User's Guide

Clinipad
NHS Friends and Family Test
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USING CLINIPAD WITH NHS FRIENDS AND FAMILY TEST

This applies to NHS-compliant practices only.

From April 2015 NHS-compliant English practices are required to make this test available for patients and to forward results to the NHS.

Patients anonymously complete tests on Clinipad and the practice generates a report summary ranging across a minimum of one month. The practice uploads this data on the NHS portal.

Available from EXACT v11.5 onwards.

Overview

| Purpose (see "Purpose of the Friends and Family Test" on page 5) |
| Features (see "Features of the Friends and Family Test" on page 6) |
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| Competencies Checklist http://help.soideal.com/11.5/PDFs/ClinipadNHSFriendsAndFamilyTest-CompetenciesChecklist.pdf |
Overview of the Friends and Family Test

Purpose, benefits, features, requirements and limitations.

Purpose of the Friends and Family Test

In its drive to continuously improve services the NHS stipulates that NHS practices must provide all patients with:

- a means to record feedback on their experiences,
- access to collated information from other patient feedback.

In other words, to better inform their own future choices and decisions, patients have a right to see how other patients feel about particular services.

This policy drives service excellence in the industry:

- patients increasingly support those who provide the best service,
- practitioners become increasingly responsive to patient feedback,
- the NHS formulates national best practice guidelines based on what works best for patients.

The NHS regulation introduced in April 2015 requires NHS dental practices to survey their patients with the Friends and Family Test questions.

NHS practices have identified tablets as the most desirable method for collecting data, so this test is ideally suited to the Clinipad.

Non-NHS practices

Non-NHS practices can opt to use the test functionality without submission to the NHS, and they can configure custom questions to monitor patient perceptions of their service.

Benefits of the Friends and Family Test

Benefits to the practice:

- Conventional test media may skew results:
  - Test completion via pick-up forms and forms mailed to patients is left to patient whim, so it is likely that the most proactive responders will be the dissatisfied patients, which skews the responses towards the negative.
  - Practices can drive more balanced test responses by means of a standard Clinipad procedure while the patients are present and compliant within the practice.
- Rigorously applying the Friends and Family Test requirement via Clinipad is a consistent, automated means for practices to 'buffer compliance' with NHS regulations so that they have some leeway if they are found to be non-compliant in other areas.
- By driving test use within the practice, sites increase the test hit rate and raise their average scores above those sites whose patients respond only from home when they feel strongly enough to make a negative statement.

Benefits to the patient:

- Patients prefer tablets for recording test information.
- For patient interest a practice can report test data (on websites, newsletters or other media) by provider, thereby identifying providers with the most positive feedback.

Benefits to the industry:

- The Friends and Family Test feedback loop drives service excellence in the dental industry.
Features of the Friends and Family Test

NHS Compliance:
The Friends and Family Test is always turned on for participating EXACT NHS practices (it cannot be disabled). In accordance with NHS requirements, patients must always have the option of completing the test.

Note that practices do have the option of disabling the Friends and Family Test prompt in the Exit Workflow.

Patient can be assured of anonymity:
Described here: Patient anonymity in the Friends and Family Test (on page 8)

The test is built into the practice workflow:
Receptionists are prompted to administer the Friends and Family Test via a hyperlink in the exit workflow / departure task list:

Test reporting:
- Friends and Family Test completion is reported in EXACT's Appointment Workflow Compliance Report, which identifies to what degree receptionists have complied with appointment workflow tasks.
- A Friends and Family Test Report (see "Running the Friends and Family Test Report" on page 10) summarises data from the tests without identifying patients.

Printable template:
A Presentation Manager template matching the on screen form is available to all users for their convenience, but is not automatically used by EXACT.

Sample:
Requirements for the Friends and Family Test

Requirements:

- EXACT v11.5 or later.
- Functional Clinipad module.
- NHS practices require the capability to transfer test data to the NHS via the NHS portal.
- NHS Practices may implement the Friends and Family Test at any time within their practices, but are required to start submitting data after April 2015.
- Practices are required to meet further obligations with regards to the test that are not covered by the EXACT software, such as displaying evidence of actions taken as a direct result of patient feedback. These requirements are not covered in EXACT documentation.

Limitations:

EXACT does not automatically communicate test results to the NHS; these results must be manually uploaded to the NHS portal by the practice.
Using the Friends and Family Test

Procedures and screens.

Patient anonymity in the Friends and Family Test

When patients open the Clinipad form they see a statement "Data gathered on this form is anonymous and no-one in the practice will be able to determine who has entered it"

If patients query the anonymity of this Test here are some possible replies by practitioners ...

No data is saved to the patient file:

Test data is not saved to the patient file but to a single store, where EXACT records only

• question answers
• date
• providers seen
• patient's age, gender, and ethnicity

Text comments are protective against educated guesses by practitioners:

If text comments are selected for inclusion in the report they are not be identified by date or demographic data in order to preserve anonymity.
Issuing the Friends and Family Test on patient departure

NOTE:
- The test is integrated into the Appointment Workflow Compliance Report, so Receptionists are monitored on their success or failure to urge patients to complete the test.
- The test prompt can optionally be disabled from the exit workflow.

To issue the Friends and Family Test on patient departure

1. Click Friends and Family Test in the Departure task list:

This opens the standard Clinipad dialogue for the exit workflow:

2. Ask the patient if they are willing to complete the completely anonymous NHS Friends and Family Test, and if they say No, select the Patient Declined button to abort the test.

3. If the patient agrees to complete the test, select a Clinipad hardware device to issue to the patient by means of the Complete forms using dropdown menu.

4. Select the Send to Clinipad button so that EXACT can prepare the Clinipad.

5. Issue the patient with the Clinipad device and offer brief instructions.

6. When the patient returns the Clinipad, click the Return button.
Running the Friends and Family Test Report

Note that report data needs to be uploaded to the NHS Portal.

SEE ALSO: Using Clinipad with NHS Friends and Family Test (on page 4)

To run the Friends and Family Test report

1. Select Administration > Reports and select the NHS Friends and Family Test Report:

![Screenshot of the Reports interface]

2. From the parameters dialogue select parameters as follows:

![Parameter selection dialogue]

**Overview:** From this screen you can choose parameters for Provider/s (if multiple, whether to combine them in a report or report each separately), patient demographics (gender, age and ethnicity), and whether to include the respondents' text comments in the report.

**Report parameters:**

**Provider/s**

Reports by Provider may be of significant interest to patients.

Use the selectors to select a Provider, or click the **Multiple** button to select multiple Providers:

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(With multiple Providers you have the option of reporting them together or separately)

**Date range to cover**
The default range is the previous complete month. Minimum range is 1 month to prevent anonymity being breached.

**Breakdown by (demographic filter)**
If you choose a demographic breakdown the grand total will be broken down by either:
- Male/Female
- Age (at time of test) 0-17, 18-29, 30-39, 40-49, 50-59, 60+
- Ethnicity (one row for each)

**Option to include text comments**
If text comments are included, they will be printed in a list under the numbers on the report.
To preserve anonymity they cannot be identified by date or demographic data.
A tick is shown next to each entry where the patient has selected NOT to allow their comment to be made public.

3. Print, Preview or Email the report. If Emailed you can preview it from the EXACT Email Outbox.

### Uploading Friends and Family Test data to the NHS Portal

**To upload Friends and Family Test data to the NHS Portal**

1. **Run the Friends and Family Test Report** (see “Running the Friends and Family Test Report” on page 10).
2. Log in to the NHS Portal.
3. Upload the report data following NHS instructions.
(Patient) Completing the Friends and Family Test

Instructions to patients:

The Friends and Family Test is optional and completely anonymous; we only ever see the collated results across all patients.

Tested data is transferred to the NHS for the benefit of health services in this country, and we may act upon suggestions that you make in order to improve our services to patients.

To complete the Friends and Family Test

1. The Receptionist will hand you a Clinipad device.
2. Select the Friends and Family Test button:

3. When the test displays select appropriate options.
4. To enter text comments, tap into the Comment field and then type using the on-screen keyboard:

5. When you’ve completed the test select the Done button:

6. Return the Clinipad device to the Receptionist.
Configuring the Friends and Family Test

There is no configuration required for this feature.

NHS practices cannot disable the Friends and Family Test functionality.

By default it is enabled for the Exit Workflow, but can optionally be disabled as a workflow prompt.

**To disable the Friends and Family Test prompt in the exit workflow**

1. Select Configure > Practice Settings...
2. Click the configure (spanner) button for Enable Appointment Workflow:

![Configure button](image)

## Competencies for the Friends and Family Test

_TIP:_ For your practice, download, print and use the printable PDF version

http://help.soedental.com/11.5/PDFs/ClinipadNHSFriendsAndFamilyTest-CompetenciesChecklist.pdf

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<td>Describe how the Friends and Family Test benefits the patient, the practice and the industry.</td>
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<td>In a simulated discussion with a suspicious patient, clarify three different ways in which patient anonymity is assured in the Friends and Family Test.</td>
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