

Questionnaires and Outcome Management

User guide

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| | | | |



1 Document

1.1 Purpose of this guide

The purpose of this document is to provide a user guide about how the questionnaire functionality in RIVIAM enables customers to gather data insights from patients or service users supporting outcome management.

The first section explains how RIVIAM will assist in designing the questionnaire and how customers can choose the trigger for people to receive questionnaires to complete.

Authorised users then have access to the questionnaire dashboard and can monitor the progress of each questionnaire.



2 Background and benefits

Questionnaires enable you to gather valuable data and insights; you can gain a deeper understanding of your service users to inform your decisions.

Here are some key advantages of using RIVIAM questionnaires:

Efficiency and cost-effectiveness:

- **Direct engagement.** RIVIAM users can send questionnaires by email or SMS to the person receiving the service.
- **Cost-effective** data collection, saving time and valuable resource.
- **Government Digital Service (GDS)** standard format questionnaires with customer branding if required.
- **Flexibility**. Customers can easily tailor the questionnaire to fit specific needs and target audience.
- **Insights and information gathering.** Quantitative and qualitative data can be gathered giving you a deeper understanding of the person's opinions, attitudes, and behaviours.

Analysis and decision-making:

- Data analysis is easier and faster as teams can view an individual questionnaire response and make quick adjustments to the service based on feedback.
- Data can be shared with other statistical software to identify trends, patterns, and relationships in the data.
- Data-driven decisions. The insights you gain from questionnaires can inform your future decision-making.
- Longitudinal studies. You can use questionnaires to track changes in attitudes, behaviours, and opinions over time, providing valuable insights for long-term projects.



3 Designing a questionnaire

RIVIAM will work closely with your organisation to support you to plan, design and implement a questionnaire campaign which allows you to gather quantitative and qualitative data.

You can send questionnaires based on a referral or by person.

Questionnaires can be presented using the Government Digital Service (GDS) standard and can display organisational branding if required.

| THE ACTIVE MAY | | | | | ١ | Powered by | : 1 | |
|--------------------------------|-------------------------------------|--|--|------------------------------|---------------------------------------|-------------------------------|---------------------|---|
| 1. Welcome | 2. Activity | 3. Thoughts and feelings | 4. Active Travel | 5. Health | 6. Wellbeing | 7. About you | 8. Further research | |
| Welco | me | | | | | | | 1 |
| The Activ | e Way proj | ect | | | | | | 2 |
| The Active V activities tha | Vay is a projec It are offered I | t led by Bath & North East S by the Active Way help to in | omerset Council ar crease skills and co | d funded by nfidence in w | Active Travel En valking, wheeling | gland. The g* and cycling. | | |
| The Active V help us to ur | Vay is part of a nderstand the | a national project which hop difference that the project | es to increase walk makes. | ing, wheeling | g* and cycling. Th | nis survey will | | |
| This surve | ∍y | | | | | | | |
| We would li | ke to ask que | stions about how much you | walk, wheel*, or cy | cle and abou | t your health and | wellbeing. | | |
| We will be a then again ir | isking you the n 12 months' t | se questions before you tak ime. | e part in the activit | r, 6 months at | fter the activity h | as ended, and | | |
| The survey s | hould take ar | ound 15 minutes. | | | | | | |
| If you have a | already compl | eted an initial survey, you d | o not need to com | olete it again. | | | | |
| Thank you | u | | | | | | | |
| By completin to make the | ng the survey case for futur | you are helping is to under e funding. | stand whether the | oroject make | a difference an | d to enable us | | |
| * Wheeling i | includes peop | ole who use wheelchairs and | mobility scooters | who may not | identify with wa | lking. | | |
| Start now | > | | | | | | | |
| | | | | | | | | |

Figure 1 Example of a questionnaire with customer branding

| elcome 2. Activity 3. Thoughts and feelings | 4. Active Travel 5. Health 6. Wellbeing 7. About you 8. Further research | |
|---|--|---|
| | | |
| | | 1 |
| PROGRESS: 2/4 ANSWERED | | 2 |
| hat do you hope to get out of this activit | y? | 2 |
| lo learn new skills | Io improve my mental health and wellbeing | - |
| To improve my physical health | To be more confident | 5 |
| To learn more about local walking and/or cycling routes | To meet new people | |
| To explore my local area | Other | |
| _ | | |
| ontinue | | |
| Your progress has been saved | | |
| ···· p··· g···· | | |

Figure 2 Questionnaire design



4 Setting up the campaign

Customers can determine when the person should receive the questionnaire.

They can be automatically triggered when the referral is progressed to a particular step in the referral management process or triggered based on an agreed timeframe.

Each of these criteria determines how the campaign is run. For example:

- A campaign might send out a questionnaire when a referral is moved to a particular step. A campaign might be triggered six months after receipt of a referral,
- A campaign might send questionnaires six months after completion of a questionnaire from an earlier campaign.

A questionnaire link can be sent to a person by email or SMS.

| Pathway Dashboards | NHS Person name | Address | Referral reference: AW_Fri-Jan-05-2024_001347_2 |
|--------------------------|--|--------------------------------|---|
| Questionnaires Dashboard | julie fie b NHS number 202022222 Date of birth | 11 Polteney Grove - Bath | Referral received date: 05-01-2024 16:54 |
| julie fish X | 25-42-1928 (42 years, 9 months) Bitchister Telephone number 01223945928 | ba2 4bq | Date made by contact: 05-01-2024 18:54 |
| Referral Details Form | | | |
| Tasks | Graces This referral is 0 days 0 hours old | | Actions |
| Referral Contacts | Indusive Cyding | | Change service line? |
| Documents | Working Gays 0 days 0 hours 0 days 0 hours | | Record An Event |
| Questionnaires | ¢ 0 days 0 hrs 0 days 0 hrs | | Progress To Next Step |
| Journal | Received Received is New 05-01-2024 18:54-00 05-01-2024 18:54-51 05-01-2024 18 | :32:49 | 🗢 Reassign Pathway |
| | 4 | • | Create New Referral For Person |
| | Received in | Show All Timeline | Referral status |
| | 05.01.2024 Create referral | | This referral has no outcome assigned. |
| | 18:54:51 Created by: R/VIAM | · | Assign refermal status |

Figure 3 Progress to next step

If the trigger is moving the referral to an agreed step in the pathway or pod, to progress the referral to the next step, a RIVIAM user should:

- 1. Select Progress to Next Step in the referral navigator.
- 2. A pop-up box will open and select the step e.g. "Send questionnaire".

| on the observations the test step in the p | rooms, select from the steps below. | | |
|--|-------------------------------------|--------------------|------|
| Note on the set | mana managana | U8.6.8 | |
| hope cell | | Referate memory of | - 18 |
| lock activity | | | |
| hand mad | | | - 18 |
| Read and met | | | - 18 |
| Service declined by person | | | - 18 |
| Sand quartermin | | | |
| fand gweller wiy yn here nade fia de | | | _ |
| | | | |
| | | | |

Figure 4 Select the step to automatically trigger send questionnaire.

- 3. Add a description.
- 4. Select Confirm.

The questionnaire will be emailed to the person's email address included on the referral form, or an SMS to their phone number.



5 Completing the questionnaire

The person completing the questionnaire will progress through each question in the questionnaire. The sequence of the questions is displayed vertically on the right-hand side of the screen.

When the person clicks to continue, the response to the previous question will be saved. This allows the person to complete some questions and return to the form again to complete the remaining questions.

| Activity | | |
|---|---|-------------------|
| What is the activity you are participating in? | Inclusive Cycling | <u>Change</u> |
| Who referred you to, or how did you find out about this activity? | A social prescribing link worker | <u>Change</u> |
| What do you hope to get out of | • To learn new skills | <u>Change</u> |
| his activity? | To improve my physical health | |
| Are you bringing any children younger than age 18) to the activity? | No | <u>Change</u> |
| Thoughts and feelings | | |
| How confident do you feel? | Cycling in your local area: Fairly confident | <u>Change</u> |
| Now submit your form | | |
| By submitting this form you are co correct. | nfirming that, to the best of your knowledge, the details you | are providing are |
| | | |

Figure 5 Review questionnaire

People completing the questionnaire have the opportunity to review and change their responses before submitting the referral. Once submitted, the person completing the questionnaire will receive confirmation of their submission.



Figure 6 Confirmation of submission



6 Monitor responses

6.1 User access rights to questionnaires

Organisations can give their RIVIAM users various levels of access to enable them to review questionnaire responses.

- Admin role will be able to access a person's referral(s) relevant to their organisation and have a read-only view of the individual response(s) to the questionnaire.
- **Campaign Manager role** will be able to access a person's referral(s) relevant to their organisation and the campaign dashboard via the Referrals page. They can see the status of each questionnaire and download the responses from the questionnaires that are completed.
- **Researcher role** users with Researcher rights will not be given access to a person's referral(s) but be able to download the responses from the completed questionnaires in JSON file format. A CSV. file will be available if required.

6.2 Individual responses

If a person has completed the questionnaire, the authorised RIVIAM user can view the responses from within the person's record. This is a read-only view.

| | Home People Referrals Contacts | |
|--------------------------|---|--|
| Pathway Dashboards | 1 | |
| Questionnaires Dashboard | Person name Address jalle fish 11 Pale sey Grove | Referral reference: AW_Fri-Jan-05-2024_001347_1 Referral received date: 05-01-2024 16:54 |
| julie fish 🗙 | NHS number Date of birth Bath 22222222 25-92-1999 (47 years, 9 months) ba2 dbq | Date made by contact: 05-01-2024 16:54 |
| Referral Details | Telephone rumber 81225945820 | |
| Referral Details Form | | |
| Tasks | Green This referral is 1 days 6 hours old | Actions |
| Referral Contacts | Active Steps | Change service line? |
| Documents | Working days Working days | Active Steps |
| Questionnaires | O days 0 hours O days 0 hours 1 days 8 hours | Record An Event |
| Journal | 0 days 0 hrs 0 days 0 hrs 3 days 22 hrs | Progress To Next Step |
| | Received Received in Send questionanime Now 05-01-2024 16:54:00 05-01-2024 16:54:43 05-01-2024 16:56:34 09-01-2024 15:34:49 | C Reassign Pathway |
| | 4 | Create New Referral For Person |
| | Send questionnaire Show All Timeline | |
| | | Referral status |
| | 05.01.2024 Referral Status Assigned | This referral has no outcome assigned. |
| | 10:80:34 Created by: Lynsay Redwood | Assign referral status |
| | 05-01-2024 Moved on a step | |

Figure 7 Questionnaires tab.

Select the Questionnaires tab on the left-hand navigation menu and this will open a new page.





Figure 8 Questionnaire Status.

This page displays the name of the campaign and the status of the questionnaire. If the user selects the name of the questionnaire, and if the status of the questionnaire is completed, the file will open, and you will have a read-only view of the responses.

6.3 Questionnaires dashboard

To access the Questionnaires dashboard, select the Referrals page and if the user has access rights, the option to select the Questionnaires dashboard is on the left-hand navigation menu.

| | Home | e People | Referrals | Contacts | |
|--------------------|------|-----------------|------------|----------|----|
| Pathway Dashboards | 1 | Questionna | aire Campa | ns | |
| | | Show questionna | ires | | \$ |

Figure 9 Questionnaires dashboard.

To access a campaign, click the arrows and a drop-down menu will appear. Choose the questionnaire you would like to view either by campaign or by pathway(pod).



6.3.1 Campaign or pathway

Campaign encompasses all the questionnaires that have been submitted in this campaign. A campaign might, for example, be issued to all people with a referral, or all people with a referral at a 6 month interval.

| | Home | People | Referrals | Contacts | | | | | | | | |
|--------------------|-----------------|-------------------------------------|--------------|----------|-------------|------------|-----------|------------------|-----------------|---------|---------|---|
| Pathway Dashboards | Q | uestionna _{y campaign} | aire Campa | igns | | | | | | | | ¢ |
| | | | | | | | | | | | | |
| | Ci | ampaign qu mpaign | estionnaires | | Total | Sent | Read | in progress | Completed | Pending | Erromed | |
| | Ci Ca Ter | ampaign qu mpaign st Campaign | estionnaires | | Total 37 | Sent 14 | Read 0 | la progress 7 | Completed 18 | Pending | Errored | |

Figure 10 Questionnaire by campaign

Pathway includes all questionnaires that have been submitted related to referrals in a single pathway or pod.

| ALCONTRACTOR | Home | People | Referrals | Contacts | | | | | | | |
|--------------------------|------|---------------|-------------|----------|------|------|-------------|-----------|---------|---------|---|
| Pathway Dashboards | · | | | | | | | | | | |
| Questionnaires Dashboard | Qu | iestionnair | e Campa | gns | | | | | | | |
| | Ву | pathway | | | | | | | | | ¢ |
| | Sna | ap and Stroll | questionna | ires | | | | | | | |
| | Can | paign | | Total | Sent | Read | in progress | Completed | Pending | Errored | |
| | Test | :Campaign | | 8 | 3 | 0 | 1 | 2 | 0 | 0 | |
| | Act | ive Steps qu | estionnaire | s | | | | | | | |
| | Can | paign | | Total | Sent | Read | in progress | Completed | Pending | Errored | |
| | Test | :Cam paig n | | 11 | 5 | 0 | 3 | 3 | 0 | 0 | |
| | Wa | lk and Talk q | uestionnair | es | | | | | | | |
| | Cam | paign | | Total | Sent | Read | in progress | Completed | Pending | Errored | |
| | Test | Campaign | | 5 | 2 | 0 | 0 | 3 | 0 | 0 | |

Figure 11 Questionnaire by Pathway.

Each view of the dashboard will give the Campaign manager a view of how many questionnaires they have in:

- Total
- Sent
- Read
- In progress
- Completed
- Pending



• Errored.

If you select a questionnaire by campaign or questionnaire by pathway, a new page will open, and this will list the referrals where the questionnaire has been sent.

The user can also filter by date range and status of the responses.

| Questionnaires Dashboard | Questionnaire | Campaigns | | | | | | | | | |
|--------------------------|-------------------------------------|------------------|------------|------------|--------------------------------|---------------------------------|-------------|--|--|--|--|
| | By campaign | | | | | | ¢ | | | | |
| | Test Campaign | | | | | | | | | | |
| | Total 37 | Sert 14 | Operad 0 | in progre | e. 7 Completed: 10 | Pending: 0 | Entry 0 | | | | |
| | Conc. at the fill | | | The second | | | | | | | |
| | Show 11 💙 estiles Person surrame | · Penss fintname | 0+6 | Postcode | Ralemace code | Pathway | Status | | | | |
| | | George | 01-01-2020 | BA2 2EE | AW_Mon-Col-08-2023_001285_1 | Bite Hire | Completed | | | | |
| | Test-Self | Phone | 02-01-1955 | BA2 45J | RMAM_Mon-Jul-31-2023_001245_2 | Bike Hire | in progress | | | | |
| | 2044 | George | 01-05-1070 | BA2 2EE | RMIAM_Tue-Nov-07-2023_001276_2 | Bika Hira | Completed | | | | |
| | Smith | Jerny | 04-02-1948 | tal 4hh | RMAM_Web-Jun-28-3523_00977_2 | Adult one-to-one cycle training | Completed | | | | |
| | Balley | Georgina | 02-03-1007 | BA2 2EE | RMIAM_Mon-Jul-03-2023_001085_5 | Active Steps | in progress | | | | |
| | Mark | Questionnaire | 01-01-2000 | 86307az | RMIAM_Thu-Dec-07-2023_001262_1 | Snap and Stroll | in progress | | | | |
| | Pilow | Ted | 03-07-1935 | BA2 2EE | R/MAM_Mon-Dec-11-2023_001294_1 | Dr Bike session | Completed | | | | |
| | Pilow | Ted | 02-07-1935 | BA2 2EE | RMIAM_Mon-Dec-11-2023_001294_3 | Bike Hire | Sent | | | | |
| | Pllow | Ted | 02-07-1938 | EA2 2EE | R/MAM_Mon-Dec-11-2023_001294_2 | DIY Bike Maintenatoe | Sent | | | | |
| North East | Bravo | Johnny | 01-01-1977 | ba25ee | AW_Mon-Dec-11-2023_001203_1 | Active Steps | Completed | | | | |

Figure 12 Dashboard of questionnaires sent.

If the user selects any name on the list, this will open the person's referral record.

6.3.2 Downloading data

Researchers can download a JSON file to extract data for further analysis. Only data from completed questionnaires is exported. A csv. file can also be provided as required.

| Contentor or Contento | Questionnaire | Campaigns | | | | | |
|-----------------------|------------------|---------------|------------|--------------|------------------------------------|----------------------------|-------------|
| | the surveyor | | | | | | |
| | Text Campaign | | | | | | |
| | Test 27 | Sec. 14 | Special II | a tabu | | People 1 | lown 0 |
| | Part advariant | 8 10 1000 | | Piler status | 8 @ Develop | | |
| | Dor W. Warm | | | | | - | |
| | Participants and | - Annotations | 1.0 | Partonia | Takawa ank | Partnersy. | Terior |
| | | Ownya | 14.00 | 10.00 | ALCOHOLD REPORT OF THE PARTY NAMES | 5 m Ta | Completed |
| | | Para | 12-01-100 | 80.61 | NUM, No. 411-333, N. 94, J | 214 TH | 1. propriet |
| | | Darge | 1.0.17 | 10.00 | 1000/admit/2010/0703 | Dia No. | Constant |
| | 210 | James | 140.04 | tai en | No. 10, No. 10, Oct. 10, UKT (2 | Address to the unit of the | Congressed |
| | 100 | Georgine . | 8.0.92 | \$PC 355 | 1000,0e-ar0-000,0-00,0 | Adminus | in program |
| | 144 | Gardenaia | 11-0-200 | 800°w | 1000_h-0+0100_0100_ | ing an inst | 1.00 |
| | 100 | 54 | 11-0-12 | 842.005 | 1000,00-00-000,0100,0 | 0-lite sector | Corginal |
| | Para | 54 | 647-68 | 842.005 | Rest, to be million (197) | Bio Co | ier. |
| | 144 | ~ | 647-68 | 842.005 | Rest, Reduct-100, 0109, J | D7 Bis Datasan | less. |
| A New York Concession | 8.00 | January 1 | 0.01107 | talfee | ANUAR-DOI-1011-01-011-0 | Attached | Congressed |

Figure 13 Download data.