

Best Practice Instructions for Primary Care Patient Experience Survey

In the Patient Details screen, click 'Enrol' to open up the patient's Enrolment Details. You may find it useful to reference whether the patient has been asked about taking part in the survey.

The screenshot shows the 'Patient Details' form for a patient named JORDAN. The form is divided into several sections: Personal Information (Surname, Title, First Names, Middle name, Birth, NHI, File Number), Contact Information (Building/Box, No/Street, Suburb, City, Postcode, Ethnic Gr., Birth Ctry., Iwi), and Employment/Insurance (Employer, Occupation, Warnings, Eligible for public Health Funding, CSC Grp 1, High User). A red box highlights the 'Enrol' button located in the bottom right corner of the form. Another red dashed box highlights the 'Unasked', 'Opt In', and 'Opt Out' radio buttons in the 'Contact' section.

This opens a second window where you can enter the Patient's contact details they would like used for the patient experience survey in the Patient Preference Response section.

The screenshot shows the 'Enrolment Details' form, which is a sub-window of the Patient Details form. It is divided into several sections: 'Details of Registration with Practice' (Registration Status, Date Registered with Practice), 'Details of Enrolment with PHO' (Enrolment Status, PHO Enrolment Date, Mode of enrolment, Enrolment End Date, Termination Reason), 'CBF Details' (Current Funding Status, Funding Started From, Reason for Rejection), and 'Geocoding Details' (X-Coordinate, Y-Coordinate, MeshBlock, Quintile, Uncertainty Code, DHB Code, Last Visit Date, Last Download/Export, Last Upload/Import, Last Sync to NES). A red box highlights the 'Patient Preference Response' section at the bottom of the form, which contains the following questions and answers:

- Would you like to partake in a patient experience survey? No Yes
- What is your preferred cell phone number to text the survey invitation to? 021 3456789
- What is your preferred email address to send the survey invitation to? test@example.com