

Te Tāhū Hauora
Health Quality & Safety
Commission



Patient experience survey core question handbook

July 2023



**He ara aupiki,
he ara auheke**

Aotearoa New Zealand
patient experience survey

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**Te Kāwanatanga
o Aotearoa**

New Zealand Government

Document purpose

This handbook explains the purpose of the patient experience survey core question set and how it fits within the national survey questionnaires. It also outlines some issues to consider when using the set in your own local data collection activities.

Core questions

The patient experience survey core question set is a set of validated questions that feature in each of the current Te Tāhū Hauora Health Quality & Safety Commission (Te Tāhū Hauora) national patient experience surveys. These questions are relevant across patient populations and health care settings. They enable providers to be consistent in collecting valid and reliable patient experience survey feedback, which can then be benchmarked nationally.

The core questions reflect essential elements of patient experience, including effective communication, partnership, coordination, whether services meet specific needs, and experience of culturally safe care.¹

Elements in core question set

- Involved in decisions about treatment and care as much as wanted^{*a}
- Felt comfortable to ask any questions*
- Not treated unfairly*
- Treated with respect and kindness*
- Name pronounced properly and staff asked how to say patient's name if uncertain*
- Cultural, spiritual, and individual needs met*
- Family/whānau involved in discussions about care*
- Trust and confidence in staff
- Views and concerns listened to by staff
- Staff explained what was going on in an understandable way
- Kept informed about treatment and care as much as wanted

The core questions have been tested and validated in Aotearoa New Zealand. They are available in English and te reo Māori. Te Tāhū Hauora reviews the set regularly to keep the questions robust and relevant. Appendix A contains a comprehensive overview of the questions, including how they are worded in the different surveys.

^a Items marked with an asterisk * are questions that indicate culturally safe care in the core set. This is not the full set of questions that indicate culturally safe care because topic-specific questions in each survey also fit in this category.

Components of the national patient experience survey questionnaires

All patient experience surveys consist of several different components. The key components of Te Tāhū Hauora national patient experience surveys are:

- core questions
- topic-specific questions for the kind of health care setting that the survey is focused on
- questions that indicate culturally safe care (some of which are included in the core set and others that are topic-specific)
- questions on respondent demographics
- patient information available in the administrative data system (eg, health specialty code).

Combined, these components provide a comprehensive snapshot of patient experience and the patient journey through a care episode in a specific care context (ie, inpatient or primary care). Wording of both core questions and survey topic-specific questions is adapted to the context of the health care setting topic. As a result, a question that refers to the same element of patient experience may have slightly different wording across the primary care, inpatient and outpatient surveys. Table 1 shows an example of differences in wording across surveys.

Table 1: Differences in wording across survey types for the question on family/whānau involvement in discussions

Element	Adult primary care patient experience survey question	Adult hospital inpatient experience survey question	Adult hospital outpatient experience survey question
Family/whānau involvement in discussions	<p>At [practice name] if you want to, are you able to have family/whānau involved in discussions about your treatment and care?</p> <ul style="list-style-type: none"> ○ Yes, definitely ○ Somewhat ○ No ○ I do not want them included ○ Not applicable 	<p>Did hospital staff include your family/whānau or someone close to you in discussions about the care you received during your visit?</p> <ul style="list-style-type: none"> ○ Yes, definitely ○ Somewhat ○ No ○ I do not want them included ○ Not applicable 	<p>If you wanted to, were you able to have your family/whānau or someone close to you involved in discussions about your treatment and care?</p> <ul style="list-style-type: none"> ○ Yes, definitely ○ Somewhat ○ No ○ I do not want them included ○ Not applicable

What to consider before collecting your data

Stats NZ's *A guide to good survey design* (fifth edition) is a helpful resource that outlines issues to consider and steps to take when planning and undertaking a survey.²

If you are developing your own local patient experience survey, we recommend you start with the core question set as the foundation, and then consider what topic-specific questions, demographics and administrative data you also need to include. In this section, we outline these and other key issues about data collection to consider.

Administrative data. What patient information is already available in your system that you can link to the survey data to help you identify patient cohorts or quality improvement activities you are focusing on?

Topic-specific questions. You may want to include additional questions to build up a more comprehensive picture of patient experience for your specific health care setting. If other questions from the national patient experience surveys can contribute to this picture, you can use them as they have been tested and validated in Aotearoa New Zealand and are available in English and te reo Māori.

Collecting demographic information. We recommend using Stats NZ standard demographic questions for age,³ gender,⁴ ethnicity⁵ and disability status⁶. In this way, wording across the surveys of individual health care settings can be consistent, which in turn makes their data comparable (see Appendix B). Demographic items contribute to analyses relevant to equitable experiences of care.

Privacy and data security. The [Patient experience surveys: Privacy impact assessment report](#) considers how the surveys and reporting may impact on individual privacy and how closely they comply with the information privacy principles. The report also outlines steps to assess areas of potential risk and to minimise that risk.⁷ Storing data in Aotearoa New Zealand is good practice and upholds the principles of Māori data sovereignty.⁸

Accessibility. For accessibility resources, see <https://msd.govt.nz/about-msd-and-our-work/work-programmes/accessibility/index.html> and www.digital.govt.nz/standards-and-guidance/design-and-ux/accessibility/.

Choice of survey tools (eg, SurveyMonkey, Google Forms). Many survey tools are available for creating and distributing questionnaires, as well as analysing the results. They differ in their ease of use, data storage protocols and analytic capabilities. It is important to be aware of your specific needs so that you can choose the survey software tools best suited to meeting those needs.

Survey mode. To administer your survey, you can choose from several different modes (eg, paper-based, online, on a tablet, in person or telephone interview). Each has its own strengths and weaknesses. For example, paper-based surveys can be time-consuming (eg, because they involve the extra step of manually entering the data into a register or spreadsheet).

Resourcing for quality improvement. Designing and running a survey is only part of the task.⁹ Surveys collect data but, to gain insights for quality improvement, you need additional analysis and capability. Whatever method you use to collect data, it is critical that you have resource available to analyse, interpret and act on the feedback you receive from patients. Ask yourself what method you will use to analyse the data and who will do it. Also check whether the team has the capacity and capability to undertake quality improvement activity.

Te Tāhū Hauora has developed resources to help you use survey data for improvement:

- *From PES to PDSA – Workbook: Using adult hospital inpatient experience survey data for quality improvement:* www.hqsc.govt.nz/resources/resource-library/from-pes-to-pdsa-workbook-using-adult-hospital-inpatient-experience-survey-data-for-quality-improvement/
- *From PES to PDSA – Workbook: Using adult primary care patient experience survey data for quality improvement:* www.hqsc.govt.nz/resources/resource-library/from-pes-to-pdsa-workbook-using-adult-primary-care-patient-experience-survey-data-for-quality-improvement/

Contact details

To contact The Te Tāhū Hauora patient-reported measures programme, email: survey@hqsc.govt.nz

To contact Ipsos (current survey provider for the New Zealand patient experience survey programme), email: NZPatientExperienceSurveys@ipsos.com

References

1 Health Quality & Safety Commission. 2021. *Measuring culturally safe care through the patient experience surveys*. Wellington: Health Quality & Safety Commission. URL: www.hqsc.govt.nz/resources/resource-library/measuring-culturally-safe-care-through-the-patient-experience-surveys (accessed 26 June 2023).

2 Stats NZ. 2019. *A guide to good survey design* (5th ed). Wellington: Stats NZ. URL: www.stats.govt.nz/methods/a-guide-to-good-survey-design-fifth-edition (accessed 26 June 2023).

3 Stats NZ. 2022. Statistical standard for age V1.0.0. URL: https://aria.stats.govt.nz/aria/?&_ga=2.246490432.590498824.1683235763-39577387.1683103121#StandardView:uri=http://stats.govt.nz/cms/StatisticalStandard/age (accessed 26 June 2023).

4 Stats NZ. 2021. Data standard for gender, sex, and variations of sex characteristics. URL: www.stats.govt.nz/methods/data-standard-for-gender-sex-and-variations-of-sex-characteristics/ (accessed 26 June 2023).

5 Stats NZ. 2022. Statistical standard for ethnicity V1.0.0. URL: https://aria.stats.govt.nz/aria/?&_ga=2.251535426.590498824.1683235763-39577387.1683103121#StandardView:uri=http://stats.govt.nz/cms/StatisticalStandard/vv0ovwUoTSSVDhpt (accessed 26 June 2023).

6 Stats NZ. 2017. *Improving New Zealand disability data*. Wellington: Stats NZ. URL: www.stats.govt.nz/assets/Reports/Improving-New-Zealand-disability-data/improving-new-zealand-disability-data.pdf (accessed 26 June 2023).

7 Health Quality & Safety Commission. 2021. *Patient experience surveys: Privacy impact assessment report*. Wellington: Health Quality & Safety Commission. URL: www.hqsc.govt.nz/resources/resource-library/patient-experience-surveys-privacy-impact-assessment-report/ (accessed 26 June 2023).

8 Kukutai T, Campbell-Kamariera K, Mead A, et al. 2023. *Māori data governance model*. Te Kāhui Raraunga. URL: www.kahuiraraunga.io/files/ugd/b8e45c_a5b7af8b688c4cd9b7583775c27da52e.pdf (accessed 26 June 2023).

9 Dixon-Woods M. 2019. How to improve healthcare improvement – an essay by Mary Dixon-Woods. *BMJ* 367: I5514. URL: www.bmj.com/content/367/bmj.I5514 (accessed 26 June 2023).

Appendix A: Elements of patient experience with corresponding core question wording across three national patient experience surveys

Element	Adult primary care patient experience survey	Adult hospital inpatient experience survey	Adult hospital outpatient experience survey
Listened to by staff	<p>Did the [insert HCP]² listen to you?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes, definitely <input type="radio"/> Somewhat <input type="radio"/> No 	<p>During your most recent hospital stay, did the [insert HCP]³ listen to your views and concerns?</p> <ul style="list-style-type: none"> - Doctors <ul style="list-style-type: none"> <input type="radio"/> Yes, always <input type="radio"/> Sometimes <input type="radio"/> No - Nurses <ul style="list-style-type: none"> <input type="radio"/> Yes, always <input type="radio"/> Sometimes <input type="radio"/> No - Other members of your healthcare team <ul style="list-style-type: none"> <input type="radio"/> Yes, always <input type="radio"/> Sometimes <input type="radio"/> No <input type="radio"/> I did not have contact with them 	<p>Did the [insert HCP]⁴ listen to your views and concerns?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes, definitely <input type="radio"/> Somewhat <input type="radio"/> No
Kept informed about treatment and care	<p>Did the [insert HCP] inform you as much as you wanted about your health condition, treatment or care?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes, definitely <input type="radio"/> Somewhat <input type="radio"/> No 	<p>Were you kept informed as much as you wanted about your treatment and care?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes, always <input type="radio"/> Sometimes <input type="radio"/> No <input type="radio"/> I was unable to be informed 	<p>Did the [insert HCP] inform you as much as you wanted about your health condition, treatment or care?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes, definitely <input type="radio"/> Somewhat <input type="radio"/> No
Staff explained things in an understandable way	<p>Did the [insert HCP] explain things in a way you could understand?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes, definitely <input type="radio"/> Somewhat 	<p>Did your healthcare team explain what was going on during your stay in a way you could understand?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes, definitely 	<p>Did the [insert HCP] explain things in a way you could understand?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes, definitely <input type="radio"/> Somewhat

² An earlier question asks who the patient's appointment was with. The response (GP, nurse, mental health professional or another health care professional) is then piped in here.

³ In the adult hospital inpatient experience survey, this question is asked for doctor, nurse and other members of health care team.

⁴ An earlier question asks who the patient's appointment was with. The response (doctor, nurse, physiotherapist, radiographer, dietician, occupational therapist, psychologist or counsellor, social worker, speech pathologist, other health care professional) is then piped in here.

Element	Adult primary care patient experience survey	Adult hospital inpatient experience survey	Adult hospital outpatient experience survey
	<ul style="list-style-type: none"> <input type="radio"/> No 	<ul style="list-style-type: none"> <input type="radio"/> Somewhat <input type="radio"/> No 	<ul style="list-style-type: none"> <input type="radio"/> No
Involved in decisions	<p>Did the [insert HCP] involve you as much as you wanted to be in making decisions about your treatment and care?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes, definitely <input type="radio"/> Somewhat <input type="radio"/> No <input type="radio"/> I did not want to be involved 	<p>Were you involved as much as you wanted to be in making decisions about your treatment and care?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes, always <input type="radio"/> Sometimes <input type="radio"/> No <input type="radio"/> I did not want to be involved <input type="radio"/> I was unable to be involved 	<p>Were you involved as much as you wanted to be in making decisions about your treatment and care?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes, always <input type="radio"/> Sometimes <input type="radio"/> No <input type="radio"/> I did not want to be involved
Felt comfortable to ask questions	<p>Did you feel comfortable to ask the [insert HCP] any questions you had?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes, definitely <input type="radio"/> Somewhat <input type="radio"/> No <input type="radio"/> Can't remember/don't know 	<p>Did you feel comfortable to ask any questions you had?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes, definitely <input type="radio"/> Somewhat <input type="radio"/> No <input type="radio"/> Can't remember/don't know 	<p>Did you feel comfortable to ask the [insert HCP] any questions you had?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes, definitely <input type="radio"/> Somewhat <input type="radio"/> No <input type="radio"/> Can't remember/don't know
Name pronounced properly	<p>Was your name pronounced properly by the [insert HCP]?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes, always <input type="radio"/> Sometimes <input type="radio"/> No <input type="radio"/> No one used my name <input type="radio"/> Unsure/don't know 	<p>Was your name pronounced properly by those providing your care?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes, always <input type="radio"/> Sometimes <input type="radio"/> No <input type="radio"/> No one used my name <input type="radio"/> Unsure/don't know 	<p>Was your name pronounced properly by the [insert HCP]?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes, always <input type="radio"/> Sometimes <input type="radio"/> No <input type="radio"/> No one used my name <input type="radio"/> Unsure/don't know
Staff asked how to say patient's name if uncertain	<p>Did the [insert HCP] ask you how to say your name if they were uncertain?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes, always <input type="radio"/> Sometimes <input type="radio"/> No 	<p>Did those involved in your care ask you how to say your name if they were uncertain?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes, always <input type="radio"/> Sometimes <input type="radio"/> No 	<p>Did the [insert HCP] ask you how to say your name if they were uncertain?</p> <ul style="list-style-type: none"> <input type="radio"/> Yes, always <input type="radio"/> Sometimes <input type="radio"/> No

Element	Adult primary care patient experience survey	Adult hospital inpatient experience survey	Adult hospital outpatient experience survey
	<ul style="list-style-type: none"> ○ They did not need to ask ○ Unsure/don't know 	<ul style="list-style-type: none"> ○ They did not need to ask ○ Unsure/don't know 	<ul style="list-style-type: none"> ○ They did not need to ask ○ Unsure/don't know
Treated with respect and kindness	<p>Did the [insert HCP] treat you with respect and kindness?</p> <ul style="list-style-type: none"> ○ Yes, definitely ○ Somewhat ○ No 	<p>While you were in the hospital did the [insert HCP] treat you with respect and kindness?</p> <ul style="list-style-type: none"> - Doctors - Nurses - Other members of your healthcare team <ul style="list-style-type: none"> ○ Yes, definitely ○ Somewhat ○ No ○ I did not have contact with them 	<p>Did the [insert HCP] treat you with respect and kindness?</p> <ul style="list-style-type: none"> ○ Yes, definitely ○ Somewhat ○ No
Trust and confidence in staff	<p>Did you have trust and confidence in the [insert HCP]?</p> <ul style="list-style-type: none"> ○ Yes, definitely ○ Somewhat ○ No 	<p>While you were in the hospital did you have trust and confidence in the ...</p> <ul style="list-style-type: none"> - Doctors - Nurses - Other members of your healthcare team <ul style="list-style-type: none"> ○ Yes, definitely ○ Somewhat ○ No ○ I did not have contact with them 	<p>Did you have trust and confidence in the [insert HCP]?</p> <ul style="list-style-type: none"> ○ Yes, definitely ○ Somewhat ○ No
Family/whānau involvement in discussions	<p>At [practice name] if you want to, are you able to have family/whānau involved in discussions about your treatment and care?</p> <ul style="list-style-type: none"> ○ Yes, definitely ○ Somewhat ○ No ○ I do not want them included ○ Not applicable 	<p>Did hospital staff include your family/whānau or someone close to you in discussions about the care you received during your visit?</p> <ul style="list-style-type: none"> ○ Yes, definitely ○ Somewhat ○ No ○ I did not want them included ○ Not applicable 	<p>If you wanted to, were you able to have your family/whānau or someone close to you in discussions about your treatment and care?</p> <ul style="list-style-type: none"> ○ Yes, definitely ○ Somewhat ○ No ○ I did not want them included ○ Not applicable

Element	Adult primary care patient experience survey	Adult hospital inpatient experience survey	Adult hospital outpatient experience survey
Cultural needs met	During this [appointment mode] ⁵ did you feel your cultural needs were met? <ul style="list-style-type: none"> <input type="radio"/> Yes, definitely <input type="radio"/> Somewhat <input type="radio"/> No <input type="radio"/> I did not have any 	Did you feel your cultural needs were met? <ul style="list-style-type: none"> <input type="radio"/> Yes, definitely <input type="radio"/> Somewhat <input type="radio"/> No <input type="radio"/> I did not have any 	During your appointment, did you feel your cultural needs were met? <ul style="list-style-type: none"> <input type="radio"/> Yes, definitely <input type="radio"/> Somewhat <input type="radio"/> No <input type="radio"/> I did not have any
Spiritual needs met	During this [appointment mode] did you feel your spiritual needs were met? <ul style="list-style-type: none"> <input type="radio"/> Yes, definitely <input type="radio"/> Somewhat <input type="radio"/> No <input type="radio"/> I did not have any 	Did you feel spiritual needs were met? <ul style="list-style-type: none"> <input type="radio"/> Yes, definitely <input type="radio"/> Somewhat <input type="radio"/> No <input type="radio"/> I did not have any 	During your appointment, did you feel your spiritual needs were met? <ul style="list-style-type: none"> <input type="radio"/> Yes, definitely <input type="radio"/> Somewhat <input type="radio"/> No <input type="radio"/> I did not have any
Individual needs met	During this [appointment mode] did you feel your individual needs were met? <ul style="list-style-type: none"> <input type="radio"/> Yes, definitely <input type="radio"/> Somewhat <input type="radio"/> No <input type="radio"/> I did not have any 	Did you feel your individual needs were met? <ul style="list-style-type: none"> <input type="radio"/> Yes, definitely <input type="radio"/> Somewhat <input type="radio"/> No <input type="radio"/> I did not have any 	During your appointment, did you feel your individual needs were met? <ul style="list-style-type: none"> <input type="radio"/> Yes, definitely <input type="radio"/> Somewhat <input type="radio"/> No <input type="radio"/> I did not have any

⁵ An earlier question asks about the mode of delivery of most recent appointment. The response (in person visit, video call or phone call) is then piped in here.

Element	Adult primary care patient experience survey	Adult hospital inpatient experience survey	Adult hospital outpatient experience survey
Not treated unfairly (not discriminated against)	<p>During the experience, did you ever feel you were treated unfairly for any reasons below?</p> <ul style="list-style-type: none"> ○ I was NOT treated unfairly [exclusive choice] ○ Your skin colour ○ Your race or ethnic group ○ Your sex ○ Your gender identity ○ Your age ○ A disability or physical health condition you have ○ A mental health condition you have ○ Your sexual orientation ○ Your religious beliefs ○ Your income or your family/whānau's income ○ Your appearance ○ Something else, please specify: ○ Don't know/unsure 	<p>When you were in hospital did you ever feel you were treated unfairly for any of the reasons below?</p> <ul style="list-style-type: none"> ○ I was NOT treated unfairly [exclusive choice] ○ Your skin colour ○ Your race or ethnic group ○ Your sex ○ Your gender identity ○ Your age ○ A disability or physical health condition you have ○ A mental health condition you have ○ Your sexual orientation ○ Your religious beliefs ○ Your income or your family/whānau's income ○ Your appearance ○ Something else, please specify: ○ Unsure/don't know 	<p>During your appointment did you ever feel you were treated unfairly for any of the reasons below?</p> <ul style="list-style-type: none"> ○ I was NOT treated unfairly [exclusive choice] ○ Your skin colour ○ Your race or ethnic group ○ Your sex ○ Your gender identity ○ Your age ○ Your disability, impairment or long-term health condition ○ Your mental distress or mental health condition ○ Your sexual orientation ○ Your religious beliefs ○ Your income or your family/whānau's income ○ Your appearance ○ Something else, please specify: ○ Unsure/don't know

Appendix B: Demographic questions

Demographic	National experience surveys
Age	<p>Please tell us the year of your birth.</p> <p>[If no response for the first age question]</p> <p>What is your age? [numerical range 15–120]</p> <p>[If no response for either of the previous two age questions]</p> <p>Which age range are you in?</p> <p>[In years old: 15–24, 25–34, 35–44, 45–54, 55–64, 65–74, 75–84, 85+]</p>
Gender	<p>What is your gender?</p> <p>[male, female, another gender]</p>
Ethnicity	<p>Which ethnic group or groups do you belong to?</p> <p>[New Zealand European, Māori, Samoan, Cook Island Māori, Tongan, Niuean, Chinese, Indian, Other (such as Dutch, Japanese, Tokelauan)]</p> <p>[If 'Other' for the first ethnicity question]</p> <p>You selected 'other' as an option for your ethnic group. Which of these ethnic groups do you belong to?</p> <p>[English, Australian, Dutch, Other European, Tokelauan, Fijian, Other Pacific Peoples, Filipino, Japanese, Korean, Cambodian, Other Asian, Middle Eastern, Latin American, African, Other, specify]</p>
Disability status – WGSS	<p>WGSS1: Do you have difficulty seeing, even if wearing glasses?</p> <p>WGSS2: Do you have difficulty hearing, even if using a hearing aid?</p> <p>WGSS3: Do you have difficulty walking or climbing steps?</p> <p>WGSS4: Do you have difficulty remembering or concentrating?</p> <p>WGSS5: Do you have difficulty washing all over or dressing?</p> <p>WGSS6: Using your usual language, do you have difficulty communicating, for example understanding or being understood?</p> <p>Response options for each question [No – no difficulty; Yes – some difficulty; Yes – a lot of difficulty; Cannot do at all]</p>
Disability status – self identified ⁶	<p>Do you think of yourself as disabled (or as having a disability)?</p> <p>[Yes; No; Unsure]</p>

⁶ The national patient experience surveys include an additional self-identified disability question because the Washington Group Short Set (WGSS) does not necessarily identify all people with a disability, and in particular may exclude people with developmental and intellectual disabilities. For the national methodology for disability reporting, see: Health Quality & Safety Commission. 2021. *Methodology for disability reporting – COVID-19 patient experience survey*. Wellington: Health Quality & Safety Commission. URL: www.hqsc.govt.nz/assets/Our-data/Publications-resources/COVID-disability-report-methodology_final-for-web_161221.pdf (accessed 27 June 2023).

