# **Care Opinion Canada Onboarding**

**Welcome to Care Opinion Canada!**

We’re excited to support your organization in amplifying patient voices. This walkthrough tool outlines each phase of your onboarding journey with suggested actions, planning space, and reflection prompts.

**Your Support Team:**

|  |  |  |
| --- | --- | --- |
| **Name:** | **Role:** | **Contact:** |
| Tracee Daschuk | Client Liaison | tracee@imaginecitizens.ca |
| Kelly Turner | Communications Lead | kellyt@imaginecitizens.ca |
| Care Opinion Team | General Support | info@careopinion.ca |
| Moderator Team | Moderation and Response Support | moderator@careopinion.ca |

There are 3 initial training sessions that will take place during onboarding. Please feel free to book immediately following your **Kickoff Meeting**, where we will discuss the implementation process, key roles, and navigation of the platform.

1. **Site Administrators Orientation Session** with Client Liaison
2. **Communications for Care Opinion** with Kelly Turner
3. **Responding Well Session** with Client Liaison

These sessions are 1 hour in length and can be booked at your convenience. We are happy to accommodate your schedule and look forward to providing the guidance and resources you need to make the most of your Care Opinion subscription.

**Phase 1: Initiate & Plan**

|  |  |  |
| --- | --- | --- |
| Step | Target Date | Status / Notes |
| Schedule kick-off meeting |  |  |
| Review implementation plan |  |  |
| Identify key contacts and assign roles |  |  |
| Confirm member and Service Tree set up on Care Opinion site |  |  |
| Set up story alerts and report preferences |  |  |

**Phase 2: Train & Set Up**

|  |  |  |
| --- | --- | --- |
| Step | Target Date | Status / Notes |
| Complete admin and responder training |  |  |
| Book communications session with Kelly Turner |  |  |
| Configure story tags and email alerts |  |  |
| Conduct internal walkthrough with key staff and promotion within the organization |  |  |

**Phase 3: Go Live**

|  |  |  |
| --- | --- | --- |
| Step | Target Date | Status / Notes |
| Soft launch internally (staff awareness) |  |  |
| Integrate internal communications plan into existing workflows |  |  |
| Confirm profile is live on Care Opinion (*custom service page)* |  |  |
| Test internal response and alert processes |  |  |

**Phase 4: Promote & Respond**

|  |  |  |
| --- | --- | --- |
| Step | Target Date | Status / Notes |
| Launch communications plan (newsletters, posters, etc.) |  |  |
| Book “Responding Well” training session with Client Liaison |  |  |
| Share Care Opinion link on website or patient materials |  |  |
| Leadership reviews initial story responses |  |  |

**Phase 5: Maintain & Review**

|  |  |  |
| --- | --- | --- |
| Step | Target Date | Status / Notes |
| Review monthly reports and KPIs |  |  |
| Continue internal story promotion and visibility |  |  |
| Maintain regular community engagement |  |  |
| Review and adjust roles, alerts, tags and reporting requirements as needed |  |  |

**Reflection Prompts**

What’s good? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What could we do better? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

How did you feel during your experience? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_