

## 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:
Kelly Mendes	Client Liaison	kelly@imaginecitizens.ca
Kelly Turner	Communications Lead	kellyt@imaginecitizens.ca
Care Opinion Team	General Support	info@careopinion.ca subscribing@careopinion.ca
Moderator Team	Moderation and Response Support	moderator@careopinion.ca
Elizabeth de Guzman	Program Director	elizabeth@imaginecitizens.ca
Don McLeod	Executive Director	don@imaginecitizens.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 ( <i>custom service page</i> )		
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? \_\_\_\_\_