

## ATIP’s Guide to Creating Surveys

**1. Choose an approved and secure survey platform**

- a) QuestionPro is the web-based survey tool approved for standard use by the Government of PEI. It allows users to develop and deliver online surveys and polls to specific groups. To learn more about accessing a QuestionPro account, contact the Service Center by email at [servicecentre@gov.pe.ca](mailto:servicecentre@gov.pe.ca) or by phone at 902-620-3600 to log a request.
- b) If you have created a survey using other tools, reach out to your Manager or Director and submit a ticket to the Service Centre requesting support in moving the survey over to QuestionPro. Other survey software is not approved for use.

**2. Determine whether the survey will be collecting PI or PHI**

Personal Information (PI)	Personal Health Information (PHI)
Information about an identifiable individual, including: (i) name, date of birth, address or telephone number, (ii) race, national or ethnic origin, colour or religious or political beliefs or associations, (iii) age, sex, marital status or family status, (iv) an identifying number, symbol or other particular assigned to the individual, (v) information about the individual’s educational, financial, employment or criminal history, including criminal records where a pardon has been given, (vi) anyone else’s opinions about the individual, and (vii) the individual’s personal views or opinions, except if they are about someone else.	Identifying information that: (i) relates to the individual’s physical or mental health, family health history or health care history, including genetic information about the individual, (ii) relates to information about an individual that is collected for the purpose of registering the individual for the provision of health care, including a health number, medical record number and any other identifier assigned to an individual, (iii) relates to an individual’s entitlement to benefits under or participation in a health care program or service.

Consider whether the survey truly requires **identifiable information**.

- Can the purpose be met with anonymous or de-identified data?
- Can you collect less detailed PI or PHI?
- Can identifiers (name, PHN, contact info) be separated from responses?

Prior to collecting PI or PHI through a survey, a Privacy Impact Assessment (PIA) may be required. To determine whether a PIA is needed, please complete the Personal Information Checklist, which can be obtained from the Service Centre, and review the PIA Protocol found here: [HPEI PIA Protocol](#)

Other helpful PIA resources can be found on ATIP’s SRC page: <https://src.healthpei.ca/ATIP>

**3. Include a privacy statement that informs the individual of the following information:**

- a) the purpose for which the information is collected;
- b) the specific legal authority for the collection; and
- c) contact information of an employee of the program/service area who can answer questions about the collection.

Examples of privacy statements can be found here: [HPEI Privacy Statements](#)

#### 4. Considerations

- a) Consider whether you are collecting only the minimum amount of information (i.e. if you're collecting the participant's gender, what will that information be used for?)
- b) Consider the potential for reidentification
  - Certain combinations of information may reasonably identify an individual, particularly in PEI's smaller populations. Information such as:
    - Age + rare condition
    - Small community + service date
    - Job role + clinic location
  - Mitigation strategies:
    - Use age ranges instead of exact ages
    - Avoid small-cell reporting
    - Suppress or aggregate results for small groups (typically less than 5)
    - Separate demographic questions from health questions where possible
- c) Limit access to survey results to staff with a need-to-know
- d) Do not store data on personal devices or shared drives
- e) Develop clear rules for exporting, emailing, or printing data
- f) How will the survey be distributed? If it will be sent in a mass email, use blind copy to ensure the email addresses are not visible to the participants. To avoid a privacy breach, consider implementing a double check process to ensure all email addresses are entered in the bcc field only.
  - i. If the survey is distributed in a fillable format, consider how the results will remain anonymous if returned via email.

#### 5. Inform individuals of the following information:

- a) Engagement, whether as a survey participant, a committee member, or focus group participant, is voluntary (unless there is a statutory requirement)
- b) For any questions that have a free text space, add a disclaimer advising the participants to not include any PI or PHI in their responses
- c) If the survey will be collecting PI/PHI, inform participants of the following:
  - Why it is being collected
  - How it will be used
  - Whether results will be identifiable or aggregated
  - Who will have access
  - How long it will be retained
    - Align with approved records retention schedules. Reach out to [healthpeiRIM@ihis.org](mailto:healthpeiRIM@ihis.org) for more information
- d) How they can request access to their own responses
- e) How to correct errors.