Friends & Family Test User Guide

Contents

This is a training manual which has been created to help guide users to the new Envoy data reporting system. This manual contains a step by step guide on how to login into the system find the relevant information required to support you and your service.

Envoy is a data system which holds all relevant information collected by users completing patient experience surveys. This system allows people to analyse and investigate their data to identify any trends or patterns.

1. Login

- First step will be to email the Q.A team elft.qa@nhs.net and request a login. Once you have done this you will be sent some details via healthcare communications which will contain on two separate emails your username and password.
- Once you receive this information it is important to access the Envoy system www.trustenvoy.co.uk via google Chrome
  Enter your username – this is your Trust email address
  Enter your password
  Ensure you always access the system this way avoiding internet explorer.
- Ensure you tick the box below 'remember me'. This will ensure your computer recognises you and accessing the system is easier.

2. Bookmarking the Website

You may need to use the Envoy site daily, so we suggest that you add the site address to your browser bookmarks or favourites. You may also consider saving a shortcut on your desktop. This is very simple and easy to do.

If you are having difficulty doing this, please consult you IT department or refer to your browser user guide.

3. Change password

- Click on your **username** in the top right corner of the screen
- Click on the **Change Password**
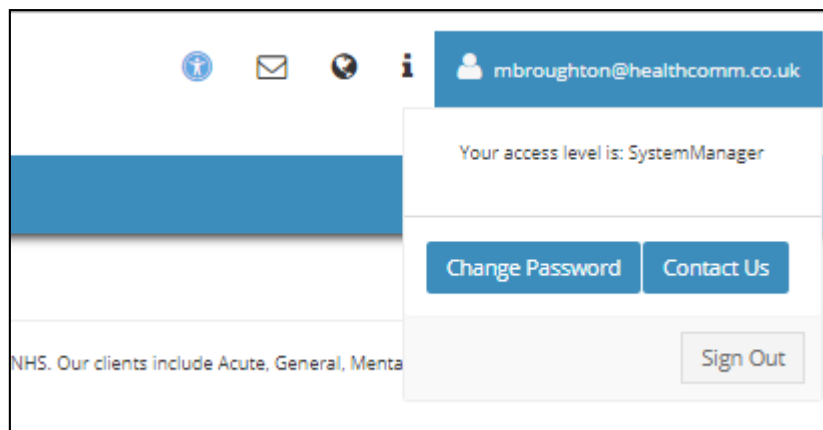
- Your New Password length is a minimum of 9 characters - 4 of which MUST be numbers
- Follow the simple onscreen instructions to create your own memorable password or click **"Generate"** password & click **"Change Password"**
- A successful change will log you out and request that you log in with your new details

Password Successfully Changed

Your password has been changed. Please click here to log in

If you continue to experience difficulties accessing your account, please contact us on 0845 9000 890* and ask for the Envoy Support Team or email support@healthcomm.co.uk.

- If you forget your password, click on the **"Forgotten Password?"** link on the login page.
- You will then receive an automated email with the password upon request.

4. Landing page

- Once you have logged in successfully you will be presented with this landing page.
- You will only need to enter the portal via the patient experience page. Please click on this box to review information regarding patient experience.
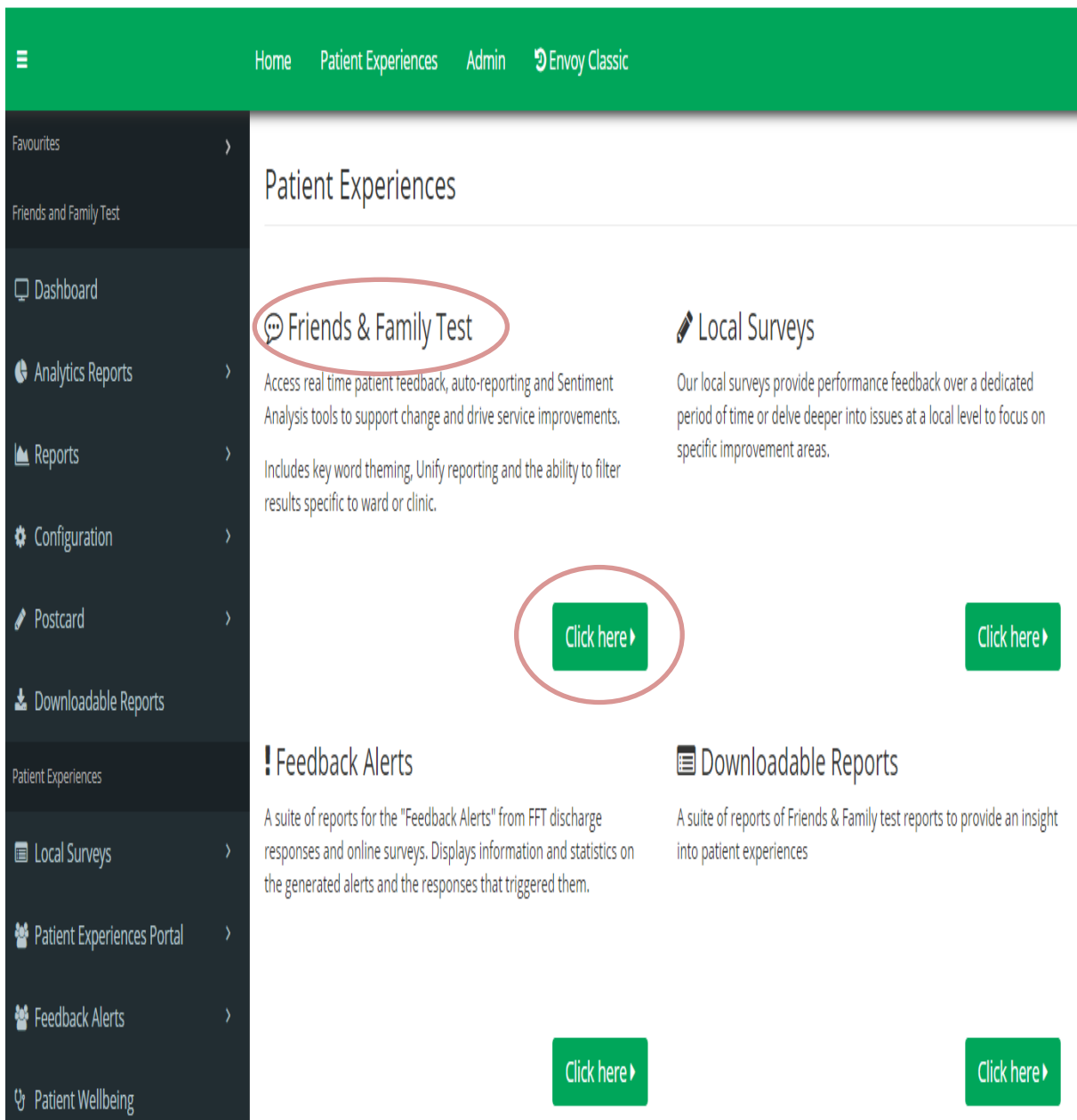

Welcome to Envoy Messenger

Healthcare Communications are market leaders in patient communications software, providing Envoy Messenger services to 104 NHS Trusts within the UK. Established in 2000 we have securely sent over 100 million patient messages, delivering Appointment Management and Patient Experiences software to the NHS. Our clients include Acute, General, Mental Health and Community NHS Trusts, Health Boards, Dental and GP practices.

Please make a selection from the product options below:

Envoy Messenger is our leading communications software that provides messaging options to over 104 Trusts and Health Boards across England, Wales and Northern Ireland. Over 100 million messages have been securely sent to patients via Voice, SMS, Agent Calls, Email, Online and Letters.

Return to Envoy Classic ▶

Designed exclusively for the NHS with direct input from front line staff, so every feature exists to drive patient experiences and increase efficiency.

Envoy automatically captures responses, analyses and reports on results in real time. Supports The Friends and Family Test, Local Surveys, Mystery Shoppers and bespoke Trust surveys with auto reporting and action plan capabilities.

Click here ▶

A powerful way to capture The Friends and Family Test staff feedback, Trust staff surveys and the NHS annual staff survey data. Envoy collates responses from all communications channels used and then reports on results to provide a real time picture of staff experience.

Click here ▶

5. Patient experience data

- Here is the landing page for all patient experience data from the Envoy system.
- There are a few different options to select from to find data relevant to you.
- This page will be main point of accessing all data; it is advisable to save this page for reference and ease of access. Envoy allows you to 'Star' or 'Favourite' a page if you select this option it will be stored in your favourite selection, details of this are found on page 13 & 14.

6. FTT Dashboard

To further gain access to this information select the Friends & Family Test Dashboard.
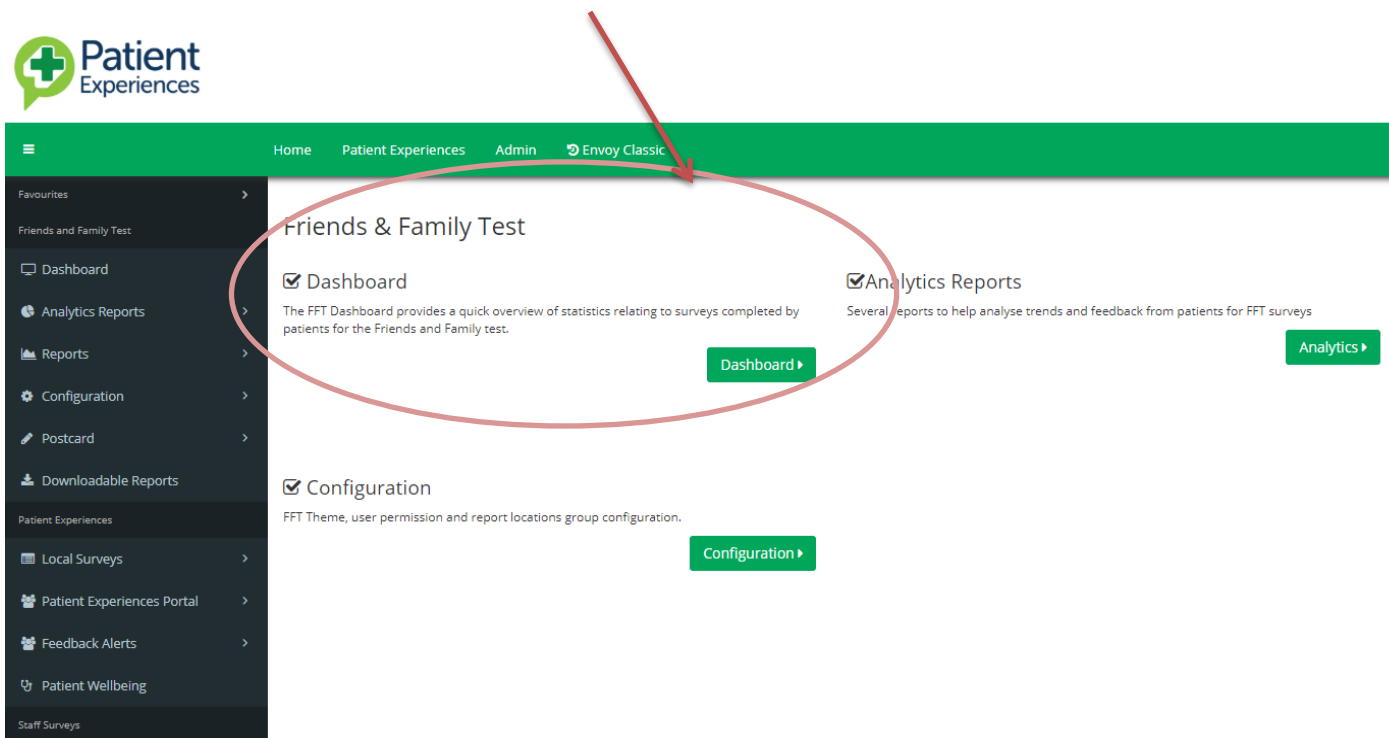
7. Filtering

The Dashboard offers a performance overview by Trust, Department & Ward.
Go to **Patient Experience Tab**, choose Friends & Family Test and click Dashboard.
Department, Area & Date Filters

- Filtering information
- This page allows you to filter the data specific to you, the first tab allows you to filter the directorate specific to you; such as Tower Hamlets, Newham ETC.
- The next allows you to further drill down into this information and filter via service. This can give you information based on one service such as: foot health, Topaz ward ETC.
- Next is the date range: you can filter what range you wish to see the data from. I.E calendar month, by week, per quarter ETC.
- If you are happy with the criteria you have selected, click the search button.

8. Results Page

- **Response Rate:** real time response rates based on the search criteria
- **Positive/Negative:** recommend (Positive) and Non-Recommend (Negative) patient comments based on the search criteria

Date Overview

- Survey Status shows 'Surveys Sent' and 'Messages not scheduled due to error' (i.e. bad data)

- Question 1 shows total number of ratings and Response Rate by survey mode
- Question 2 shows the total number of comments and the Response Rate survey mode

Feedback Cloud

- Feedback Cloud groups patient comments to a keyword
- Click a keyword to open patient comments relating to the keyword
- Click **Discharge Date** to run comments in date order
- Click on **Export to Excel** to export comments out of Envoy Messenger

Top 10 Keywords

- Top 10 Keywords rank keywords in trending order
- Splits keywords by positive and negative
- Click on the keyword to open patient comments relating to the keyword

Themes

- Theme: group keywords together
- Splits grouped keywords by positive or negative
- Click on the keyword to open patient comments relating to the keyword

9. Finding response data

- Here is how to find response data which will give you data regarding the number of responses and when they were submitted.
- When you select the main portal as detailed above, locate Friends and Family test you will see under the heading Patient experience a drop down tab labelled 'Local Surveys', select this and then select Dashboard.

FFT Dashboard

Search Criteria

Department

All Departments

Location

All Locations

Date From

06/06/2018

Date To

05/07/2018
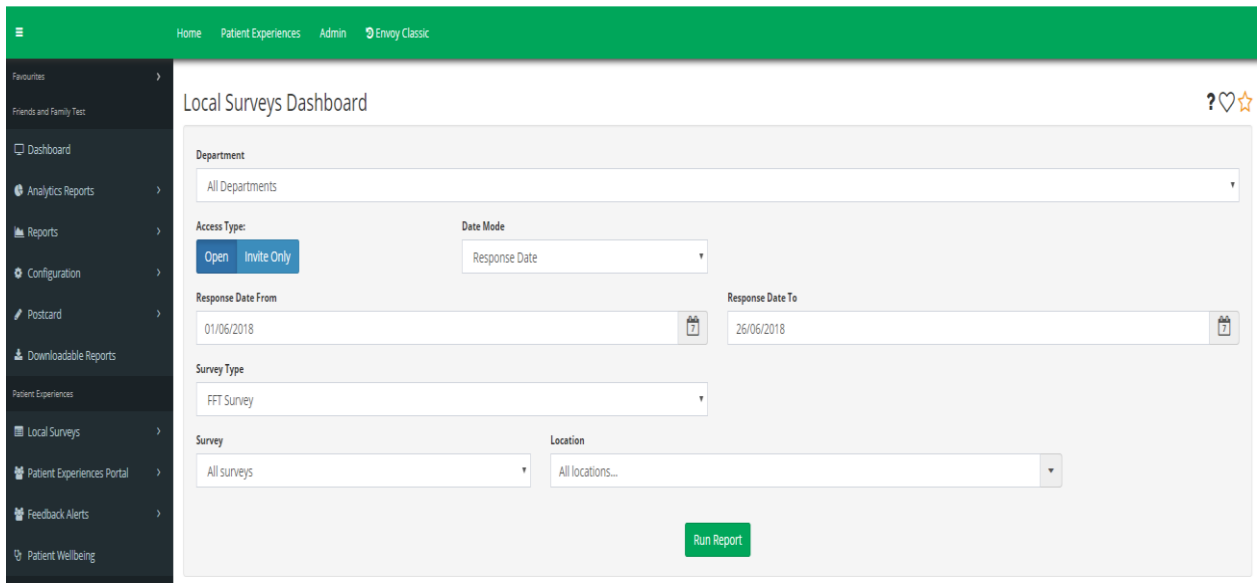
Q Search

10. Filtering Data

- Once you have selected the dashboard Tab you will be presented with the below
- It is important to select the data criteria carefully, you can select from the following.
  - Date; From → to
  - Survey Type → ensure this is selected as FFT Survey
  - Type of survey; this is filtered by adult Prem, community ETC
  - Location → is a specific service within a directorate
- Once you are happy with your selection criteria then select the run report function to generate your data set

11. Understanding your report

- You will be presented with the below graph it details the following information
- Surveys Started, this is the number of surveys where people have not exceed the first page of the survey.
- Incomplete surveys, is the number of surveys people have started but not completed them all of the way through.
- Completed surveys this is the number of surveys which have been completed from start to finish.
- If you wish to extract this data in an excel format you can do by pressing the Export Answers tab.
- There is also a graph which shows you how many surveys have been done the time selected in the search function.

Export Answers

73	62	217
Started Surveys	Incomplete Surveys	Completed Surveys
Surveys viewed	Surveys started but not completed	Surveys completed

Responses 01/06/2018 to 26/06/2018
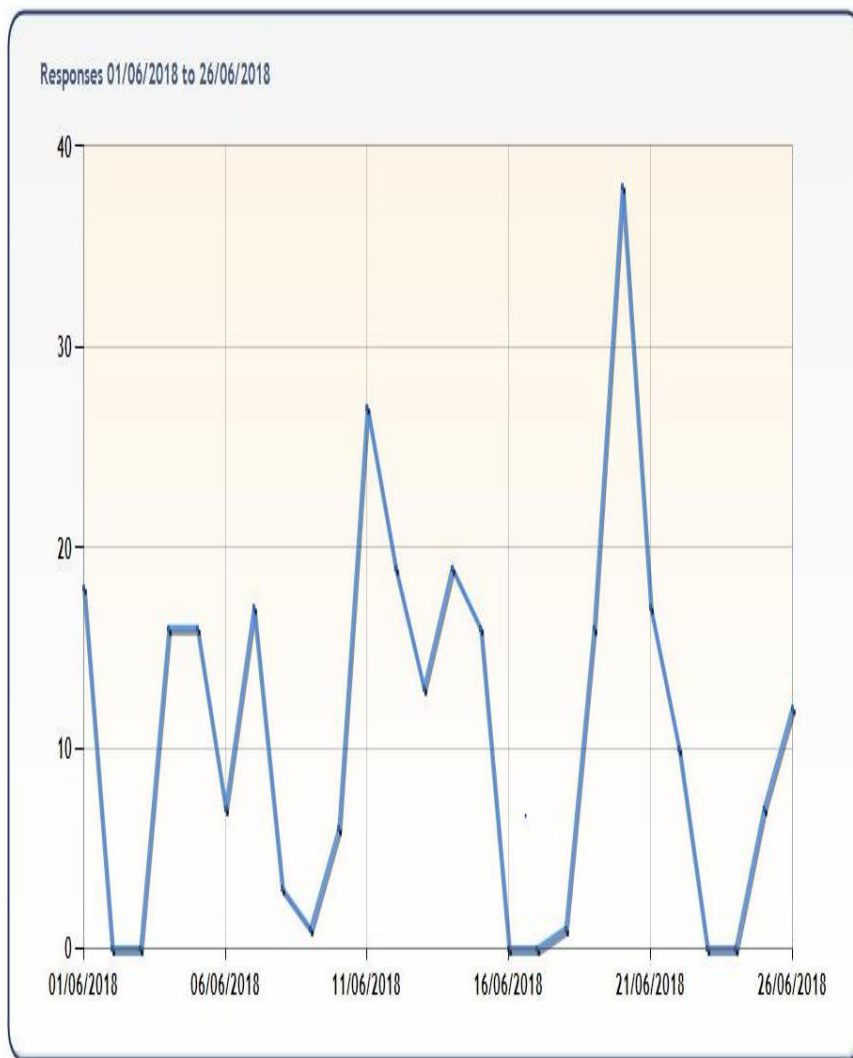
12. How to collect qualitative information

In order to collect and dissmeinate all infomraiton which has been collected by indiviudals services as well as a directorate you will need to run the Crystal report. This can be done by selecting downloadable reports on the left hand side. You will then need to run reports as per the below
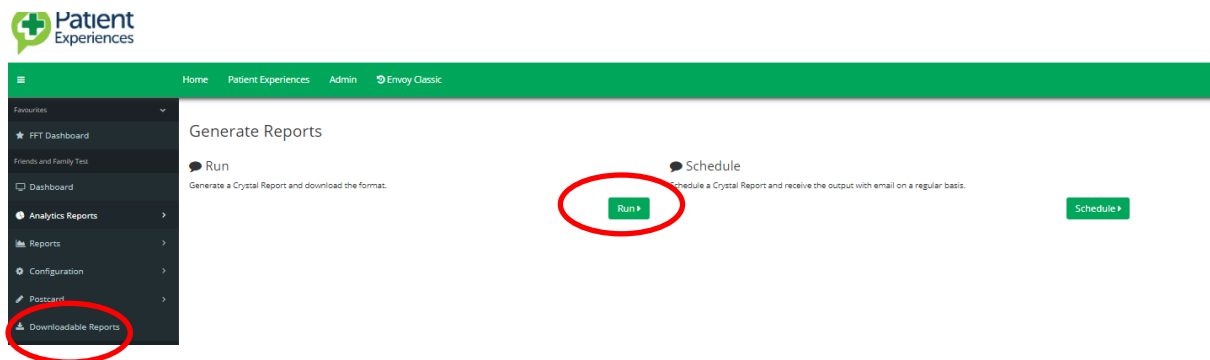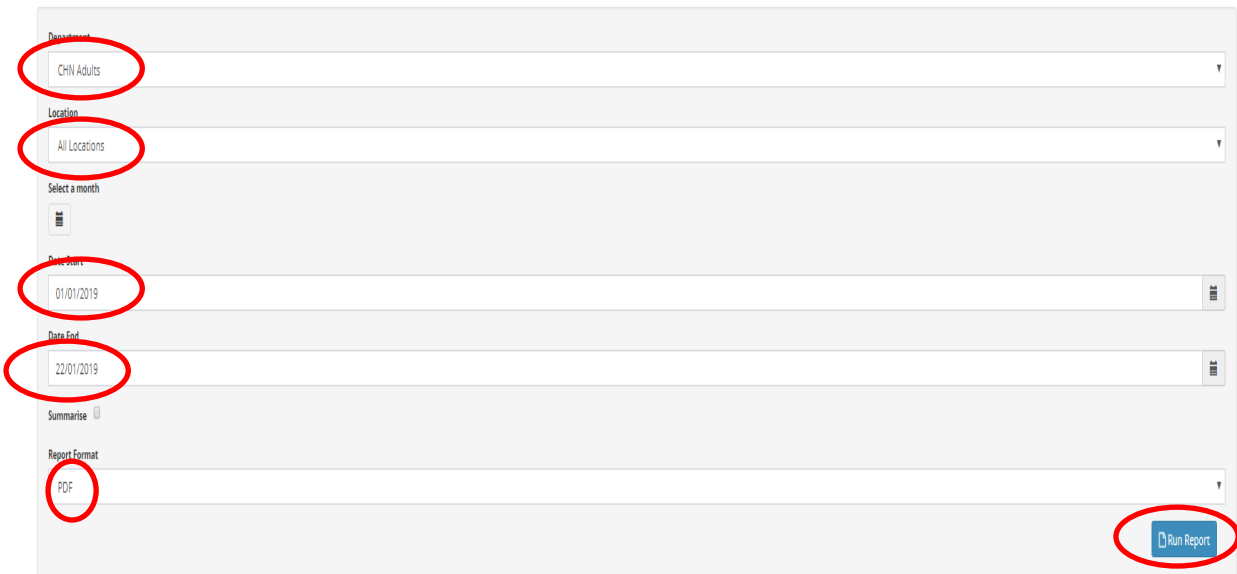
One you select this you will then need to select FFT Service report from the drop down menu, then click display report options
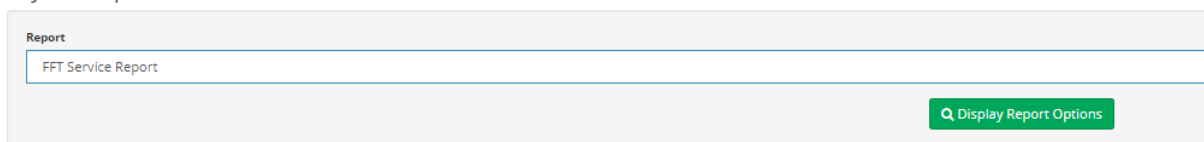
Once you have selected this you will then need to complete the relative dropdown options below, once you have selected your team/service, the date and the format you want the survey in click on the run report.

This will generate all of the qualitative information for that directorate for you to share

13. Analytics - Rating Trend

This section creates a graph that tracks ratings received.

- Go to search list on the right side of the page and choose **Analytics Reports**
- Choose **Rating Trend**
- Select **Department**
- **Enter Location** if want to drill down to Ward Level
- Select **Day, Week or Month**
- Select Trend, Stacked or Recommendations
- Run graph

For further graphs, choose **Theme Trend** & **FFT Trend Analysis** under **Analytics Reports** on the right-hand side of the page.

14. Comment Report
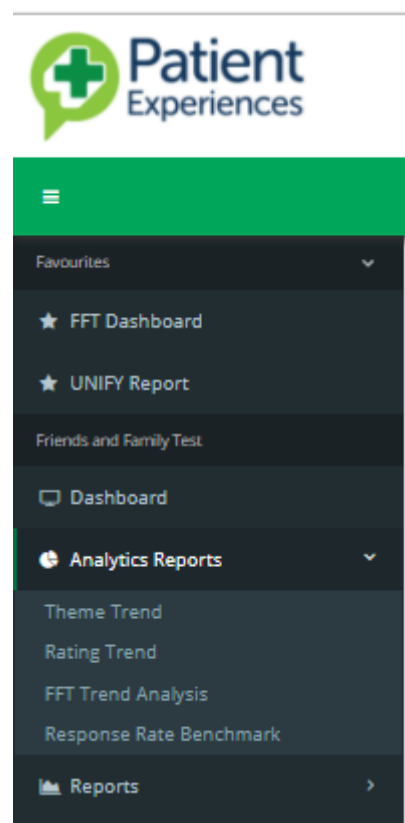
This section captures all patient Comments in one area.

- Go to search list on the right side of the page and choose **Reports**
- Choose **Comments Report**
- Select **Department**
- Enter or Search for location if want to drill down
- Select **date range**
- Select Rating 1, 2, 3, 4, 5 & 6 or click Select All
- Click **Search**

Comments Report   ? ♡ ☆

Department

All Departments   ▾

Location

All Locations   ▾

Date From   **Date To**   **Discharge ID**

🗓 01/02/2017   🗓   🗓 04/02/2017   🗓

Theme   **Phrase**

All Themes   ▾

Rating

☑ 1 ☑ 2 ☑ 3 ☑ 4 ☑ 5 ☑ 6 ☑ No Rating

[Select All] [Deselect All]

[Q Search]

Discharge ID

- Envoy allocates a non-patient identifiable Discharge ID to all surveys
- Input the Discharge ID in Discharge ID field
- Set date parameters
- Click Search

Search Word or Phrase

- Input word or phrase into Search Word or Phrase field.
- Set date and/or department parameters
- Click Search

Search Theme

- To add a specific theme to your search, select from the drop-down list

+ Search Summary

Showing 1 - 25 of 141 results.   ⬇ Export ▾   🖶 Print

| Discharge ID	Department	Location	Discharge Date	Survey Date	Survey Channel	Rating	Feedback	Response ID	Last Response Date	Recording
38971141	Inpatients	COCH > Ward 31A	Friday, February 3, 2017 3:20 PM	Sunday, February 5, 2017 1:52 PM	SMS	1	At 34 weeks pregnant I thought my waters had broken! I called the labour ward and was told to come in straight away, which I did. I was checked out and the baby was monitored for about an hour, and assured everything was fine. This care is impeccable. We are so lucky to have the NHS! | YES	10969104	Sunday, February 5, 2017 5:49 PM	i ↱ 🖾
38971179	Inpatients	COCH > Ward 46	Friday, February 3, 2017 4:46 PM	Sunday, February 5, 2017 1:06 PM	SMS	1	Attention to detail, awareness of my illness. I almost died, but both staff and doctors stayed with me, I felt safe | Private | a big yes	10967139	Sunday, February 5, 2017 3:31 PM	i ↱ 🖾
38970355	Outpatients	VASC > GEN WING OPD COCH > BALAREV	Friday, February 3, 2017 3:40 PM	Sunday, February 5, 2017 1:33 PM	SMS	1	Because I went in on time	10965539	Sunday, February 5, 2017 1:38 PM	i ↱ 🖾
38971143	Inpatients	COCH > Ward 60	Friday, February 3, 2017 3:27 PM	Sunday, February 5, 2017 1:55 PM	SMS	1	Because the staff on the ward (joe, sarah and linda) are always working hard to keep me alive. And they do it with a smile. Well done. | Yes	10968699	Sunday, February 5, 2017 4:57 PM	i ↱ 🖾
38970998	Outpatients	ORTH > ORTHOPAEDIC SEMINAR ROOM DEPT > VFCULNFRI	Friday, February 3, 2017 9:40 AM	Sunday, February 5, 2017 1:28 PM	Voice	2	Care Received	10967515	Sunday, February 5, 2017 4:04 PM	▶ ⬇ i ↱ 🖾
38971057	Inpatients	COCH > Ward ENDO	Friday, February 3, 2017 10:25 AM	Sunday, February 5, 2017 1:07 PM	Voice	1	Care Received	10967634	Sunday, February 5, 2017 4:05 PM	i ↱ 🖾
38971266	Inpatients	COCH > Ward 30	Friday, February 3, 2017 10:30 PM	Sunday, February 5, 2017 1:37 PM	Voice	1	Care Received	10967483	Sunday, February 5, 2017 4:04 PM	i ↱ 🖾
38970392	Outpatients	ELM > EPH OUTPATIENTS > CHAT.EPH	Friday, February 3, 2017 1:30 PM	Sunday, February 5, 2017 1:28 PM	Voice	1	Care Received	10969226	Sunday, February 5, 2017 6:05 PM	i ↱ 🖾
38970286	Outpatients	OPHT > OPHTHALMOLOGY OUTPATIENTS DEPT > ALIKL	Friday, February 3, 2017 1:45 PM	Sunday, February 5, 2017 1:33 PM	Voice	1	Care Received	10991534	Tuesday, February 7, 2017 4:03 PM	i ↱ 🖾

1 2 3 4 5 6 »

Sorting your results

- Clicking the column headers will sort by the column selected (A - Z or Z - A)

Recording

- Where IVM is used, click **Recording** at ascend or descend to group all the recordings
- Select the play button to listen to the IVM recording
- Select the download button to download the file
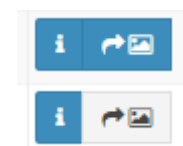
You Said, We Did Poster

Where you want to add a comment to a You Said, We Did poster.

- Select **Add to 'You Said, We Did'** Poster on the right-hand side of the page
  - Where a patient has indicated that they want their comment to remain private, you will not be able to add comment to poster
- Select the 2nd **comment you to add to a 'You Said, We Did' Poster**
- Select the **Generate Poster** button that appears next to the export to excel button
- Type in the action taken from the patient comment in the **Action text box**
- Add a logo if required and a Title/heading
- Select Generate Poster in the required format

"You Said We Did" report   ×

Comments

Comment: Action Text:

All the doctors and nurses are very friendly
and made my nervous 5 year old feel

Comment: Action Text:

At 34 weeks pregnant I thought my waters
had broken! I called the labour ward and

Logo: (Select/Upload an image to use in the report)

Enabled   Disabled   All

There are currently no images to choose from. You can upload a new image below.

+ Add files…

Poster Heading:

Generate PDF Poster   Generate Word Poster

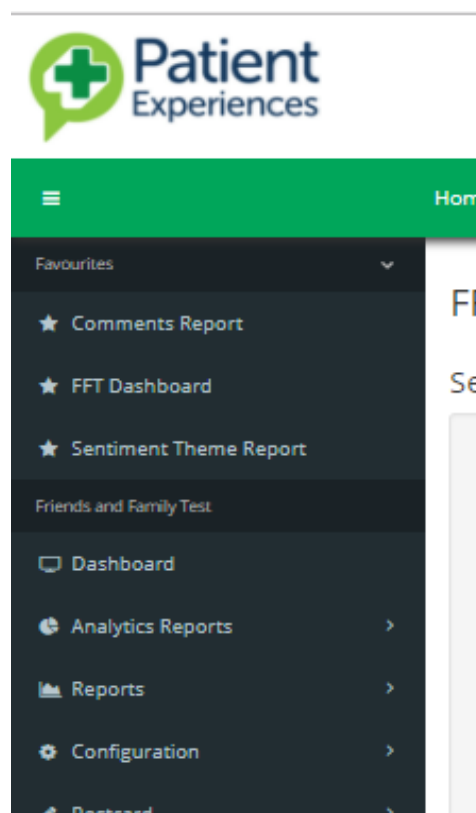## 15. Useful tips

On most screens, you will see the following icons [? ♡ ⭐]

- **?** Click on the **'?'** icon for a useful on screen tour guide and select tour guide from the menu
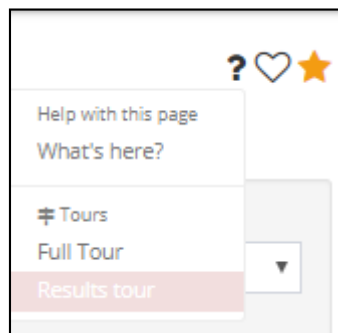
- Add your most visited pages to your Favourites by clicking the star. These will then appear in the favourites list on the left-hand menu. You can then access these pages within a single click of logging in.

- Saved searches: if you find yourself running the same search criteria, you can add this as a saved search by clicking the heart symbol:
  - Set you search criteria and click search
  - Click on the heart symbol
  - Click save search
  - Name the search and click save

You can save multiple searches with differing criteria. To access your saved searches:
  - When you're on the report you wish to run click the heart symbol
  - Select the pre-saved search from your list
  - Set your date ranges
  - Click search

16. Support Details

For any further help or to discuss the website features further, please feel free to contact our support team via email at support@healthcomm.uk or call us on **0845 9000 890.**

17. FAQs

Query	Answer
I am unable to log onto Envoy	1. Double check that you are entering the correct user name (Trust e-mail address) and password. 2. Check you do not have caps lock on. 3. Re-try to log on using the process detailed in the envoy Messenger Training Checklist.

I am unable to change my password.	1. Follow the steps in section 2 in the Training Checklist.
	2. Check that your chosen new password is:
	   a. a minimum of 9 characters long
	   b. contains 4 numbers

I have forgotten my password.	1. Click on the automated e-mail facility 'Forgotten Password?' and you will be e-mailed your password. 2. If this doesn't work then e-mail support@healthcomm.uk 3. Healthcare Communications will e-mail you with your new password.
A member of staff who has access to the text system has left the Team.	1. The Team Manager must inform the Trust IT Service Desk and ask for the staff's access to the Envoy system to be cancelled. 2. The Team Manager should e-mail the Trust IT Service Desk who will action this request for you. The staff member's full e-mail address, name and the team name must be included in the e-mail request.
A new member of staff needs access to the system.	1. The Team Manager must inform the Trust IT Service Desk and ask for the staff's access to be created. 2. The Team Manager should e-mail the IT Service Desk who will action this request for you. The staff member's full e-mail address, name and the team name must be included in your e-mail request. 3. The staff member will be e-mailed by the Trust IT Service Desk with their log in and password
Who will train a new member of staff how to use the Envoy text system?	1. Healthcare Communications are happy to provide web based training sessions, please contact support for our web training dates