

# MEMBER USER GUIDE AGED CARE EXPRESS SUBSCRIPTION RESPONDER ROLE

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#### INTRODUCTION

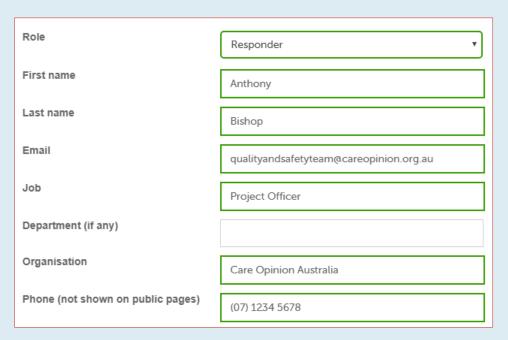
The following information has been provided to aid in undertaking the basic functions as a member of a Care Opinion subscription. The guideline provides information regarding:

- Creating and saving searches
- Setting up alerts for yourself
- Submitting responses from yourself

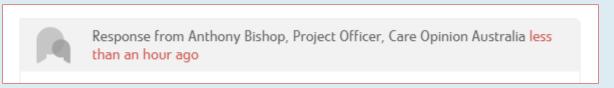
#### SUBSCRIPTION REQUIREMENTS

Care Opinion aims to create meaningful dialogue between consumers and care providers, and we believe an important part of that is having a face to the organisation – this is often better received by consumers as it shows that an organisation is willing to be transparent and open.

Under each Aged Care Express subscription, your nominated user is required to have their name and role present on their profile. This means that the user to be entered into the system must be a named member of staff (to ensure that Care Opinion has a contact, should we need to discuss a story). However, we are aware that you may like to have a central team email receiving the alerts for your organisation, to ensure that responses are prompt. In this case, you may wish to attribute a named responder, whilst having a central email attached to receive alerts – for example, you may set the user up as follows:



All responses have a banner at the top that indicates who the response is from — it is important that you bear this in mind when choosing who will be your nominated responder, as all responses from your organisation will show this. Carefully consider what the responder's role is, as some roles may be considered by consumers as an inappropriate person within the organisation for a response to be coming from. The banner appears as:



While it is not required that you attribute your name to the response (banner sign-off options include [name, role, organisation], [role, organisation] or just [organisation]) we **highly** recommend that you attribute a person's name to the response when given the option of how to sign off, as well as <u>including that person's photo</u>.

#### **LOGGING ON TO CARE OPINION**

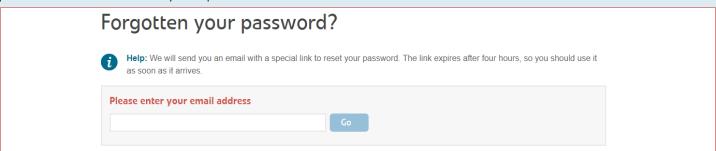
All of the functionality that is outlined in this document requires you to be logged in and an active member of a subscription.

- 1. Head to <a href="https://www.careopinion.org.au">https://www.careopinion.org.au</a> and click on 'Log in' in the top right corner of the page
- 2. Enter your user name 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



#### **FORGOT YOUR PASSWORD?**

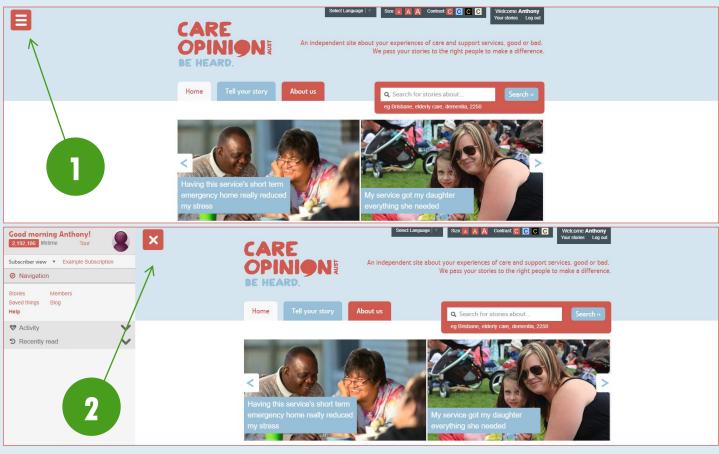
If you have forgotten your password, you can click the link at the bottom of the 'Log in' page to request we send you a password reset link. Enter the email address you use for your subscription and click 'Go'. Check your emails, as the password reset link we send you expires in 4 hours.

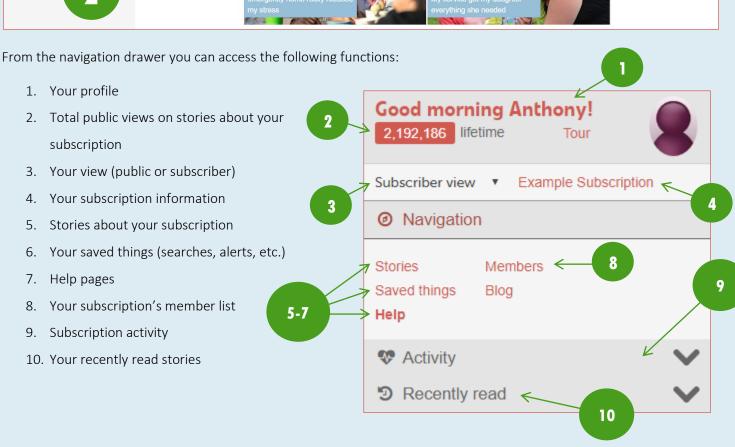


#### **NAVIGATING THE WEBSITE**

Once logged in you will have access to the navigation drawer. This houses all of the key links to managing your profile in the subscription.

- 1. The navigation drawer can be accessed by clicking the elicon in the top left corner of any page
- 2. It can be closed by clicking the xicon at any time.





#### **YOUR PROFILE**

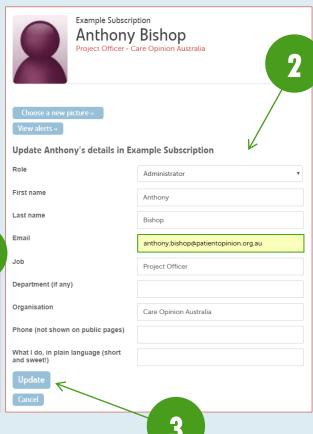
Your profile can be accessed by clicking your name in the <u>navigation drawer</u> (shown above) or by clicking your name at the top right of the page – 'Welcome [YourName]'.

#### **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
- Click 'Update' to save the changes, or 'Cancel' to leave the page without saving





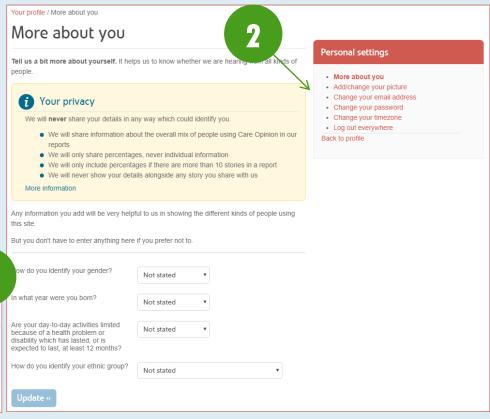
#### **UPDATING YOUR PERSONAL DETAILS**

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'.

- Click 'Add or change your personal details' on your profile page
- Select any of the various
   personal settings options to
   amend and follow the

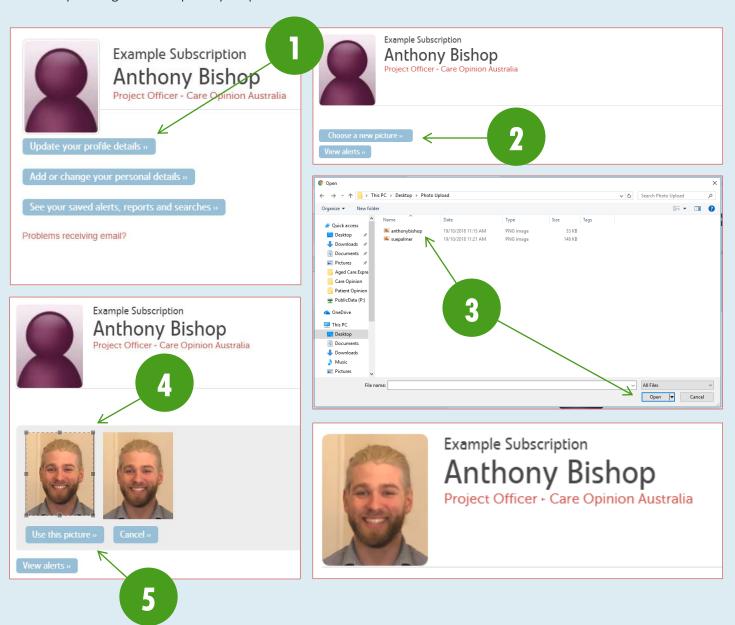




#### **ADDING A PICTURE TO YOUR PROFILE**

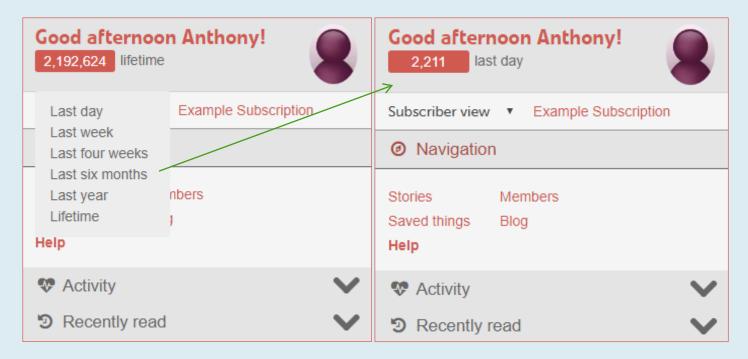
For those that will be responding to stories, it is suggested that you upload a photo of yourself to help add a human face to your responses. This will help the story author and the wider community connect with your responses, rather than seeing you as a 'faceless' organisation. We suggest that the photo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



#### **PUBLIC STORY VIEWS**

You can check the total number of public views stories about your subscription have received from the <u>navigation drawer</u>. There are a number of timeframes you can constrain this to, from public views in the last day to the entire lifetime of the platform. You can do this by clicking the number of views to open a drop-down menu of all options, and selecting the desired timeframe.



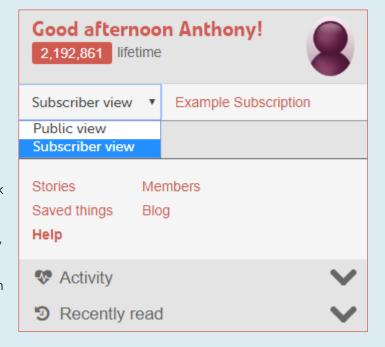
#### SUBSCRIBER VIEW OR PUBLIC VIEW?

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 being come with a subscription to Care Opinion. However, things such as the pool of

stories you can see by doing a search changes from all stories on the platform, to only those that are about your organisation.

Occasionally, you may want to see what the public sees — all stories being visible in a search, or what a story looks like without all of the extra subscriber only information that you are privy to. To do so, simply click on 'Subscriber view' in the <a href="mailto:navigation drawer">navigation drawer</a> and select 'Public view' from the drop down menu. To change back, simply do click on 'Public view' and reselect 'Subscriber view' again.

It should be noted that if you wish to share your own story on the platform while you are a member of a subscription, that this will need to be done in 'Public view' as the system no longer considers you a member of the public while 'Subscriber view' is active.

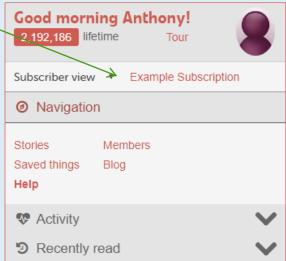


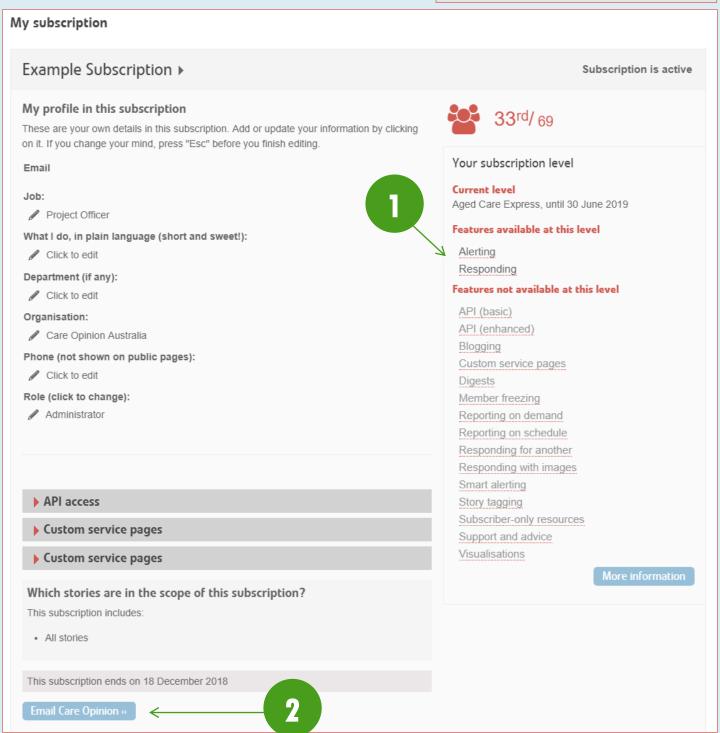
#### YOUR SUBSCRIPTION INFORMATION

By clicking your organisation name in the <u>navigation drawer</u>, you can access the information for your subscription. This will show you the features that you can access at your subscription level.

To access your subscription information page, click the link in the <u>navigation drawer</u>. From here you can:

- 1. View your available features
- 2. Email Patient Opinion this inbox is monitored daily, however we recommend that you contact our personal emails should you require assistance, as these inboxes are monitored at more regular intervals



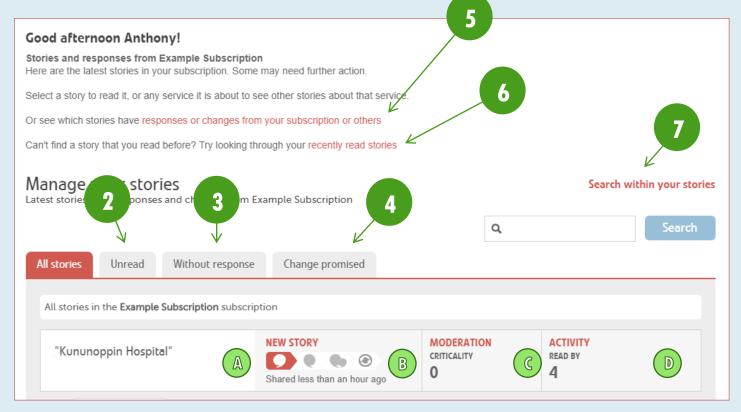


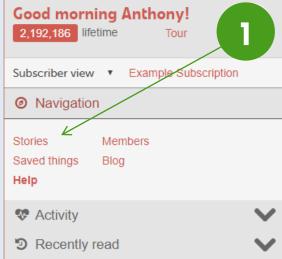
#### STORIES ABOUT YOUR SUBSCRIPTION

Your subscription will be scoped to include all stories about your organisation. This allows you to quickly access the stories that are relevant to you for response. To access your stories:

- Click on 'Stories' in the <u>navigation drawer</u> this will automatically bring you to a page with a tab showing all stories about your organisation to date
- 2. Click 'Unread' to see all stories that have not yet been read by anyone in the subscription
- Click 'Without response' to see all stories from the last 3 years that have not received a response from a member of our subscription
- 4. Click 'Change promised' to see all stories that have received a response from your anyone in your subscription indicating a change is planned, but that has not then had a follow-up response indicating the change has now been made.
- 5. Click the link attached to 'responses or changes from your subscription or others' to see a full list of stories about you were anyone from any subscription may have responded or made a change (this is helpful where there is more than one service attached to a story, and therefore another organisation may have responded)
- 6. Click the link attached to 'recently read stories' to see recent stories that you yourself have read (while logged in)
- 7. Click 'Search within your stories' to filter the stories shown here by various tags or keywords

Key information for each story is shown such as the title (A), the progress (B), the moderation level (C) and the number of total public views (D).

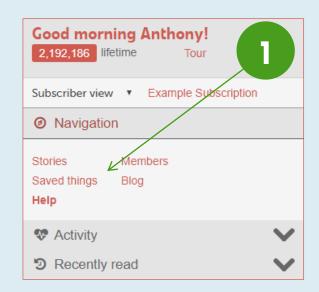


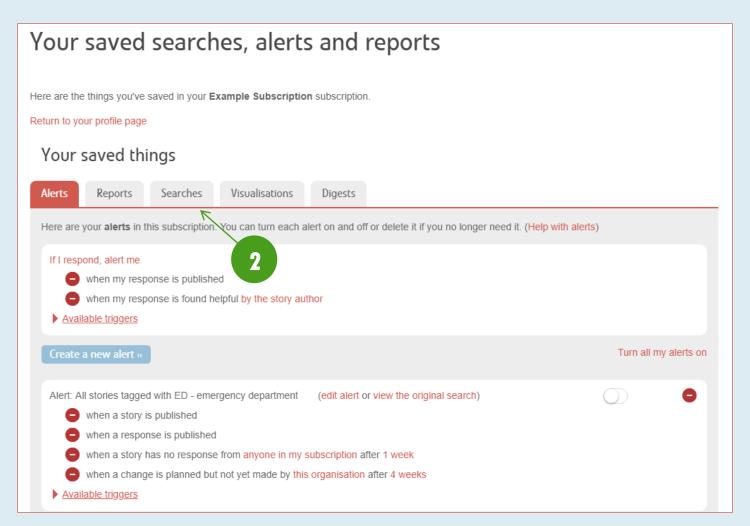


#### YOUR SAVED THINGS

This holds all of the searches, reports, alerts, visualisations and digests you have saved for later use for your user. To access your saved things:

- Click on 'Saved things' in the <u>navigation drawer</u> this will automatically bring you to a page with a tab showing your alerts (which trigger your email notifications of relevant stories)
- 2. Click 'Searches' to access all saved searches this is helpful for accessing searches you run on a regular basis that have multiple filters



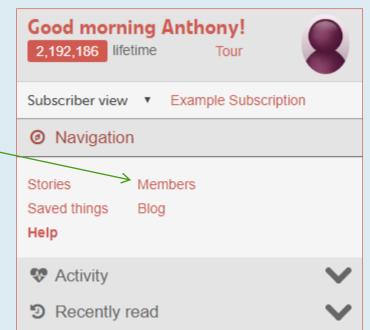


#### **HELP PAGES**

You can access further guides to using the site from our Help pages – available by clicking 'Help' in the <u>navigation drawer</u>.

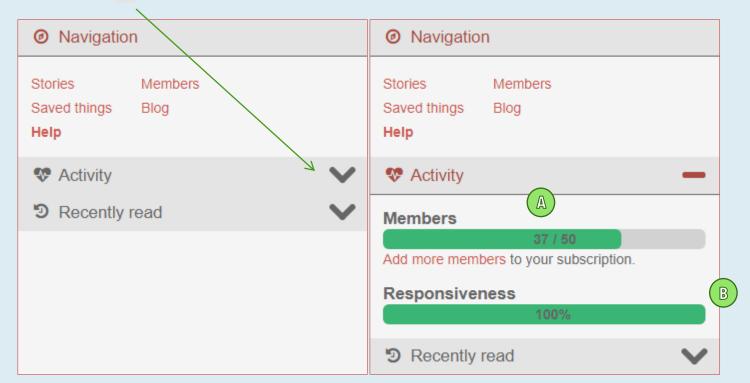
#### **MEMBER LIST**

Each subscription has access to a page listing all its members. Under the Aged Care Express subscription, you will only have access to one user login; however this page will still allow you to update this user's details. You can view details for each member or pull reports on all members collating things such as how many stories they have read and how many stories they have responded to. To access the member listing page, click 'Members' in the <u>navigation</u> drawer.



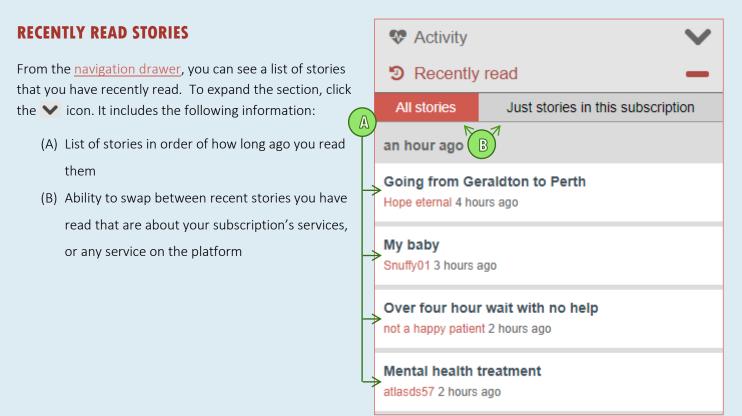
#### **SUBSCRIPTION ACTIVITY**

From the <u>navigation drawer</u>, you can see a quick overview of the details in your subscription. To expand the activity section, click the vicon.



It includes the following information:

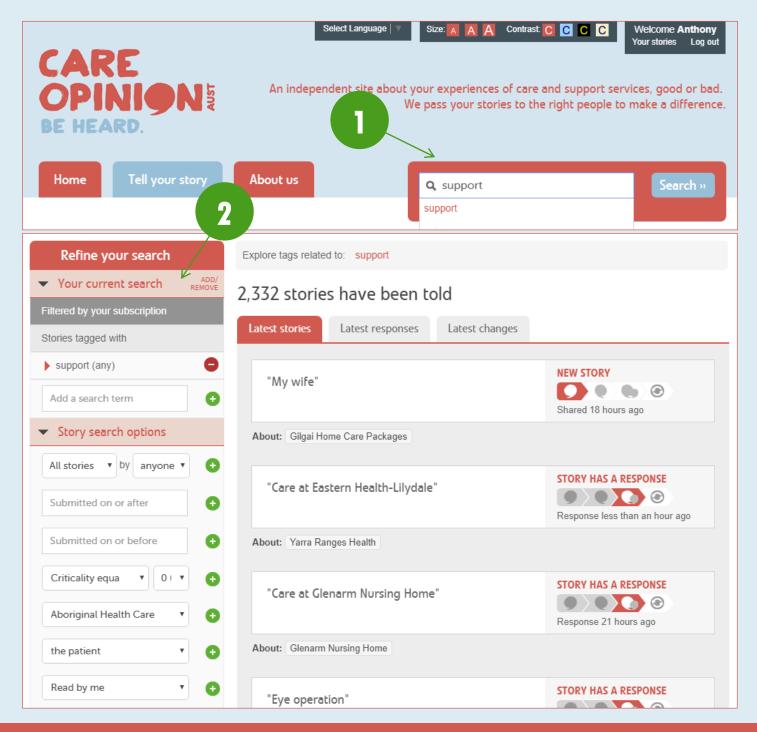
- (A) Number of active members out of your subscription's total capacity
- (B) Your responsiveness percentage of total stories about your subscription that has received a response from any member of your subscription



#### **SEARCHING STORIES**

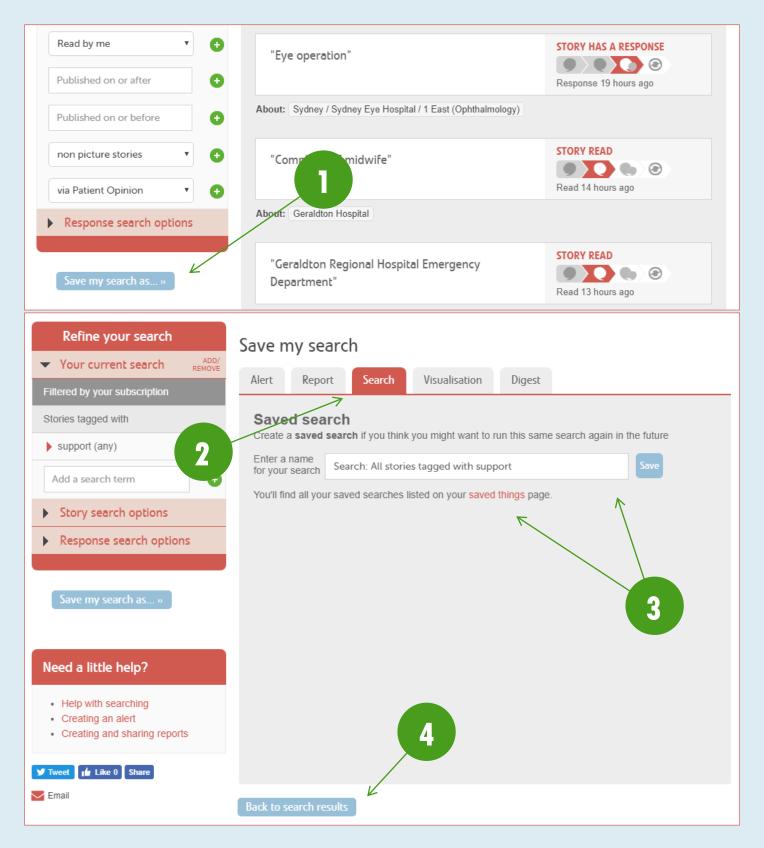
Searches are the basis for all alerting, and generating reports and visualisations on the platform - to set a story alert, you will define what stories you want to receive notification of by creating a story search; to pull a report, you will define the data set of stories by creating a story search. You may run reports on the same search on a regular basis, perhaps as a monthly or quarterly report, and as such you can save your search (especially those with lots of filters, or where you may have lots of different searches you need to run) to make it more efficient to run later.

- 1. Type a search term (the name of a service, medical condition, emotion tag, etc.) into the search bar and click 'Search' the search bar is accessible from almost every page of the website and will match what you write as you type with terms and services already in the system; select them from the drop down for better search matching
- 2. Refine your search further by adding one or more filters options available include both story and response parameters and a full list is below



#### **SAVING SEARCHES**

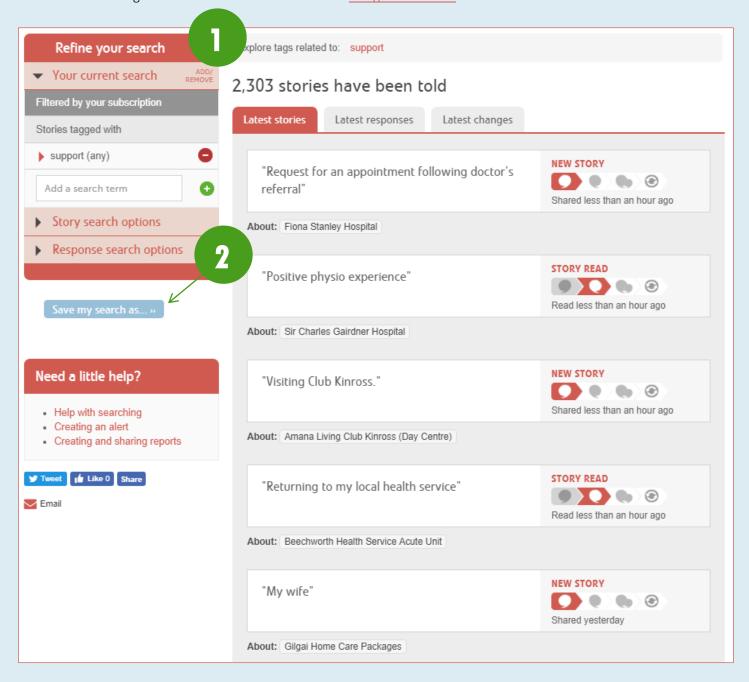
- 1. Once the appropriate search terms and filters have been added, click 'Save my search as...'
- 2. Click the 'Search' tab
- 3. Enter a name for your search and click 'Save' saved searches are added to and can accessed through your 'Saved things' and a link to this is located in the <u>navigation drawer</u> and below the 'Save' button
- 4. You can click 'Back to search results' if you would like to alter your search

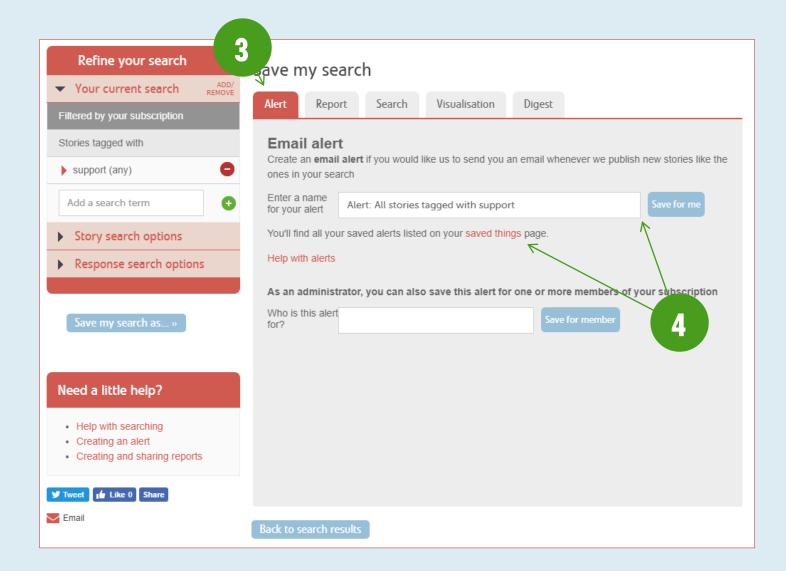


#### **ALERTS**

You can save any search as an alert, and this will define what stories you receive email notification of. This allows you to control story alerts by relevance to the person that is receiving them. This means that you could set an alert up of all stories in your subscription, or be very specific, for example, by setting up an alert for only stories tagged with 'ED – emergency department'. To save an alert for yourself:

- 1. Create a search with the relevant filters
- 2. Click 'Save my search as...'
- 3. Click the 'Alert' tab
- 4. Enter a name for your alert and click 'Save for me' saved alerts are added to and can accessed through your 'Saved things' and a link to this is located in the <u>navigation drawer</u> and below the 'Save for me' button

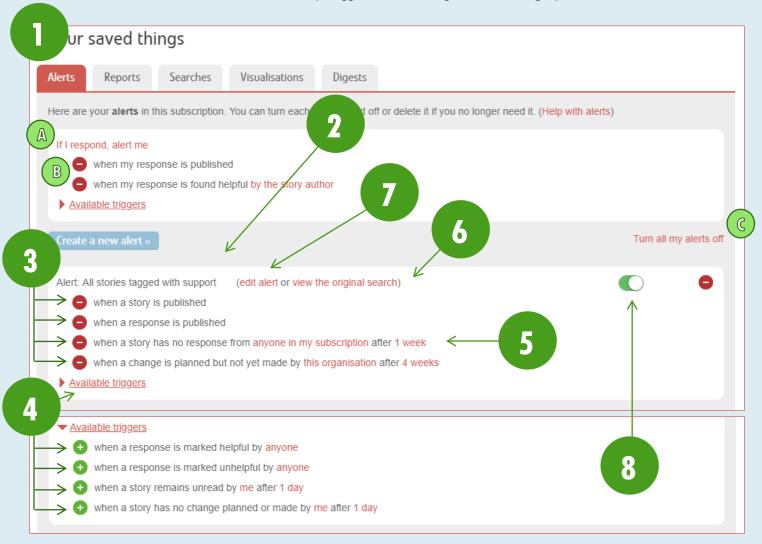




#### **EDITING ALERTS AND SETTING TRIGGERS**

When you save an alert, it will automatically be set up with default triggers. These can be updated to suit your needs for that alert, to ensure that the email alerts you receive are only what is relevant. To edit your alerts:

- 1. Navigate to the 'Alerts' tab on your 'Saved things' page
- 2. Go to the alert that you want to edit
- 3. To remove a trigger, click the --- icon next to it
- 4. To add a trigger, click 'Available triggers' to expand the list and click the --- icon next to it
- 5. To cycle through a trigger's options, click the pink text (only triggers with pink text have options)
- 6. To view a list of stories currently captured by this alert, click 'view the original search'
- 7. To edit the search filters for the alert, click 'edit alert'
- 8. To deactivate/reactivate the alert entirely, toggle the switch green is active, grey is inactive



If you are a person with responding rights, such as a 'Responder' or an 'Administrator' you will also have an alert with triggers for when you post a response (A) – this alert is automatically added to your saved things, and can be deactivated by removing all active triggers (B).

To deactivate all of your alerts (if you have multiple), click 'Turn all my alerts off' (C). This does not include your response alert.

#### RESPONDING

There are two methods available to respond to a story; you must be logged on to the system in order to respond.

#### **RESPONSE METHOD 1: EMAIL ALERT**

When a story is published that is relevant to you, you will receive an email alert (<u>subject to how you have set up your alerts</u>). Inside this email alert is a web-link to the story – the link also contains a single-use login token that means that the first time you click the link, it will also log you in. The respond via your email alert:

- 1. Click the story link in the email
- 2. After reading the story, scroll down to the response box if the response box is not visible, ensure you are <u>logged</u>

  in and that you are in <u>'Subscriber View'</u>
- 3. Type your response into the response box
- 4. Indicate if you are planning to or have made a change
- 5. Choose how you will sign your response from the drop-down options you can sign with your [name, role, organisation], [role, organisation], or just [organisation]
- 6. Provide your consent for your response to be published you cannot submit the response without this
- 7. Click 'Send your response'

## Anthony, Care Opinion has published a story relevant to you



This is your **personal link**. It will log you in the first time you use it. After that it is safe to share with other people.

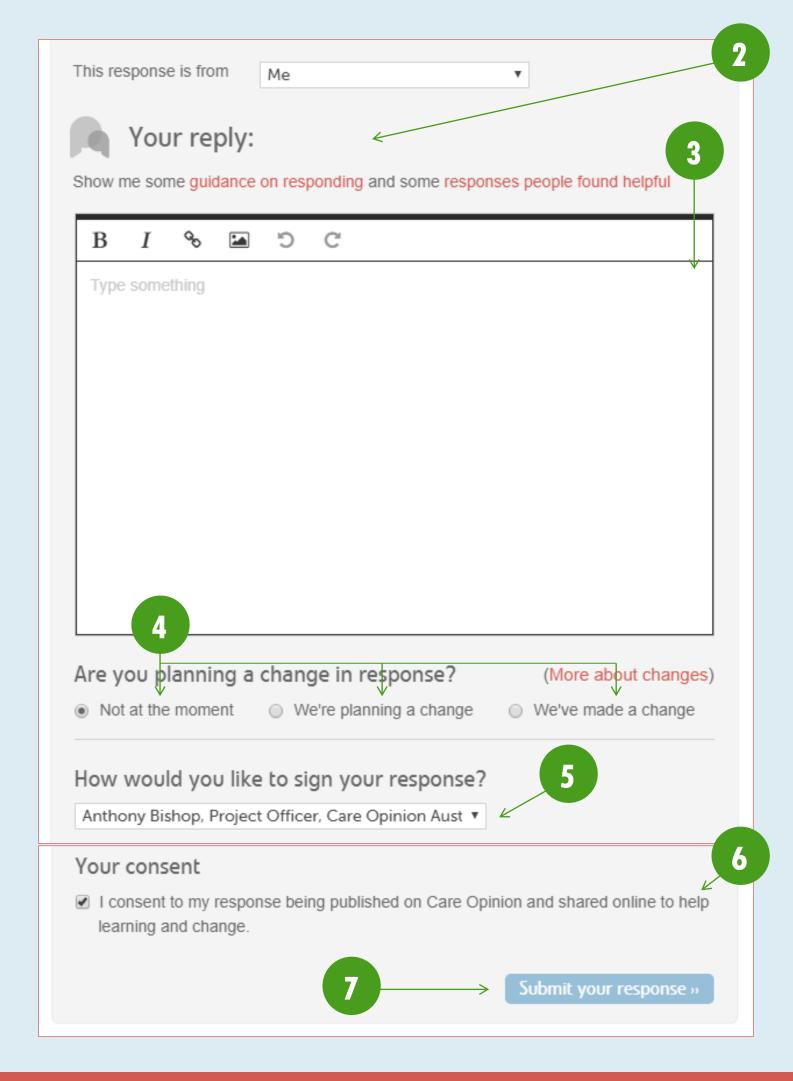
You can also see who we've told about this story

#### Why did I get this email?

We've sent this email in line with alerts you have set on Care Opinion. You can change or pause emails you receive from us at any time.

Just log into Care Opinion, and then change your alerts.

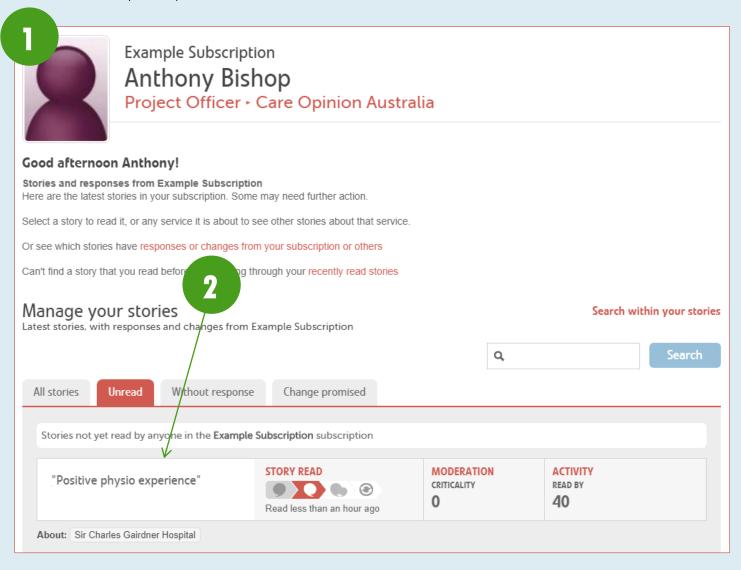
If you need help, check our alerting help page

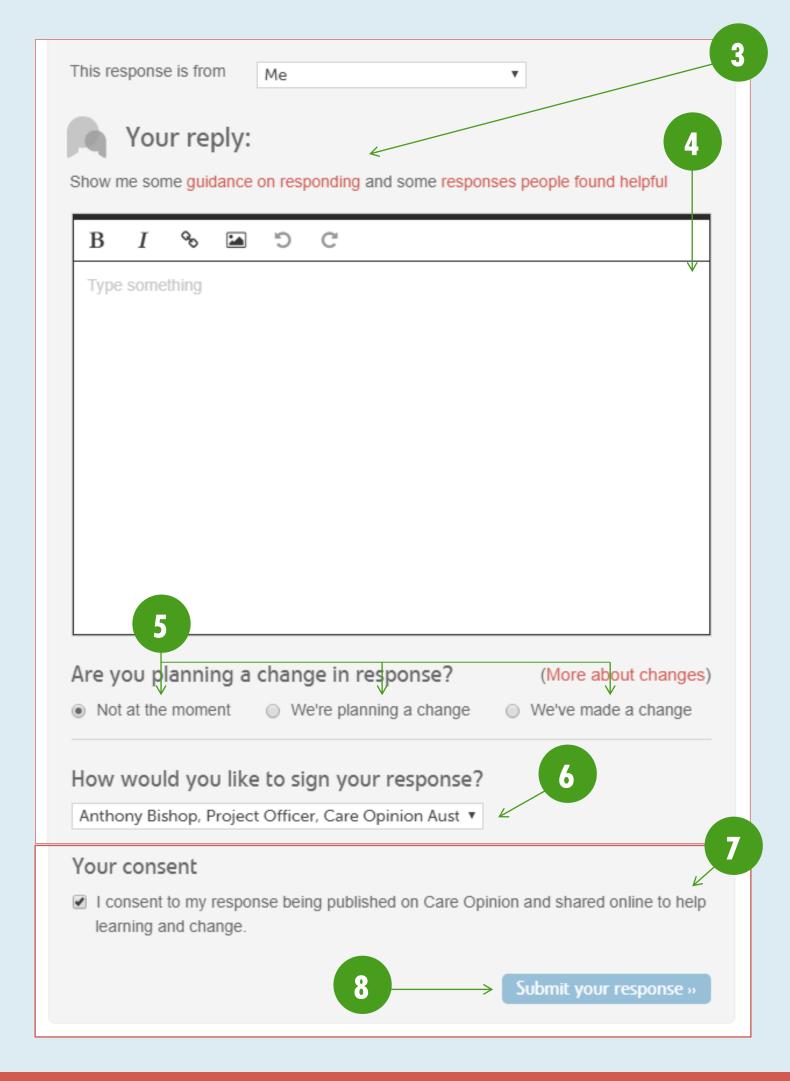


#### **RESPONSE METHOD 2: YOUR STORIES PAGE**

You can view a list of stories about your subscription from the <u>'Stories' page</u> – accessible from the <u>navigation drawer</u>. To respond to a story this way:

- 1. Navigate to your 'Stories' page
- 2. Click on the story you want to respond to
- 3. After reading the story, scroll down to the response box if the response box is not visible, ensure you are <u>logged</u> in and that you are in 'Subscriber View'
- 4. Type your response into the response box
- Indicate if you are planning to or have made a change
- 6. Choose how you will sign your response from the drop-down options you can sign with your [name, role, organisation], [role, organisation], or just [organisation]
- 7. Provide your consent for your response to be published you cannot submit the response without this
- 8. Click 'Send your response'





#### **ADDITIONAL INFORMATION AND GUIDES**

New features are added to the platform regularly – <u>check out our blog to see the latest updates</u>. You can access the <u>'Help'</u> pages from your <u>navigation drawer</u> for further subscriber guides.

If you should have any issues, please do not hesitate to contact us:



(07) 3354 4525



info@careopinion.org.au

For general subscriber enquiries, please contact our Client Liaison Officer, Sue Palmer:



sue.palmer@patientopinion.org.au

For platform IT issues, please contact our Project Officer, Anthony Bishop:



anthony.bishop@patientopinion.org.au