



# ACTIVE INSIGHTS

BY CFEP SURVEYS

## User Guide

# Welcome to your Active Insights User Guide

Active Insights is your organisation's agile digital feedback solution that provides real-time patient experience data and insights.

This User Guide provides you with step-by-step instructions to support you in navigating this tool which enables you and your team to get this most out of its features and functionality.

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## Your user types explained

Upon purchase of your Active Insights subscription, you or a member of your team would have completed an 'Activation Form' or updated details of current users. This has allowed the CFEP Surveys Team to have set up your users and prompted the distribution of your 'Welcome to Active Insights Email' to support you in logging in.

To allow you to understand your platform capabilities and key functions based on user type, please refer to the explanations below. This will help you navigate your way around your Active Insights platform once logged in.

### User types

#### Organisation Admin – key functions

The Organisation Admin is the key contact for CFEP Surveys and your team. This contact will receive any relevant correspondence regarding the platform on behalf of your organisation.

If the Organisation Admin is managing a multi-site subscription, they will be able to view aggregated data across all sites (practices or organisations) from their Organisation Dashboard. They also have the ability to view data sets for each individual site sitting within the multi-site subscription.

If an Organisation Admin is managing a single-site subscription, their dashboard will display aggregated data for this particular site (practice or organisation).

In addition, Organisation Admins have the same functionality permissions as Site Users.

#### Site User – key functions

The Site User will have access to question themes and all collected data relevant to one specific site (which could be a practice or organisation) using the Active Insights platform. Site Users have the ability to view data in real time, create various data reports based on a variety of filters and extract specific site and question theme reports. Site Users have the capability to customise two slide sets (which can house several customised questions) for a particular site.

At times, some people can be set-up as Site Users for multiple sites. These multi-site Site Users will be able to view individual site data all within the one login profile.



**Please note:** *Organisation Admin and Site User types both have the ability to create and edit customised question themes (see page 22 'Creating custom questions' for more details regarding this functionality). When setting up your custom questions we also recommend setting up some team rules to support the creation and updating of these custom questions based on your organisational goals. For example, you may want to leave it up to each site to create their own custom questions or you may like to collect data against the same question themes across all your sites (and will therefore need to specify to your site users that these questions can't be changed even though they have the ability to do so).*

## Updating user types

If at any time you need to make any changes to your Organisation Admin or Site User details or require a resend of login details for any of your users, please contact the CFEP Surveys Team by emailing requests to [activeinsights@cfepsurveys.com.au](mailto:activeinsights@cfepsurveys.com.au) or phone 07 3855 2093.


## Logging in

As part of your 'Active Insights Welcome Email' you would have received your personalised account login details. This email also specifies the type of Active Insights user you've been nominated as (see explanations in the 'User Types' section on page 4) in addition to instructions to assist you with logging in to your account.

Details to support you with logging in are also provided below:

### To log in

- 1 Refer to your CFEP Surveys 'Active Insights Welcome Email' and click on the contained URL link or enter <http://cfepprms.care> directly into your browser. This will take you to the CFEP Surveys login gateway.

 [cfepprms.care/login](http://cfepprms.care/login)

- 2 Enter your email address (Username) and Password into the appropriate fields and select the 'LOGIN' button.



### Login

Email Address \*

Password \*

[FORGOT YOUR PASSWORD?](#)



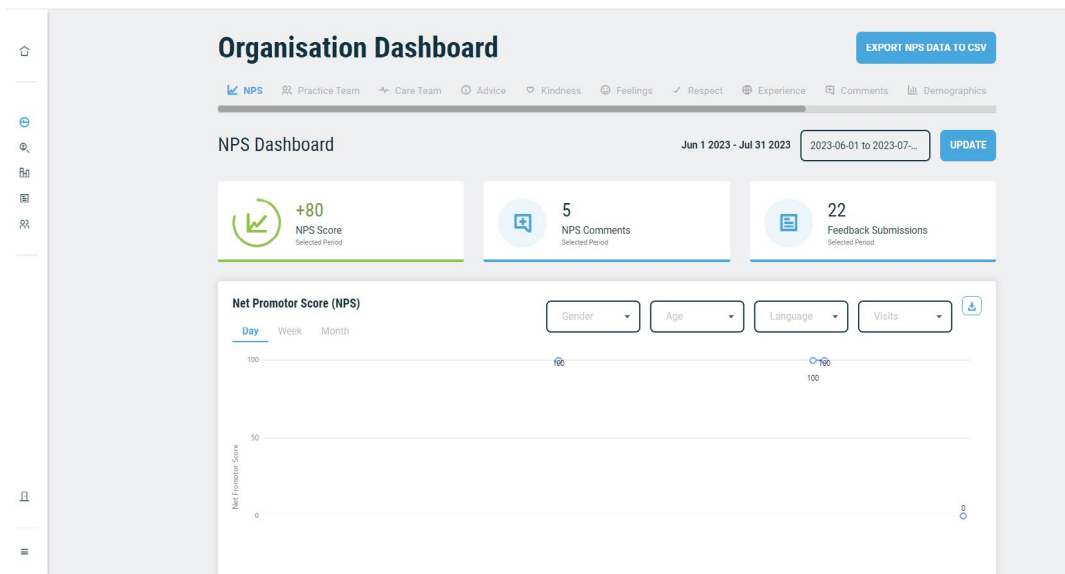
**Please note:** you can use the 'FORGOT YOUR PASSWORD?' function on the login page to reset your password if needed.

## Navigating your Active Insights platform

Once you've successfully logged in to your Active Insights account, you'll be directed to your default homepage. Based on your user type you'll either have an Organisation Dashboard (Organisational Admin) or Site-specific Dashboard (Site User), both of which default to the display of data relating to your mandatory Net Promoter Score (NPS) data.

### Homepages

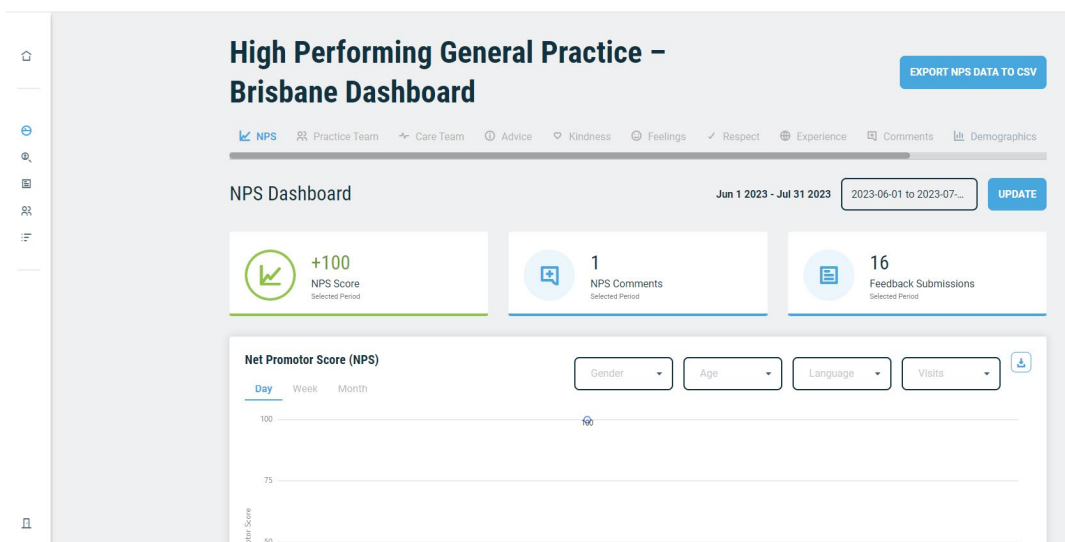
#### Organisation Dashboard (default homepage for Organisation Admins)



As an Organisation Admin your Organisation Dashboard will grant you access to data from either your one registered site or aggregated data from across all linked sites.

The homepage defaults to data collected from the mandatory Active Insights question theme for Net Promoter Scores (NPS) (see page 12 for more information).

#### Site Dashboard (default homepage for Site Users)

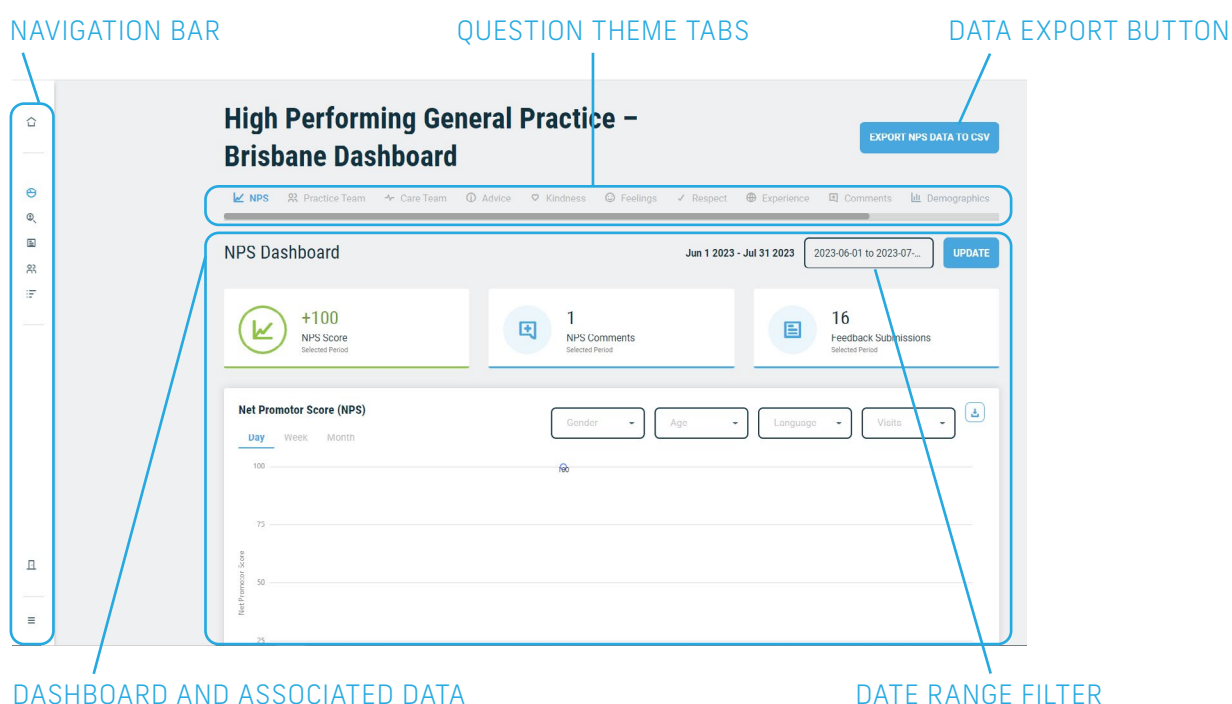


As a Site User your Site Dashboard will grant you access to data from your specific site. The homepage defaults to data collected from the mandatory Active Insights question theme for Net Promoter Scores (NPS) (see page 12 for more information).

## Navigation bar, menu and tabs

Although some features slightly vary between an Organisation Admin and Site User the key features and functionality linked to navigation across the platform is very similar.

The key sections are highlighted below:



## Navigation bar

The navigation bar can be found on the left-hand side of your Active Insights platform. This is accessible from whatever page you're on within the platform.

The navigation bar defaults to the condensed version but can be expanded out by selecting the 'Hamburger icon' ☰ located in the bottom left-hand side of the screen.

The navigation bar menu is made up of the following:

Home

**Home** – Takes you back to your default homepage which is the first screen that you see when you log in.

Dashboard

**Dashboard** – This is the same screen as your default homepage where you'll either be able to view your 'Organisational Dashboard' or a specific 'Site Dashboard' and the associated data. From here you can also view data from each of your question themes (see the 'Question Tabs' section for navigating this functionality).

Organisation Admins

**Organisation Admins** – Allows you to see the list of employee(s) you have nominated as your Active Insights 'Organisation Admins'.

Sites

**Sites** (only available for Organisation Admins) – Lists all linked sites (practices, organisations etc.) to your organisation that then enables you to access individual dashboards for each specific site.

Site Forms

**Site Forms** – This houses all of the question themes linked to your Active Insights subscription and each individual site. From here you can create and customise two question themes to add to your Active Insights survey (see page 22 for instructions of custom question development).

Site Users

**Site Users** – Allows you to see the list of employee(s) you have nominated as your Active Insights 'Site Users'.

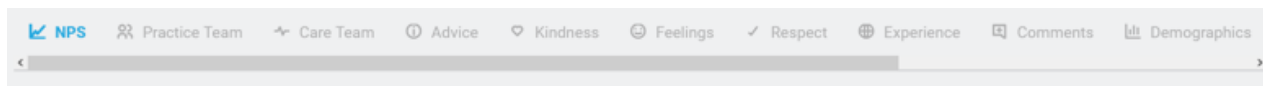
Logout

**Logout** – With a simple click of this icon you'll be logged out of your Active Insights account.

Hamburger Menu

**Hamburger Menu** – Allows you to condense or expand the view of the Navigation Bar.

## Question tabs and dashboards (for your question sets)



The top menu bar identifies the different Question themes linked to your Active Insights account. These question themes are broken down into topics e.g. 'Practice Team' and 'Demographics', and were selected when activating your Active Insights account with CFEP Surveys. Each question theme contains a series of questions which comes together to form the survey your patients or consumers undertake.

Depending on the question themes you've chosen as part of your Active Insights account, will depend on the question tabs displayed on this top menu bar. Each tab links you to an overarching dashboard for a particular question theme.

Refer to the 'Dashboard types' section on page 12 onwards to discover the associated data display for each of the question theme dashboards.



## Viewing and interacting with live dashboards

If you're logging in as an Organisation Admin, your homepage will be the Organisation Dashboard where aggregated data from all of your sites will appear. You can apply all the same filtering functionality and report extractions to your Organisation Dashboard (aggregated data) in the same way you would for individual sites.

To access dashboards and associated data for individual sites (if you have a multi-site account), go to the 'Sites' option within your navigation bar. On the site you wish to view select the 'MORE' eypsies and 'VIEW DASHBOARD' to enter into each linked site.

Once you're within your organisation or a specific site dashboard type, you'll be able to start monitoring and reviewing your data by using a range of filters and functionality. Details and instructions on how to utilise the various options available to you are provided within this section of your User Guide.

### Data range and demographic filters



**Please note:** *demographic filters will only be available if you have selected the 'Demographics' question theme when activating your Active Insights account.*

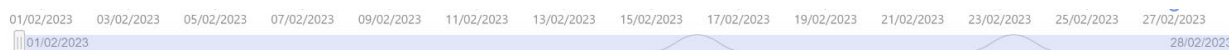
On your selected Dashboard use the available filter function to select your date range and select the 'UPDATE' button to apply this time filter. Once you choose a date range, the time period selected will apply to all your available sub dashboards.

Feb 1 2023 - Feb 28 2023    2023-02-01 to 2023-02-...    UPDATE

You can further filter your data by demographics using the 'Gender', 'Age', 'Language' and 'Visits' drop-down menus.

Gender    Age    Language    Visits

Once you have started collecting data you can also use the 'slider' at the bottom of any of the line graphs to condense your date range.



## Exporting data to CSV

All data sets and individual charts can be downloaded to a CSV file using the export feature.

To download the dashboard data in its entirety, use the 'EXPORT <DASHBOARD NAME> DATA TO CSV' button on the top right-hand side of the dashboard.



EXPORT DEMOGRAPHICS DATA TO CSV

To download individual chart data, use the 'Download Chart Data to CSV' icon which is represented in the rounded square and arrow button to the top right-hand side of each chart question and display.

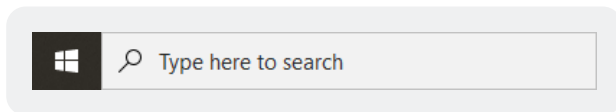
How do you describe your gender?



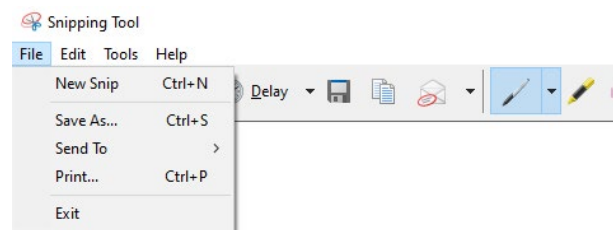
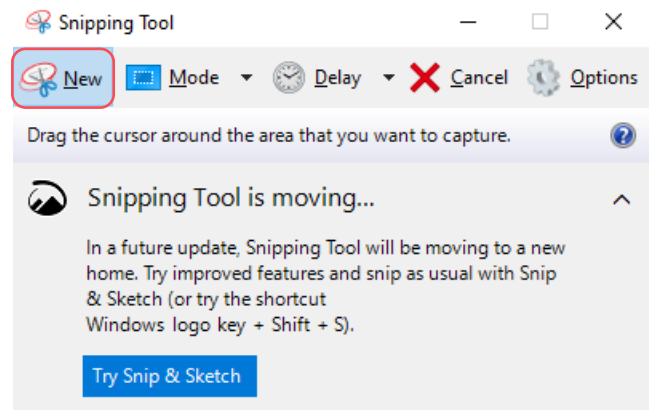
## Capturing data and graphs

Although you can download your data into a CSV file, this is provided in raw form. To gather data in a more visual and summarised way you can set-up your data ranges and then utilise the Microsoft 'Snipping Tool' to capture screen grabs of whole dashboards, specific graphs or comment boxes.

The 'Snipping Tool' is included as a feature of the Microsoft Office Suite and can be found by searching 'Snipping Tool' within the search function of your PC.



- 1 We suggest if you haven't already, pin this tool to your taskbar as it comes in handy on a regular basis.
- 2 To take a 'Snip' of a graph for example, open the 'Snipping Tool' and select the **'New'** option from the top menu bar.
- 3 A thin cross will display which then allows you to draw a box (to make your selection) around the area you would like to copy.
- 4 Once captured you can then save this as an image on your computer by choosing 'File' > 'Save As' from the 'Snippy Tool' menu.



If you are working on a Mac based computer or electronic device we suggest you search how to capture screen grabs and follow the associated instructions provided.

## Dashboard types



**Please note:** details relating to all dashboards or question themes have been included in this User Guide. When you completed your CFEP Surveys Active Insights 'Activation Form' you would have selected which dashboards you wanted to include as part of your patient/consumer experience measures. With this in mind you'll note that some dashboards or question themes may not be included within your Active Insights subscription.

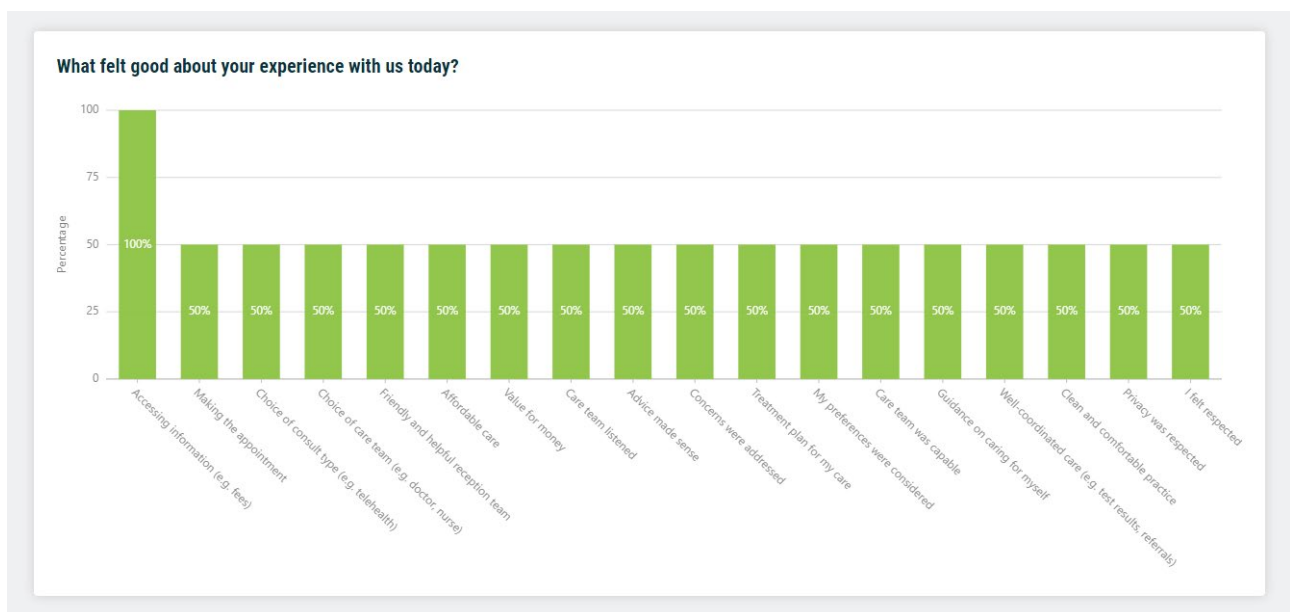
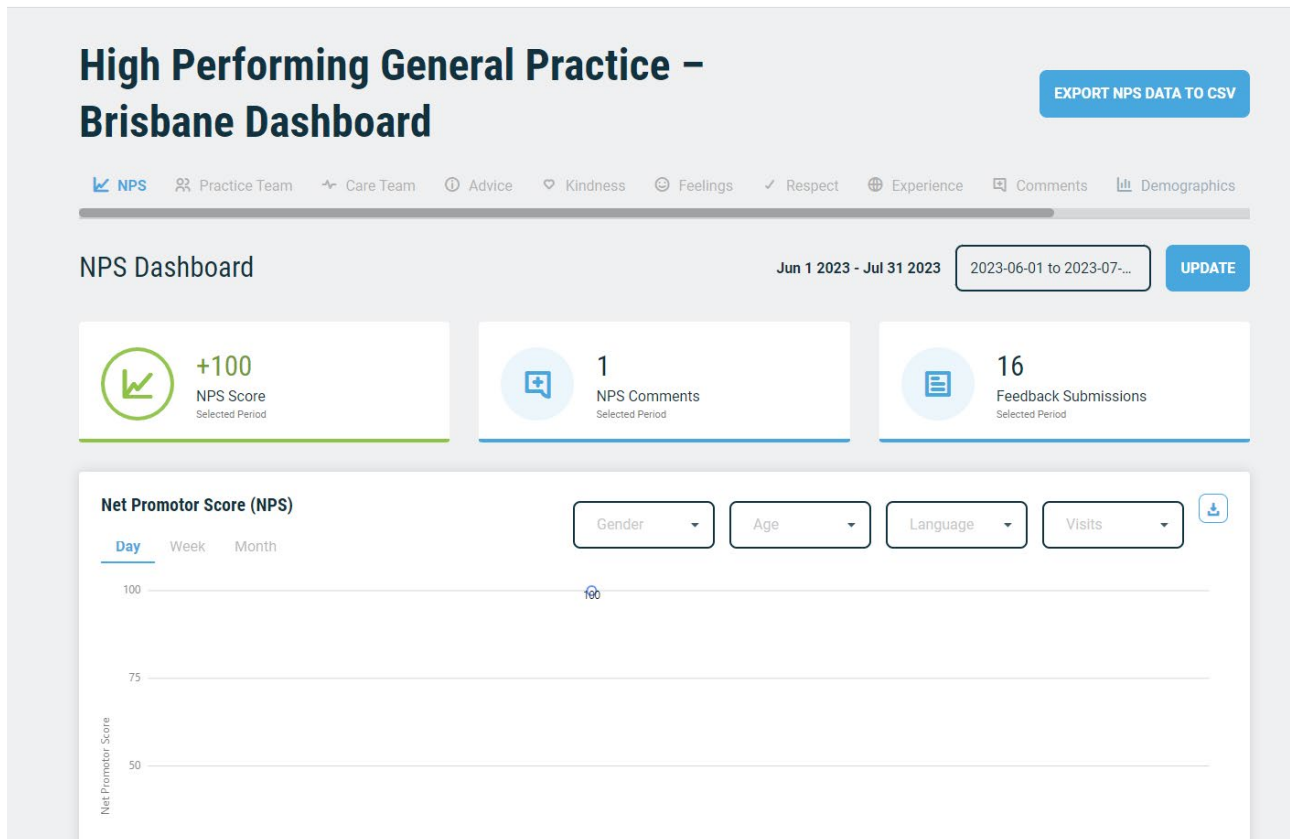
### Net Promoter Score (NPS) Dashboard (included for all clients)

To support nation-wide benchmarking and as a key patient reported experience measure (PREM) all organisations will have the Net Promoter Score (NPS) Dashboard included as part of their Active Insights question themes. This dashboard will display as the default homepage page each time you log in.

The NPS Dashboard allows you to view the following data sets, which can be filtered across particular time periods:

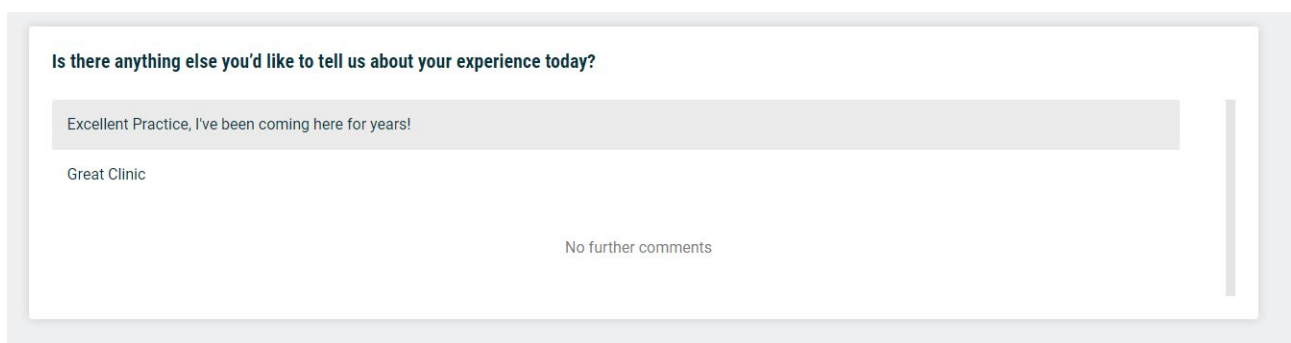
- 1 NPS Score (Using a 1-10 Scale: Promoters 9-10, Passives 7-8, Detractors 0-6)
- 2 % Promoters - % Detractors = NPS (Net Promoter Score)
- 3 NPS Comments (total number)
- 4 Feedback Submissions (total number)

On the NPS Dashboard you can view responses in a dynamic bar graph which are linked to the question **'What felt good about your experience with us today?'**. This feature allows responses to be stacked in a descending order (with the best highlighted first). This chart will be ever changing as it updates in response to the collected live incoming patient feedback.



Another feature of your NPS Dashboard is the ability to view patient comments relating to the free-text NPS question **'Is there anything else you would like to tell us about your experience today?'**.

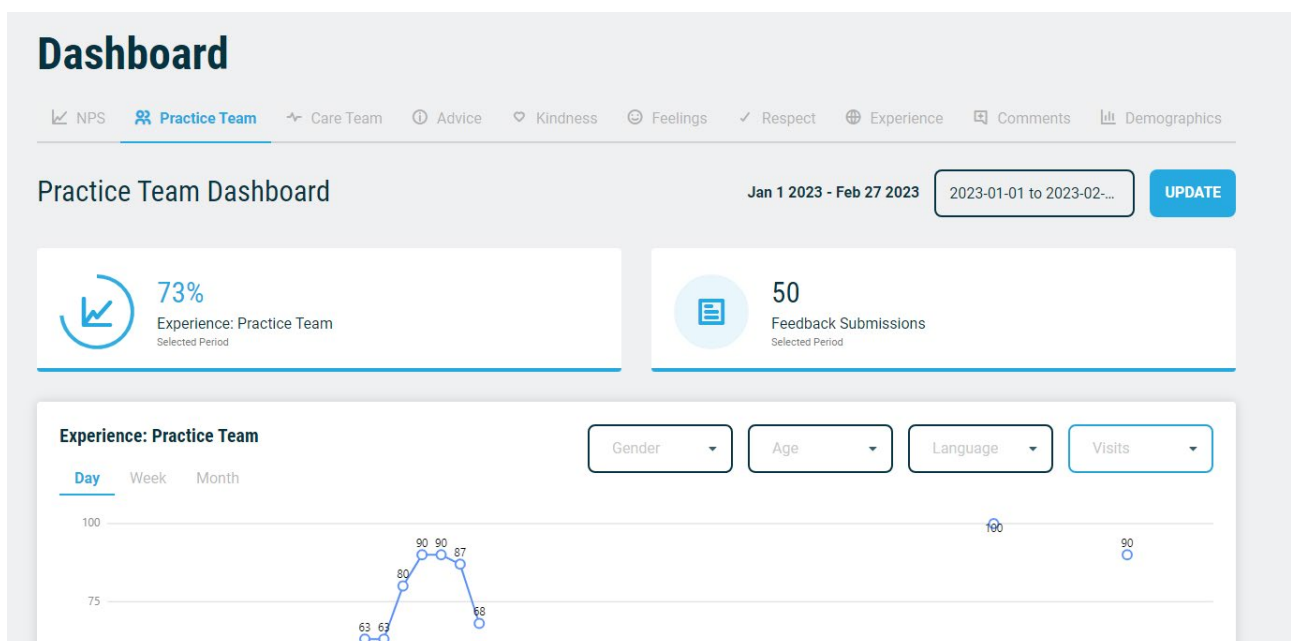
Patients are able to provide their own personal response to this question and therefore you'll have access to raw and unfiltered patient experience data. This qualitative dashboard data will provide your team with direct insights into your patients' feelings and thoughts. You may discover trends emerging across the responses and there may be key feedback provided which can support your team to identify and/or drive quality improvements within your organisation. The collected data can also provide you with the opportunity to celebrate your team and organisation strengths.



## Practice Team and Care Team Dashboards (if selected)

Your Practice Team and Care Team Dashboards relate to the selected question theme about the patient's overall experience with the non-clinical (practice) and clinical (care) teams.

The responses are represented as a line graph, and the score as a percentage. At a quick glance, the data displayed will be in a scorecard format and will provide you with an average percentage score.



You can use the 'Day', 'Week' or 'Month' options to view the data within the selected range.



### Advice Dashboard (if selected)

The Advice Dashboard relates to the questions surrounding information and advice.

The responses are represented in a horizontal bar chart. When looking at your Advice Dashboard you can quickly identify which bar is the highest or lowest, including the incremental differences between the bars.

The following responses are highlighted using the following colours:



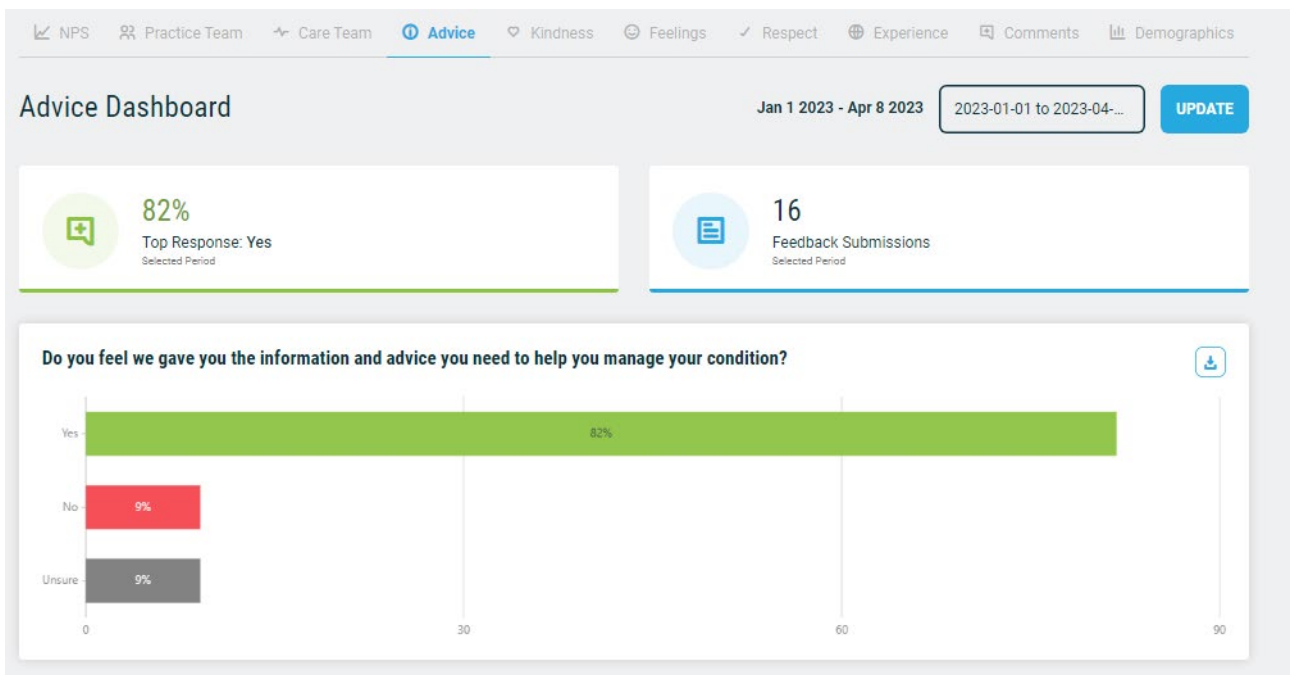
**Positive responses**  
= Green bar



**Negative responses**  
= Red bar



**Unsure responses**  
= Grey bar



## Kindness Dashboard (if selected)

The Kindness Dashboard relates to questions regarding feelings experienced by your patients.

You'll see that all responses are represented in a horizontal bar chart. You can quickly identify which bar is the highest or lowest, including the incremental differences between the bars.

The following responses are highlighted using the following colours:



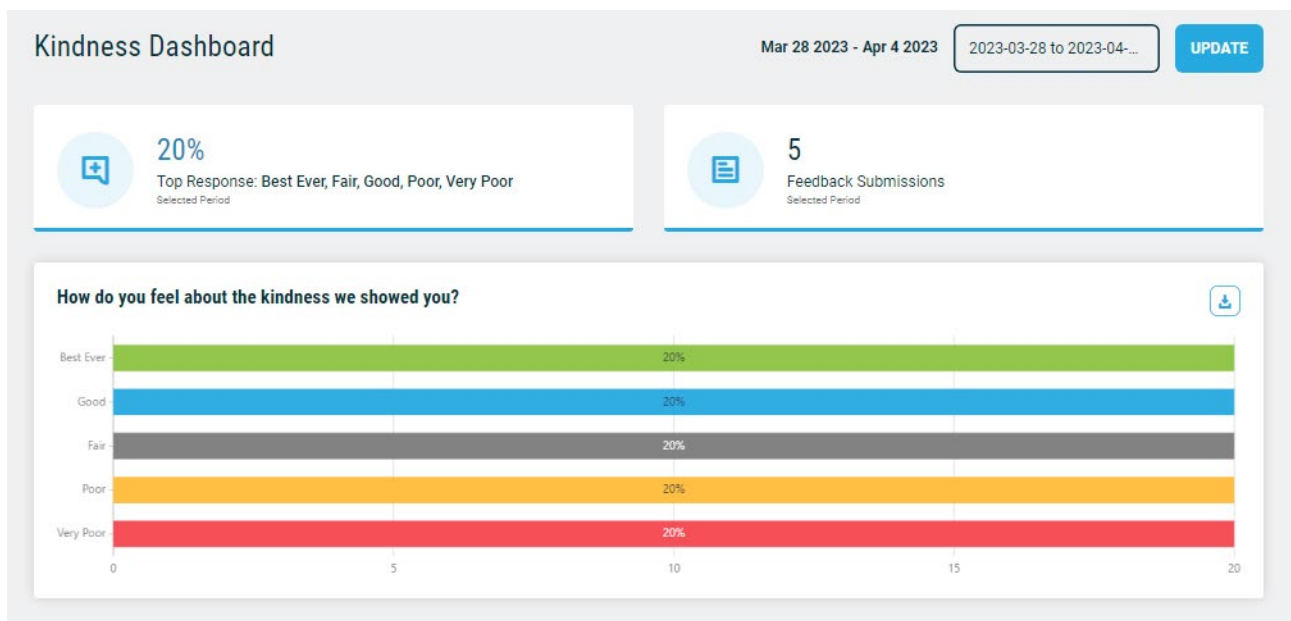
**Positive responses**  
= Green and Blue bars



**Negative responses**  
= Orange and Red bars



**Passive responses**  
= Grey bar





## Feelings Dashboard (if selected)

The Feelings Dashboard relates to questions obtaining data in response to feelings experienced by your patients.

The responses and corresponding data are represented in a horizontal bar chart. You can quickly identify which bar is the highest or lowest, including the incremental differences between the bars.

The following responses are highlighted using the following colours:



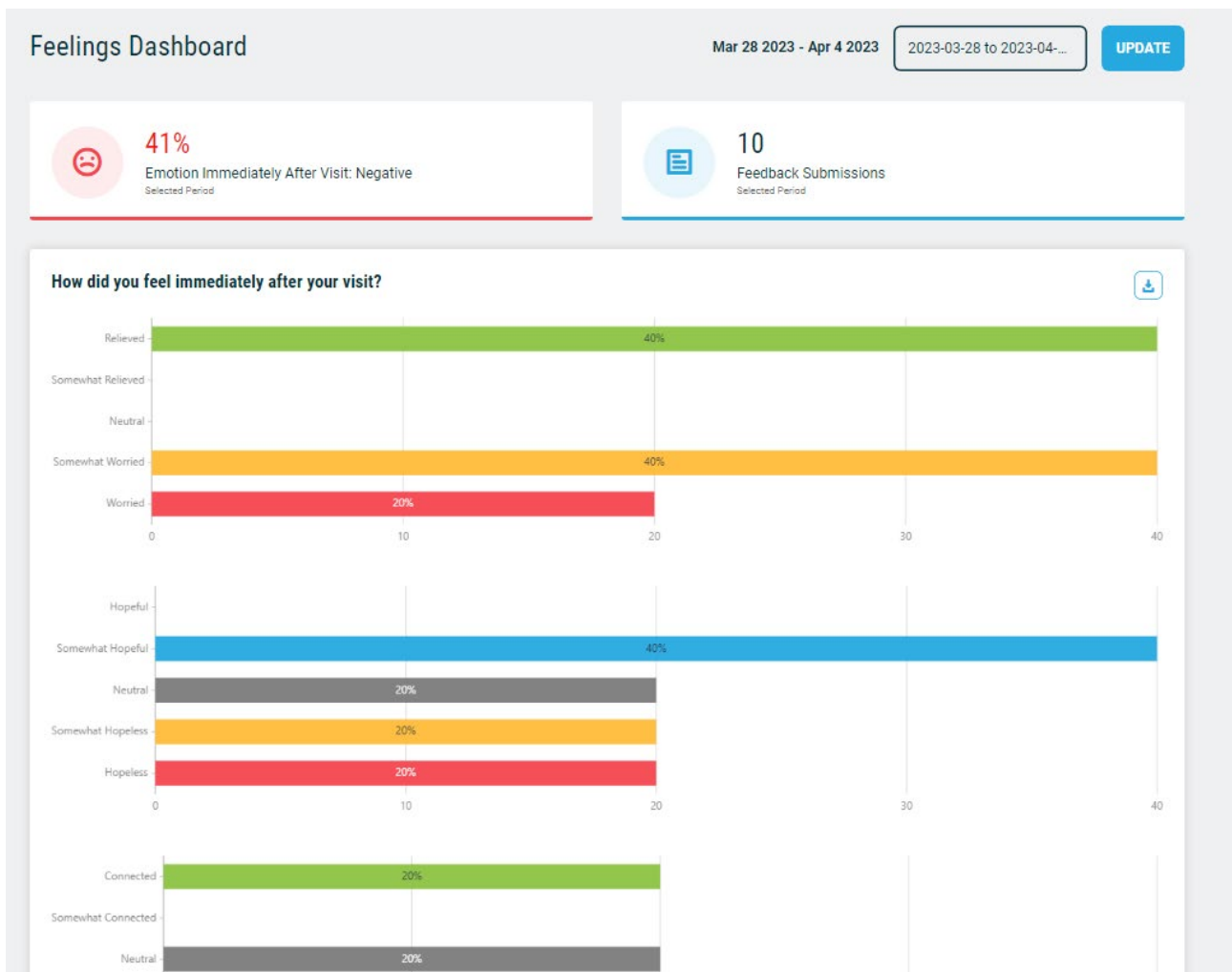
**Positive responses**  
= Green and Blue bars



**Negative responses**  
= Orange and Red bars

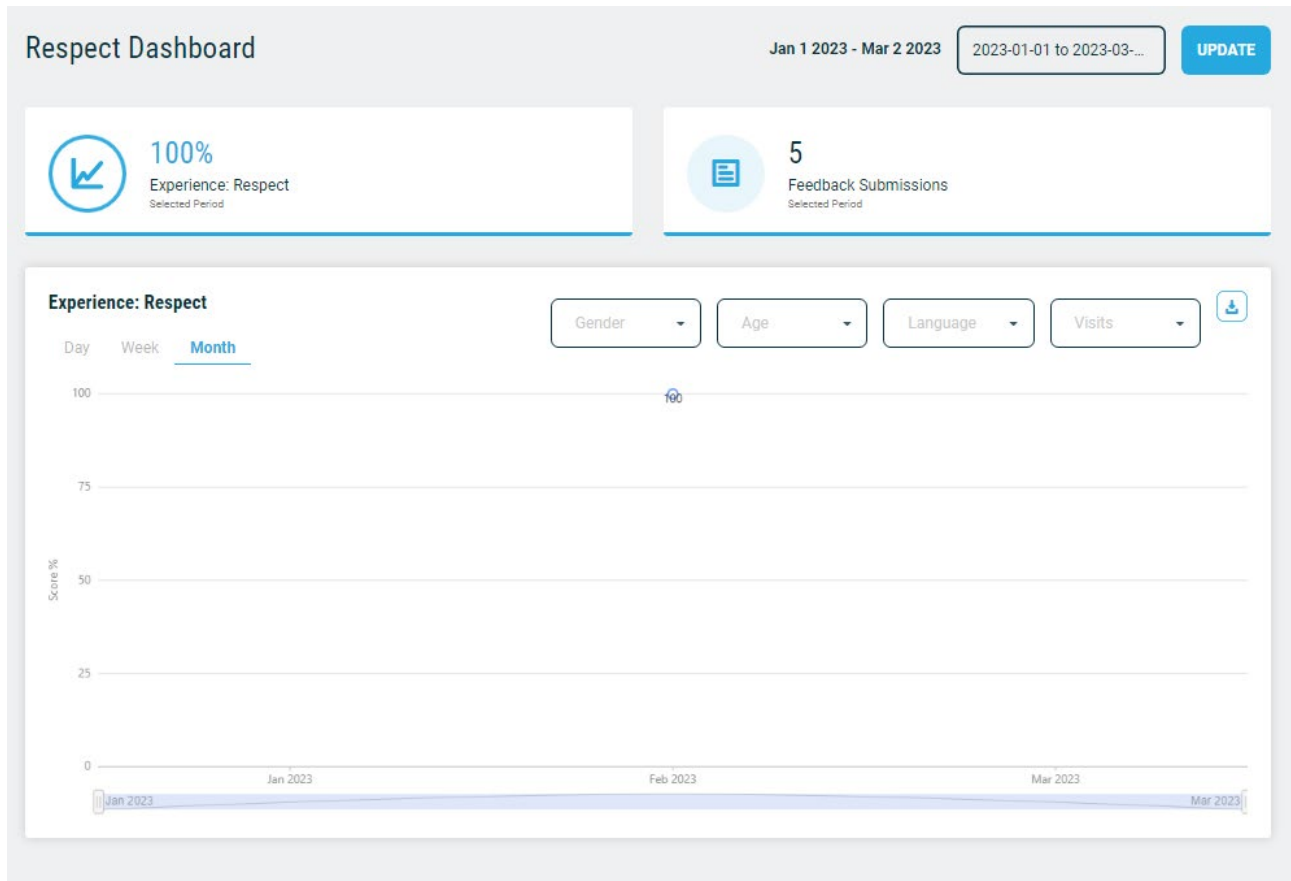


**Passive responses**  
= Grey bar



## Respect Dashboard (if selected)

The Respect Dashboard focuses on questions relating to respect. The responses are represented as a line graph with the score being displayed as a percentage.



## Experience Dashboard (if selected)

The Experience Dashboard relates to the general patient experiences with your organisation. The responses are represented in a horizontal bar chart. You can quickly identify which bar is the highest or lowest, including the incremental differences between the bars.

The following responses are highlighted using the following colours:



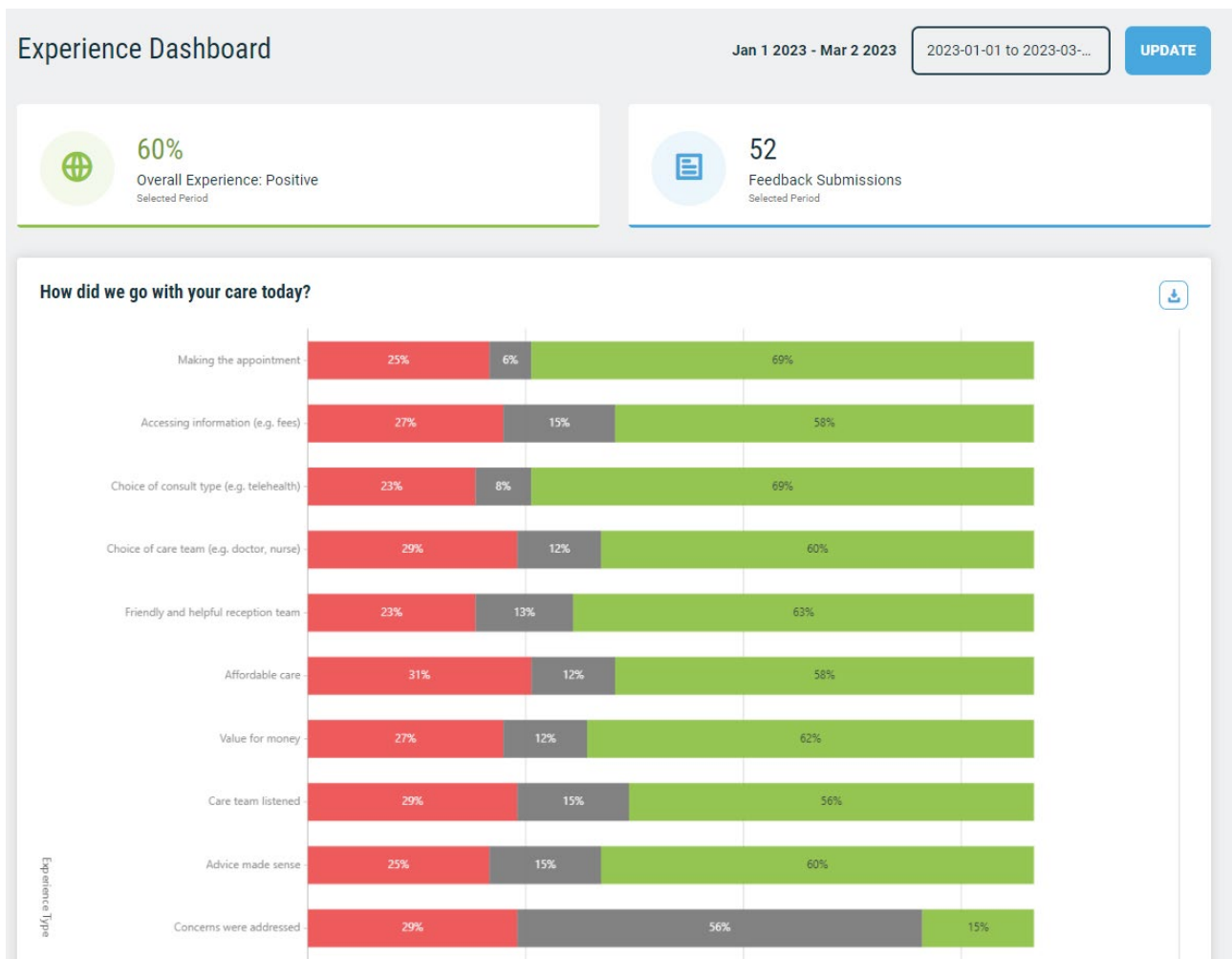
**Positive responses**  
= Green bar



**Negative responses**  
= Red bar



**Unsure responses**  
= Grey bar



## Comments Dashboard (if selected)

The Comments Dashboard relates to the free text question slide - **What more could we do to improve your experience of care?**

Patients are able to provide their own personal response to this question and therefore you'll have access to raw and unfiltered patient experience data. This qualitative dashboard data will provide your team with direct insights into your patients' feelings and thoughts. You may discover trends emerging across the responses and there may be key feedback provided which can support your team to identify and/or drive quality improvements within your organisation. The collected data can also provide you with the opportunity to celebrate your team and organisation strengths.

The screenshot displays the 'Comments Dashboard' for the period 'Jan 1 2023 - Mar 2 2023'. It features two summary cards: '5 NPS Comments' and '5 Feedback Submissions'. Below these is a list of comments for the question 'What more could we do to improve your experience of care?'. The comments are: 'Have more plants in the waiting room', 'have more comfortable seats in the waiting room.', 'Have more GP's', 'Wait times are long, i prefer telehealth. Should have more options for telehealth', and 'Practice is great, no improvement needed.'. A 'No further comments' message is shown at the bottom of the list. A date range selector shows '2023-01-01 to 2023-03-...' and an 'UPDATE' button is present.

Category	Count
NPS Comments	5
Feedback Submissions	5

**What more could we do to improve your experience of care?**

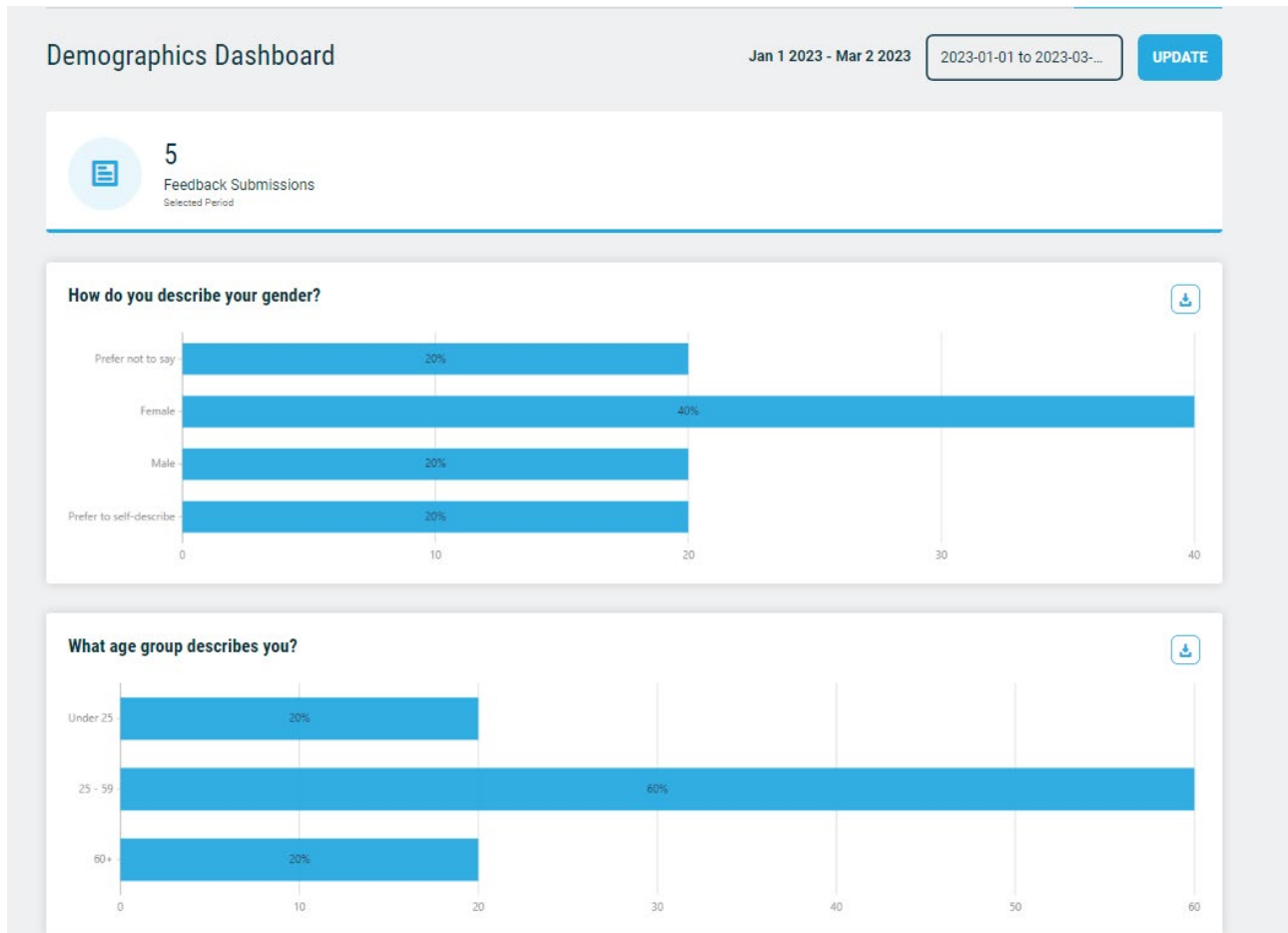
- Have more plants in the waiting room
- have more comfortable seats in the waiting room.
- Have more GP's
- Wait times are long, i prefer telehealth. Should have more options for telehealth
- Practice is great, no improvement needed.

No further comments

## Demographics Dashboard (if selected)

The Demographic Dashboard relates to questions and collected data regarding the patients who participated in your Active Insights survey.

The responses are represented in a horizontal bar chart and are all highlighted blue. You can quickly identify which bar is the highest or lowest, including the incremental differences between the bars.



## Creating customised questions

As part of your Active Insights subscription you have the ability to create two customisable question themes for each individual site. These question themes can include multiple questions in multiple formats.

Although the two question themes can include multiple questions, it's strongly recommended that each question set revolves around a central topic or a limited number of questions per theme (ideally no more than five questions) to ensure a positive patient feedback experience. It's desirable for all participating patients to answer all included survey questions to provide well-rounded and complete data sets.

Active Insights has been designed as a simple and quick survey solution tool to enable you to collect valuable real-time patient experience data. Therefore, we further recommend that your customised questions aren't complicated or lengthy. They should be clear and easily understood by your patients, so be sure to formulate them in a way that relates to those likely to be undertaking the survey.

In order to collect an ample amount of data we suggest that you include your customised question themes within your survey for a period of at least six months before making any changes or updates.

Prior to adding your customised questions, you may find it helpful to seek feedback on your questions from your staff and patients to ensure they are easily understood and answers appropriately link to the data you are trying to assess.



**Please note:** As mentioned in the 'User types' section, Organisation Admin and Site User types both have the ability to create and edit customised question themes. When setting up your custom questions we also recommend setting up some team rules to support the creation and updating of these custom questions based on your organisational goals. For example, you may want to leave it up to each site to create their own custom questions or you may like to collect data against the same question themes across all your sites (and will therefore need to specify to your site users that these questions can't be changed even though they have the ability to do so).

## Creating question themes known as a 'Form'

Your customised questions need to sit within an overarching question theme (of which you are eligible for two).

In order to create or make updates to your customised question themes, you'll need to go to the 'Site Forms' section within your Active Insights platform.

As an Organisation Admin, if your Active Insights account is connected to multiple sites you'll see a full list of these displayed. You can customise your questions per site or utilise the same customised question(s) across all your sites. You will however need to enter your customised questions into each of your sites whether they are different or the same.

If you only have one site listed or you're a Site User, one row will be displayed with your site information.

To customise your site questions, select the 'EDIT' feature on the far right-hand side of the screen, in line with the 'Name' of the site you wish to customise your questions for.



**Please note:** *within this screen you'll also notice the column 'Slug'. This is related to the customised URL for each of your site(s) surveys and is unable to be changed.*

### Edit Forms

Search [ ] GO FILTER

<input type="checkbox"/> Select All	Name ↕	Slug ↕	VIEW	EDIT
<input type="checkbox"/>	High Performing General Practice - Hobart - Primary Care (General Practice, After Hours care)	is1nja	VIEW	EDIT
<input type="checkbox"/>	High Performing General Practice - Darwin - Primary Care (General Practice, After Hours care)	0apimf	VIEW	EDIT
<input type="checkbox"/>	High Performing General Practice - Adelaide - Primary Care (General Practice, After Hours care)	aj3ct2	VIEW	EDIT
<input type="checkbox"/>	High Performing General Practice - Melbourne - Primary Care (General Practice, After Hours care)	k35wdg	VIEW	EDIT
<input type="checkbox"/>	High Performing General Practice - Sydney - Primary Care (General Practice, After Hours care)	tmn24n	VIEW	EDIT
<input type="checkbox"/>	High Performing General Practice - Canberra - Primary Care (General Practice, After Hours care)	fihtbl	VIEW	EDIT
<input type="checkbox"/>	High Performing General Practice - Brisbane - Primary Care (General Practice, After Hours care)	0vwzvq	VIEW	EDIT

Once you've selected 'EDIT' you'll reach the 'Site Forms' > 'Customised Forms' page. This page displays all your question themes however you'll only have the functionality to create a 'NEW SLIDE' and edit the details contained within this section.

To see where your custom questions will be added into your survey you must scroll down to the bottom of the page using the 'Page Scroll Bar' located on the far right-hand side of the screen.

To create and edit your first set of customised questions, click on the ellipses (three small dots) under the listed 'NEW SLIDE' title followed by the 'EDIT SLIDE' tab from the dropdown display.



This then provides you with the opportunity to name your slide/question theme. It's important to note that the name of this slide will be displayed within the patient-facing survey as the section title so ensure it's patient-friendly and relevant to the questions you're asking.

Enter your new name into the 'Slide Name' field after deleting the 'New Slide' pre-populated text. Once done click on the 'CLOSE' button.

A screenshot of the 'Slide Name' form. It features a text input field with the placeholder text 'New Slide' and a blue 'CLOSE' button below it.

You can also add an additional 'NEW SLIDE' by selecting the '+ ADD A NEW SLIDE' link at the bottom of the left-hand side. Once this has been added, simply follow the instructions above to rename your slide/question theme.



**Please note:** You do not need to add this second slide/question theme if you only want to include one set of customised questions. The maximum number of customised question slides/themes is two however you can include multiple questions within a question slide/theme.



## Adding your customised questions

Your newly created slide/question theme(s) will appear at the end of the survey (scroll down to the end of the page) and on the right-hand side you'll see the function to 'ADD A NEW QUESTION'.

You'll note that all other survey questions included in your Active Insights account are listed in the section above. To support data collection over time and benchmarking opportunities you're unable to edit these pre-selected questions.

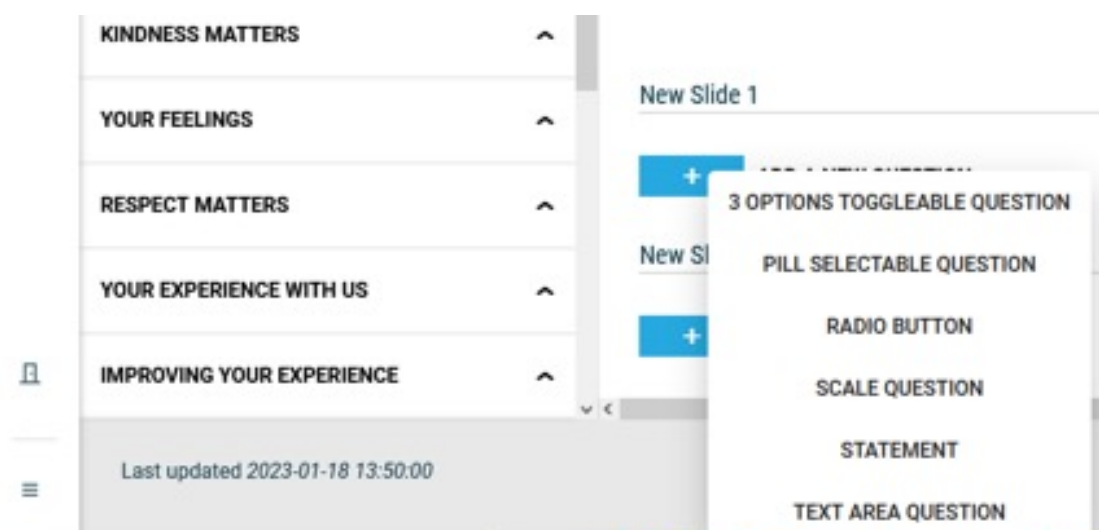
As previously mentioned, you do have the ability to add as many individual questions as you'd like to each of your slide/question themes however we strongly recommend that you only include a couple of questions per slide to ensure the survey remains simple, easy and timely for patients to complete.

New Slide 1

+ ADD A NEW QUESTION

When you select the 'ADD A NEW QUESTION' function you'll be presented with a dropdown menu containing the following question type options:

- 3 Options Toggleable Question
- Pill Selectable Questions
- Radio Button
- Scale Question
- Statement
- Text Area Question



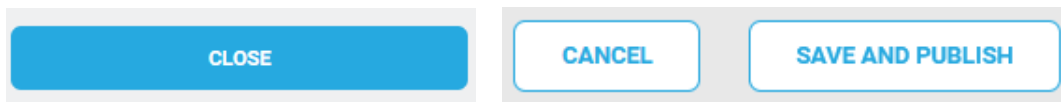
For each question type, instructions on how to add in your details is provided over the following pages under the heading 'Question type instructions'.

## Saving your custom questions

It's important to note that after you've added in your customised question information (as per the instructions that follow), you'll need to click on the 'CLOSE' button on the left-hand side, followed by the 'SAVE AND PUBLISH' button on the right-hand side.

If you've set up a custom question and then decide not to include this in your survey, simply click on the 'CANCEL' button to remove all entered information.

This functionality applies across all question types.



After saving or removing each custom question, you'll be redirected back to the 'Site Forms' page. You'll then need to select the 'EDIT' functionality for your site to add more or update your custom questions.

## Question type instructions

### 3 Options Toggleable Question

Your '3 Option Toggleable Question' allows patients to select a response as 'NOT GOOD', 'UNSURE' or 'GOOD'.

The screenshot shows the 'Edit Forms' interface with a sidebar on the left and a main content area on the right. The sidebar contains a navigation menu with icons for home, search, and other functions. The main content area is titled 'Customise form' and contains the following sections:

- Options:** A section with a title '3 Options Toggleable Question title' containing the text 'Toggleable Question 1'. Below it is a description field '3 Options Toggleable Question description' containing the text 'DESCRIPTION'.
- Selectable options:** A section with two options, 'Option 1' and 'Option 2', each with a 'REMOVE' button. Below these is an 'ADD NEW OPTION' button.
- Example:** A section showing a preview of the question. It has a title 'Toggleable Question 1' and a description 'DESCRIPTION'. Below the description are two options, 'Option 1' and 'Option 2', each with a toggle scale containing 'NOT GOOD', 'UNSURE', and 'GOOD' buttons. The 'UNSURE' button is highlighted in grey.

Annotations with blue lines point to various parts of the interface:

- One points to the title field with the text: 'Enter your main question here'.
- Another points to the description field with the text: 'Add a question description if needed or any relevant instructions for the patients. Ensure this information is kept short.'
- A third points to the 'REMOVE' button for 'Option 2' with the text: 'Point you would like the patient to rate on the toggle scale'.

An example of questions using this question type could include:

→ **Question title:** What rating best describes your experience with our ...

**Description:** Please select the most appropriate answer and if you did not engage with the team members listed below, simply skip this question

**Selectable options:** General Practitioner  
Practice Nurse  
Reception Staff  
Other Staff



**Question title:** If you participated in our community health initiative, how did you find your experience in relation to...

**Description:** Select your response for each item:

- Selectable options:**
- Registration process
  - Expectations of involvement
  - Friendliness of our team
  - Instructions around activities
  - Health benefits
  - Encouragement by our team

## Pill Selectable Question

Your 'Pill Selectable Question' allows patients to choose multiple responses.

**Edit Forms**

Customise form

**Options**

Pill Selectable Question title  
New Pill Selectable Question

Pill Selectable Question description  
Description

**Validator**

ADD NEW VALIDATOR

**Selectable options**

Option 1 REMOVE

Option 2 REMOVE

Option 3 REMOVE

Less than 1 year

1-3 years

4-7 years

8 years or more

New Slide

**New Pill Selectable Question**

Description

Option 1 Option 2 Option 3

+ ADD A NEW QUESTION

Enter your main question here

Add a question description if needed or any relevant instructions for the patients. Ensure this information is kept short.

Click the 'ADD NEW VALIDATOR' button and select 'Required' if you'd like answers to your question to be mandatory. If you do not need this to be mandated simply skip over this functionality.

Enter your answers that can be selected by the patient

An example of questions using this question type could include:

→ **Question title:** Were there any areas in our practice that you feel could be improved?

**Description:** Choose any/all that apply:

**Selectable options:** Booking an appointment  
Welcome on arrival  
Waiting area facilities  
Communication during my consultation  
After-care instructions provided by my GP

→ **Question title:** If we ran the following health-based education sessions, which would you be interested in attending (in person or virtually)?

**Description:** Choose any/all that apply:

**Selectable options:** Healthy eating  
Keeping fit  
How to get a better sleep  
Low-impact exercise class  
Stress management

## Radio Button

Your 'Radio Button' based question allows patients to choose one response from a list of options.

**Edit Forms**

Customise form

**Options**

Radio Button title  
New Radio Button

Radio Button description  
Description

**Validator**

ADD NEW VALIDATOR

**Radio Options**

Option 1  
Option 1 REMOVE

Option 2  
Option 2 REMOVE

Option 3  
Option 3 REMOVE

ADD NEW RADIO OPTION

**Style**

**How long have you been visiting this practice?**

First visit

Less than 1 year

1-3 years

4-7 years

8 years or more

**New Slide**

**New Radio Button**

Description

Option 1

Option 2

Option 3

Other (free text option)

Enter your main question here

Add a question description if needed or any relevant instructions for the patients. Ensure this information is kept short.

Click the 'ADD NEW VALIDATOR' button and select 'Required' if you'd like answers to your question to be mandatory. If you do not need this to be mandated simply skip over this functionality.

Enter your radio button options, one of which the patient will select from the list

An example of questions using this question type could include:



**Question title:** What do you enjoy most about attending our practice?

**Description:** Select your response from the list:

**Selectable options:** Location  
Facilities  
Services offered  
Reception staff  
Practice Nurse  
My GP/Practice GPs



**Question title:** I would be open to being involved in patient-focus groups?

**Description:** Select your response from the list:

**Selectable options:** Yes  
No

## Scale

Your 'Scale' based question allows patients to rate their response across a set range.

**Edit Forms**  
Customise form

**Options**

Scale Question title  
New Scale Question

Scale Question description  
Description

Min value description  
0

Max value description  
5

Type  
Rating

**Validator**  
ADD NEW VALIDATOR

CLOSE

**New Scale Question**  
Description

0 1 2 3 4 5 6 7 8 9 10

ADD A NEW QUESTION

Enter your main question here

How long have you been visiting this practice?

First visit  
Less than 1 year  
1-3 years  
4-7 years  
8 years or more

Add a question description if needed or any relevant instructions for the patients. Ensure this information is kept short.

Enter the minimum scale (or measurement) of your range

Enter the maximum scale (or measurement) of your range

You have the option to select your scale 'Type' as 'Rating' or 'NPS'. If selecting rating then the classification of the response will be up to you however if you select 'NPS' this will apply the NPS rating scale of Promoters 9-10, Passives 7-8 and Detractors 0-6)

Click the 'ADD NEW VALIDATOR' button and select 'Required' if you'd like answers to your question to be mandatory. If you do not need this to be mandated simply skip over this functionality.

An example of questions using this question type could include:



**Question title:** How would you rate your

**Description:** Select your response from the list:

**Selectable options:** Location  
Facilities  
Services offered  
Reception staff  
Practice Nurse  
My GP/Practice GPs





**Question title:** I would be open to being involved in patient-focus groups?

**Description:** Select your response from the list:

**Selectable options:** Yes  
No

## Statement

Your 'Statement' based question allows you to provide an introduction to a set of following questions such as those created as radio buttons, scales etc.

**Edit Forms**

Customise form

**Options**

Statement title  
New Statement

**Statement Text**

this is the statement text

**How long have you been visiting this practice?**

Punjabi  
 Other

First visit  
 Less than 1 year  
 1-3 years  
 4-7 years  
 8 years or more

**New Statement**  
this is the statement text

**ADD A NEW QUESTION**

Enter your introductory question to summarise the following question sets.

Add a question description if needed or any relevant instructions for the patients. Ensure this information is kept short.

An example of questions using this question type could include:

- **Statement title:** Can you tell us more about your experience with us today?  
**Statement text:** Answer those questions that you feel comfortable with.
- **Statement title:** Can you share your thoughts around our digital platforms?  
**Statement text:** Answer the questions that you can and skip those you don't have enough information on or are unsure about.

## New Text Area

Your 'New Text Area' based question allows patients to respond to your question using free-text (in their own words).

**Edit Forms**

Customise form

**Options**

Text Area Question title  
New Text Area Question

Text Area Field title  
Title

**Validator**

ADD NEW VALIDATOR

CLOSE

**how long have you been visiting this practice?**

First visit

Less than 1 year

1-3 years

4-7 years

8 years or more

New Slide

**New Text Area Question**

Title

+

ADD A NEW QUESTION

Enter your question

Add a question description if needed or any relevant instructions for the patients. Ensure this information is kept short.

Click the 'ADD NEW VALIDATOR' button and select 'Required' if you'd like answers to your question to be mandatory. If you do not need this to be mandated simply skip over this functionality.

An example of questions using this question type could include:

→ **Text Area Question title:** What is important to you when you come to our practice?

**Text Area Field Title:** Tell us in your own words.

→ **Text Area Question title:** Our team would like to share more health information for patients online. Would type of information would you be interested in?

**Text Area Field Title:** Tell us in your own words.

## Preview your completed survey

Once you've added in all your questions you'll need to ensure some testing is carried out to check everything is working as you intend it to. It's helpful to ask other members of your team to undertake this task to provide an objective point of view.

You can undertake this activity by using the 'PREVIEW' button in the top right-hand side.

### PREVIEW

This will allow you to view your survey in full and to read over each of the questions in chronological order, just like a patient completing the survey.

### Editing or removing saved and published questions

After previewing your survey(s) you may discover that you need to make some edits to your custom questions (e.g. to correct typos, make questions more succinct or to change their intent etc.).

To edit or remove your saved or published questions you'll need to go back into the 'SITE FORMS' section within your navigation bar, select the 'EDIT' function for the relevant practice(s) and scroll to the bottom of your survey by using the right-hand side scroll bar.

You'll then need to be able to make your required updates by using the following features:



'OPTIONS' allows you to make edits by updating your question information on the left-hand side and the three ellipses gives you the option to delete your question.

Remember to 'SAVE AND PUBLISH' after you've made your required updates to ensure these changes are made within your survey.

You may like to go through the preview process again just to double check everything before commencing your data collection.



**Please note:** you can also use this feature to change or create entirely new custom questions at any time. As highlighted in the information provided at the start of this section, it's strongly recommended that you include your customised question themes and the individual questions within your survey for a period of at least six months before making any changes or updates. This will allow you to collect an ample amount of data to assist you in identifying any key trends or findings.

## Activating Active Insights for your patients (gathering feedback)

Now that you've navigated your way around your Active Insights platform, have instructions on how to apply various data filters, pull reports and set-up any customised questions you're ready to start collecting your patient or consumer feedback!

You'll find details on the technical steps you'll need to take to gain your unique survey link(s) for distribution as well as some ideas as to the ways your team may like to start distributing your survey(s) to your patients or consumers.



**IMPORTANT:** Prior to distributing your survey it's extremely important to check that your survey displays and works correctly. Testing can be done once you have gained your customised survey link by following the instructions below.

## Collecting your survey data

To start collecting data via your Active Insights survey(s) you'll need to provide your intended respondents with access to your survey.

Each site will have a customised survey link which is available as a URL and QR Code.

If managing multiple-sites, prior to distribution remember to double check that you have the correct survey for the correct site.

To obtain your unique survey link(s):

- Select the 'Site Forms' icon on the navigation bar.

Site Forms			
Search			
GO FILTER			
<input type="checkbox"/> Select All	Name ↕	Slug ↕	
<input type="checkbox"/>	High Performing General Practice - Hobart - Primary Care (General Practice, After Hours care)	is1nje	
<input type="checkbox"/>	High Performing General Practice - Darwin - Primary Care (General Practice, After Hours care)	0apimf	

- Once on the Site Forms page you will have a list of your organisation's linked sites or site. To gain access to the relevant survey link for a specific site click the corresponding 'VIEW' function located on the right-hand side of the screen.
- You'll then land on the 'Form Preview' page of your specified site survey. This is a no frills view of your final site survey and includes the survey's customised URL and QR Code in the top left-hand corner. To check you're happy with the survey we strongly recommended that you review all the content contained in the survey by reviewing each question theme. To move to the next question theme contained within your survey, click on the 'NEXT SLIDE' button in the bottom right-hand side of the screen.

**NEXT SLIDE →**

At the end of your previewed survey you will be presented with the option to select a green 'SUBMIT' button. We recommend that you don't select this button during your preview checks otherwise any submitted data will enter into your collected responses and formulate part of your live data sets.

### Preparing your URL and QR Code for distribution

Once you've reviewed your survey(s) you'll now be ready to distribute this to your patients or consumers. Your customised URL and QR Code can be found in the top left-hand corner of the page:



<https://cfepprms.care/submitform/>

You can copy and paste the URL details by selecting the URL information (as highlighted like the example above) or retype the details into your relevant distribution channels.

To share your QR Code, you'll need to copy the image and place this into your relevant distribution channels. You can either use the 'PRINT SCREEN' button on your keyboard and crop it down or follow the same instructions in the 'Capturing data and graphs' section (page 11) to utilise the functionality of the Snipping Tool.

## Ways you may like to distribute your survey

Now that you've got your customised URL or QR Code it's time to start collecting data!

Based on the questions being asked, you'll want to be capturing experience data from patients or consumers who have visited your site (practice or organisation) that day.

Here are some ideas that you may like to implement to distribute your survey(s) to your intended respondents:

- Set-up the survey on a tablet device and ask patients to complete this following their consultation.
- Create a poster or sign using the QR Code and place this on your reception desk. Ask patients to scan and complete the survey following their consultation/appointment via their own electronic device.
- Place the URL or QR Code in an email or text message and send an email to your patients following their consultation.
- Create a slip you can hand out to your patients post consultation which contains the QR Code and ask them to scan the QR Code to complete the survey.



### TIPS

- Test your survey on a small group (or target audience) to identify issues with interpretation or processes.
- Ensure you involve your staff to inform them that the organisation is collecting feedback with Active Insights and how to engage patients to provide feedback. This can be done at your team meeting.
- Communicate any rules around custom questions to ensure all Organisation Admin and Site Users are clear in their roles and responsibilities in relation to this functionality of the platform.
- Ensure your distribution channels are creating enough opportunity for the collection of feedback via the Active Insights platform.
- Ensure you allow enough time to collect data before you start analysing the feedback and providing feedback to your staff. This could take one to two months of collecting before you have sufficient responses.
- Ensure that a quality improvement culture and processes are embedded in your organisation and staff.
- Engage and encourage patients to provide feedback in support of your team's quality improvement commitment.
- Surveying more patients will give you a more reliable sample of your patients' views.
- Undertake focus groups with patients if you want to gain additional insights into data results or potential initiatives your team would like to implement as a result of the patient feedback collected.

# Contact us

We hope you've found your Active Insights User Guide helpful.

If you have any questions regarding your account (particularly around the custom questions section) or need to update your account users, simply reach out to our team via the details below.

If you'd like to learn how our other service offerings can assist in supporting individual members of your team and additional value add solutions for your practice, please contact us for a one-on-one discussion.

Thank you for choosing CFEP Surveys' Active Insights as your real-time patient feedback provider.

We're proud to be supporting you on your journey of quality improvement.



## CONTACT US

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