



Orientation and Site Navigation Guide

for

Site Administrators

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Introduction

First of all, welcome to Care Opinion!

The following information has been provided to guide and support you in undertaking the basic functions as an 'Administrator' member of a Care Opinion subscription. The guideline provides information regarding:

- Managing your profile
- Managing your subscription
- Navigating the platform

Key Member roles

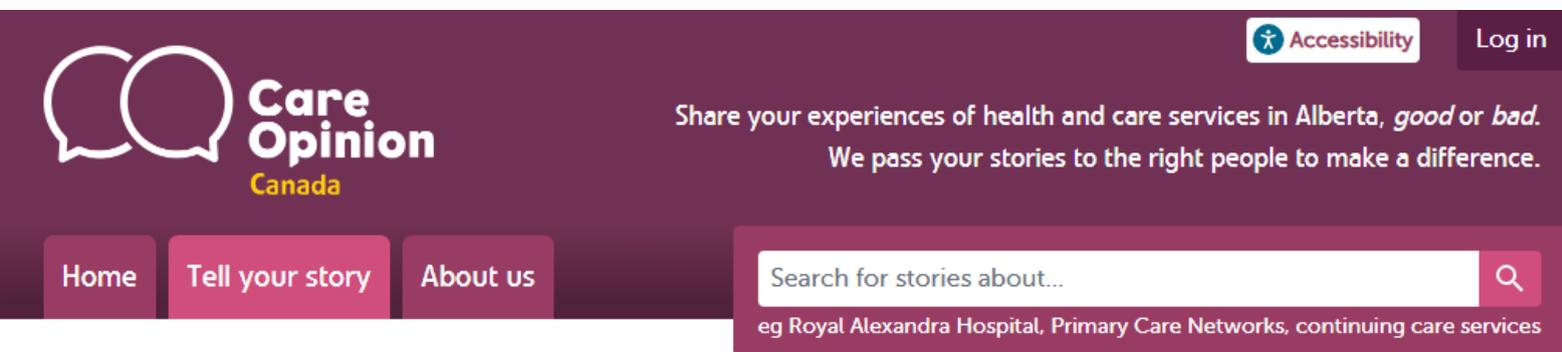
There are three different roles available when you set up a new account, with varying features available to each:

Administrator	Responder	Member
<ul style="list-style-type: none"> 🔗 View stories 🔗 Generate and save reports, digests and visualizations (<i>for themselves and others</i>) 🔗 Manage email alerts (<i>for themselves and others</i>) 🔗 Respond to stories (<i>for themselves and on behalf of others</i>) 🔗 Publish blog posts 🔗 Add/remove members 🔗 Change member roles and details 	<ul style="list-style-type: none"> 🔗 View stories 🔗 Generate and save reports, digests and visualizations 🔗 Manage email alerts 🔗 Respond to stories 🔗 Publish blog posts 	<ul style="list-style-type: none"> 🔗 View stories 🔗 Generate reports, digests and visualizations 🔗 Manage email alerts

Logging on to Care Opinion

All the functionality outlined in this document requires you to be logged in and an active member of a subscription.

1. Head to www.careopinion.ca and click on **'Log in'** in the top right corner of the page
2. Enter your username or email address, followed by your password, then click **'Log in'** below - you can request that your details are remembered on that computer for future logins



The screenshot shows the top navigation bar of the Care Opinion Canada website. On the left is the logo with two speech bubbles and the text "Care Opinion Canada". On the right, there is an "Accessibility" icon and a "Log in" button. Below the logo, there are three navigation buttons: "Home", "Tell your story", and "About us". A search bar is located on the right side of the header, containing the text "Search for stories about..." and a magnifying glass icon. Below the search bar, there is a list of search suggestions: "eg Royal Alexandra Hospital, Primary Care Networks, continuing care services".

Login to Care Opinion

Using a password

Your username or email address

Tracee@imaginecitizens.ca

Password

.....

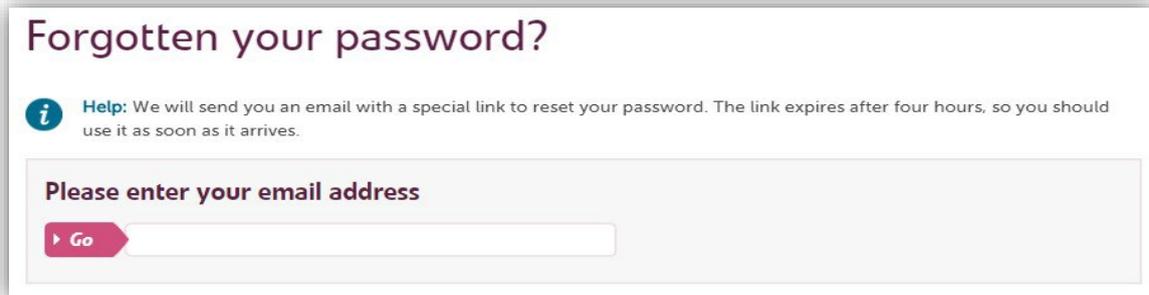
[Forgotten your password?](#)

Keep me logged in for 30 days on this device

> Login

Forgot your password?

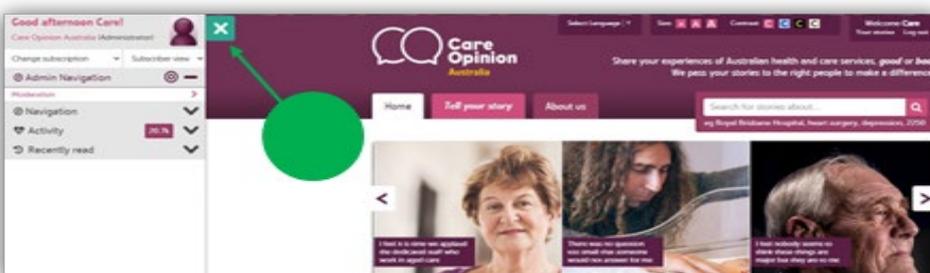
If you have forgotten your password, you can click the link at the bottom of the 'Log in' page to request a password reset link. Enter the email address you use for your subscription and click 'Go'.



IMPORTANT: Check your emails, as the password reset link, we send you expires in 4 hours.

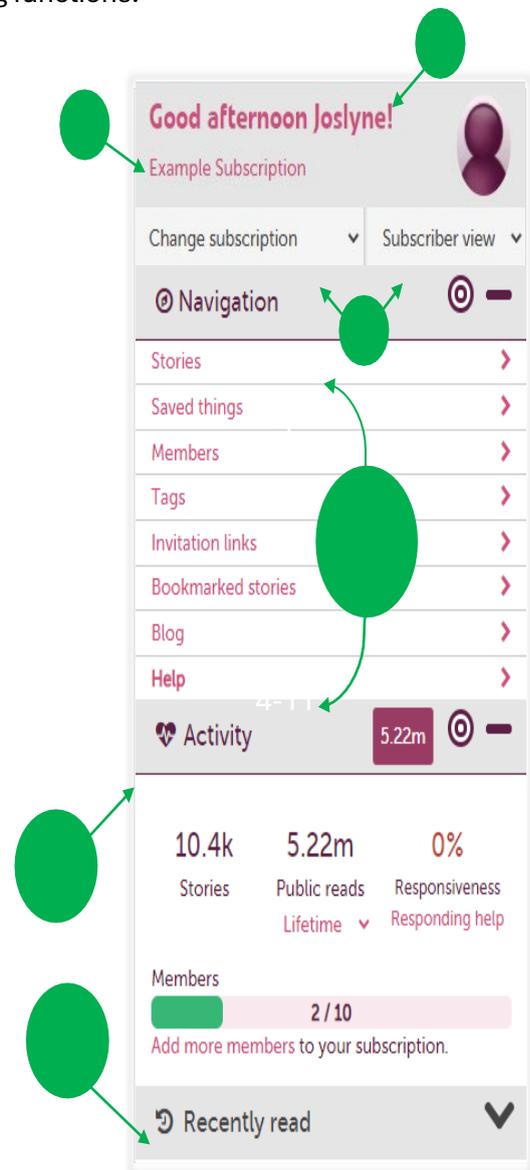
Navigating the website

Once logged in you will have access to the **Navigation Drawer**. This houses all the key links to managing your profile in the subscription. The navigation drawer can be accessed by clicking the  icon in the top left corner of any page. It will close by clicking this .



From the **Navigation Drawer** you can access the following functions:

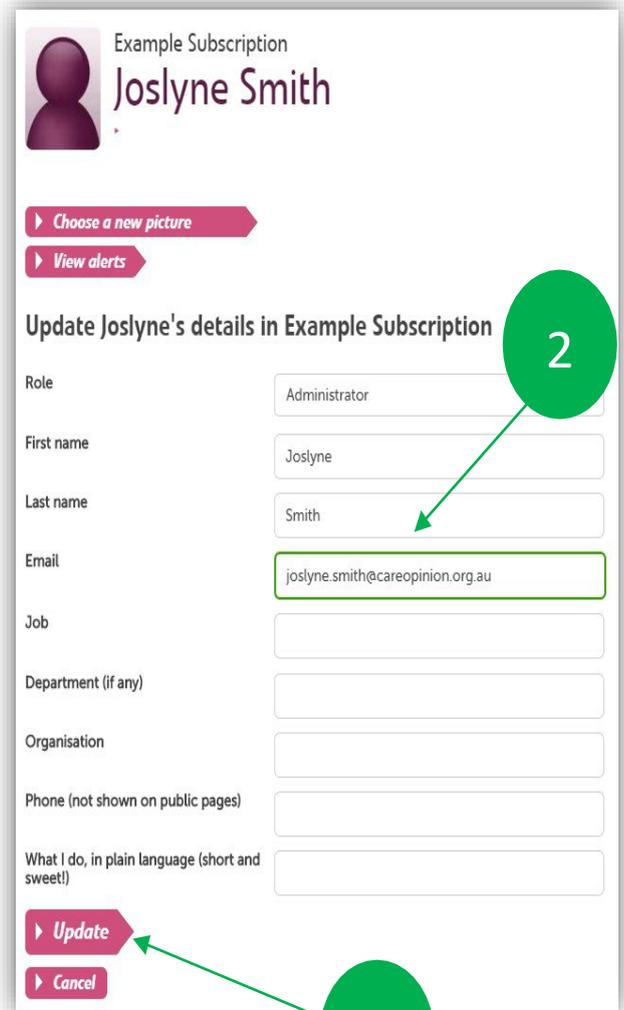
1. Your profile
2. Your subscription information
3. Your subscriptions and subscription view (public or subscriber)
4. **Stories** about your subscription
5. Your **saved things** (searches, alerts, reports, etc.)
6. Your subscription's **members** list
7. **Tags** added to stories by yourself/subscription members
8. **Invitation links** created within your subscription
9. View **Bookmarked stories**
10. Your subscription's **blog posts**
11. **Help** pages
12. Subscription **activity** (number of members and responsiveness to stories published)
13. Your **recently read** stories



Updating your 'profile' details

These are the details that appear for you in your subscription, such as your name and job role.

1. Click 'Update your profile details' on your profile page
2. Make any changes to your details in the various fields – any changes will be highlighted in green
3. Click 'Update' to save the changes, or 'Cancel' to leave the page without saving

Example Subscription
Joslyne Smith

Choose a new picture

View alerts

Update Joslyne's details in Example Subscription

Role: Administrator

First name: Joslyne

Last name: Smith

Email: joslyne.smith@careopinion.org.au

Job:

Department (if any):

Organisation:

Phone (not shown on public pages):

What I do, in plain language (short and sweet!):

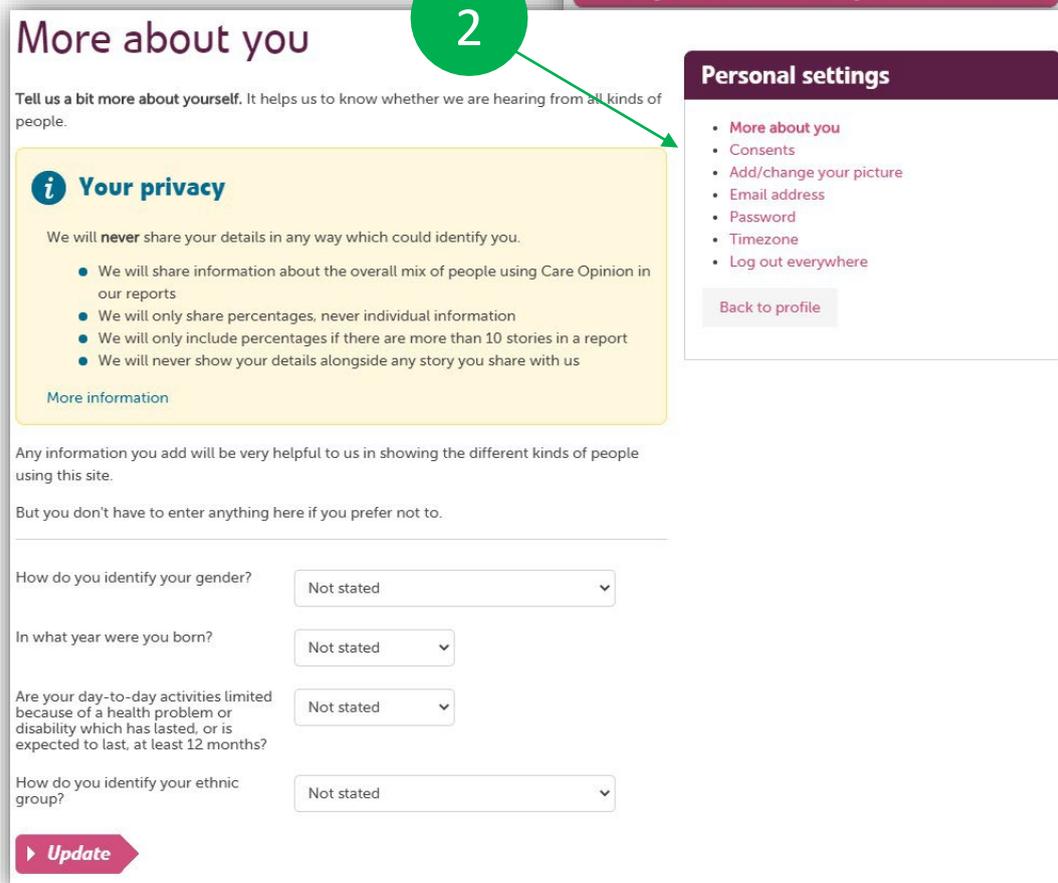
Update

Cancel

Updating your personal details

These are the details that are independent of your membership in your subscription, such as your password and time zone – meaning these details can be changed whether you are member of a subscription or not. Please note that changing your email address in this section will not affect the email that Care Opinion sends your story alerts to – that can be updated under ‘Update your profile details’.

1. Click ‘Add or change your personal details’ on your profile page
2. Select any of the various personal settings options to amend and follow the instructions on those pages.

More about you

Tell us a bit more about yourself. It helps us to know whether we are hearing from all kinds of people.

i Your privacy

We will **never** share your details in any way which could identify you.

- We will share information about the overall mix of people using Care Opinion in our reports
- We will only share percentages, never individual information
- We will only include percentages if there are more than 10 stories in a report
- We will never show your details alongside any story you share with us

[More information](#)

Any information you add will be very helpful to us in showing the different kinds of people using this site.

But you don't have to enter anything here if you prefer not to.

How do you identify your gender?

In what year were you born?

Are your day-to-day activities limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months?

How do you identify your ethnic group?

[Update](#)

Personal settings

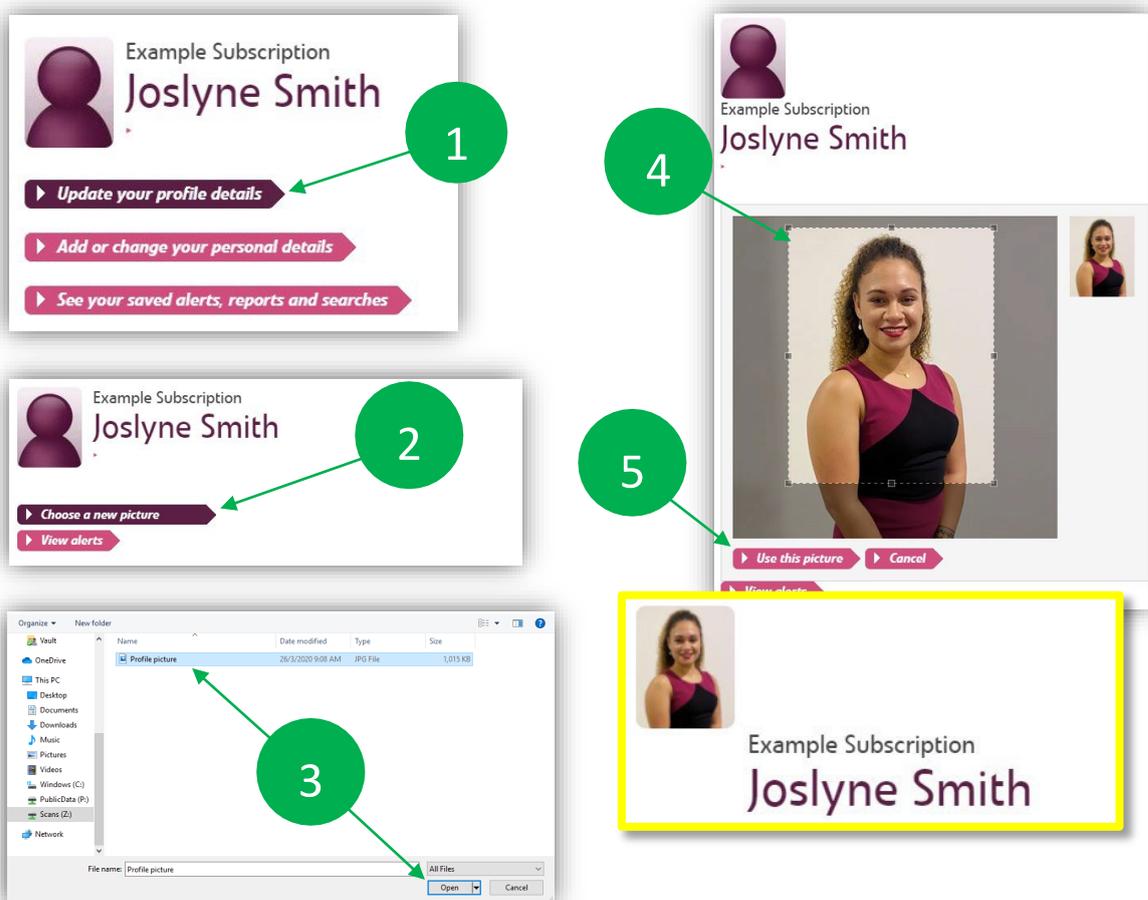
- **More about you**
- Consents
- Add/change your picture
- Email address
- Password
- Timezone
- Log out everywhere

[Back to profile](#)

Adding a picture to your profile

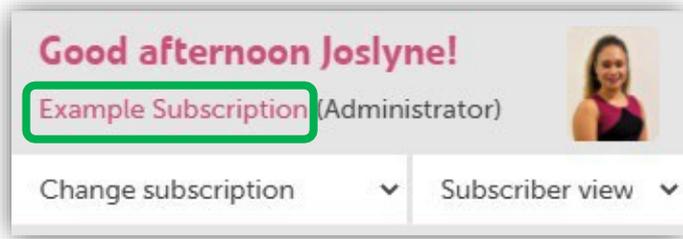
For those that will be **responding to stories**, it is suggested that you upload a photo of yourself to help add a human face to your responses. This will help the story author, and the wider community connect with your responses, rather than seeing you as a 'faceless' organization. We suggest that the photo be warm, but professional.

1. Click 'Update your profile details' on your [profile page](#)
2. Click 'Choose a new picture'
3. Select your photo from the pop-up file selection screen and ensure that the photo you want to upload has a filename that is all lower case, is an appropriate file type (.png, .jpg, etc.), and that the file size does not exceed 1MB – photos can be easily resized in a program such as 'Paint' to ensure that they do not exceed this size
4. Use the tool to position or centre your photo as necessary to fit the required frame ratio – a preview is available on the right.
5. Once you are happy with the preview, click 'Use this picture' – you can update or remove your photo at any time by coming back to 'Update your profile details'



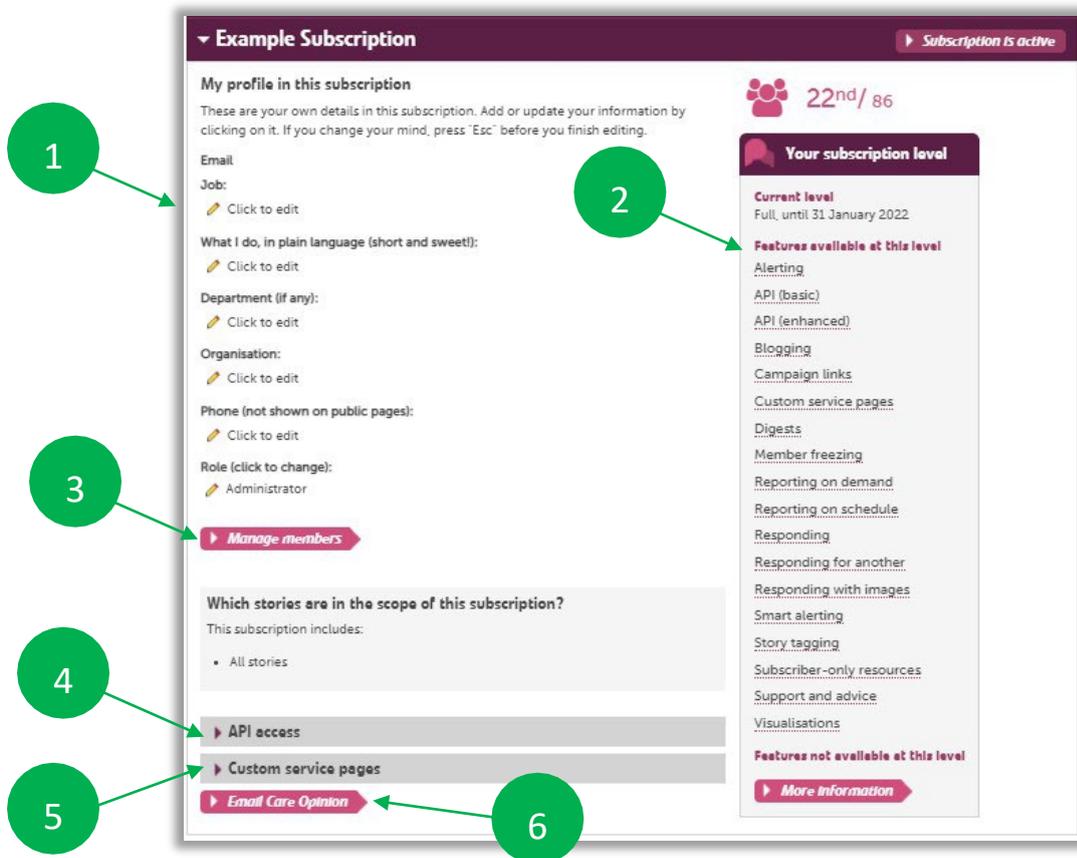
Your subscription information

To access your subscription information page, click on the subscription name in the Navigation Drawer:



From here you can:

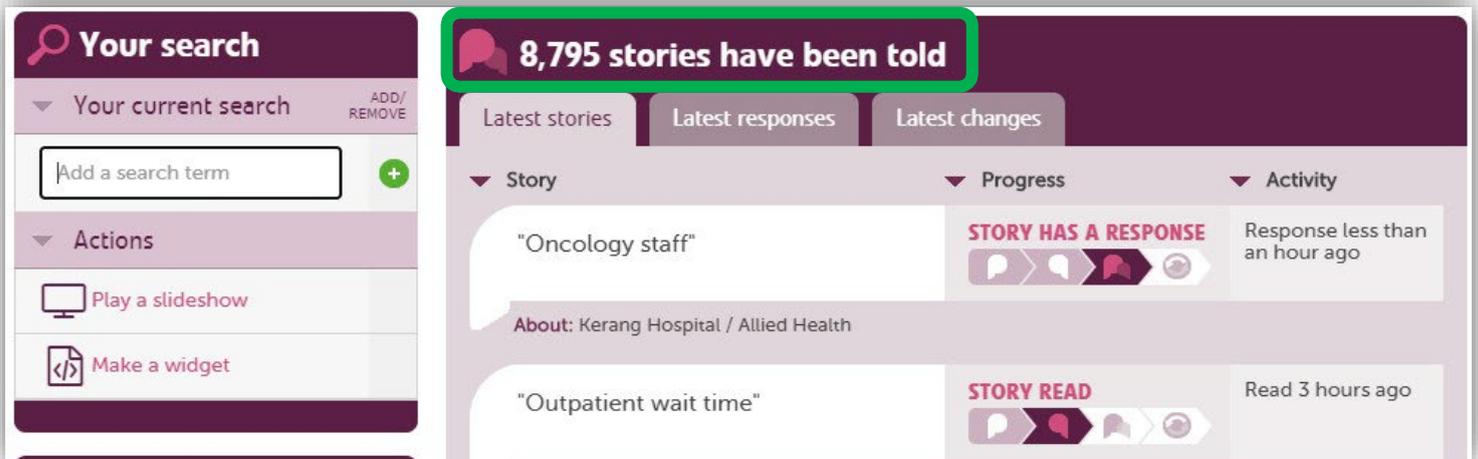
1. Edit your role
2. View your available features
3. Manage your subscription members
4. Generate an API key
5. Customize your service pages
6. Email Care Opinion – this inbox is monitored from Monday to Friday.



Subscriber view or public view?

While you are logged in to the system, the site will appear differently to that of a 'public' user. You will have access to all of the membership functions that come with a subscription to Care Opinion.

For example, instead of seeing all stories published on Care Opinion (**Public view**):



This screenshot shows the public view of the Care Opinion interface. On the left is a search sidebar with a search bar and action buttons like 'Play a slideshow' and 'Make a widget'. The main content area features a header with a speech bubble icon and the text '8,795 stories have been told', which is highlighted with a green box. Below this are tabs for 'Latest stories', 'Latest responses', and 'Latest changes'. The main content displays two story cards: one titled 'Oncology staff' with a 'STORY HAS A RESPONSE' badge and 'Response less than an hour ago', and another titled 'Outpatient wait time' with a 'STORY READ' badge and 'Read 3 hours ago'.

You will only see...

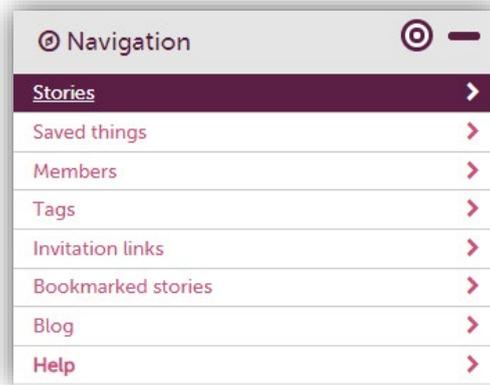
- total number of stories about your organization (**Subscriber View**)



This screenshot shows the subscriber view of the Care Opinion interface. The search sidebar on the left includes a yellow box with the text 'Filtered by your subscription' and a green arrow pointing to the search bar. The main content area features a header with a speech bubble icon and the text '498 stories have been told', highlighted with a green box. Below this are tabs for 'Latest stories', 'Latest responses', and 'Latest changes'. The main content displays one story card titled 'My autistic child and our struggles with the mental health system' with a 'STORY HAS A RESPONSE' badge and 'Response 3 days ago'. The 'About' text for this story is 'Bentley Adolescent Unit and East Metropolitan Youth Unit (EMYU)'.

Stories about your subscription

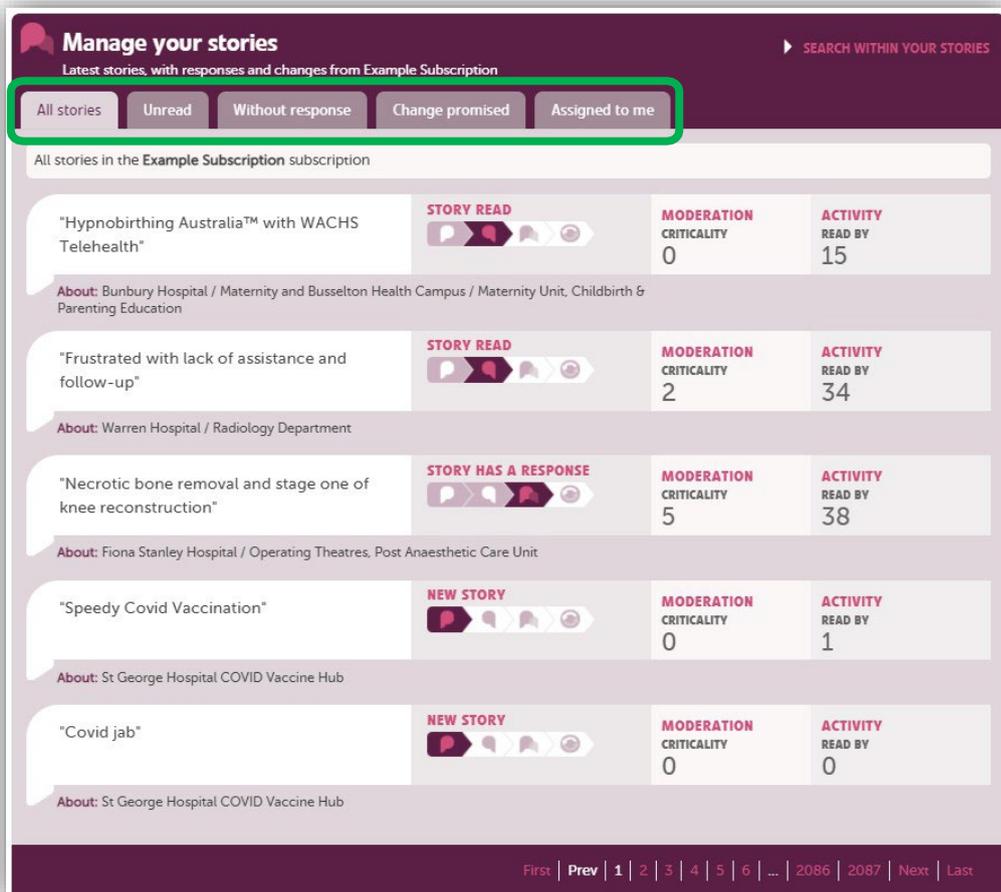
Viewing and searching for stories within the scope of your subscription is a fundamental task on Care



Opinion.

A good place to start is your subscription [stories page](#).

When you view this page in your own subscription, you will see five tabs, as follows:



All stories: this tab shows all the stories within the scope of your subscription, along with the story progress, the criticality score and the number of reads by public users.

Unread: stories within your subscription which haven't yet been read by any of your subscription members.

Without response: stories within your subscription which don't yet have any response from a member of your subscription.

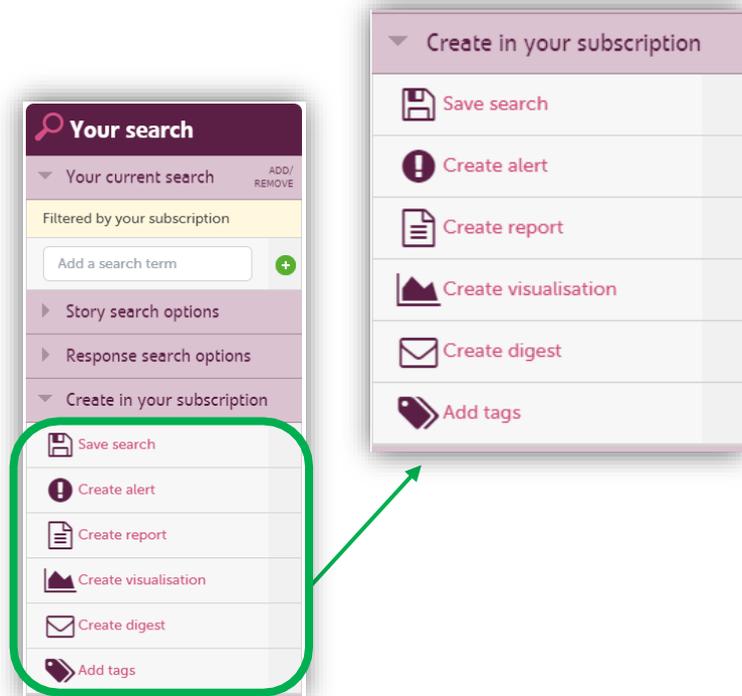
Change promised: stories for which someone in your subscription has promised a 'change planned', but which doesn't yet have a 'change made'.

Assigned to me: stories that have been assigned to you by either yourself or another member in your subscription.

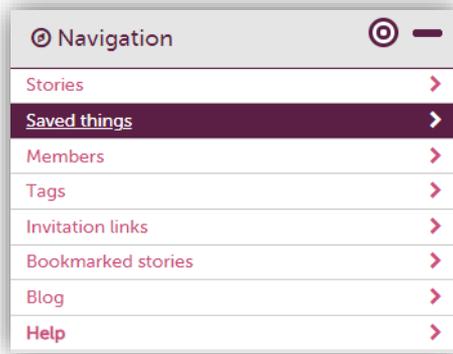
Note that on any of these tabs, you can filter down to just the stories you need by selecting "search within your stories" just above the tabs. This will allow you to enter a search term. You can also just click open the search area and select the search button to go to the search page and develop a search from there.

Your 'saved things'

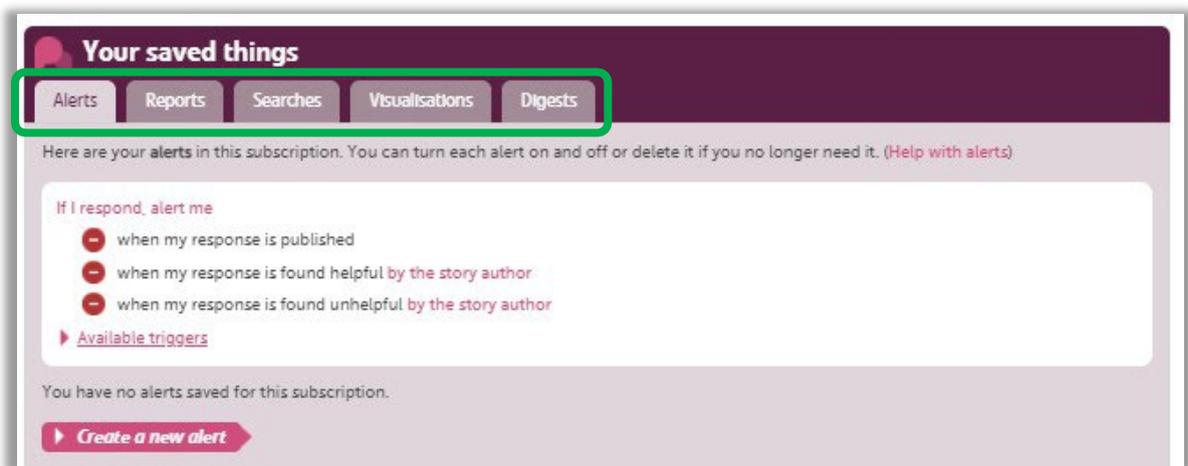
This holds all of the searches, reports, alerts, visualizations and digests you have saved for later use for your user, and it is a duplication of the actions that you can 'Create in your subscription' from the [advanced search page](#) before they go into your 'saved things':



You can access your [‘saved things’](#) via the Navigation Drawer - this will automatically bring you to a page with a tab showing your **alerts** (which trigger your email notifications of relevant stories)



You will also see the following tabs:



Reports: access any/all saved reports to be generated at any time, as well as details of when they will be automatically generated and emailed to you on schedule (if your subscription has access to this feature).

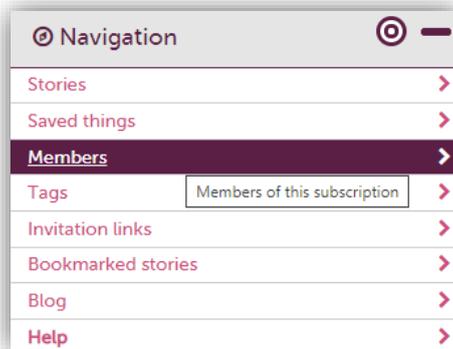
Searches: this is helpful for accessing your saved searches you run on a regular basis that have multiple filters.

Visualisations: these include links to visualizations you have created and saved for public or internal sharing – all visualizations are fully interactive provided they are accessed via the saved link(s).

Digests: these are a 1-page overview reports that can be emailed to you on a weekly basis.

Members' list

On the [Members](#) page, you can see a list of all the current members of your subscription.

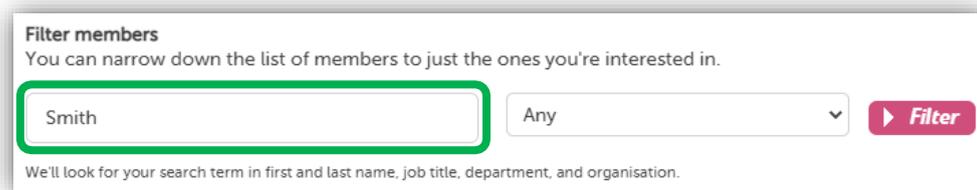


If you are a subscription administrator, you can also use this page to:

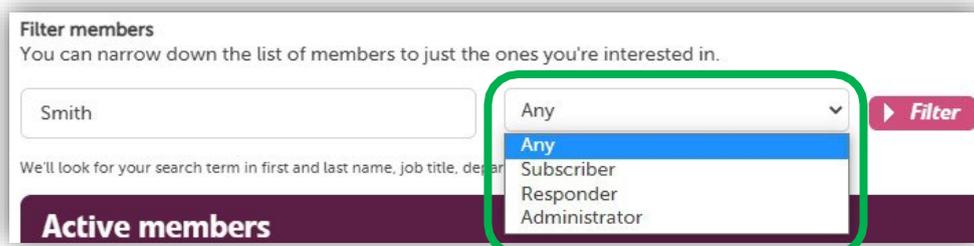
- [add and remove members](#)
- [run member reports](#)
- [freeze or unfreeze members](#)
- [upload bulk members](#)

You can filter the list by...

- Typing in their name/role/job title, hospital / department they work at in the 'Filter members' field:



- Care Opinion member role:



Adding a new member

To add a new member to your subscription list, click on the [Members](#) tab from your Navigation Drawer, and select the 'Add a new member' icon. The page will expand and display the required

Add a new member

This information is required

First name

Last name

Email of the new member

Role of the new member
Subscriber

Add an alert for all stories in the subscription

Add

This information is optional

Job title

Department

Organisation

Phone

What this person does, in plain language

fields to enter the details of the member you are adding.

IMPORTANT: Not all the fields are considered required, however, please ensure to at least enter the new member's: First Name, Last Name, Email address and Job title. It is preferred but not mandatory that a phone number is also provided. Other mandatory fields include:

1. **Role of the new member:** This will default to 'subscriber' unless specified otherwise. So be sure to select the appropriate member role for the member you are adding. Refer to page 4 of this document for an outline of the key member roles.
2. **Add an alert for all stories in this subscription:** if the member you are adding would like to receive notifications on all stories for your organisation, make sure this is ticked. Otherwise, you can tailor their alerts after they are added by following this [Alerting](#) guide.

Once these fields are completed, simply click 'Add' and that member will receive a 'Welcome to Care Opinion' email, with information on setting up a password to activate their access.

Updating a single member's details

1. Select the member's name from the list.
2. Click on 'edit member details to display their profile.
3. Select the role you want them to have from the drop-down list.
4. Update any necessary information on that same page.
5. Click 'update' once all necessary changes have been made.

Active members				
	Julie McGovern	Administrator	🔔 0	Edit Remove
	Patient Opinion	Administrator	🔔 0	Edit Remove

1

[▶ Back to members](#)

 Care Opinion Australia
Care Opinion
▶ Care Opinion Australia

Email: info@careopinion.org.au

[▶ Edit member details](#)

[▶ View alerts](#)

2

[▶ Back to members](#)

 Care Opinion Australia
Care Opinion Australia
▶ Care Opinion Australia

[▶ Update profile picture](#)

[▶ View alerts](#)

Update Care's details in Care Opinion Australia

Role

3

[▶ Back to members](#)

 Care Opinion Australia
Care Opinion Australia
▶ Care Opinion Australia

[▶ Update profile picture](#)

[▶ View alerts](#)

Update Care's details in Care Opinion Australia

Role

First name

Last name

Email

Job

Department (if any)

Organisation

Phone (not shown on public pages)

What I do, in plain language (short and sweet!)

[▶ Update](#)

[▶ Cancel](#)

4

Update Patient's details in Care Opinion Australia

Role

First name

Last name

Email

Job

Department (if any)

Organisation

Phone (not shown on public pages)

What I do, in plain language (short and sweet!)

[▶ Update](#)

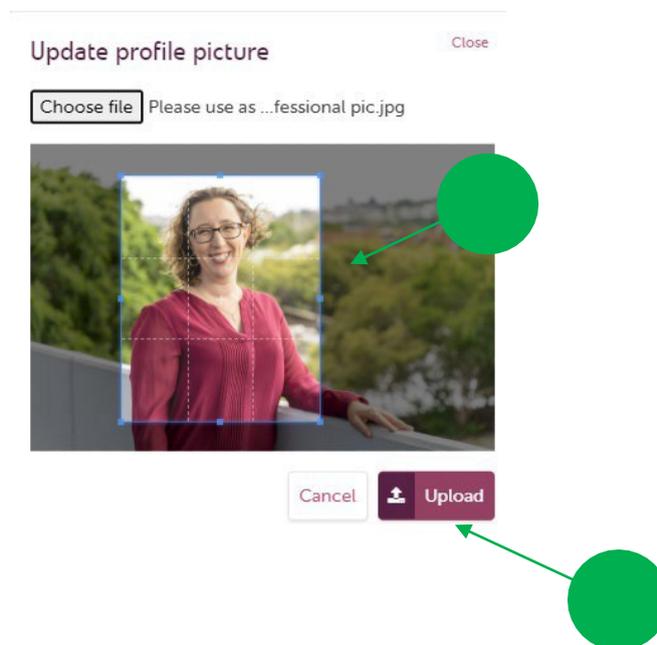
[▶ Cancel](#)

5

Adding a profile picture to another member's profile

As an administrator, you also have the capacity to upload a photo for the members of your subscription on their behalf. You can do this from the Members page. Like the steps above:

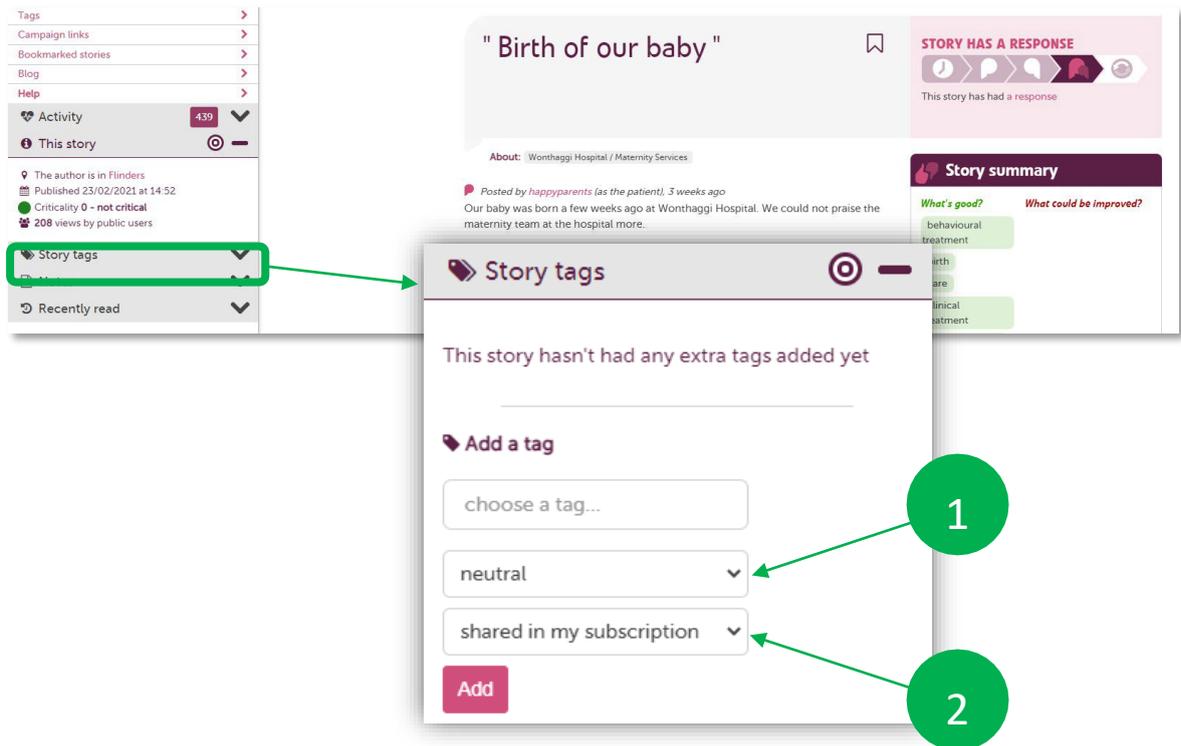
1. Select the member's name from the list (*refer to 'step 1' figure above*)
2. Click on 'edit member details to display their profile (*refer to 'step 2' figure above*)
3. Click 'Update profile picture'
4. select your photo from the pop-up file selection screen – **ensure that the photo has a filename that is all lower case, is an appropriate file type (.png, .jpg, etc.), and that the file size does not exceed 1MB**
5. Use the tool to position or centre your photo as necessary to fit the required frame ratio – a preview is available on the right.
6. Once you are happy with the preview, click 'Upload' – you can remove (or change) the photo at any time by returning to this page and selecting the appropriate option.



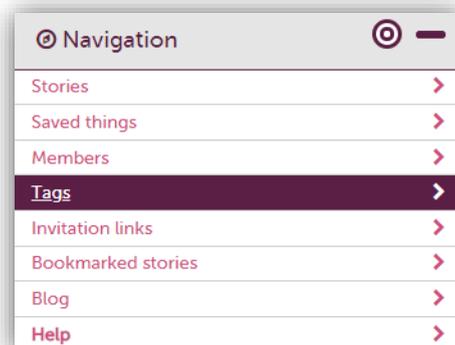
Tags

Subscriber members have the ability to add 'Story tags' on published stories that fall under their subscription scope, along with the option to:

1. Polarize added tag/s as positive, neutral or negative.
2. Choose a visibility preference of private (to you), shared (with subscription members) or public.



Once story tag/s have been added, members can tag as many stories as they wish with the same tag. To view story tags in more detail, click on 'Tags' from your Navigation Drawer:



Invitation links

An invitation link is a special link that subscribers can create through their subscription for sharing externally, to invite more people to feedback about a service or issue. A link might look like this:

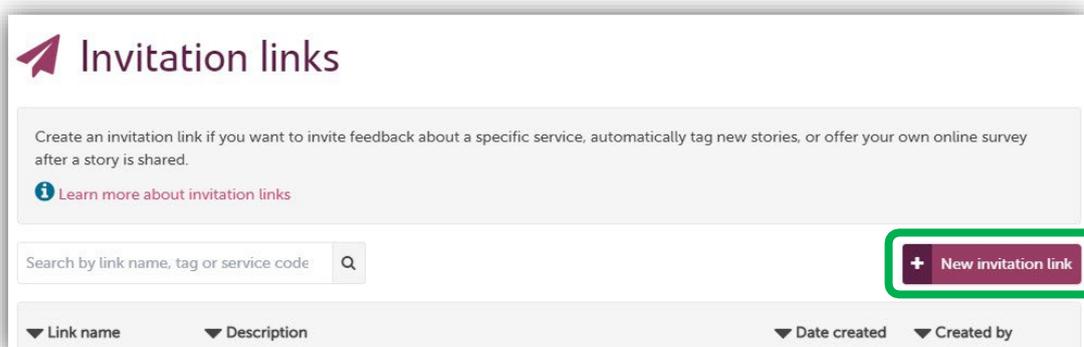
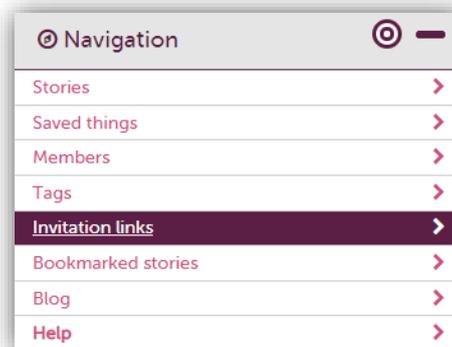
<https://www.careopinion.ca/49/example-link>

The part up to the last forward slash (/) is fixed, however, the digits before that (49) will also be different to this example, as it depends on the code associated with your subscription. The text after that is up to your choosing. But the invitation link also has two extra special powers you can use to specify:

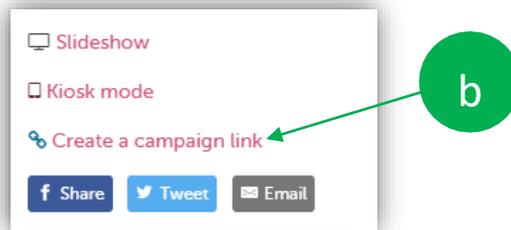
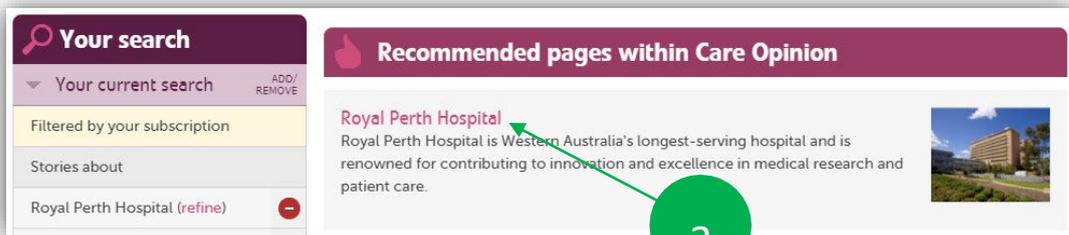
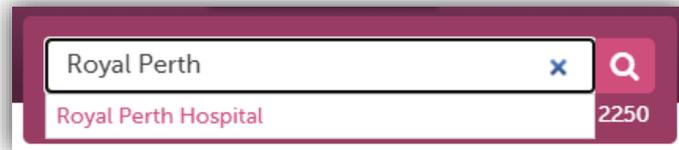
- the **service** you want to be linked to stories told using this link.
- any **tags** you want to be automatically added to stories told using this link.

There are two ways that you can generate an invitation link for your service.

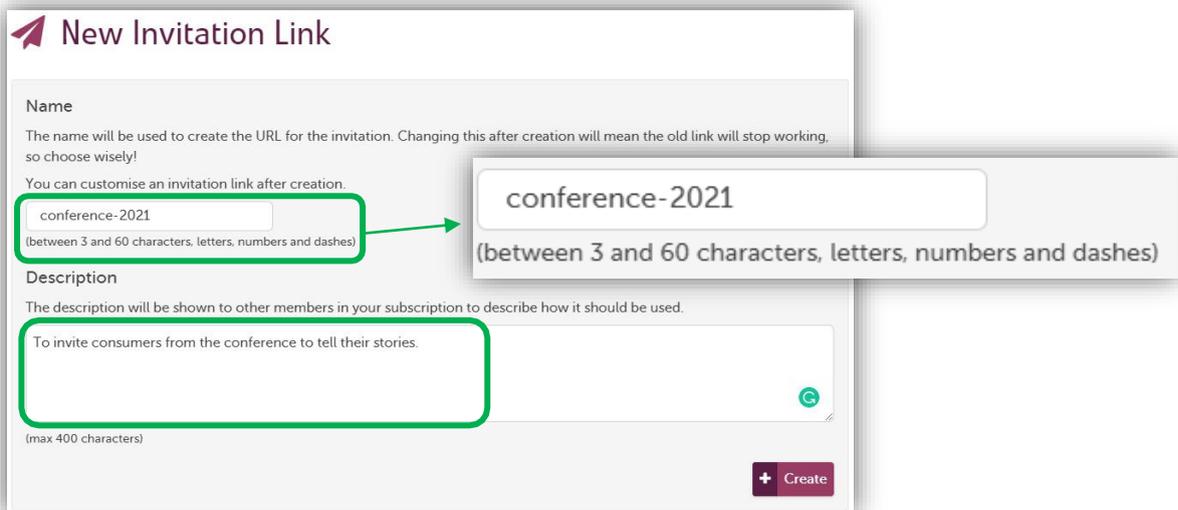
1. Click on '[Invitation links](#)' from the Navigation Drawer and select '[New invitation link](#)' on the right-hand side



2. Search for the hospital or health service on Care Opinion's search bar.
 - a. Click on the service name from the 'Recommended pages within Care Opinion' to view the service page
 - b. Scroll down the service page and you will find the 'Create campaign (invitation) link' on the bottom right-hand side.

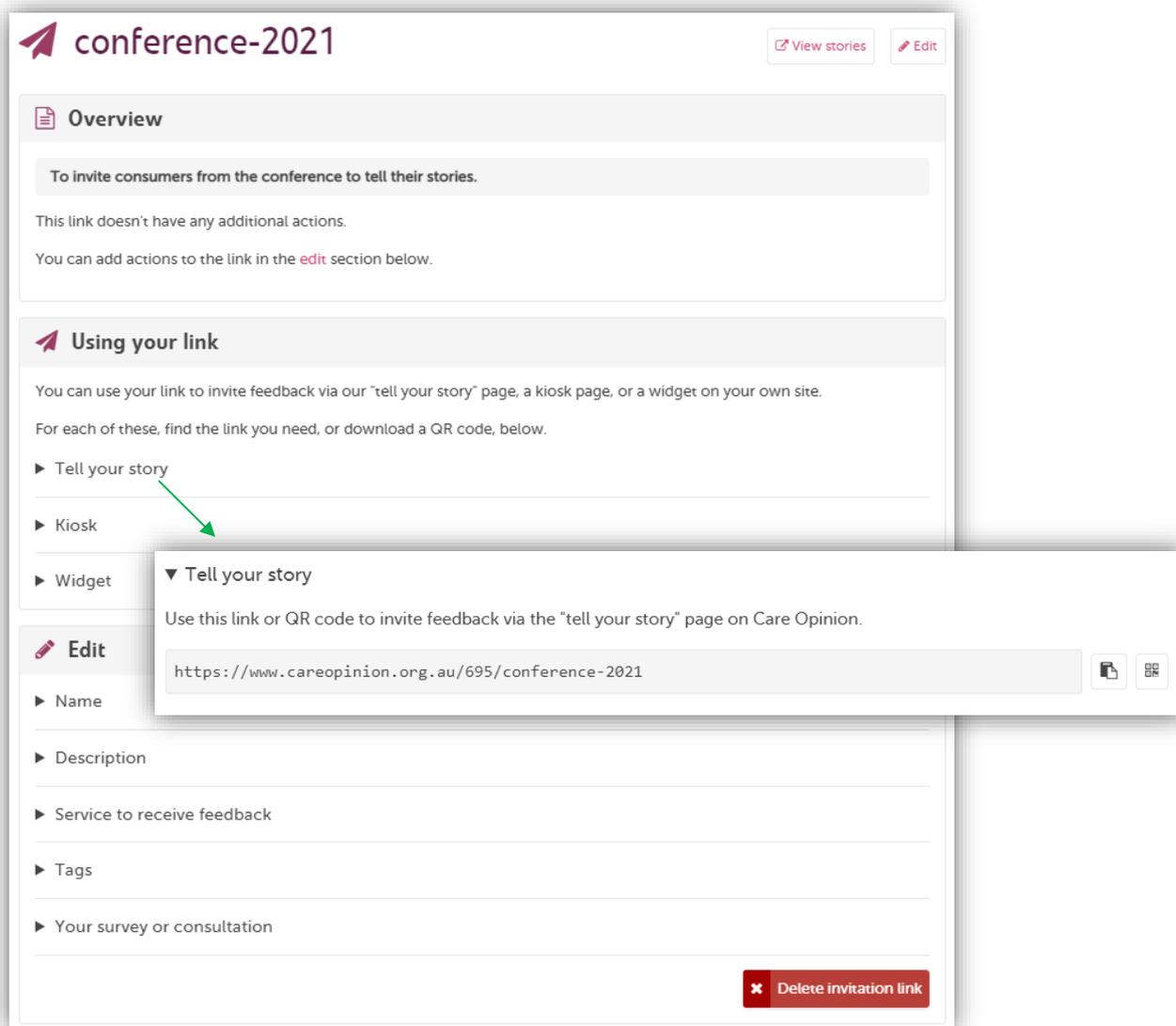


Both of the above actions will take the page to create a 'New invitation link' and fill in the blank fields. Here is an example:



Once you select 'create', the web browser will take you to the 'Invitation links' page, which can also be accessed via your Navigation Drawer (*Point 1 in previous page*).

From here, the page will display additional information in relation to the newly created link, such as the URLs under 'using your link', which can be copied or generated as a QR Code for sharing purposes:



For more detailed guidance on how to create, customize and share an invitation link, please click on the following resources:

- <https://www.careopinion.ca/info/invitation-links>
- <https://www.careopinion.ca/resources/site?id=co-branding-and-promotional-material-guidelines.pdf>

Bookmarked stories

Members now have the ability to bookmark any stories that they wish to refer back to. The bookmark icon can be found next to the title of a story. Simply click on the bookmark icon to bookmark. Here's what it will look like:

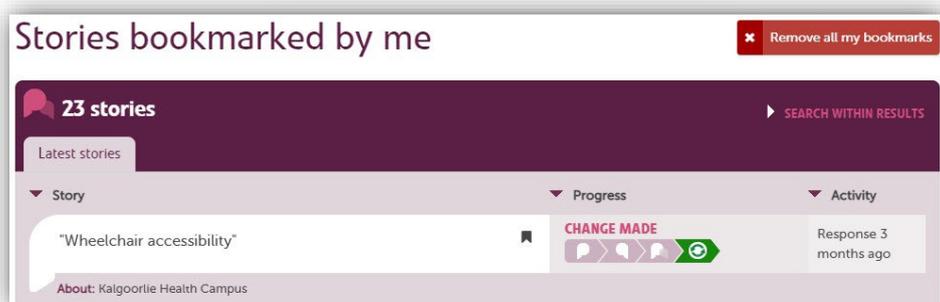
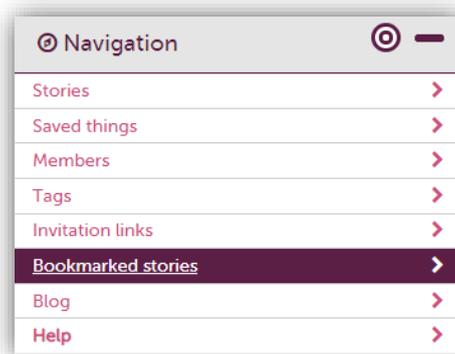


Un-bookmarked



Bookmarked

Once bookmarked, members can access and manage their list of marked stories through the 'Bookmarked stories' tab in their Navigation Drawer:



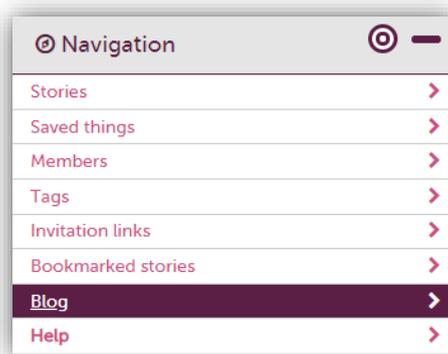
Blogging

Blogging is included in many of our subscription levels. This can be performed by members with 'Responder' or 'Administrator' roles.

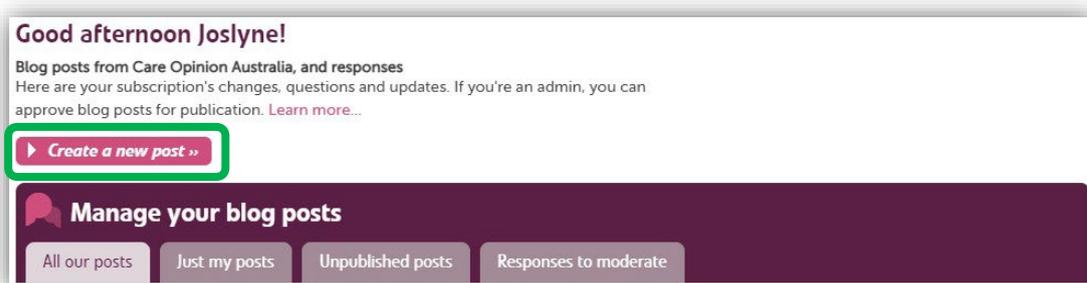
You could use our blogging feature for all kinds of things:

- Update everyone on plans for your services
- Consult with patients, users and carers about changes you plan to make, and collect their responses
- Add a "change post" when you have made a service improvement
- Share good practice in getting the most from Care Opinion

To access this feature, log in to your subscription and follow the [blog](#) link.



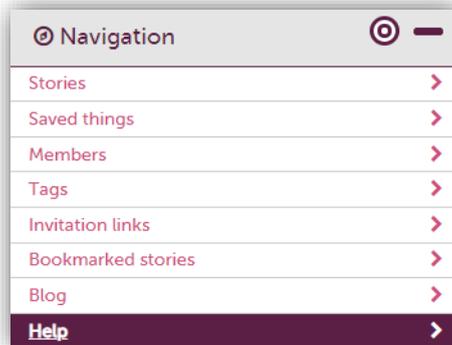
You will see a 'Create a new post' tab, along with tabs on how to 'Manage your blog posts'.



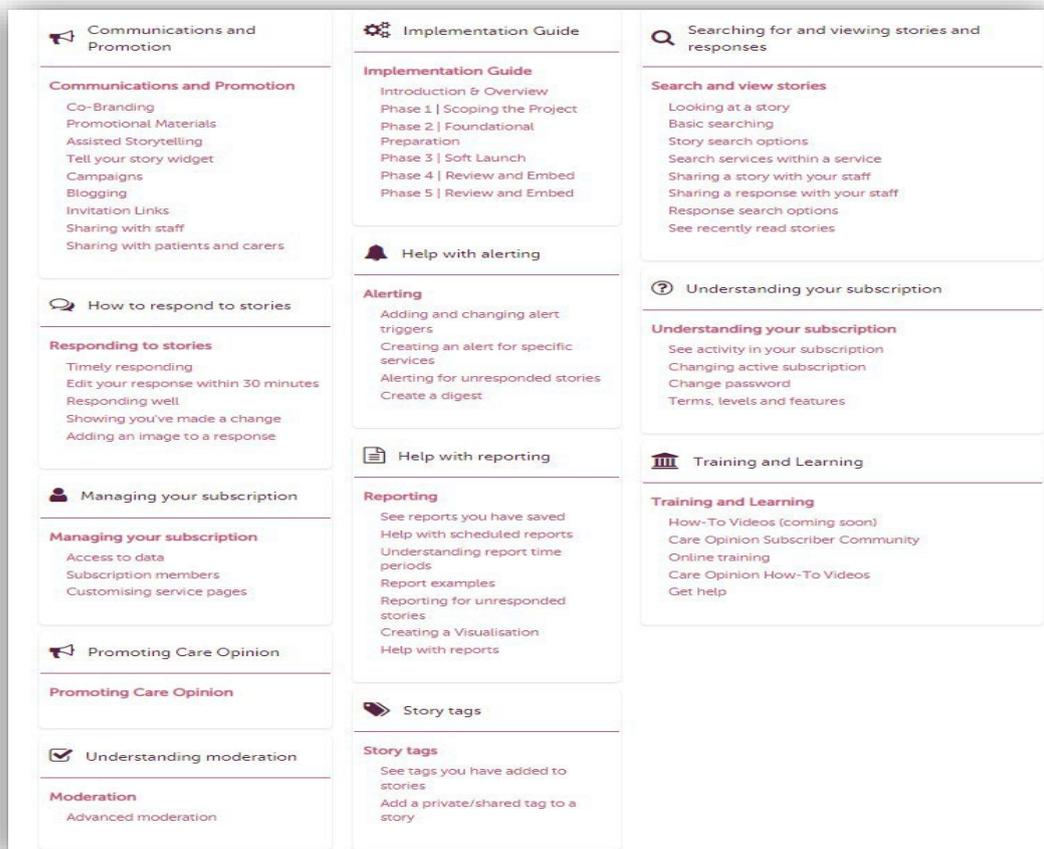
There are more tips to [help with blogging](#) available on the Care Opinion website, just make sure you follow the links on the right-hand side of the page under 'More Information'.

Subscriber Help pages

This webpage includes a wealth of information to support subscriber members. It covers some of the topic within this document, plus more!



Each category includes sub-categories for that subject, which are individually linked to each 'help' page on that topic. Some will include detailed explanations and short clips on how to create/search/access certain features and functionalities, while others will contain information on guidance and support.



Notes for Follow Up