



SURVEY & EVALUATION | User Guide

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INTRODUCTION

The **Survey/Evaluation** function is found on the **Quality Tab** of Risk Clear.

Surveys and Evaluations can be administered from the **Survey/Evaluation** function within RiskClear. Surveys can include patient/resident, staff, doctor/primary physician, contractors or other. Evaluations can include evaluating product trials, healthcare processes and programs such as staff orientation and performance appraisals.



SURVEYS ON TABLET

Surveys on Tablet can be customised with results updated into RiskClear for analysis and reporting.

SETTING UP SURVEYS/EVALUATIONS

STEP ONE: Go to the **Setup Tab**

STEP TWO: Click on **Survey/Evaluations** and select **Survey Setup**



STEP THREE: Select a Survey/Evaluation from the Select Survey/Evaluation drop-down at the top of the page. You may wish to select the default 'Patient/Resident Survey' and over-key the questions and responses (providing it has not yet been used). Shown below is a typical completed Survey/Evaluation format (template).

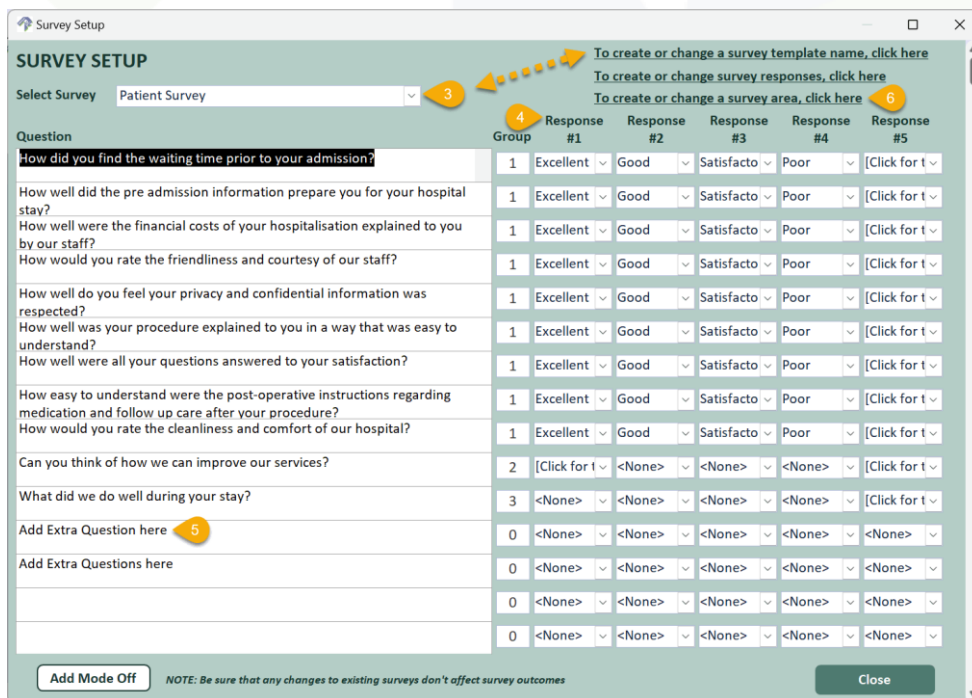
Alternatively, to create a new Survey/Evaluation click 'To create a completely new Survey/Evaluation, click here' label at the top of the page. Enter a name for the new Survey/Evaluation, close that box and then select the Survey/Evaluation name you just created from the Select Survey/Evaluation drop-down.

STEP FOUR: Enter the responses that your Survey/Evaluation uses e.g. 'Yes', 'No', 'Very Good', 'Average', 'Poor' etc.

Note that some responses require the entering of free text. There are two ways of achieving this:

1. Where a response requires only free text e.g. "Please let us know anything we've missed" without any question to be answered, create a response item "[Click for text]" (without the quotes) and select this as Response#1.
2. Where one of several response options requires text such as "Yes, No, Other (please specify)" create the response item appended with the word text in square-brackets "[text]". In the above example "Other[text]" (without the quotes).

When entering the Survey/Evaluation results, clicking on items formatted this way will cause a ZoomBox to display for the entering/viewing of text. In the tablet Survey/Evaluation, these will appear as free text boxes which will display the on-screen keyboard when tapped with the finger.



SURVEY SETUP

Select Survey: Patient Survey

Question

Group	Response #1	Response #2	Response #3	Response #4	Response #5
1	Excellent	Good	Satisfactory	Poor	[Click for text]
1	Excellent	Good	Satisfactory	Poor	[Click for text]
1	Excellent	Good	Satisfactory	Poor	[Click for text]
1	Excellent	Good	Satisfactory	Poor	[Click for text]
1	Excellent	Good	Satisfactory	Poor	[Click for text]
1	Excellent	Good	Satisfactory	Poor	[Click for text]
1	Excellent	Good	Satisfactory	Poor	[Click for text]
1	Excellent	Good	Satisfactory	Poor	[Click for text]
1	Excellent	Good	Satisfactory	Poor	[Click for text]
2	[Click for text]	<None>	<None>	<None>	[Click for text]
3	<None>	<None>	<None>	<None>	[Click for text]
0	<None>	<None>	<None>	<None>	<None>
0	<None>	<None>	<None>	<None>	<None>
0	<None>	<None>	<None>	<None>	<None>

Add Extra Question here

Add Extra Questions here

Add Mode Off

NOTE: Be sure that any changes to existing surveys don't affect survey outcomes

Close

STEP FIVE: Enter the questions and select from one to five responses you have created from the dropdowns on the right-hand side of the page. If the response does not exist, click the **'To create a new response, click here'** label, enter the new responses into box then close it. These responses will now be available for selection.

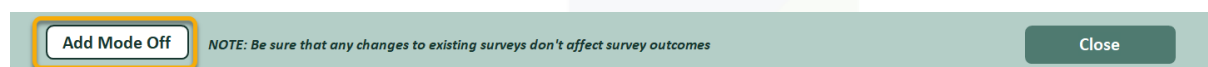
STEP SIX: Survey/Evaluation Areas enable different areas within the hospital to be reported on separately if needed. Examples of Survey/Evaluation areas are, 'Inpatient', 'Outpatient' or 'Day Patient', Resident, Product or Process Evaluation, although anything at all can be entered here if you would like the ability to report separately. If configured, this will cause a 'Survey/Evaluation Area' drop-down to appear when running a Survey/Evaluation report where you can select a single area, or all areas on which to report.

Click the **Create Survey/Evaluation Area** label at the bottom of this panel to display the 'Add/Change Survey/Evaluation Area' dialog box. Select the Survey/Evaluation to which you wish to attach Survey/Evaluation areas, and then enter the Survey/Evaluation areas below and press the 'Add' button. Note that a maximum of 5 Survey/Evaluation areas can be entered. Any more than this will be ignored by the tablet Survey/Evaluation

ADDITIONAL FEATURES:

THE GROUP COLUMN: is used by some reports to group questions into sections with their own subtotals. Reports will group attempt to put all like responses into a group however will, for example, group all questions which have a Yes/No response together where it might be best to separate these. For more assistance on grouping, contact RiskClear.

ADD MODE: When creating a Survey/Evaluation, 'Add Mode' will be on. This means that there will be a blank line at the bottom of the page for you to enter a new question and response. When entering a Survey/Evaluation which has already been created, Add Mode will be off. Click the Add Mode button to toggle on.



It is important that once a Survey/Evaluation has been created, any subsequent changes need to be carefully considered so that they do not skew data already keyed for this Survey/Evaluation. In general, any changes to the format of a Survey/Evaluation should necessitate the creation of a brand-new Survey/Evaluation.

CREATING A NEW SURVEY/EVALUATION

STEP ONE: Click the **New Survey/Evaluation** button from the **Quality Home Page** to create a new Survey/Evaluation record below.

STEP TWO: Select the **Survey/Evaluation Name** (template) that you wish to use.



Survey/Evaluations are different to other records in RiskClear in that the page itself contains all records relating to a particular Survey/Evaluation. Survey/Evaluations are usually batched by month and, if you are using more than one Survey/Evaluation, by Survey/Evaluation.

STEP THREE: You can create a new record within the Survey/Evaluation by clicking the **"New Survey Record"** button. Scroll between existing records by using the **navigation buttons** to the left of the "New Survey Button".

STEP FOUR: The **"Batch Date"** and **"Description"** fields on the upper left of the page need only be completed once as they refer to *the entire* Survey/Evaluation. Note that this date determines which month the Survey/Evaluation data appears in. The remaining fields are where the details of each individual Survey/Evaluation are recorded.

All the following control fields are optional except Source. These fields can be captured depending upon whether you wish to capture this information or not.

STEP FIVE: Complete the following fields:

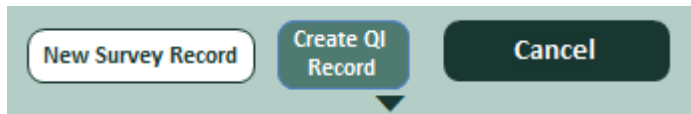
SOURCE DROPDOWN	A mandatory field and indicates where the Survey/Evaluation response originated from e.g. Paper Survey/Evaluation, Telephone, Tablet Survey/Evaluation etc. This can be configured in the "Survey/Evaluation Source" function in Setup.
DATE (on the right-hand side)	Usually the date that the Survey/Evaluation response was received.
GENDER	The entries can be changed or added to in Setup.
NET PROMOTER SCORE	Drop-down option to select NPS
FULL NAME & CONTACT	Those of the respondent if known. Contact can be telephone or email address.
FUND	The entries can be changed or added to in Setup.
DOCTOR	Can be the patient's surgeon/admitting doctor or residents' primary physician or can be blank if not required.
DATE OF BIRTH	Can be completed if necessary
ABORIGINAL TORRES STRAIT ISLANDER (ATSI)	Yes, No and Unknown option
SURVEY/EVALUATION AREA	Will only be required if this field is configured (refer to page 3 for details). This enables different areas within the hospital to be reported on separately if needed.
LANGUAGE	Can be added to in Setup.
COMMENT	Applies to any comments left by Survey/Evaluation participants. Note that the questions themselves can also be configured to contain text responses.
RESPONSE	Can be completed by staff and refers to any action taken in response to the current Survey/Evaluation.

To get a more complete view of all Survey/Evaluation questions, clicking the **Full screen** label at the top right of the page will stretch the page to the top-most and bottom-most borders of your screen. Depending on the size of your screen this may fully display all questions, so scrolling up and down is not needed when completing Survey/Evaluation information. Click **Windowed** to return to the standard windowed view.

STEP SIX: Clicking on the "**Delete Survey/Evaluation Record**" will permanently delete the current record. If this is the only response for this Survey/Evaluation, the entire Survey/Evaluation batch record will also be deleted.

CREATE QUALITY IMPROVEMENT RECORD: If a survey triggers a quality improvement opportunity, you can create and link it from the survey. Click the "**Create QI Record**" button at the bottom of the page and fill out the QI page that appears. Once closed, you'll be able to access this QI record directly from that survey or from the Quality search list as usual. To remove the link, click the down-arrow below the button and select "**Remove QI record**"

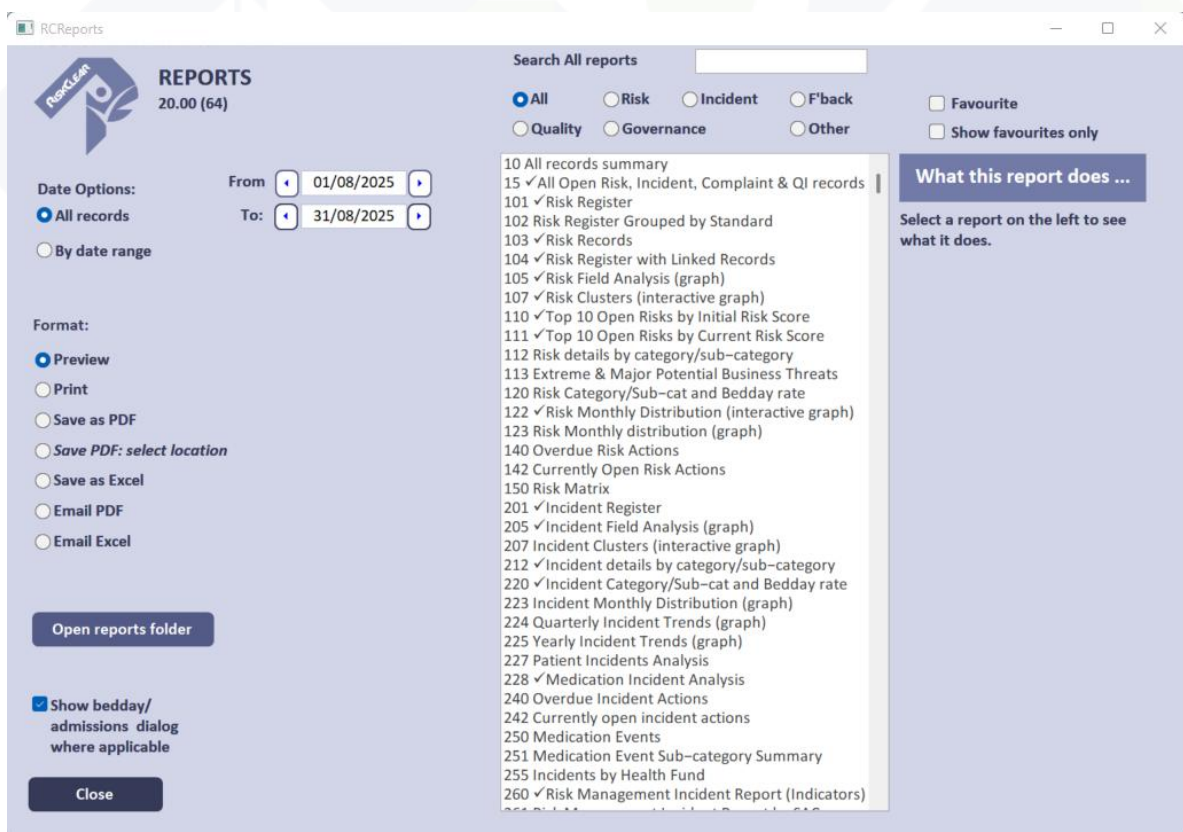
link". To link a QI record previously created, click the down-arrow, select **"Link to existing QI record"**, enter the record number then press OK.



Note: If either "[Click for text]" is displayed as a response, or "[text]" is appended to the response (e.g. "Other [text]"), then clicking this box will bring up a ZoomBox for you to enter the response text.

SURVEY AND EVALUATION REPORTS

Survey and Evaluation reports can be generated in the Report Suite of RiskClear. Select **Quality** or use the **Search All reports** function.



The following reports can be run via the Reports Suite in RiskClear and include:

REPORT 430	Survey/Evaluation Response Analysis 6 months	Displays monthly summary data for individual responses for 6 months to the month selected
REPORT 431	Survey/Evaluation Response Analysis 6 months (%)	Like report 430 but shows percentage of monthly totals
REPORT 432	Survey/Evaluation Response Report by Survey Type (graph)	Separate stacked bar-graph for each question comparing responses and reported by type selected from the drop-down on the left. This report is useful only if these fields are recorded during the survey.
REPORT 433	Survey/Evaluation Response by Month (graph)	Displays stacked bar-graph of responses by question by month for the period selected.
REPORT 435	Monthly Survey/Evaluation Summary	Displays a summary of surveys for the month selected, including NPS and average surveys per bed day or admission express as a percentage
REPORT 439		Blank Survey/Evaluation Form

Helpful Hints

- ✓ Tick the Favourite box if it's a frequently used report.
- ✓ A description of "What the Report does...." is provided when you select a report.