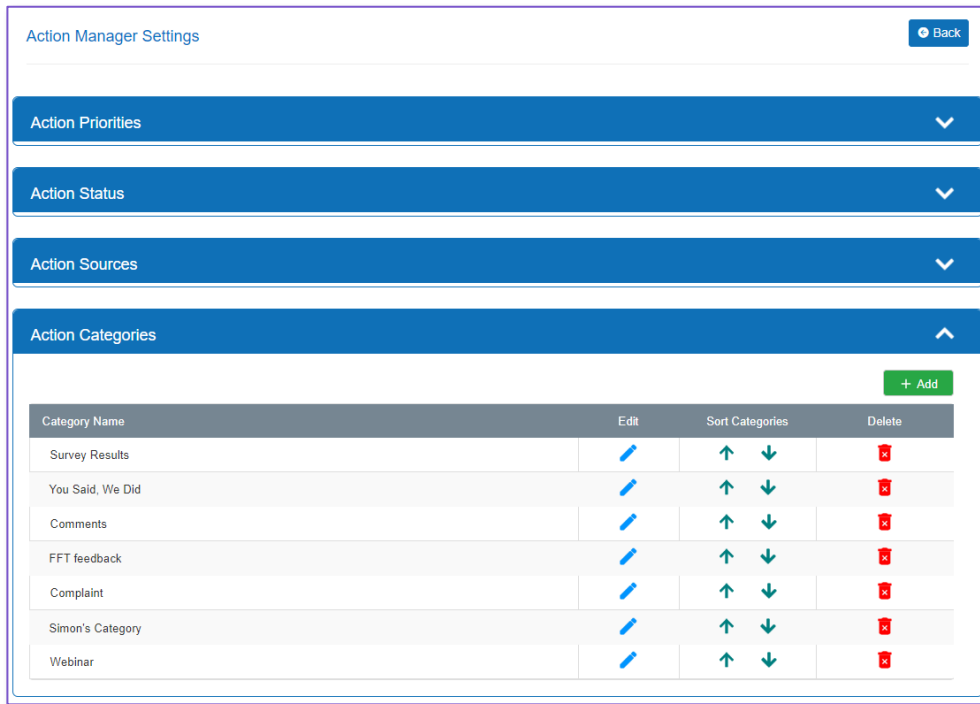
The downloaded spreadsheet includes all fields stored within the Action Manager. This includes the Action Summary, Progress Updates, Proposed Resolution and Outcome. Any search filters previously applied to the Action Manager will also apply to your export.

Customising the Action Manager

The Action Manager functionality allows a degree of customisation to some of the data fields. These can be updated by first selecting the cog icon on the Action Manager main page.



From this page you will find four sections that can be edited, each corresponding to a data field in each action. These are the Priority Levels, the Status of the action, the data sources for the Actions and the Categories. Please note when using the edit function some of the standard fields cannot be removed.



Automated Actions

The key benefit of the Action Manager is the ability to generate actions throughout Civica Experience at the click of a button. This function exists in a number of places – namely reports, feedback posters and comment flagging.

Feedback Posters

Where an organisation has a Feedback Poster style report that includes a “You Said, We Did” section, you now have the option to add this to the Action Manager. As this section is intended to record completed work, this function creates a Completed Action rather than generating a new open action. All the relevant information from the poster is automatically pulled across to the action, this includes hierarchy, survey, action category, action status, dates etc. No additional input is required for this type of action.

You said:

We did:

Add to Action Manager

Reports

At V6 rollout the Action Manager function has been added to the following reports (in addition to Feedback Posters)

- Comment Reports
- Survey Summary Reports

Comment Flagging

The comment flagging feature now includes the ability to generate an action from a flagged up comment. So, in addition to the Release, Edit Comment and View Full Results options there currently, you'll now find a button called create new action.

Question: Please can you tell us the main reason for the answer that you have given to question 1.

Survey: Emergency Department Survey , Recorded: 02/01/2018 16:43:28 , Survey Ref:

5110354 *Flagged Comment:* The care that I was given by the doctor that I saw was very professional and reassuring.

Reason: Staff Identifier

[Release](#) - [Edit comment](#) - [View full results](#) Create new action

Selecting this option will take you through to the Action Manager and will copy across all the relevant information required.

- Action Name – A default name is added, but can be customised to something more specific if required
- Action Summary – The comment itself, together with the survey reference will be copied across. If required, this field can be customised with additional information
- Hierarchy – Relevant information from the survey response will be copied across
- Category – Set by default to Comments
- Status – Set by default to Pending
- Action Created – set to today's date
- Due Date – set 30 days in the future (can be changed)

[Back](#)

Create New Action

Action Name *

Action Summary *

Proposed Resolution

Hierarchy Selection

Directorate

Service Type

Service

Action Details

Category *

Priority Level *

Status

Assigned to *

Created by *

Key Dates

Action Created *

Due Date *

All the users will be required to add to save the action is a proposed resolution, the priority level and assigned to and created by fields.

10. Link Creation

In the Civica Experience platform users automatically have direct access to Standard Links. The standard link is automatically generated as soon as you create your survey and can be found in the Manage Surveys section as shown in the screenshot below.

The screenshot shows the 'Survey Conditions' configuration interface. On the left, there are dropdown menus for 'Themes' (Easy Read Theme, Space Theme, Standard Theme), 'Category' (Childrens), 'Method of Delivery' (Online (Single), Paper), 'Main Survey Logo' (MES Logo), 'Secondary Survey Logo' (Leave Blank), and 'Survey Status' (Active). On the right, there are input fields for 'Show number of questions' (checked Show), 'Estimated Completion Time' (0 minutes, checked Show), 'Default Font Size' (Small), 'Created On' (24/11/2016), 'Ends on' (Expiry), 'Questions' (View Questions), 'Survey Group' (Default), and 'PDF Output' (English, Download PDF version). The 'Reusable Link' field is highlighted with a red box and contains the text 'Right Click - Copy Link Address'.

This link is informed by survey restrictions, so the hierarchy available to the survey will always match those restrictions when using this link type. The link also shows every tier of the hierarchy when you use it, as shown in the example below. This requires the patient to make a selection at every tier (unless there is only one option, in which case it will be pre-selected).

Test survey

Select related Departments

Please select your location from the options below

Language	<input type="text" value="English"/>
Directorate	<input type="text" value="- Select -"/>
Service Type	<input type="text" value="- Select -"/>
Service	<input type="text" value="- Select -"/>

[Take Survey](#)

East London NHS Foundation Trust
 Robert Dolan House, Trust Headquarters,
 9 Alie Street, London E1 8DE
 Application Build: 7.3.2 (28/09/2023)

Given this is an automatically generated link, there is no additional customisation possible with this link beyond updating the overall survey hierarchy restrictions.

You can identify a standard link through its inclusion of "ChooseYourDepartments" in the survey URL e.g. <https://secure.membra.net/ExperienceELFT/m/ChooseYourDepartments.aspx?ID=xxxxxxxx-xxxx-xxxx-xxxx-xxxxxxxxxxxx>

In addition to the automated standard link, we also give you the ability to create your own more customisable links that should give you a range of options depending on how you wish to use the link. These link types fall into two categories – fixed links and location links.



Fixed Links

The key difference between a fixed link and a standard link is that a fixed link is designed to work for one location only, rather than providing the patient with a selection. As such it works well in situations where you already know the patient location (e.g. direct email to a patient, SMS, link on a ward iPad etc).

When creating/requesting a fixed link there are three versions of this link you can use

- Single – The default for this link style, upon completion of the survey the patient will be redirected back to the client website.
- Multi – This is a looped survey that after the survey is completed will take you back to the survey start. This is ideal for use on tablets where more than one person will use the survey.
- Redirectable – Rather than redirecting to the client website at the point of creation you can select a website to redirect the patient to after survey completion.

You can identify a reusable link through its inclusion of “Survey1” in the survey URL e.g. - <https://secure.membra.net/ExperienceELFT/s/Survey1.aspx?ID= xxxxxxxx-xxxx-xxxx-xxxx-xxxxxxxxxxxx>

As these links only work for one hierarchy location, when you click on the link you are not presented with hierarchy dropdowns but are taken straight to the Survey Introduction page as per the example below.



East London NHS Foundation Trust

Bedfordshire and Luton Perinatal Mental Health Service Patient Experience Survey



When creating a Fixed Link, you can also use the language option in the final step of the link creation. This option will display all the languages you've added translations for.

Step 3: Select the Method of Delivery and Type

Method of Delivery: Online (Single) ▼

Link Type: Single ▼

Default Language: Arabic ▼

Create Link

The language selected against the link will be set as the Default Language and this means it will be the language displayed when the patient first clicks on the survey link. However, the fixed link will also display a language selection option to allow the survey to be taken in any of the available languages.

As well as the ability to create fixed links, there is also a library of all the links you have created, meaning you can keep them all in one place. From this page – Manage Fixed Links, you can also view the hierarchy added to each link, retrieve a copy of the link, download a QR code of the link, or edit the link itself.

Create Fixed Link			Manage Fixed Links					
Friendly Name	Survey Name	Date Created	Link Type	Delivery Method	View Hierarchy	View Link	QR Code	Edit
Pansensic Link 46	Demo Patient Experience Survey	08/03/2021	Single	Online (Single)				
Pansensic Link 45	Complaints and Compliments Survey	08/03/2021	Single	Online (Single)				
Pansensic Link	Pansensic Changes	22/10/2020	Redirectable	Online (Single)				

If you select this option (as highlighted above), you'll have the opportunity to either edit the Friendly Link Name or remove the link altogether. Please note if a link is deleted the link is not just removed from the table it will also stop the link working immediately. For this reason, you will be asked to confirm the deletion after selecting the delete button.

Edit Fixed Survey Link [Back](#)

Link Details

Friendly Link Name	Survey Name	Link Type	Delivery Method	Date Created
Pansensic Link 46	Demo Patient Experience Survey	Single	Online (Single)	08/03/2021 14:04:41

Update Friendly Name

Friendly Link Name: **Update**

Remove Link **Delete Link**

Location Links

This link type allows you to choose a set of locations to use, and the hierarchy level that patients will have to choose from. So, for example if you want a patient to be able to choose from a list of five wards (without first having to select the Type of Care and Speciality/Location) this is the link for you.

The hierarchy selections available to the link are informed by the overall survey restrictions. So, you cannot create a link for locations that you haven't made available to that survey, but you also don't have to make them all available – instead you can create a link using a sub-set of those wards.

Step 2: Select related Departments

Directorate *	- Please select hierarchy -
Service Type *	- Please select hierarchy -
Service *	- Please select hierarchy -

Add to the list of Locations

Step 3: Modify and select hierarchy level to be shown as location name

Hierarchy Level *	3. Service
-------------------	------------

Each name in the list has to be unique for location link to work.

Location ID	Location Name / Alias	Edit Location Name	Delete Location
Please add locations here			

When first creating the link, you choose the hierarchy level to display to patients; this would generally be the ward level as it would be the most recognisable to patients. This selection then becomes the only hierarchy the patient has to select.

Choose Departments

Please select the Department that you attended during your visit

Language	English
Service	- Select -

Take Survey

East London NHS Foundation Trust
 Robert Dolan House, Trust Headquarters,
 9 Alie Street, London E1 8DE
 Application Build: 7.3.2 (28/09/2023)

Location links can be identified by the style of URL and the inclusion of the text "Preliminary Page" e.g. <https://secure.membra.net/ExperienceELFT/m/preliminarypage.aspx?ID=2765473>

When creating/requesting a location link there are two versions of this link you can use

- **Single** – The default for this link style, upon completion of the survey the patient will be redirected back to the client website
- **Multi** – This is a looped survey that after the survey is completed will take you back to the survey start. This is ideal for use on tablets where more than one person will use the survey

As with the Fixed Links you'll also find an option to set the default language when creating a new Location Link. This will only display the languages supported by the chosen survey and where no translations have been provided this will be pre-selected to English.

Step 4: Select the Method of Delivery and Type

Method of Delivery	- Please select a method of delivery -
Default Language	- Please select a Language -
Link Type ?	- Please select a link type -

Create Location Link

Once the language has been set for the link this is the language that the patient will be shown when they first open the survey. However, as the Location Link shows the patient a hierarchy selection page before being shown the Survey Introduction page they will also find the language choice on this page.

选择部门

请选择你来访时前往的部门

病房/诊所 - 选择 -

语言 中国人

参见调查

Once the language has been selected the survey introduction page (and all subsequent survey pages) will be displayed in the chosen language. To prevent asking the patient to select the same thing twice the language selection option does not appear on the Survey Introduction page when using a Location Link.

As well as the ability to create location links, we have also introduced a library of all the links you create, meaning you can keep them all in one place. From this page you can also view/edit the hierarchy added to each link, retrieve a copy of the link, download a QR code of the link, or delete the link altogether. You will be asked to confirm the deletion after selecting the delete button.

Location Links
Back

Create Location Link
Manage Location Links

Search:

Survey

- Please select a survey -

▼

Group ID ?

Positive numbers only

Search by Link

Reset
Search

Group ID	Friendly Name	Edit Friendly Name	Survey Name	Location Type	Method of Delivery	View / Edit Locations	View Link	QR Code	Delete
1	Test Friendly Links		Adults with Learning Disabilities Survey	Multi	Kiosk				
2	A&E FFT		A&E Friends & Family Test	Multi	Online (Single)				
3	Demo		Demo Survey	Multi	Online (Single)				

11. Data Extract Tool

Experience gives you the ability to download data in raw Excel format, rather than through a pre-formatted report. This feature is only available to those users who have access to the Administration section.

Data Extracts

1. Quick Downloads

The screenshot shows three dropdown menus, each with '- Select -' as the selected option. Below each dropdown is a blue button with a download icon and text: 'Download Selected Month's Data', 'Download Selected Month's FFT Data', and 'Download System Hierarchy'.

2. Single Survey Data Extract

This section contains three filter groups: 'Hierarchy Filters' with 'Directorate', 'Service Type', and 'Service' dropdowns; 'Survey Filters' with 'Survey', 'Category', and 'Question' dropdowns; and 'Date Filters' with 'Start Date' and 'End Date' date pickers. A yellow 'Clear hierarchy filters' button is below the hierarchy filters. A large blue 'Download Data' button is at the bottom.

3. Raw Data Extract

A blue button with a plus sign and the text 'Expand Filters'.

4. Push Report Activity

A blue button with a plus sign and the text 'Expand Filters'.

How to download last month's data

If you simply want a download of all collected data from the previous calendar month, go to the Quick Downloads section and choose the Download Selected Months Data button and the month you want to see data from, and an excel spreadsheet will automatically download for you. For those customers using the Friends and Family Test we also include a Selected Month's FFT Data option that provides the same extract, but with only the FFT questions included.

This is an annotated version of the 'Quick Downloads' section. A red rectangular box highlights the two dropdown menus: '- Select -' and an empty dropdown menu. The 'Download Selected Month's Data' and 'Download Selected Month's FFT Data' buttons are also visible.

Before you can download any data spreadsheet you will be asked to confirm your password.

1. Quick Downloads

Password:

How to download specific data

If you require data from either a specific survey(s) or from a particular date range, you can use the following two options –

- Single Survey Data Extract
- Raw Data Extract

2. Single Survey Data Extract

Hierarchy Filters	Survey Filters	Date Filters
Directorate <input type="text" value="- Select -"/>	Survey <input type="text" value="- Select -"/>	Start Date <input type="text" value="Start Date"/>
Service Type <input type="text" value="- Select -"/>	Category <input type="text" value="- Select -"/>	End Date <input type="text" value="End Date"/>
Service <input type="text" value="- Select -"/>	Question <input type="text" value="- Select -"/>	
<input type="button" value="Clear hierarchy filters"/>		
<input type="button" value="Download Data"/>		

Step 1 – First decide whether you need data from a single survey, or multiple surveys. If the former choose Single Survey Data Extract, if the latter choose Raw Data Extract

Step 2 – For both of the two options the next step is to choose the location you require data from by using the hierarchy filters

Step 3 – You now need to choose which survey(s) you wish to download. If using Single Survey Data Extract use the three drop downs to choose your survey, category and if required which specific question you need the data for. If using Raw Data Extract, you just need to use the one available drop down to select whichever surveys you wish to download

Step 4 – Finally choose the date period you need results for by adding a Start Date and End Date filter

Step 5 – Once you have made all your selections press the Download Data button. You will be asked to confirm your password before the download start

Additional Data Extract Options

Push Report Activity

A newer extract that we provide to all clients is a Push Report Activity summary. This download allows you to see a record of all push reports that have been sent out, and importantly if they have been opened by their intended recipients or not.

4. Push Report Activity

Hierarchy Filters		Date Filters	
Directorate	<input type="text" value="- Select -"/>	Start Date	<input type="text" value="Start Date"/>
Service Type	<input type="text" value="- Select -"/>	End Date	<input type="text" value="End Date"/>
Service	<input type="text" value="- Select -"/>		
Clear hierarchy filters			
Download Data			

When choosing this download you can select the hierarchy and date filters, easily allowing you to see all push reports for a specific ward in the last month, for example.

SMS Reporting

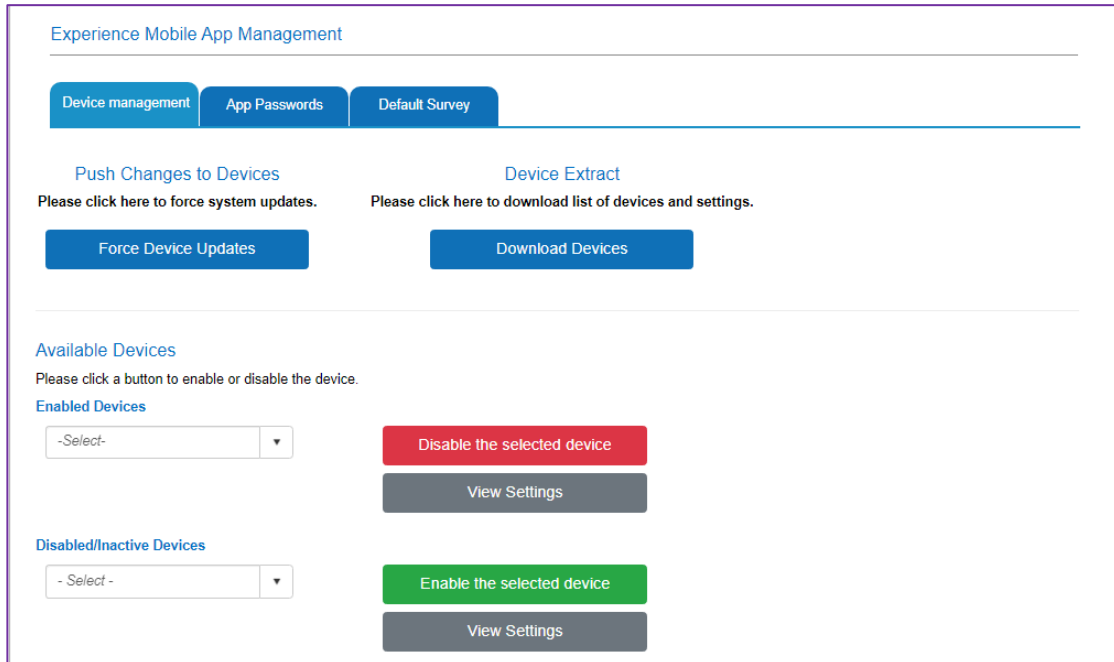
5. SMS Reporting

Select SMS Filters		Date Filters	
Report Type	<input type="text" value="- Select -"/>	Start Date	<input type="text" value="Start Date"/>
Survey Type	<input type="text" value="- Select -"/>	End Date	<input type="text" value="End Date"/>
Clean SMS Data			
Download Data			

The final option in the data extract page is only available to those clients who use our managed SMS service. Under the Report Type dropdown menu you'll find two options, an SMS Report and a Raw SMS Data. The SMS Report will give you a summary of all the SMS sent in the selected time period, it will also show you the number of responses allowing you to see the response rate for your SMS and IVR surveys. The Raw SMS Data extract is as the name suggests a simple extract showing all the SMS and IVR messages sent out to recipients in the selected time frame together with any response received.

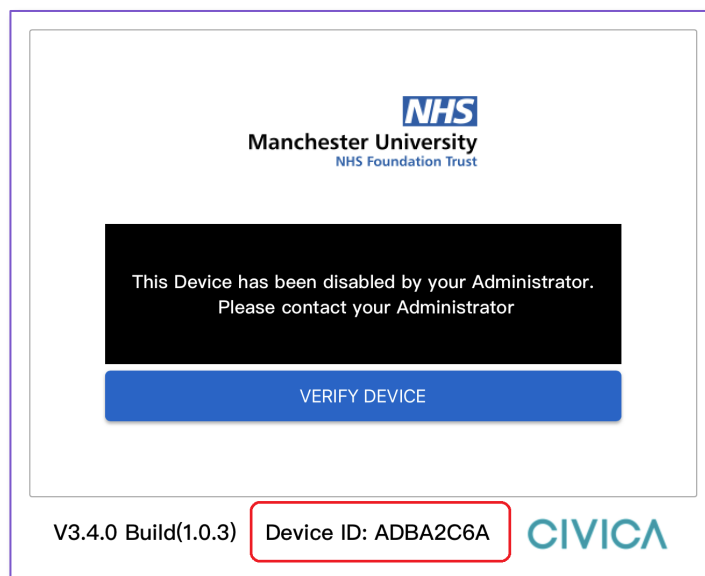
12. Device Management

For those organisations who use the Civica Experience App you will also find a Device Management page with the Administration section of the system. This page is where you can activate new tablets using the App, customising the content of each device and associated passwords, as well as download the devices extract with their settings.

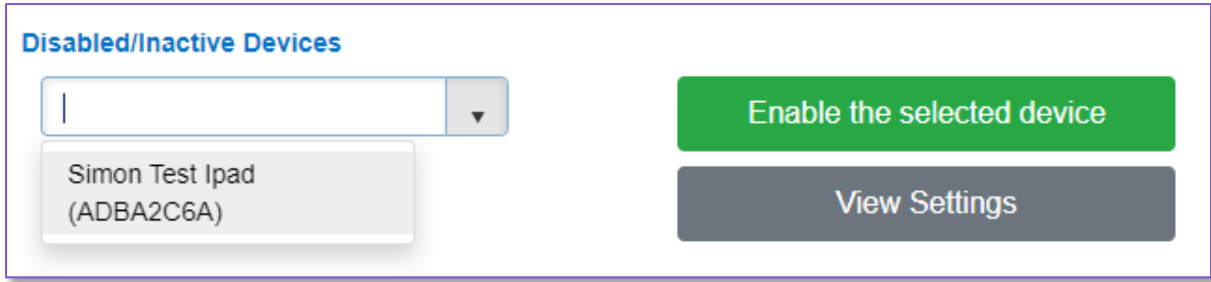


How to activate a new tablet

When you first install the Civica Experience App on your tablet it cannot be actively used until this is approved within the main Experience platform. You will find all unapproved installations listed in the dropdown labelled Disabled/Inactive Devices. Each device will be listed by a short code e.g. ADBA2C6A. This same short code will be displayed on the front page of the App as per below.



To approve the App and allow it to be used on the device you will first need to select the relevant short code from the list of available Disabled/Inactive devices.

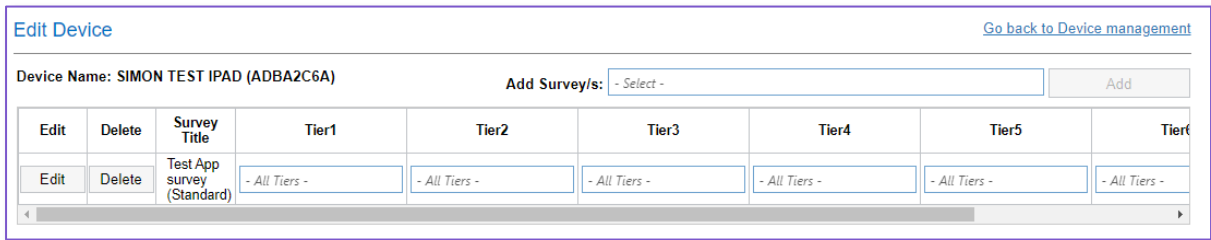


Then select the green button marked **Enable the selected device**. This will allow you to give the device a more friendly name than just the short code. Common examples including a Ward name or assigning your own code (e.g. Device 1) so you can keep a track of where each of tablets is deployed.

How to customise the App content

Once your device has been approved you will see that it moved to the Enabled Devices dropdown. By selecting your device and then pressing the View Settings button you can choose which surveys are available on that tablet.

For each device you can choose which surveys to make available and then also restrict the hierarchy choices that will be available.



This ensures that a patient can have as limited a choice as you wish to show them from as a little as a single survey with a single ward, through to all system surveys with a full hierarchy selection.

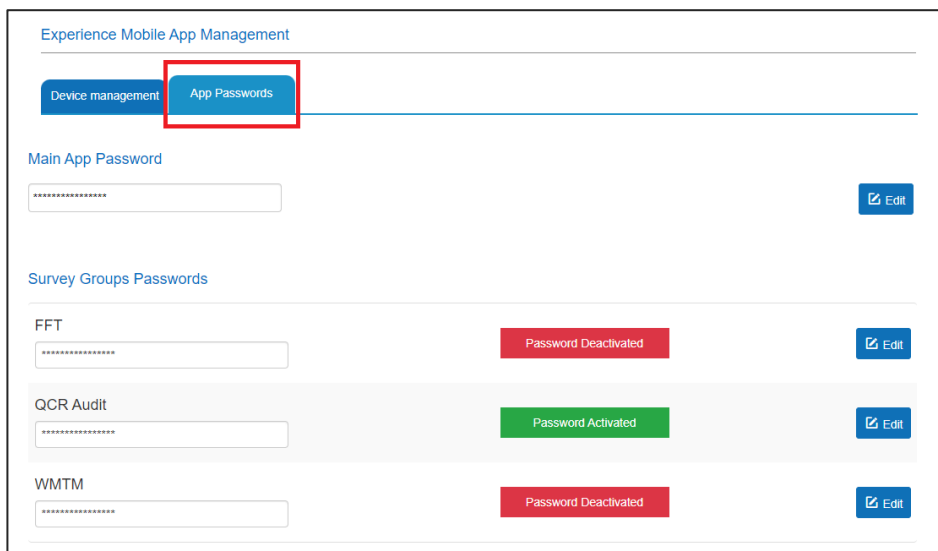
Password Access

Previously the App had a single password for the overall system, and this could only be changed upon request to the Civica team. As part of Version 7 we have made two changes here. Firstly, we have introduced optional passwords for individual survey groups. This allows you to install non-patient surveys onto a tablet but restrict access to them.



Password Changes

With the introduction of survey passwords, we have also created a new function in Device Management to allow applicable users to change the passwords directly in the platform without needing to request this from the Civica team.



Through this feature you can also decide which survey groups should have active passwords and which can be accessed with no password requirement.

Please note, for Trust's using an older version of the Civica Experience App, this feature will not be supported and will require an App upgrade.

Default Survey

You can manage the surveys in App for your devices from the Default Survey tab in the Device Management section of the Experience platform. You will now be able to add or remove default survey(s) for your devices directly, where you can find the survey group, name, and type to add to your device. Any time the App is installed on a new tablet, it will automatically include these default surveys.

Experience Mobile App Management

Device management
App Passwords
Default Survey

Please select the default survey for the device

Survey Group

- Please select a survey group -

▼

Survey *

- Please select a survey -

▼

Survey Type *

- Please select a survey type -

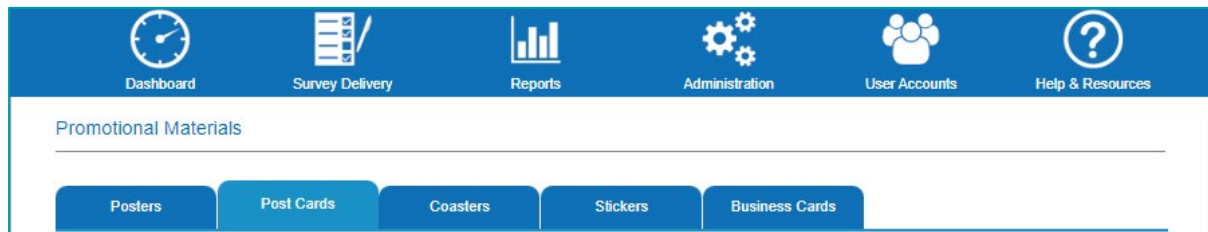
▼

Save

Survey Name	Survey Group	Survey Type	Delete
Friends and Family Test Example	Demo Surveys	Standard	🗑 Delete
Inpatient Survey	Default	Standard	🗑 Delete

13. Promotional Materials

In Experience, we have introduced a range of generic promotional materials, conveniently located in the "Help & Resources" section of Civica Experience. These materials are designed to assist you in promoting your surveys effectively.



Within the "Help & Resources" section, you will find a variety of pre-designed materials available for download. These materials include postcards, posters, coasters, and stickers, all of which can be used to advertise your surveys. To access these resources, simply choose the desired option and download it. The materials are generic, allowing you to adapt them to suit your survey requirements and branding.

Please note that the materials deployed in V7.2 are sample copies. Before utilising them, it is essential to update the templates with your organisation's logo and a URL of your choice. To update the templates, kindly get in touch with your contact in our Customer Experience team and provide them with the relevant URL. Once the customisation is complete, you will be able to download the printable material from the resources section within the system.

14. Frequently Asked Questions

These FAQs are also available as training videos on the Civica Experience platform. To access these please go to the Help option in the main menu bar.

1. How do I log in? What if I forget my password?

To login to Experience you will need your email address and password. For security your password is only known to you.

Your password is case sensitive, so you need to be careful when entering this

You will also need to complete the CAPTCHA code shown on screen by typing the series of letters and numbers into the box below.

If you can't make out the CAPTCHA code, you can click on the link that reads "Generate New Image" to see an alternative code or press the audio icon to hear the code out loud.

If you ever forget your password, you can reset this from the login page.

Select the option at the bottom of the page and when prompted enter your email address. This must be the address you use to login.

This will then send you an email with a link to create a new password.

Once you have clicked the link in the email a webpage will open, and you will be asked to enter a new password and then re-enter this for confirmation. If both passwords match you will be able to log in.

2. My user account has been locked, how can I unlock it?

If you enter your password incorrectly three times your user account will be locked. To unlock your account, you will need a user with Administration access rights (usually your patient experience team) to first unlock your account.

Once your account has been unlocked, you will then need to reset your password using the instructions above. If you try to login with your old password again your account will be immediately locked.

3. How do I add a new user account?

Experience allows you to have as many user accounts as you need

New accounts can be created either by your Civica project manager or by an existing administrator user of the platform.

If you are an administrator on Experience, you can add a new account by going to the User Accounts menu at the top of the screen and selecting the option "Add Account"

To set up a new user account all you need to do is fill in the six boxes on the web form as seen on screen

The final option, marked account type, allows you to determine what level of access will be granted to the new user. These range from Administration to Survey User

Once you have filled out the form, please select the button called Create Account at the bottom of the page. This will send an automated email to the new user informing them that an account has been created for them and giving them instructions on how to create their own password.

A list of all current user accounts including the one just created is available by clicking on the option View Accounts on the User Accounts menu.

4. How do I filter a report?

In Experience when you are running reports you will often have the option to filter the results, allowing you to interrogate the data in different ways.

To run a report, go to the Report menu at the top of the screen and select the option called Report Zone.

The first thing to do is to select which report you would like to run. The filters that are available will depend on which report you choose to run. In this example we will run the survey analysis report.

Once you have selected your report you will be presented with a number of filtering options. Typically, these are broken down into three sections - Hierarchy filters, survey filters and date filters.

Where survey filters are shown on screen these must be used. You can use the drop down menus to choose which survey and which survey category you would like to report on.

The hierarchy filters, which are optional, give you the opportunity to see the survey results for a specific location within the organisation. If you make no selections, you will be presented with results for the entire organisation.

To make a selection choose from the drop down menus to select the location you would like to see results for. For example, you can choose just a hospital site by using the first available filter.

The final set of filters is the date range which for most surveys are optional. When you use these filters, it allows you to choose what period you see results for by choosing both a start date and end date.

If you ever try to run a report without having selected required filters you will see an error message on screen highlighted in red. You will need to correct the mistake before running the report.

5. How do I send surveys by email?

One of the ways to send surveys through Experience is to use emails. To set up an email for distribution select the Survey Delivery option from the main menu bar at the top the screen.

On this page you first need to choose which survey and survey category you would like people to receive.

Then in the second set of drop down menus choose the hierarchy options you would like the data to be recorded against. This could be the location where the patient was treated or the location where a member of staff works.

In the final dropdown box please select Email as the chosen method of delivery and select Continue.

On this page we will set up the email to be sent out. First select the email template you would like to use for this group of people.

If you would like to see a sample version of what this template will look like you can type in your own email address and click Send a Sample to receive a test version of the email.

If you are happy with the template, go to the second step and upload an excel spreadsheet containing a list of email address that you wish to send the survey to.

In this spreadsheet the email addresses must be in the first column to be recognised by Experience. You can upload the data in either XLS or CSV format.

To send the emails please click Upload. All emails in the uploaded spreadsheet will now be sent a unique one-time use link through which they can complete the survey.

6. How do I edit responses?

There may be occasion where you need to edit a survey response, this will be particularly true if you are using the data entry option. This can currently only be done by administrator users of Experience.

First go to Administration menu at the top of the screen and select the option called Edit Responses.

To edit a survey response, you will first need the survey reference number. When running data entry this can be found on the survey completion page as shown on screen.

You can take your survey reference number and enter this on screen where prompted. Select the search button and this will load up your survey for editing.

When editing a survey, you can only edit one question at a time. From the question drop down list you can choose which question you would like to amend.

Once you have selected the question the chosen user response will be shown below. To change the response simply change the user response option in the dropdown box.

If you are happy with the new user response select the Update button. You will be prompted to enter a CAPTCHA code before the change is accepted. This is to ensure you cannot accidentally edit a response.

Once you have entered the code a message will appear at the bottom of the screen to confirm the edit was successful.

7. How do I view an individual survey response?

On occasion you may need a way to look at one individual survey response, rather than reporting on a collection of results. You can do this using the Individual Responses report.

First go to the Reports menu at the top of the screen and select the "Individual Survey Responses" option

On this page there are two ways to search for an individual response, either by using the survey reference number or by searching by date and survey.

If you have the survey reference number (which you can find on the survey completion page) you can enter this on the left hand side. Press search and your results will show in the bottom half of the screen.

If you don't have the survey reference number, you can search for your responses using the second option.

Using the search fields entitled General Search, you can choose your survey and survey version and then the date period required.

Pressing the search button will display all results that meet the criteria you have specified.

To view the full survey result, press the select button and the report will open in a new window.

8. Can I do my data entry in the platform?

If you have collected survey responses in paper form Experience provides you with an option to complete data entry.

First go to the Administration menu and select the Survey Data Entry option.

On the next screen select the survey and survey category you wish to record responses for

Then using the second set of dropdown lists choose the location against which the data should be recorded. Make sure to select an option for each of these dropdown menus.

In the final step please select a date that the survey responses should be recorded against. Using the correct date will allow for accurate reporting of your results.

Press the Continue button at the bottom of the page to start your data entry.

Once you have completed a survey you will return to the data entry set up page. At the top of the page, you'll find the survey reference number at the top of the screen for your completed response.

If you have additional survey responses, you would like to add you can select the Continue button at the bottom of the page to start again.

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