BrisDoc Patient care by people who care

NHS

Patient Satisfaction Survey process

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Introduction

The purpose of this Standard Operating Procedure (SOP) is to describe the process for issuing Patient Satisfaction Questionnaires (PSQs) via SMS. Feedback received through completed questionnaires supports quality assurance, service evaluation, and the identification of opportunities for service improvement.

Background:

PSQs provide patients and service users with an opportunity to provide feedback on the care and service they have received. Survey responses are analysed by the Governance Team to identify trends, monitor patient experience, and inform service improvements. Findings are reported through relevant quality governance meetings and shared with commissioners as required.

Patients are selected from CLEO using a predefined sampling methodology approved by the Quality Group. Sample sizes are reviewed periodically to ensure representative data is obtained across all services.

Sending Process:

A link to a digital survey is sent via a text message. Telephone numbers are extracted from a sample of data pulled from CLEO.

Frequency

Complete this process **twice weekly**.

For IUC cases:

Step 1: Generate the CLEO Report

1. Open the spreadsheet **"CLEO Data - Governance"**.
2. Enter the required parameters:
    - Date range: the previous two days.
    - PSQ sample size: **50%**.
3. Click the **Run Report** button (green).
4. Save the report to:

    ```
    S:\GOVERNANCE TEAM\CONFIDENTIAL - DAC\10. CONFIDENTIAL PSQ\2. IUC PSQ\2. Sent Data\2026\[Month]
    ```

5. Save the file using the naming convention:

```
IUC PSQ DD.MM.YYYY
```

6. Save the file as **CSV (MS-DOS)** format.

Step 2: Prepare the Data

1. In **Column V (Service)**, apply a filter and select only:
   - OOH - Advice
   - OOH - F2F
2. Delete columns:
   - A to D
   - F to U
3. Record the total number of:
   - OOH - Advice cases
   - OOH - F2F cases

   Enter these figures into the **PSQ Data Spreadsheet** on the **Totals** tab.

4. Randomly select **100 rows**, ensuring a reasonable mix of case types and services.
5. Delete all other rows.
6. Delete **Column B**.
7. Confirm that approximately **50 telephone numbers remain**.
8. Save the file.

Step 3: Upload Numbers to Critico

1. Open the document **"Bulk SMS for Governance Team"**.
2. Select the Critico link and log in using your credentials.
3. Copy the approved survey text message from the **Bulk SMS for Governance Team** document.
4. Paste the text into the message field within Critico.

Step 4: Import Recipient Numbers

1. Select the **Upload File** icon.



2. Click **Choose File**.
3. Navigate to the saved CSV file.
4. Ensure **All Files** is selected in the file type dropdown if required.
5. Select the CSV file and click **Import**.
6. Verify the number of recipients matches the number of telephone numbers in the CSV file.

Step 5: Send the SMS Survey

1. Review the message content and recipient count.
2. Confirm the correct survey link has been used.
3. Click **Send**.
4. Record the date sent within the PSQ tracker, if applicable.

For SCAS cases:

Step 1: Generate the CLEO Report

1. Open the spreadsheet **"CLEO Data - Governance"**.
2. Enter the required parameters:
    - Date range: the previous two days.
    - PSQ sample size: **50%**.
3. Click the **Run Report** button (green).
4. Save the report to:

    ```
    S:\GOVERNANCE TEAM\CONFIDENTIAL - DAC\10. CONFIDENTIAL PSQ\2. IUC PSQ\2. Sent Data\2026\[Month]
    ```

5. Save the file using the naming convention:

    ```
    SCAS PSQ DD.MM.YYYY
    ```

6. Save the file as **CSV (MS-DOS)** format.

Step 2: Prepare the Data

1. In **Column V (Service)**, apply a filter and select only:
    - SCAS
2. Delete columns:
    a. A to D
    b. F to U
3. Record the total number of:
    a. SCAS cases

    Enter these figures into the **PSQ Data Spreadsheet** on the **Totals** tab.

4. Randomly select **23 rows**, ensuring a reasonable mix of case types and services.
5. Delete all other rows.
6. Delete **Column B**.
7. Confirm that approximately **23 telephone numbers remain**.
8. Save the file.

Step 3: Upload Numbers to Critico

1. Open the document **"Bulk SMS for Governance Team"**.
2. Select the Critico link and log in using your credentials.
3. Copy the approved survey text message from the **Bulk SMS for Governance Team** document.
4. Paste the text into the message field within Critico.

Step 4: Import Recipient Numbers

1. Select the **Upload File** icon.



2. Click **Choose File**.
3. Navigate to the saved CSV file.
4. Ensure **All Files** is selected in the file type dropdown if required.
5. Select the CSV file and click **Import**.
6. Verify the number of recipients matches the number of telephone numbers in the CSV file.

Step 5: Send the SMS Survey

1. Review the message content and recipient count.
2. Confirm the correct survey link has been used.
3. Click **Send**.
4. Record the date sent within the PSQ tracker, if applicable.

For MH cases

Step 1: Generate the CLEO Report

1. Open the spreadsheet **"CLEO Data - Governance"**.
2. Enter the required parameters:
    a. Date range: the previous two days.

   b. PSQ sample size: **50%**.
3. Click the **Run Report** button (green).
4. Save the report to:

   ```
   S:\GOVERNANCE TEAM\CONFIDENTIAL - DAC\10. CONFIDENTIAL PSQ\2. IUC PSQ\2. Sent Data\2026\[Month]
   ```

5. Save the file using the naming convention:

   ```
   MH PSQ DD.MM.YYYY
   ```

6. Save the file as **CSV (MS-DOS)** format.

Step 2: Prepare the Data

1. In **Column V (Service)**, apply a filter and select only:
   a. MH
2. Delete columns:
   a. A to D
   b. F to U
3. Record the total number of:
   a. MH

   Enter these figures into the **PSQ Data Spreadsheet** on the **Totals** tab.

4. Randomly select **70 rows**, ensuring a reasonable mix of case types and services.
5. Delete all other rows.
6. Delete **Column B**.
7. Confirm that approximately **70 telephone numbers remain**.
8. Save the file.

Step 3: Upload Numbers to Critico

1. Open the document **"Bulk SMS for Governance Team"**.
2. Select the Critico link and log in using your credentials.
3. Copy the approved survey text message from the **Bulk SMS for Governance Team** document.
4. Paste the text into the message field within Critico.

Step 4: Import Recipient Numbers



1. Select the **Upload File** icon.



2. Click **Choose File**.
3. Navigate to the saved CSV file.
4. Ensure **All Files** is selected in the file type dropdown if required.
5. Select the CSV file and click **Import**.
6. Verify the number of recipients matches the number of telephone numbers in the CSV file.

Step 5: Send the SMS Survey

1. Review the message content and recipient count.
2. Confirm the correct survey link has been used.
3. Click **Send**.
4. Record the date sent within the PSQ tracker, if applicable.

Quality Checks

Before sending, confirm that:

- Only the case type intended cases are included.
- Telephone numbers have been reviewed for obvious errors or blanks.
- The correct approved survey text has been used.
- The recipient count in Critico matches the CSV file.
- The report has been saved in the correct folder with the correct filename.
- No patient-identifiable information other than the telephone number remains in the CSV file.

Results

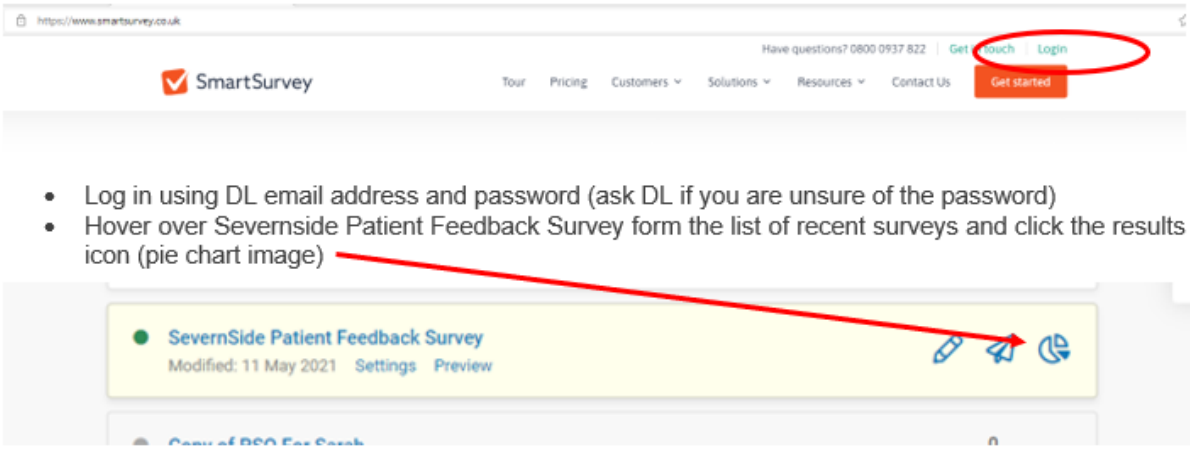
A results spreadsheets kept and updated with individual responses throughout the month. Data from the spreadsheet is presented at Quality meetings and shared with staff via individual feedback and newsletters.

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

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

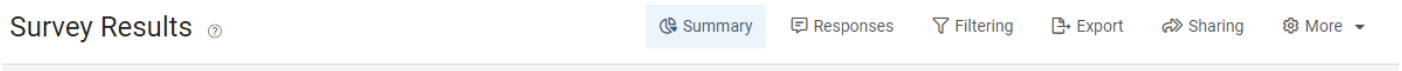
Digital results

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

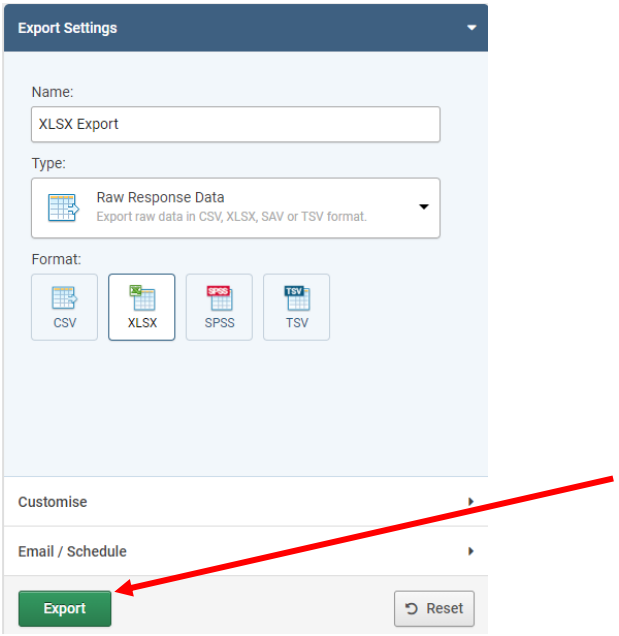


- Log in using DL email address and password (ask DL if you are unsure of the password)
- Hover over Severnside Patient Feedback Survey form the list of recent surveys and click the results icon (pie chart image)

- Click on export near the top of the page



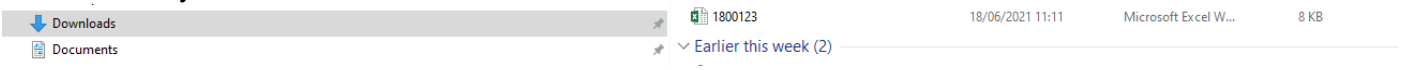
- Under ‘Export Settings’ click on excel which will change the name to: XLSX Export
- Click the green ‘Export button underneath.



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



- Go to your downloads folder to locate the file



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

Change Register

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

04/09/2024	3	SP	Reviewed and updated to reflect change in text message process.
01/10/2026	4	SP	Complete re -write, change from Adastra to CLEO and a change from AccuRx to Oventus
01/10/2026	4	SP	Removed Postal process