



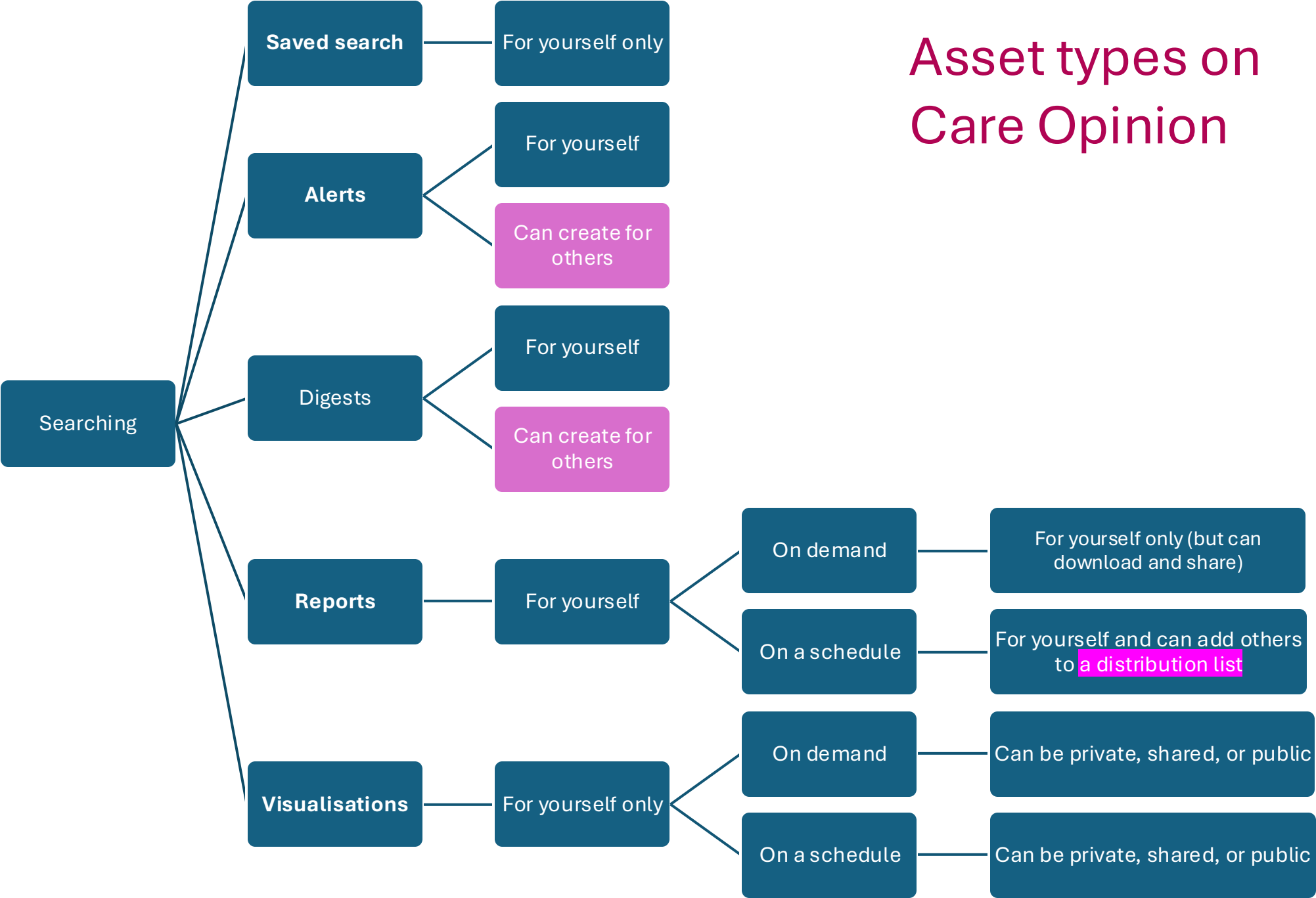
Care Opinion: Reports and Visualisation Training

April 2025

A large, light pink, abstract shape with wavy edges is positioned in the bottom-left corner of the slide, extending towards the center.

Subscriber assets based on
stories and responses

Asset types on Care Opinion



If you can search for it, you can turn it into an asset...

- Service(s)
- Geographical areas
- Tags
- A phrase
- Type of Care (treatment function)
- Author role
- Criticality
- Read/responded status
- Dates submitted or published
- Picture stories
- Word count
- Invitation links
- By responses:
 - Submitted within a time frame
 - published and submitted dates
 - From the author
 - Planned or made change
 - Contains a phrase

Use live site

- create a search
- Save
 - as a search
 - As an alert for self and another
 - As a report on demand
 - As a report on schedule with distribution list
 - As a visualisation with different views

A note on alerts

The alert email is triggered by the **publication** of a story or the **publication** of a response. To add additional triggers to story, for example when a story has no reply, you need to use smart alerts:

Go to *Saved Things* > find the alert > go to *Triggers*

Triggers

⏏ Pause this alert

Active triggers

— when a response is published

Available triggers

+ when a story is published

+ when a response is marked helpful by the story author ▼

+ when a response is marked unhelpful by the story author ▼

+ when a story is imported from NHS Choices (England only)

+ when a response is imported from NHS Choices (England only)

+ when a story remains unread by me ▼ after 1 day ▼

+ when a story has no response by me ▼ after 1 week ▼

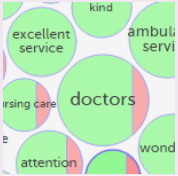
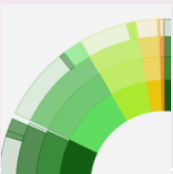
+ when a story has no change planned or made by me ▼ after 1 day ▼

+ when a change is planned but not yet made by this organisation ▼ after 4 weeks ▼

Type of reports

Report name	Best created in	Report info
Board report	PDF or Word	Basic report, experimental. Only visible to Care Opinion
Raw tag data	Excel	A table of tag counts only for a selection of stories with tag group, polarity and frequency
Responses and story progress	PDF or Word	A visual summary of responses and changes - response status, how many responses each story has and the days from publication of first response
Services with ratings	PDF or Word	Summary of the rating scores for a set of services. Ratings are optional at the end of a story that has been linked to at least one service. A subscriber therefore may have less ratings than stories
Services with response quality	PDF or Word	Indicators of quality of responding for a set of services - use of profile pictures in responding, signing off with full name, responses rated as helpful, mean response times, changes planned/made
Services with story activity	PDF or Word	Summary of story counts, responsiveness, criticality and submission routes for a set of services and it's decedents
★ Stories in summary	PDF or Word	The most popular report. This includes public read count of a set of stories, top 3 most viewed stories, month the stories were told, how the author identifies themselves, submission route, criticality, author area, most common tags
Story and response listing	PDF or Word	The full text of all stories and responses, grouped by the service they are about
Story authors in summary	PDF or Word	Summary of information provided by authors. This includes author role and adult vs child (required by author). Author age by birth year, gender, ethnicity, limitations to daily activity are all optional. Not many authors fill this in. Some charts may be excluded if there are not enough stories to prevent author identification
★ Story listing in a table	Excel	Table of stories with all metadata available to subscribers. This report is too wide to be easily used in Word or PDF formats.

Type of Visualisations

Visualisation		Description
Tag bubbles		This shows the most popular tags for your stories as bubbles. This is best used when searching by services. The bubbles are split according to how often the tag is used to say what was good, or what could be improved. This visualisation provides a lot of information in a very easy to understand way.
Story swarm		This shows how your stories are spread over time and allows you to see patterns in story progress or criticality. Up to 400 stories are included. This is good for whole subscriptions or for individual services.
Sunburst		This shows how stories progress from being told to being read, responded to and perhaps leading to change too. Stories are grouped by criticality.
Tag cloud: what was good?		This shows the most-used "what was good?" tags for your stories, sized according to use.
Tag cloud: what could be improved?		This shows the most-used "what could be improved?" tags for your stories, sized according to use.
Tag cloud: how did you feel?		This shows the most-used "how did you feel?" tags for your stories, sized according to use.
Lily pad		This shows how your stories are spread according to the services they relate to. Each circle represents an organisation or the services it provides. The more stories about a service, the larger the circle for that service. Some stories are about multiple services, so you may see services outside your subscription scope on the lily pad.
Story word cloud		This shows the most common words in the text of your stories, based on the last 1000 stories.

Where to find or view assets

Saved Things includes

- Any saved searches
- Any alerts created by you or by someone else for you
- Any reports that were **Saved** (not *Generated*)
- Visualisation templates
- Digests created by you or by someone else for you
- Moderation Advisories in moderation subscriptions only

My saved things

All moderation advisories

all asset types ▾

Has schedule



Story listing in a table: all stories about Calgary Foothills PCN

All stories about Calgary Foothills PCN



Digest: all stories about Calgary Foothills PCN

All stories about Calgary Foothills PCN



training visualisation

All stories about Westview PCN: what was good?



Stories in summary: all stories about Westview PCN

All stories about Westview PCN



Alert: all stories about Westview PCN

All stories about Westview PCN



Search: all stories about Westview PCN

All stories about Westview PCN



Alert for all stories in this subscription

Reports Archive includes

- Individual reports created on demand that were saved
- Individual reports created on demand that were not saved
- Individual reports sent to you via a schedule
- Individual reports created by someone else and sent to you on a distribution list

It is a record of previous created reports you may need to access again

Reports archive

+

Queue new report

Owner

All

▼

Origin

All

▼

Report type

All

▼

Search

Report name	Format	Generated	Method	Owned by
Withdrawn stories and responses: last month	PDF	02/03/2025 03:35	scheduled	another member
Rejected stories and responses: last month	PDF	02/03/2025 03:35	scheduled	another member
Moderator actions: last month	PDF	02/03/2025 03:35	scheduled	another member
Services with ratings	Excel	25/02/2025 16:23	on demand	me
Services with ratings	Excel	25/02/2025 16:18	on demand	me
Withdrawn stories and responses: last month	PDF	02/02/2025 03:37	scheduled	another member
Rejected stories and responses: last month	PDF	02/02/2025 03:36	scheduled	another member
Moderator actions: last month	PDF	02/02/2025 03:36	scheduled	another member
Withdrawn stories and responses	PDF	09/01/2025 15:20	on demand	me
Withdrawn stories and responses	PDF	09/01/2025 15:18	on demand	me
Withdrawn stories and responses: last month	PDF	02/01/2025 03:35	scheduled	another member
Rejected stories and responses: last month	PDF	02/01/2025 03:35	scheduled	another member
Moderator actions: last month	PDF	02/01/2025 03:35	scheduled	another member

Visualisation Gallery

- Defaults to *Shared* – all visualisations created in a subscription for other members of the subscription to see.
- Can also see private to you visualisations.
- Or public visualisations. Public view shows all public across all subscriptions

Visualisations gallery

Visibility: public ▼ Type: all ▼ Owned by me Created in my subscription



Biscuits

By Sarah Ashurst
27/03/2025

public tag cloud



Communication Deep Dive Q1 2024/25

By Lisa Townsend
27/03/2025

public tag bubble



Care Opinion feedback published Q1 2024/25

By Lisa Townsend
27/03/2025

public tag bubble



North Cumbria Integrated Care NHS Foundation Trust

By Louise Scott-Carr
26/03/2025

public tag cloud



North Cumbria Integrated Care NHS Foundation Trust visualisation

By Louise Scott-Carr
26/03/2025

public tag cloud



All stories about Southern Health & Social Care Trust / Continuity of Midwifery Carer Service: how did you feel?

By Mairead Casey
26/03/2025

public tag cloud



All stories about Southern Health & Social Care Trust / Continuity of Midwifery Carer Service: what could be improved?

By Mairead Casey
26/03/2025

public tag cloud



Month 1 of Care Opinion

By Kimberley MacInnes
25/03/2025

public tag bubble



Surrey and Sussex Healthcare NHS Trust



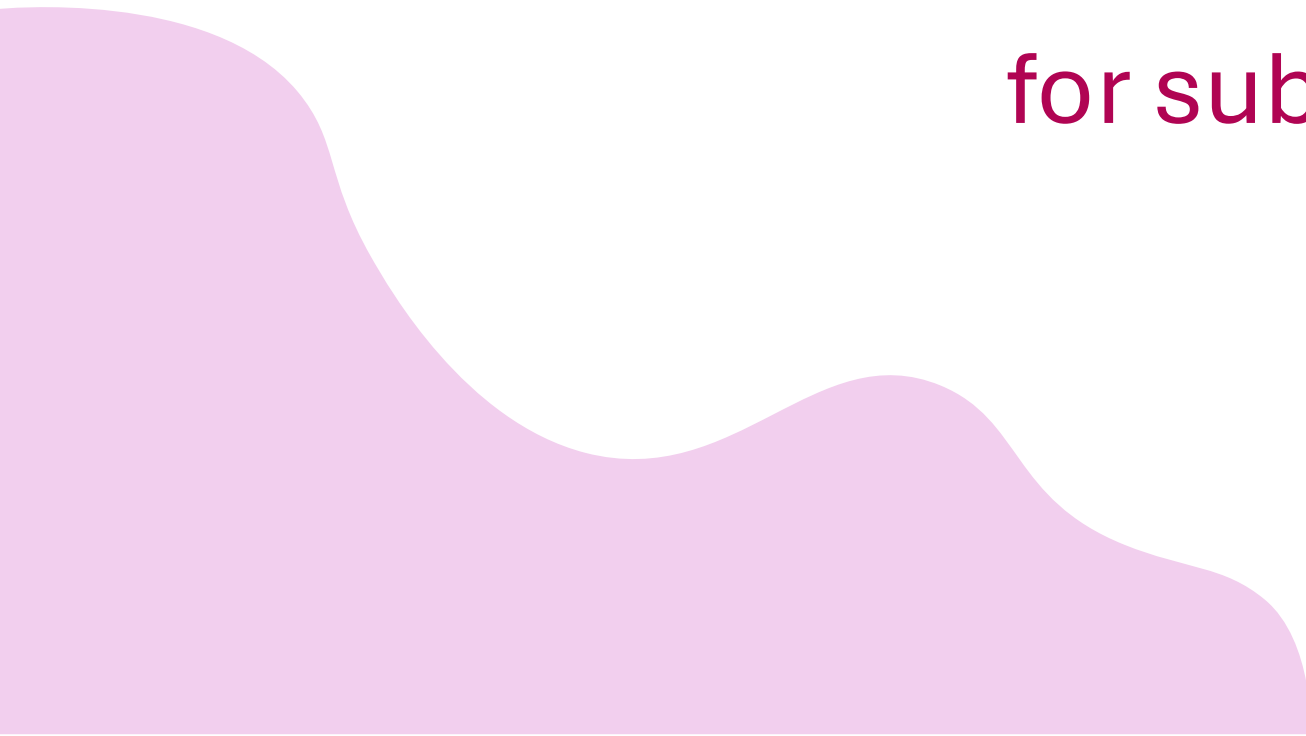
What was good?
WHSCT Jan- March



Cancer Services Wonford



What could be Improved? Jan -March

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Additional reports available
for subscribers

Member reports

- Created from the members page – scroll to bottom of members

Report name	Best created in	Description
Member list (aka simple member list)	excel	Page one is a formatted list with member's name, job title, email and date added, organised by role on Care Opinion. Page 2 is a list that can be used in mail merge, also included department, organisation (as added by the member)
Member activity report	PDF or word	Shows who is reading and responding to stories on a subscription. Also includes whether responses have been rated as helpful or unhelpful and when the member has a changed planned or made. Can set a start date for the report, but not an end date
Members with their alerts (aka member alert listing)	PDF or word	Shows the NAME of each alert set up for each member

Reports

i Filter the members who appear in your report by adding search terms to the member list above

▼ Member list

i What does this report contain?

A simple member list

Excel ▼

 Generate

▼ Member activity report

i What does this report contain?

Shows reading, responding and change statistics for each member in your list

Activity on or after dd/mm/yyyy 

Excel ▼

 Generate

▼ Members with their alerts

i What does this report contain?

Shows the alerts owned by each member in your list

Excel ▼

 Generate

Service Tree report

Report name	Best created in	Description
Service Tree download	only available in Excel	ID, levels, names, parent ID, address, treatment function(s)

Service Tree report

Found in the subscription information.

Go to the subscription name in the menu:

Good afternoon Sarah!

Administrator

South Eastern Health and Social Care Trust



 Help



South Eastern Health and Social Care Trust



Level 2 subscription
Current term ends on Tuesday, 1 April 2025



534 / 750 members
(12 frozen)



9th/573
for staff listening

> Subscription scope

> Subscription features

> Subscription history

✓ Service tree



Download your service tree to Excel

Customise your service pages

Make your service pages on Care Opinion more informative: add pictures, descriptions or links. You can update the whole tree at once, or customise individual divisions or services separately.

[Learn more](#)

[Customise your service pages](#)

Quick links

You are an administrator in this subscription

This is your active subscription

 Your profile in this subscription

 Access API Keys

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Additional reports available
for site admins

Moderation reports

Report name	Best created in	Description
Moderator actions	any	Shows actions taken by moderators to approve or reject stories, criticality scores by moderator and time distribution of actions on stories in the first 5 days
withdrawn postings and responses	any	Withdrawals (stories should only be withdrawn by the author) and any reasons given.
Rejected postings and responses	any	Rejections by moderator and reasons



Your search

▼ Your current search ADD/
REMOVE

Filtered by your subscription



► Story search options

► Response search options

▼ Create in your subscription

 Save search

 Create alert

 Create report

 Create visualisation

 Create digest

 Add tags

 **Moderation**

▼ Actions

 Play a slideshow

 Make a widget

 **Need a little help?**

Save my search

Alert

Report

Search

Visualisation

Digest

Tagging

Moderation

✓ **Moderation reports**

Your current search:
all stories in this subscription

 Your search doesn't have any filters. It includes all stories in your subscription.

Create a moderation report to keep track of group or individual moderation activity.

 Moderator actions >
Actions taken by moderators

 Rejected stories and responses >
Rejected stories and responses: counts and reasons

 Withdrawn stories and responses >
Withdrawn stories and responses: count and reasons

✓ **Moderation advisory**

Create a moderation advisory to provide moderators with information about selected stories.

Enter a name which describes which stories/responses this advisory is about

Enter the message the advisory should show to moderators

Subscription reports

Report name	Best created in	Description
Subscriptions	only available in Excel	created a report based on filters applied on "subscription" page: ID, name, level, member capacity, active members, start/end date support lead (Care Opinion)
Service tree alerts	Only available in excel	Shows by number which services have alerts that cover them. The plan is to make this available to subscription members.

Treatment Function Report

Report name	Best created in	Description
Treatment Functions	only available in Excel	List of all treatment functions and common names

Subscription report location:

Admin

Users

Subscriptions

Services

Site pages

Leaflet batches

Meta

Site admin help

Navigation

Notifications

Activity

Recently read

319

Subscriptions

Filters

+ Create new subscription

Has a current term

8 subscriptions, displaying 1 - 8				
Name	Level	Members	Start	End
Bethany Care Society	Full feature set	7 / 25	22/10/2024	23/10/2026
Calgary Foothills PCN	Full feature set	5 / 25	22/10/2024	22/10/2026
Care Opinion Canada	Full feature set	10 / 40	01/08/2024	02/08/2027
Chinook Primary Care Network	Full feature set	1 / 45	19/03/2025	02/04/2027
Circle Medical @ Copperfield	Full feature set	2 / 25	14/01/2025	21/01/2027
Life Medical Clinic	Full feature set	3 / 25	08/10/2024	09/10/2026
Training Subscription	Full feature set	6 / 12	08/11/2024	08/11/2028
WestView PCN	Full feature set	4 / 30	26/09/2024	17/09/2026
				Download

Service tree alert location:

Go to the individual subscription, scroll down to *Quick Links*. Then *Service Tree Alerts*

► Tags

► Statistics

Reports

- Member list
- Members whose emails have bounced
- Members with their active alerts
- Members without active alerts
- Member activity

Quick links

- [Leaflet batches for this subscription](#)
- [Upload new members from Excel](#)
- A new member link is not currently available
- [Invitation links in this subscription](#)
- [API keys for this subscription](#)
- [Feature matrix](#)
- [Service tree](#)
- [Service tree alerts](#)

Service tree reports

Report name	Best created in	Description
Public subtree report	PDF/word	Service name, ID, Treatment Function, and any other information added at service creation
Public subtree error report	PDF/word	Errors in a set of services. For example, if a service has no child and no treatment function
Full subtree report	PDF/word	As public subtree report but with services in other visibilities
Full subtree error report	PDF/word	As public subtree report but with services in other visibilities
All subtree data	Excel	All data from the service you are one down, presented in a table

ZT001_12036

Provided by [Belfast Health & Social Care Trust](#)

Name

Official name

Mater Hospital

Display name (overrides official name)

SimilarNameExists

☐

Address

StreetAndLocality

Street

47-51 Crumlin Road

Locality

Town

Belfast

County

Postcode

BT14 6AB

Website

Email

Copy from parent Copy to children

InheritsLocation

☐

Family tree

Provided by (official)

ZT001

Provided by (custom override)

Service which fosters for this service (nacs)

Type, source, visibility, access

Service type

hospital

Moderation

☒ Simple

☐ Advanced

Rating type

[Default for type]

Treatment functions

Add

Provided for residents in

Add

Synonyms

Mater [X]

MIH [X]

Add

Family tree

32 children

59 descendants in all

[View this service](#)

[View the parent](#)

[Edit the parent](#)

Actions

Add a [child](#) or [sibling](#) at **this** location

Add a [child](#) or [sibling](#) at a **different** location

[Visualise from here](#)

[Visualise \(V2\)](#)

Reports

- [View a public subtree report](#)
- [View a public subtree error report](#)
- [View a full subtree report](#)
- [View a full Subtree error report](#)
- [Get all the subtree data](#)

**Congratulations,
you are now a reports
and visualisations
grand master 🏆**