MEMBER USER GUIDE

SUBSCRIBER ROLE

CONTENTS

INTRODUCTION

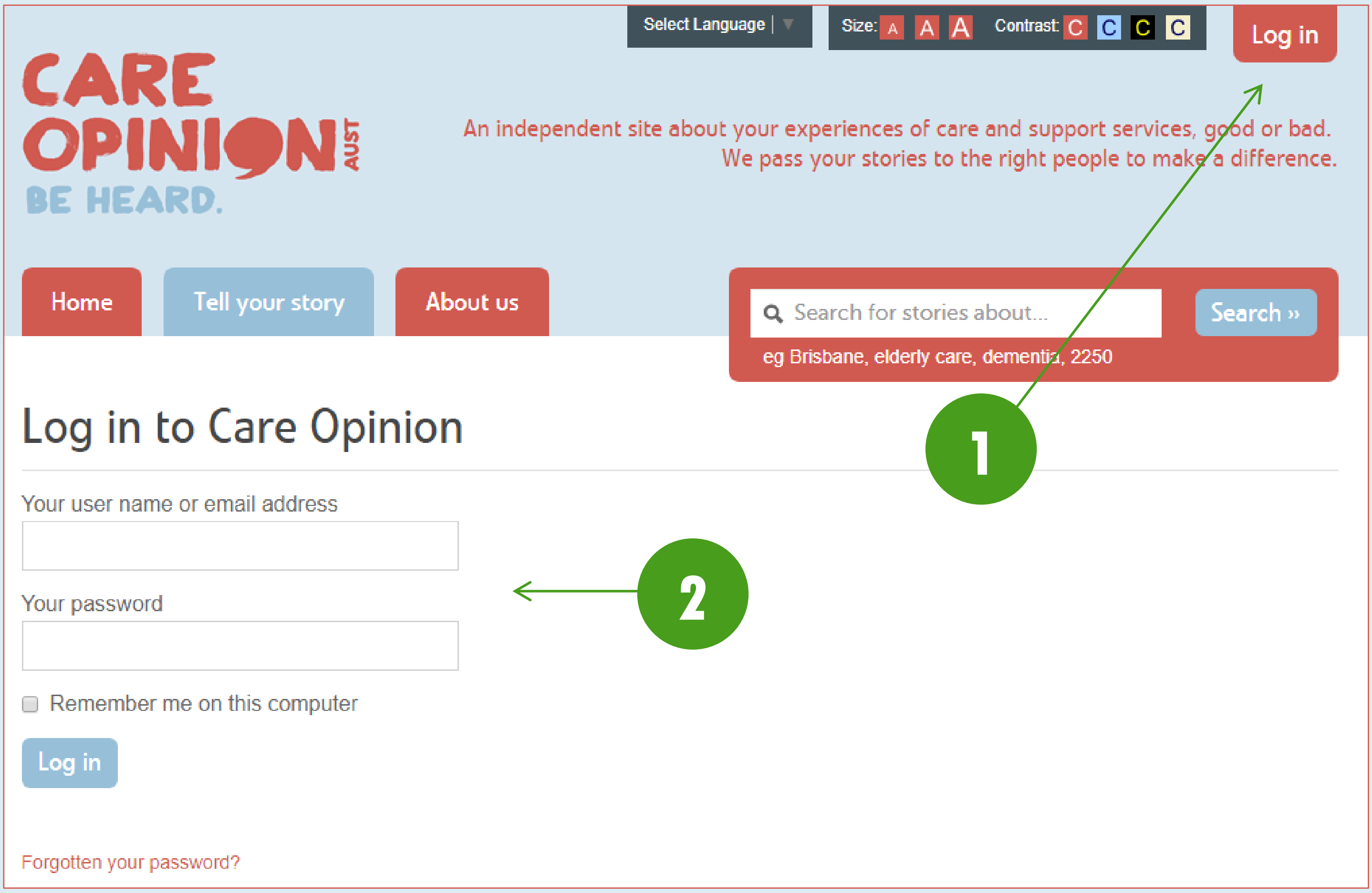
The following information has been provided to aid in undertaking the basic functions as a member of a Care Opinion subscription. The guideline provides information regarding:

- Creating and saving searches
- Setting up alerts for yourself
- Generating and saving reports, visualisations and digests

LOGGING ON TO CARE OPINION

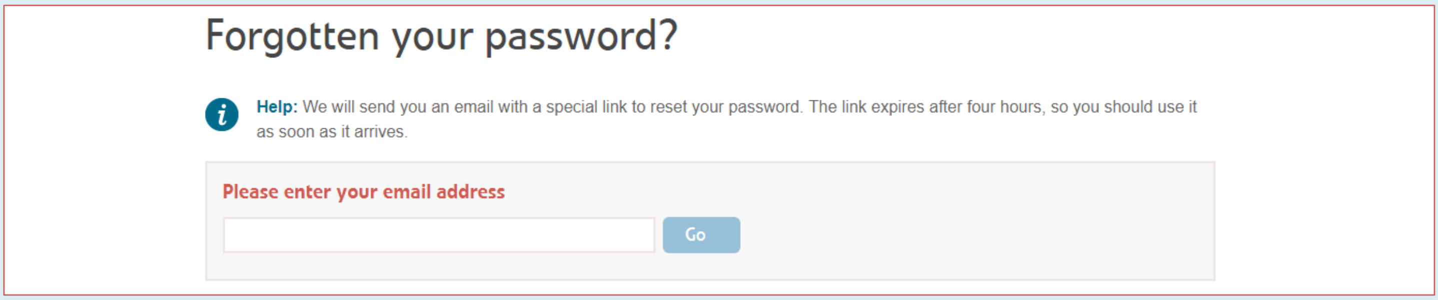
All of the functionality outlined in this document requires you to be logged in and an active member of a subscription.

1. Head to https://www.careopinion.org.au 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?

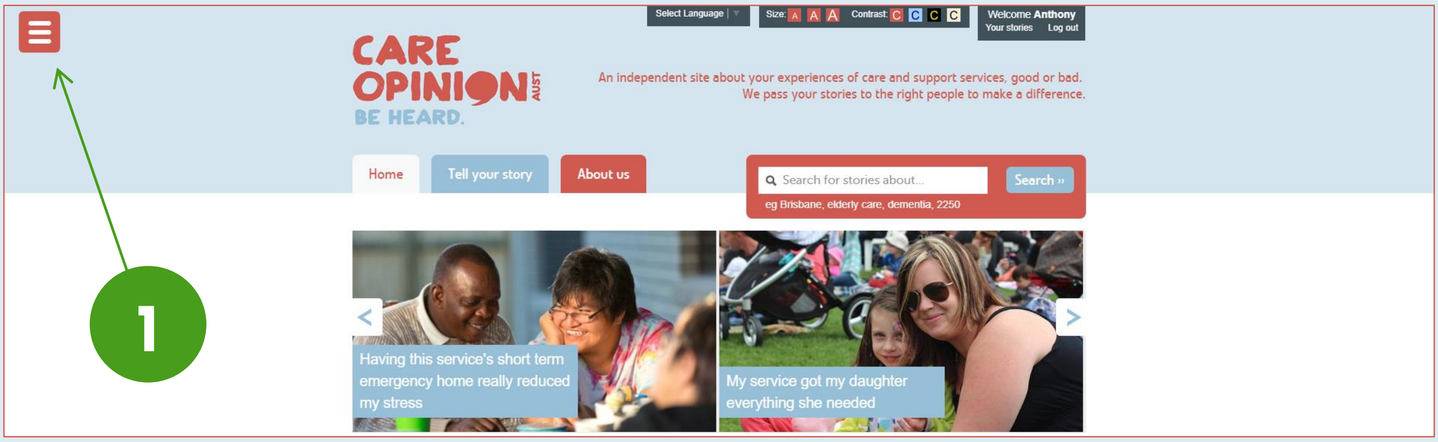
If you have forgotten your password, you can click the link at the bottom of the ‘Log in’ page to request we send you a password reset link. Enter the email address you use for your subscription and click ‘Go’. Check your emails, as the password reset link we send you expires in 4 hours.

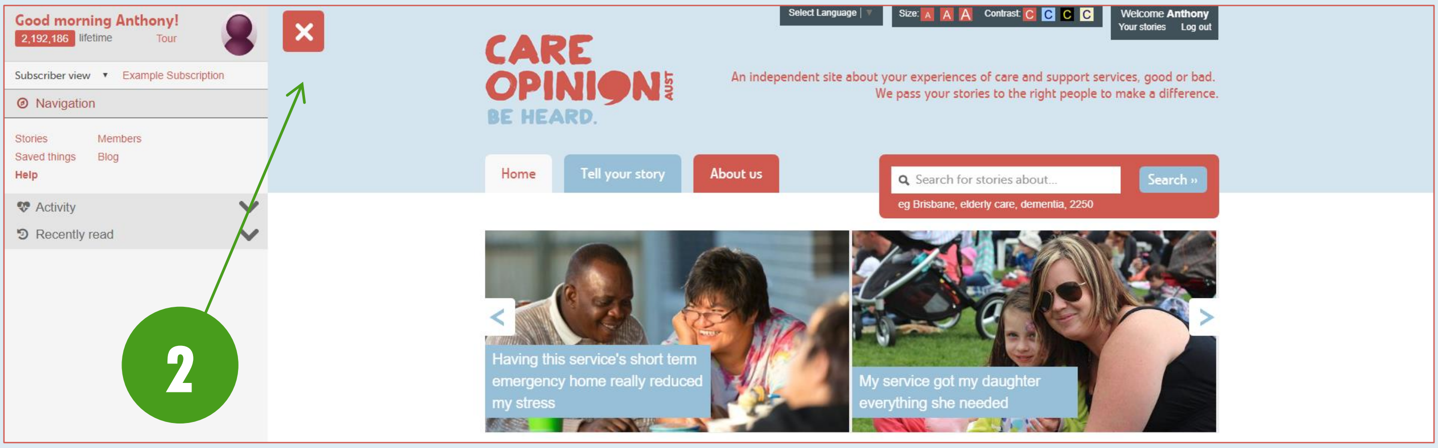


NAVIGATING THE WEBSITE

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.

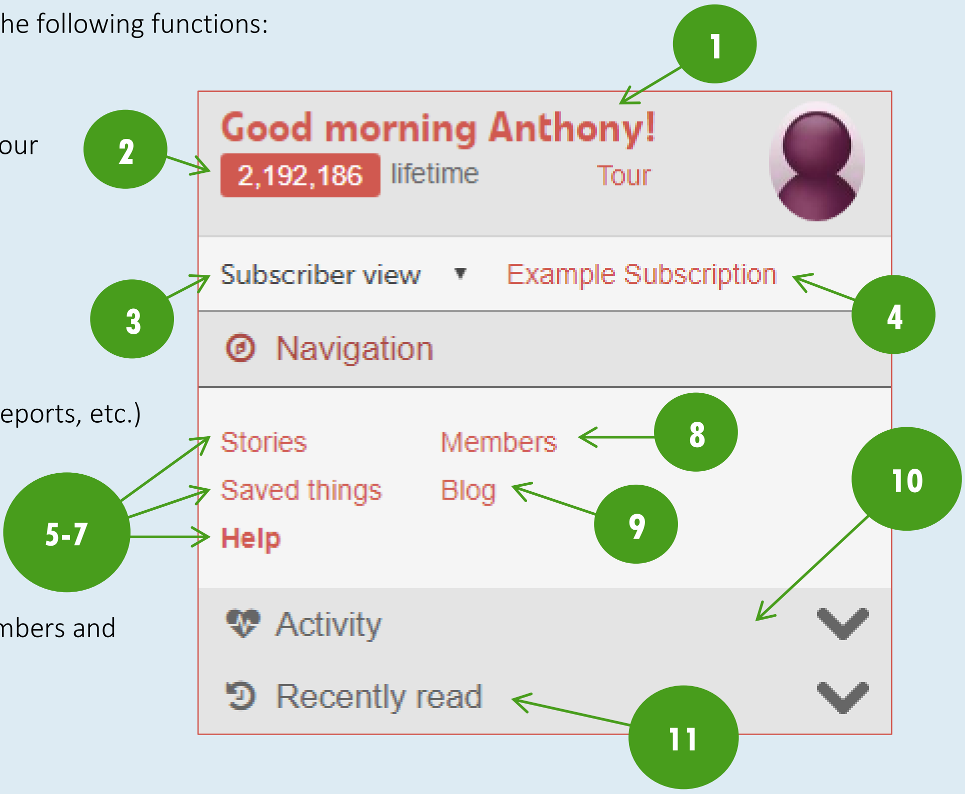
1. The navigation drawer can be accessed by clicking the icon in the top left corner of any page
2. It can be closed by clicking the icon at any time.





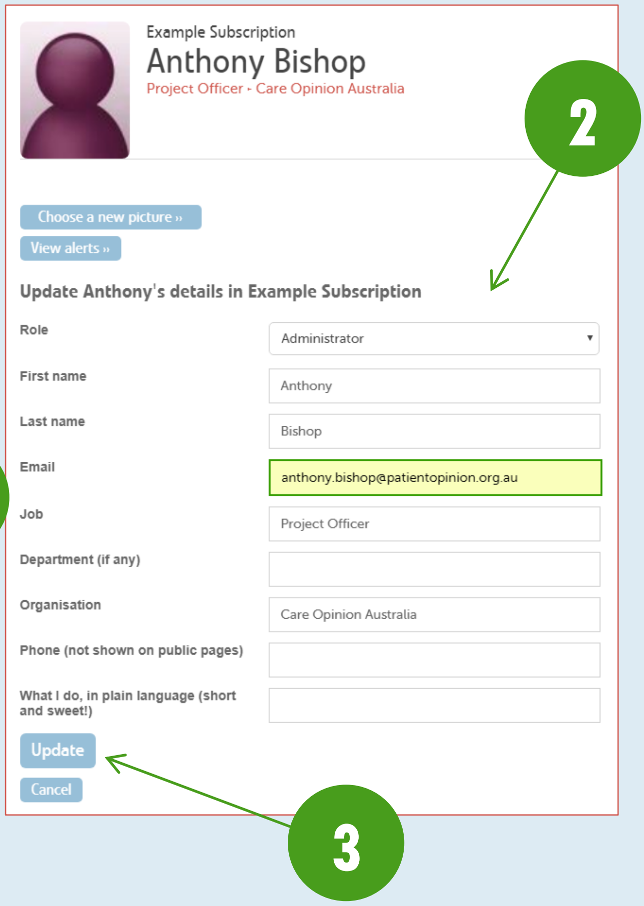
From the navigation drawer you can access the following functions:

1. Your profile
2. Total public views on stories about your subscription
3. Your view (public or subscriber)
4. Your subscription information
5. Stories about your subscription
6. Your saved things (searches, alerts, reports, etc.)
7. Help pages
8. Your subscription's member list
9. Your subscription's blog posts
10. Subscription activity (number of members and responsiveness to stories published)
11. Your recently read stories



YOUR PROFILE

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



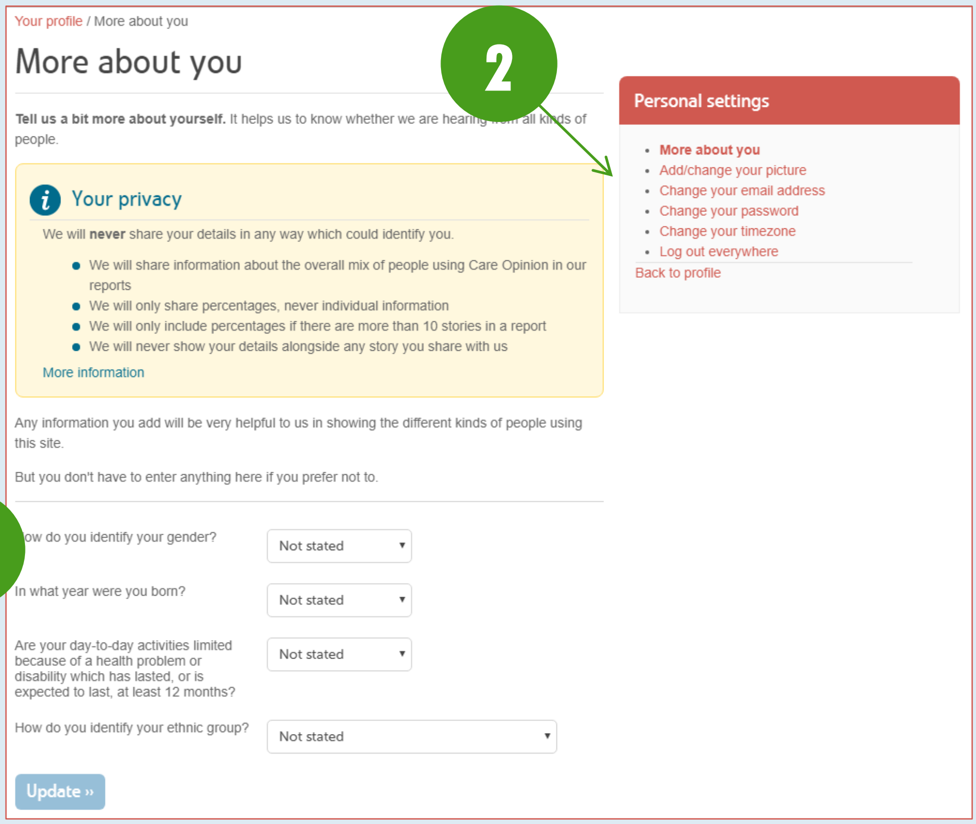
UPDATING YOUR PROFILE DETAILS

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

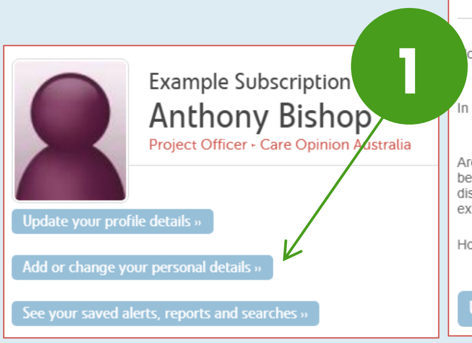
1. Click 'Update your profile details' on your profile page
2. Make any changes to your details in the various fields – any changes will be highlighted in green
3. Click 'Update' to save the changes, or 'Cancel' to leave the page without saving

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'.



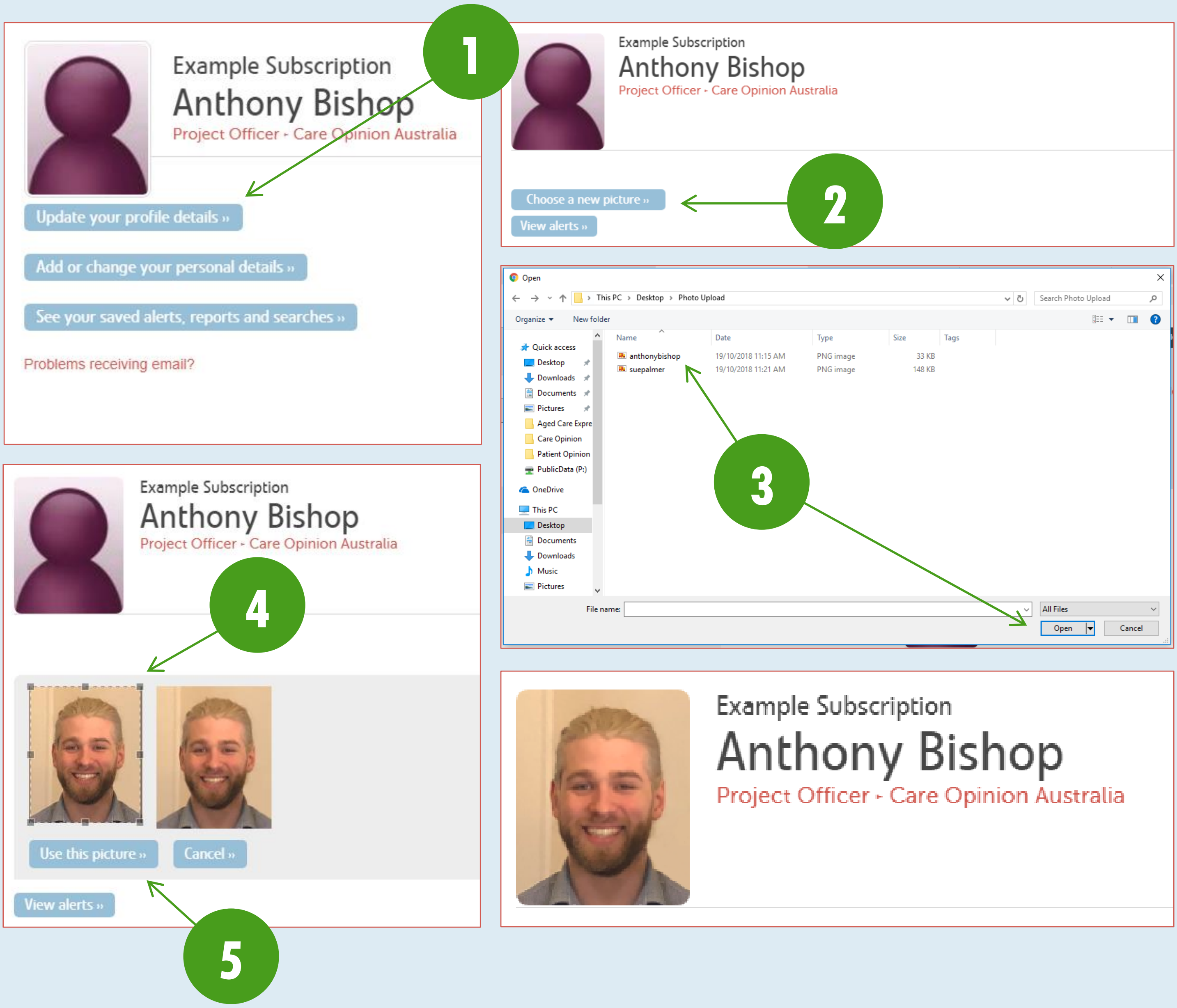
1. Click 'Add or change your personal details' on your profile page
2. Select any of the various personal settings options to amend and follow the instructions on those pages.



ADDING A PICTURE TO YOUR PROFILE

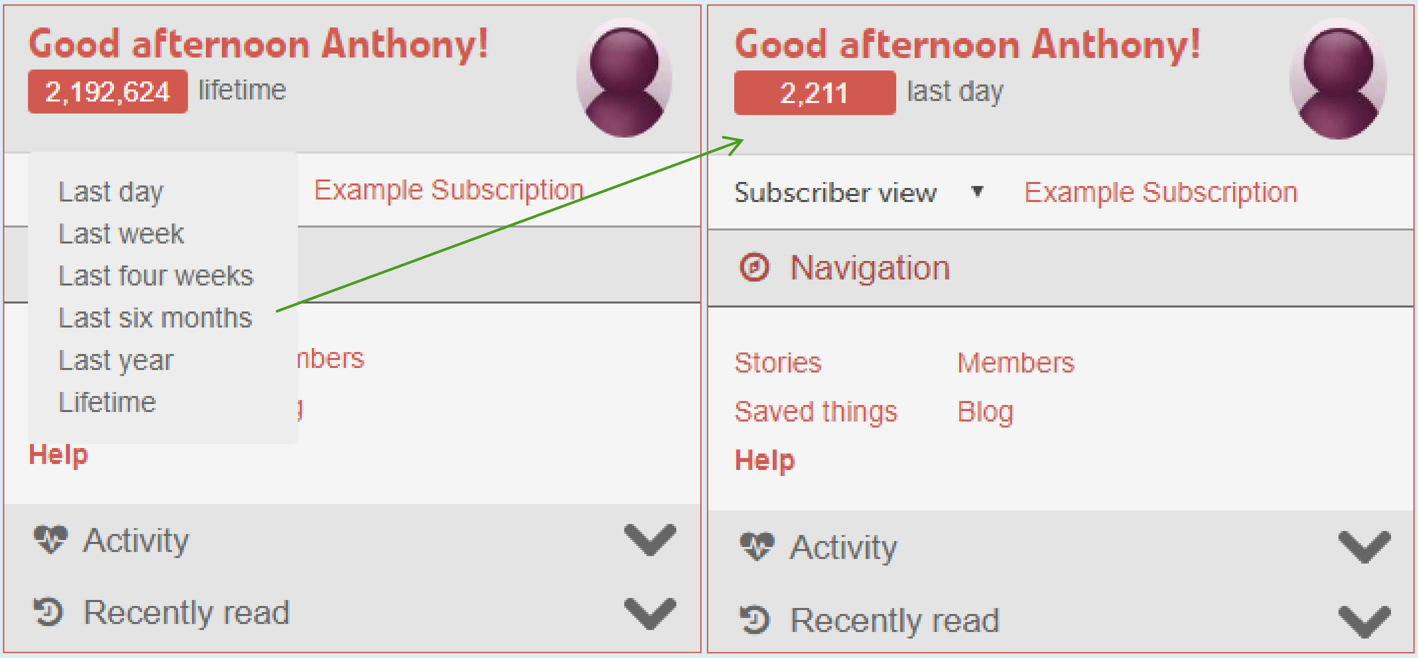
Particularly for those that will be responding to stories, it is suggested that you upload a photo of yourself to help add a human face to your responses. This will help the story author and the wider community connect with your responses, rather than seeing you as a ‘faceless’ organisation. We suggest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



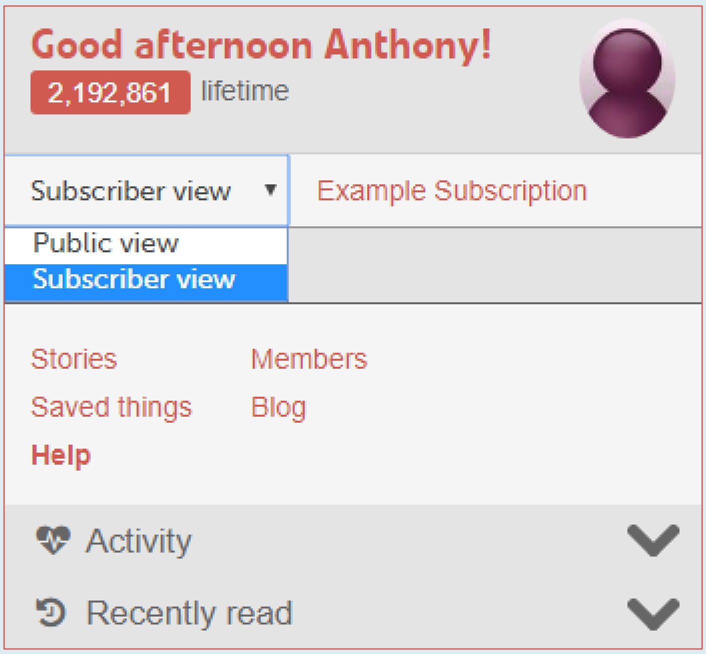
PUBLIC STORY VIEWS

You can check the total number of public views stories about your subscription have received from the navigation drawer. 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 navigation drawer and select 'Public view' from the drop down menu. To change back, simply do click on 'Public view' and reselect 'Subscriber view' again.

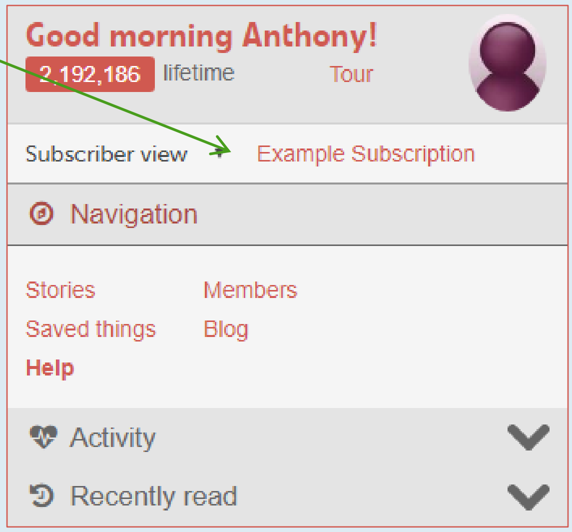
It should be noted that if you wish to share your own story on the platform while you are a member of a subscription, that this will need to be done in 'Public view' as the system no longer considers you a member of the public while 'Subscriber view' is active.

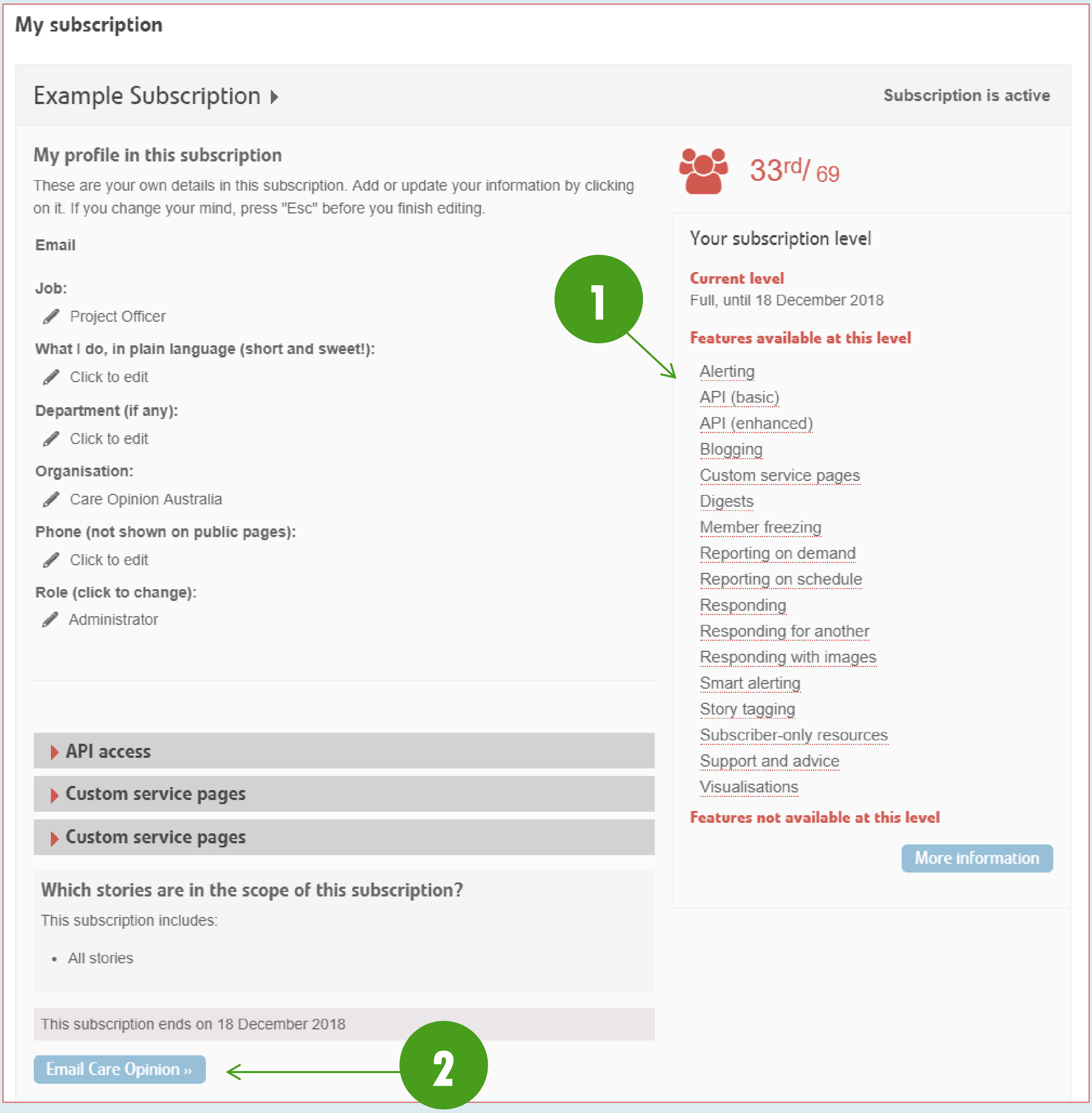
YOUR SUBSCRIPTION INFORMATION

By clicking your organisation name in the navigation drawer, 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 navigation drawer. 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

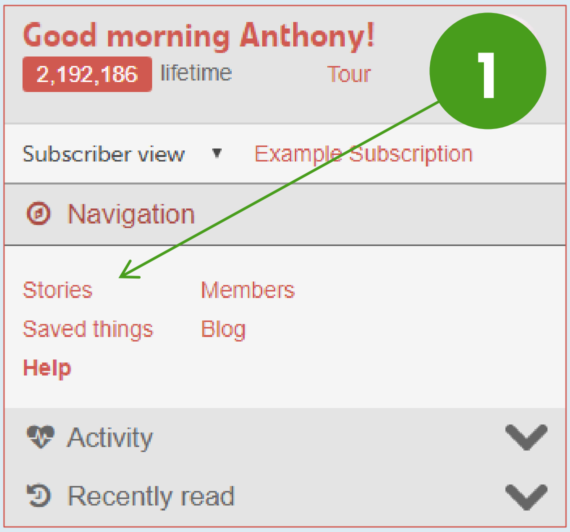




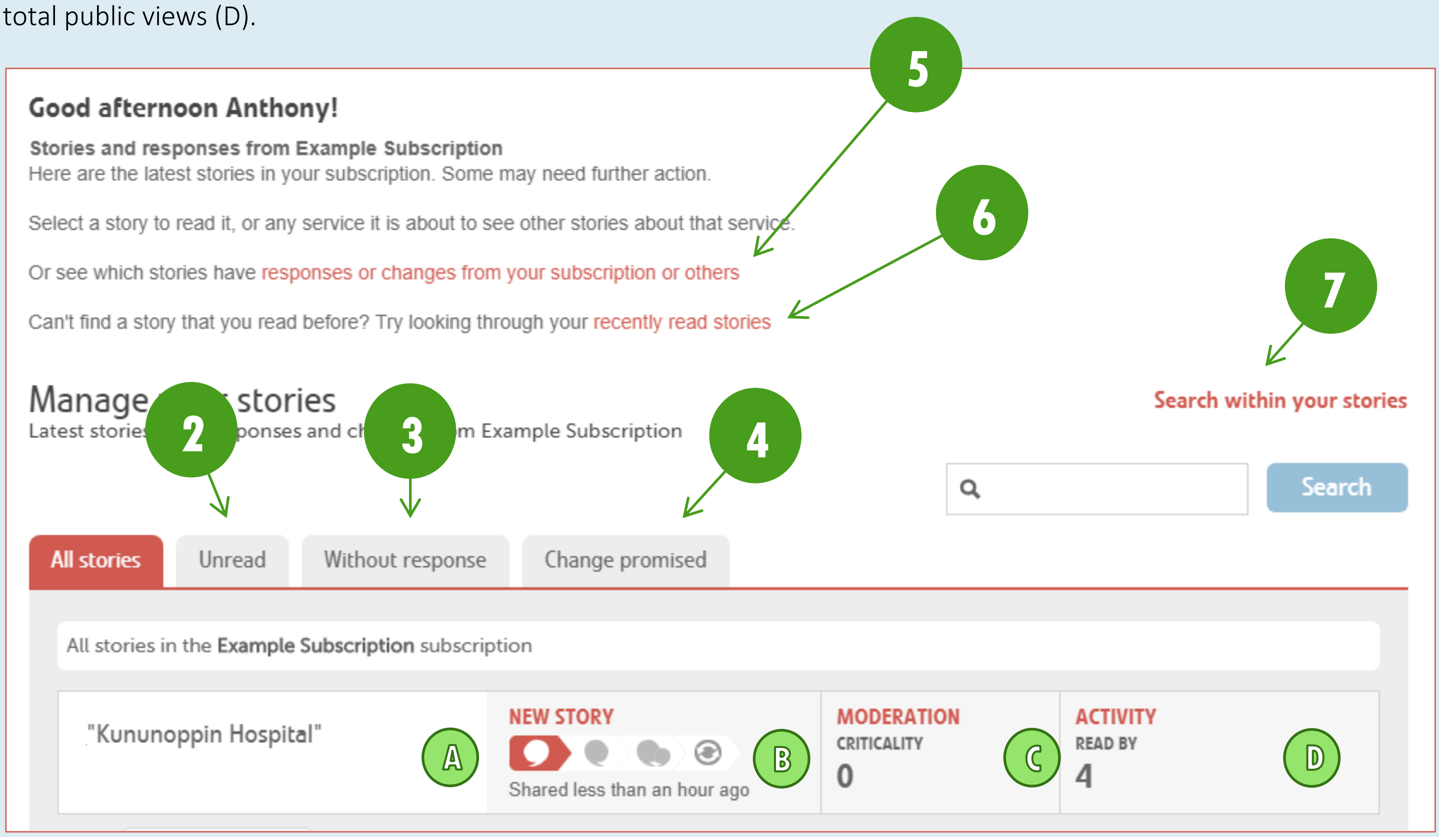
STORIES ABOUT YOUR SUBSCRIPTION

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:

1. Click on 'Stories' in the navigation drawer – 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
3. 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

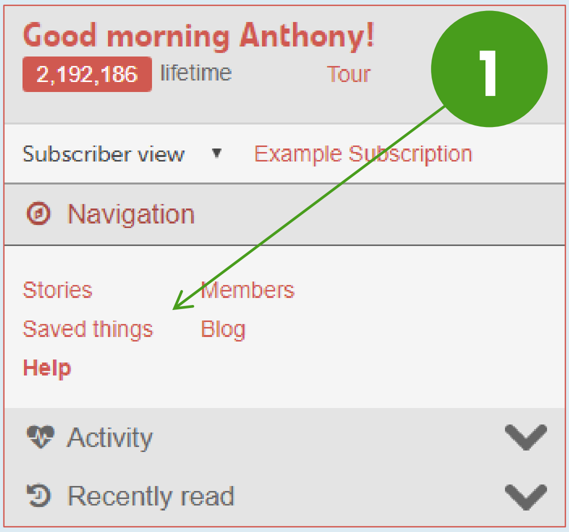


Key information for each story is shown such as the title (A), the progress (B), the moderation level (C) and the number of total public views (D).

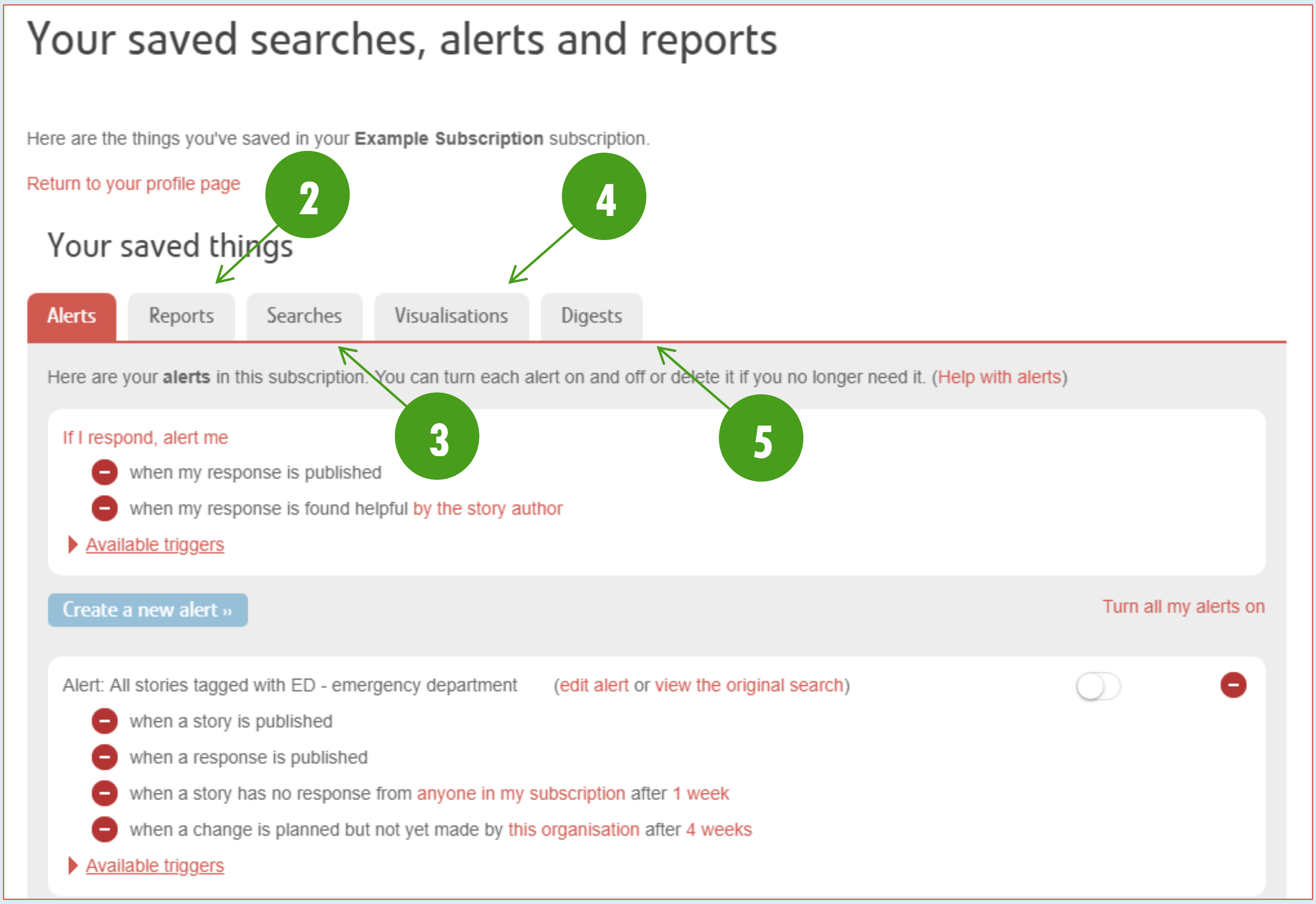


YOUR SAVED THINGS

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:



1. Click on 'Saved things' in 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)
2. Click 'Reports' to access 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)
3. Click 'Searches' to access all saved searches – this is helpful for accessing searches you run on a regular basis that have multiple filters
4. Click 'Visualisations' to access all saved visualisations – these include links to share the visualisations publicly – all visualisations are fully interactive
5. Click 'Digests' to see all saved digests – these are mini overview reports that can be emailed to you weekly

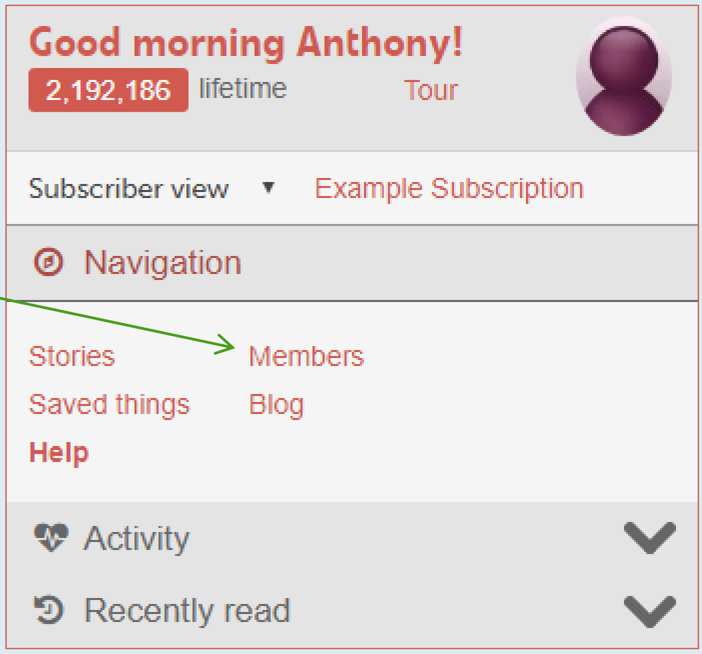


HELP PAGES

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

MEMBER LIST

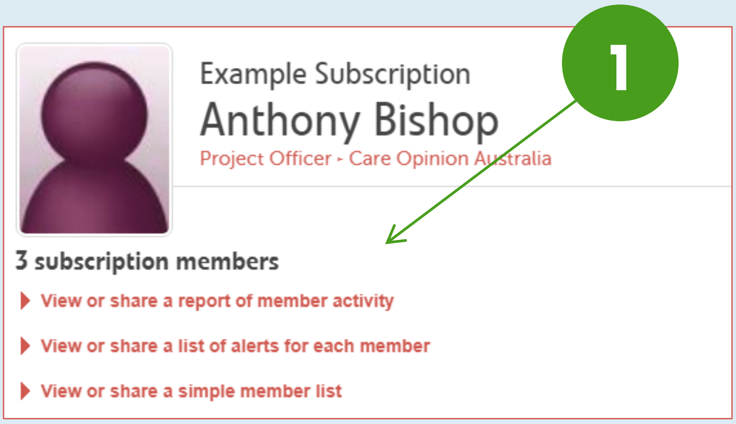
Each subscription has access to a page listing all its members. You can view details for each member or pull reports on all members collating things such as how many stories they have read and how many stories they have responded to. To access the member listing page, click 'Members' in the navigation drawer.

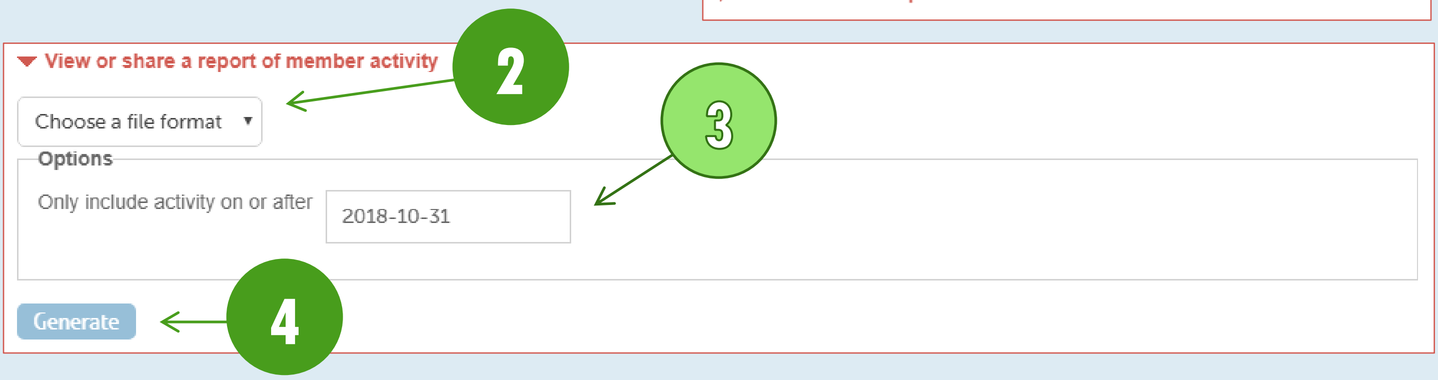


GENERATING A MEMBER REPORT

There are three member reports available – member activity, alert listing, and simple member list. To generate these:

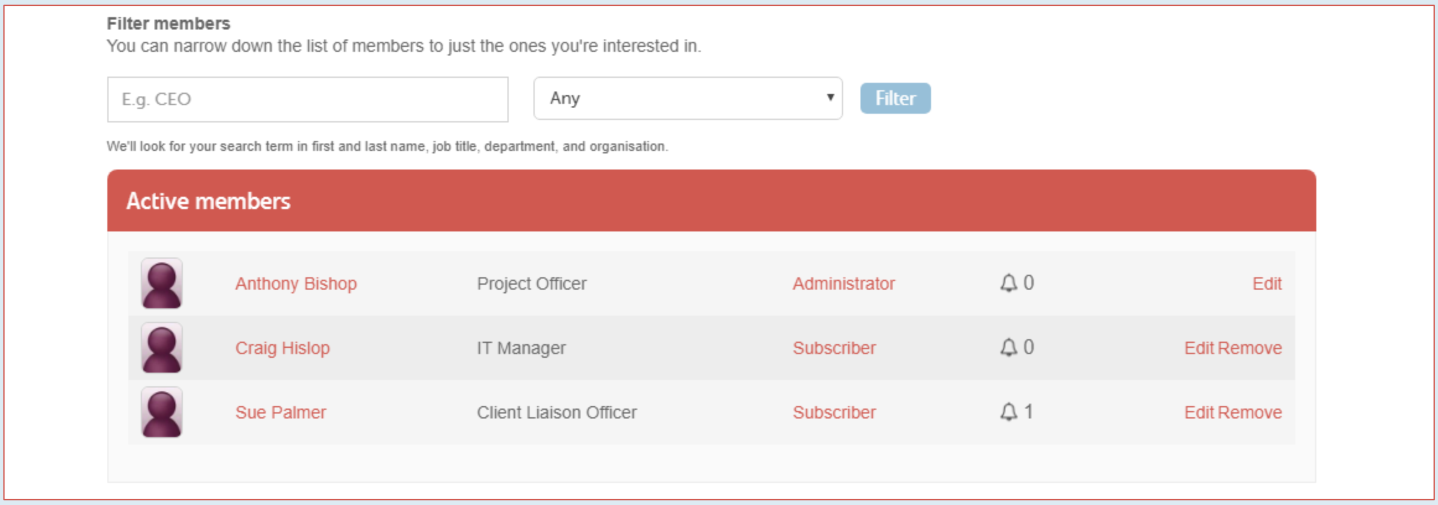
1. Select which report you want to generate
2. Select which file format of the report – options include PDF, Microsoft Excel, and Microsoft Word (both current and old file versions)
3. Select date from which to include data *(member activity report only)*
4. Click 'Generate'





FILTERING MEMBERS

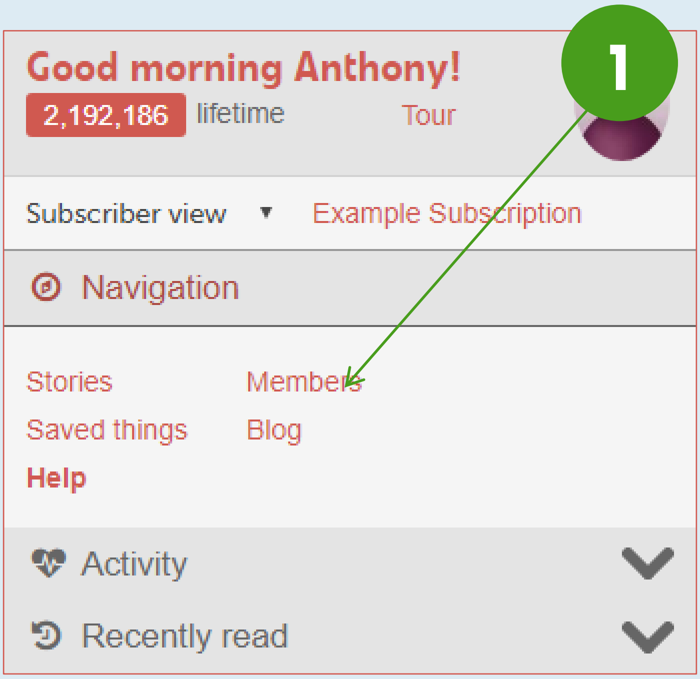
The member listing can display up to 15 members at a time, before you will need to move to the next page of members. For situations where you have a number of pages of members, you can filter them by typing keywords such as first or last names and job titles, as well as their role on Care Opinion (Subscriber, Responder and Administrator), and the clicking 'Filter'.

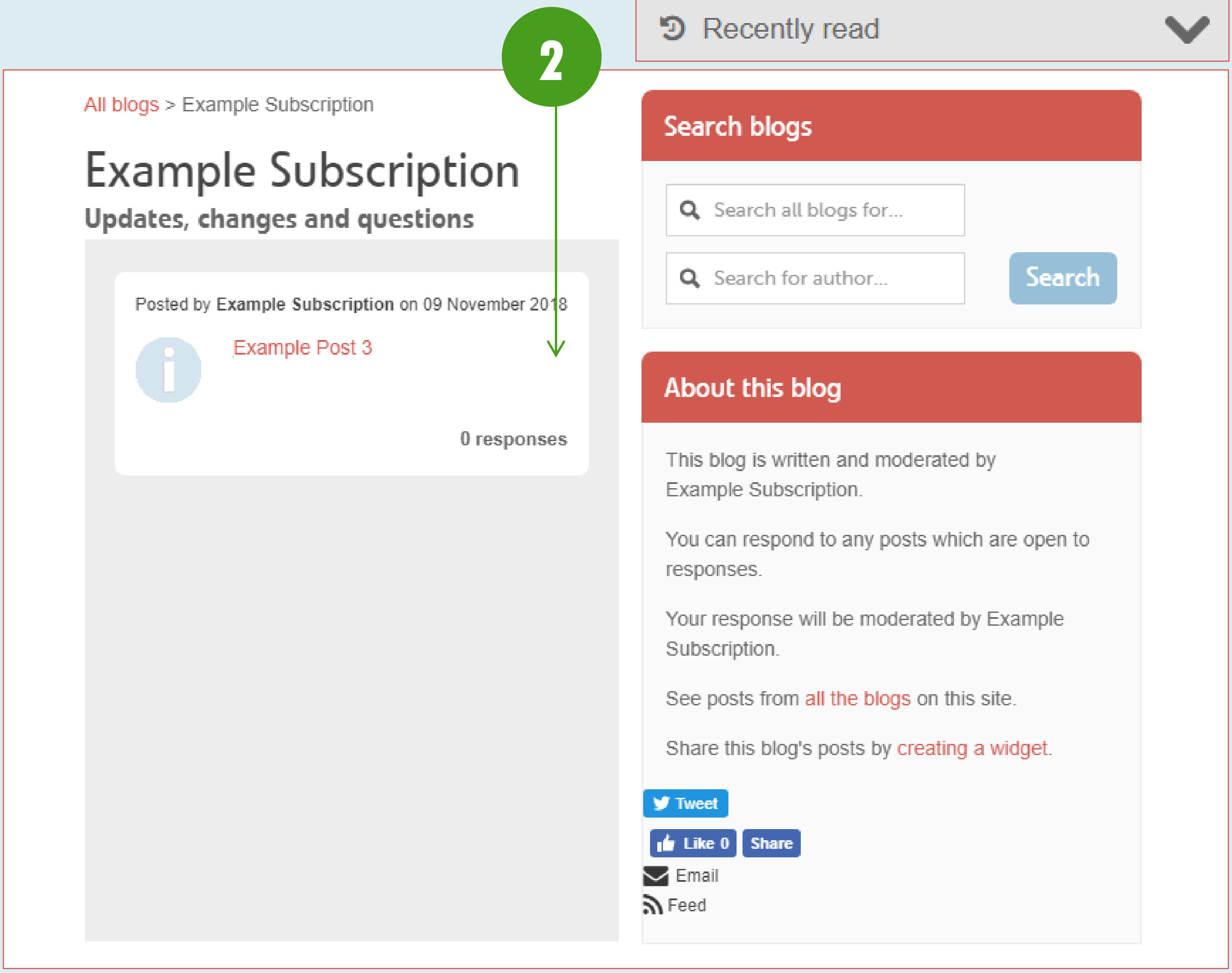


BLOGGING

As a subscription, you can publish blogs to the Care Opinion platform. This can be performed by members with the Responder or Administrator roles. Blogs could be about anything from how you have found the Care Opinion journey so far, to public information blogs such as this. To access and view your subscription's blogs:

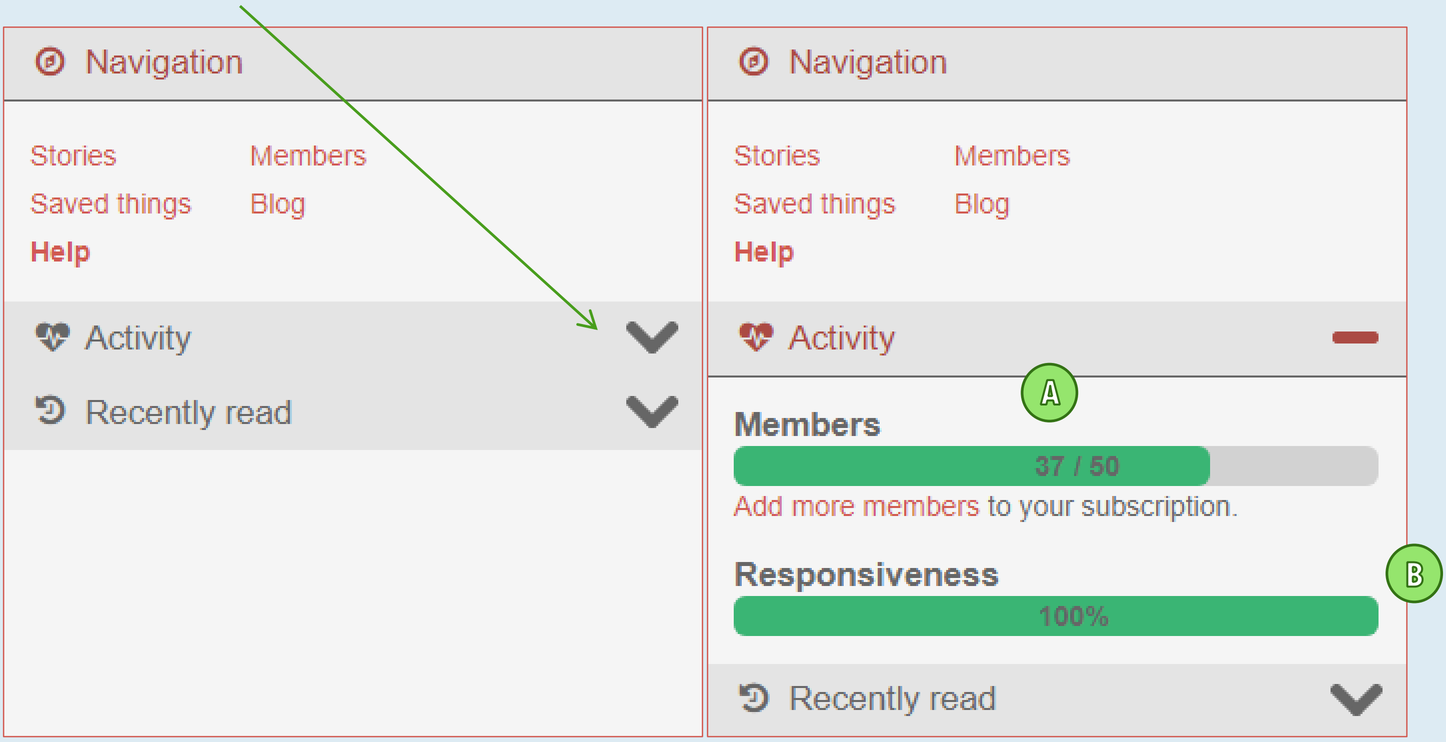
1. Click 'Blog' in the navigation drawer
2. Click the post title to open the blog post





SUBSCRIPTION ACTIVITY

From the navigation drawer, you can see a quick overview of the details in your subscription. To expand the activity section, click the ⌄ icon.



It includes the following information:

(A) Number of active members out of your subscription's total capacity

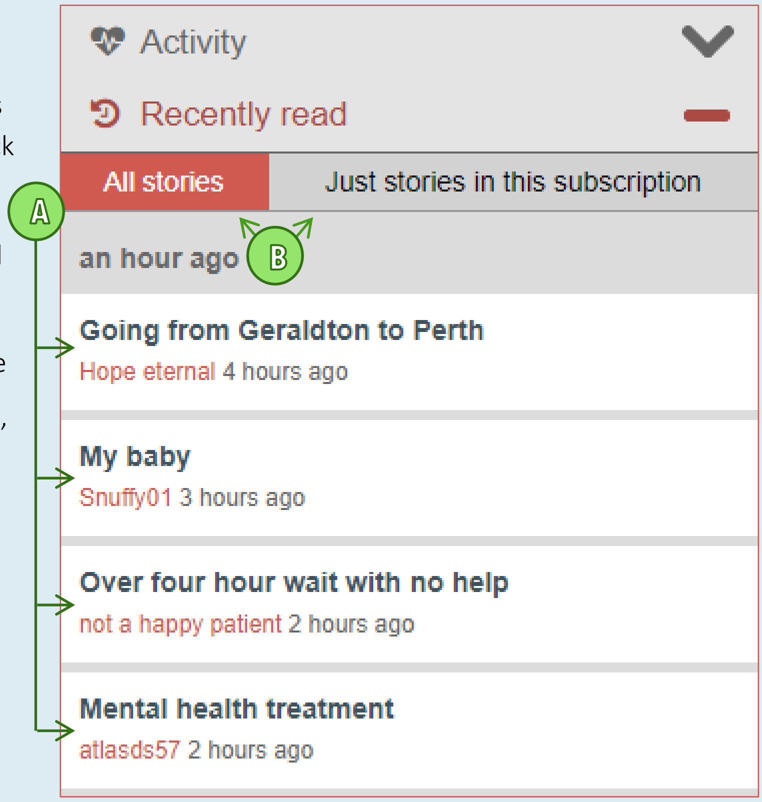
(B) Your responsiveness – percentage of total stories about your subscription that has received a response from any member of your subscription

RECENTLY READ STORIES

From the navigation drawer, you can see a list of stories that you have recently read. To expand the section, click the ⌄ icon. It includes the following information:

(A) List of stories in order of how long ago you read them

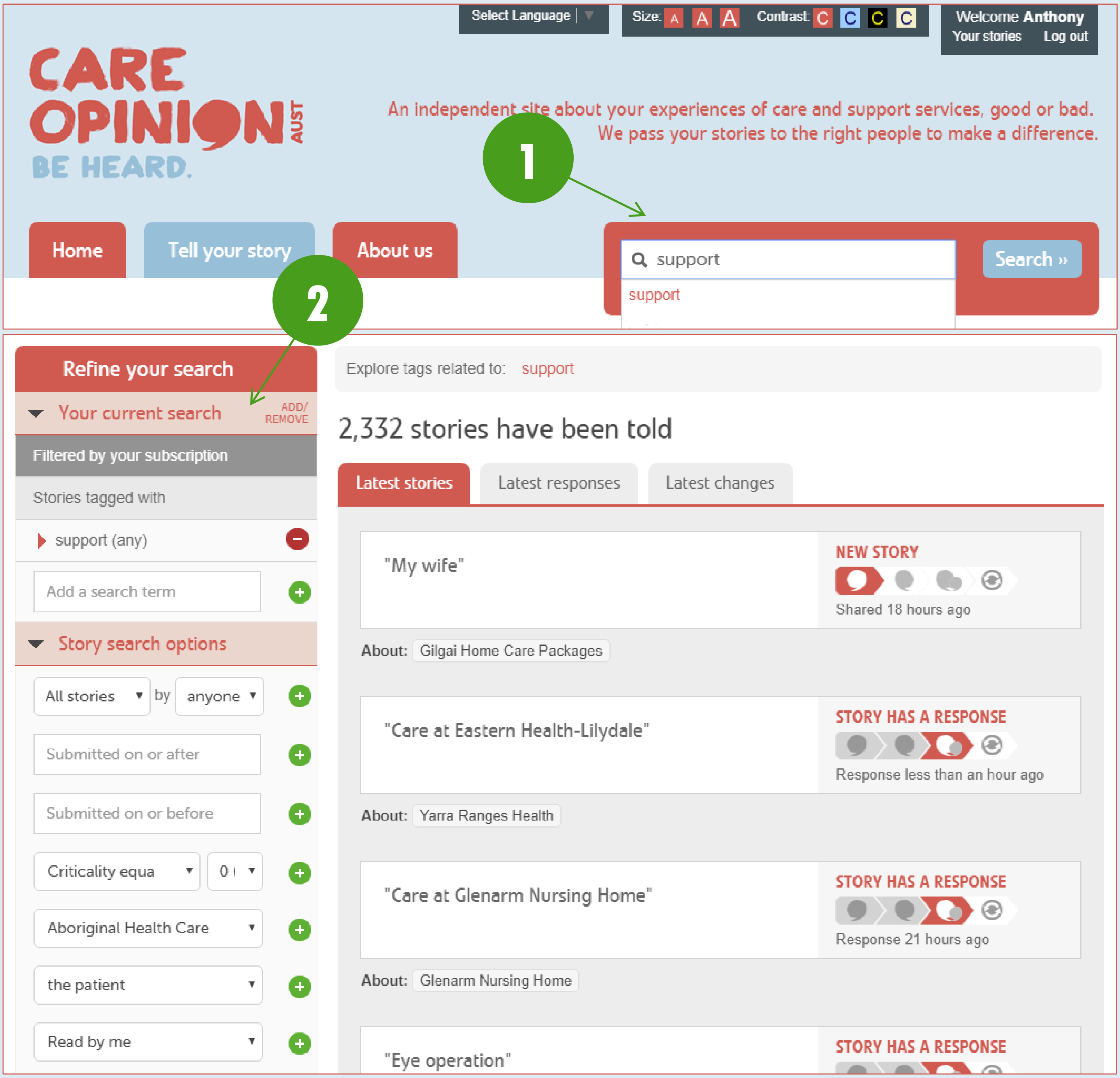
(B) Ability to swap between recent stories you have read that are about your subscription's services, or any service on the platform



SEARCHING STORIES

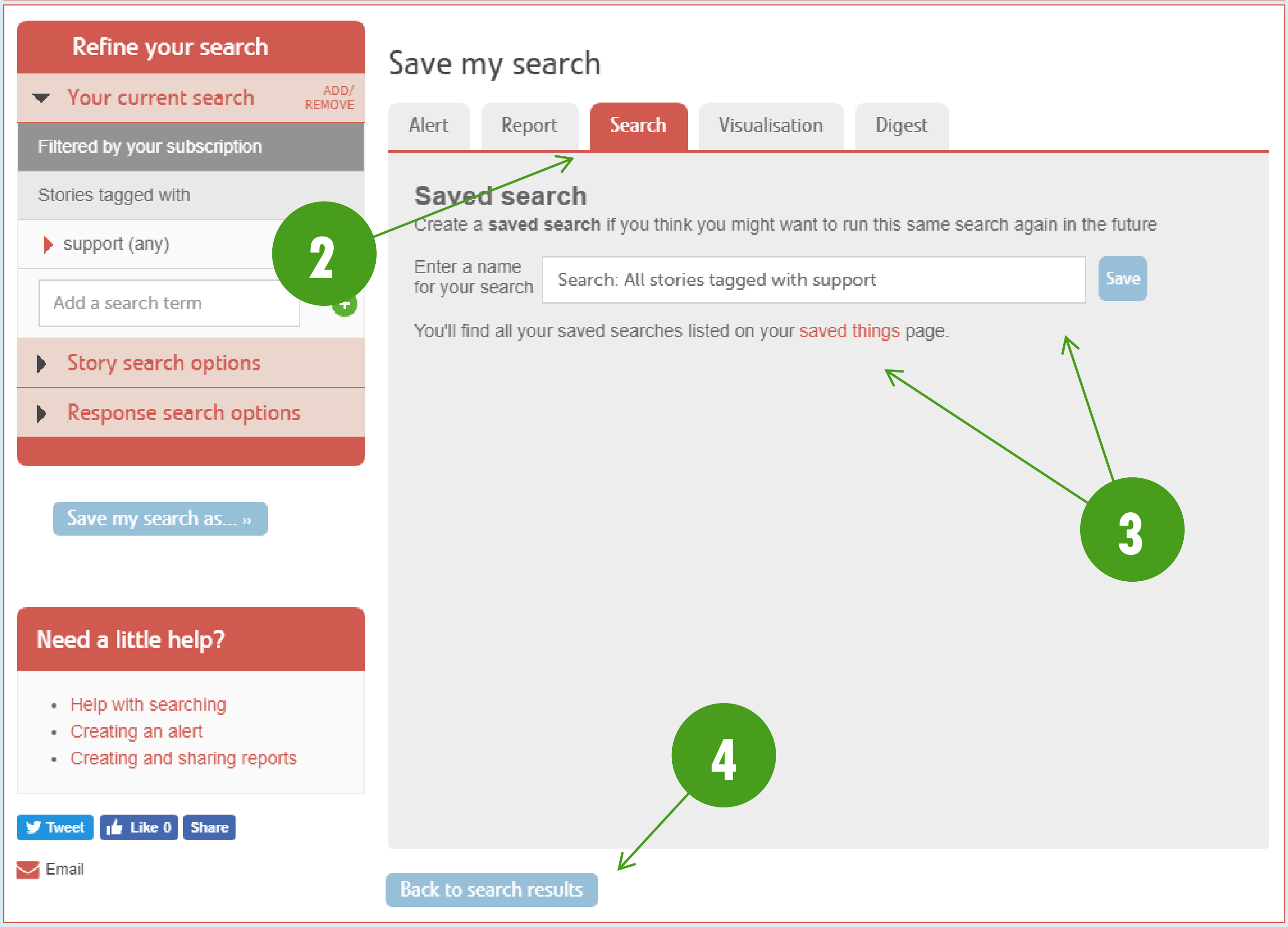
Searches are the basis for all alerting, and generating reports and visualisations on the platform - to set a story alert, you will define what stories you want to receive notification of by creating a story search; to pull a report, you will define the data set of stories by creating a story search. 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

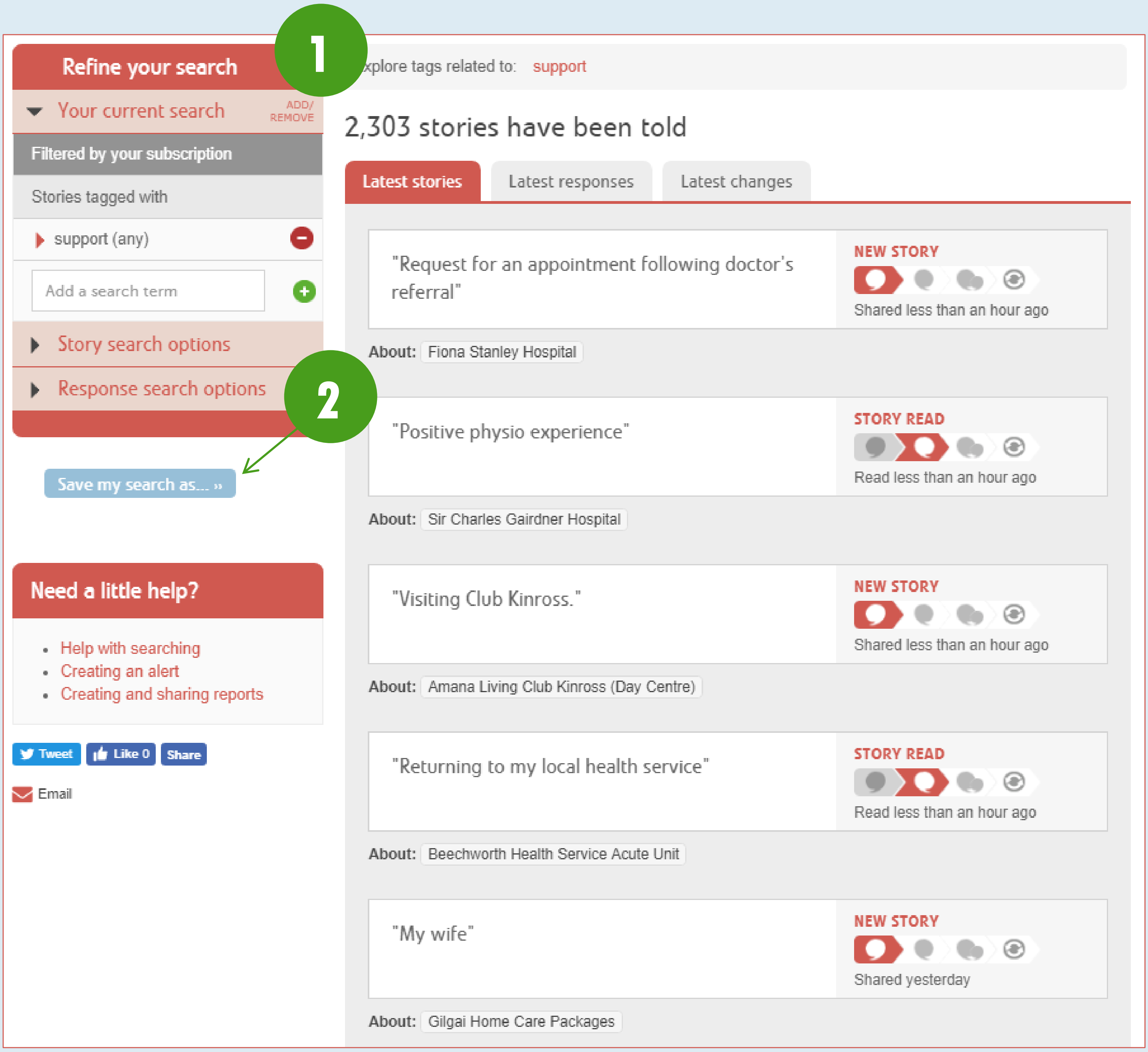
1. Once the appropriate search terms and filters have been added, click ‘Save my search as…’
2. Click the ‘Search’ tab
3. Enter a name for your search and click ‘Save’ – saved searches are added to and can accessed through your ‘Saved things’ and a link to this is located in the navigation drawer and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

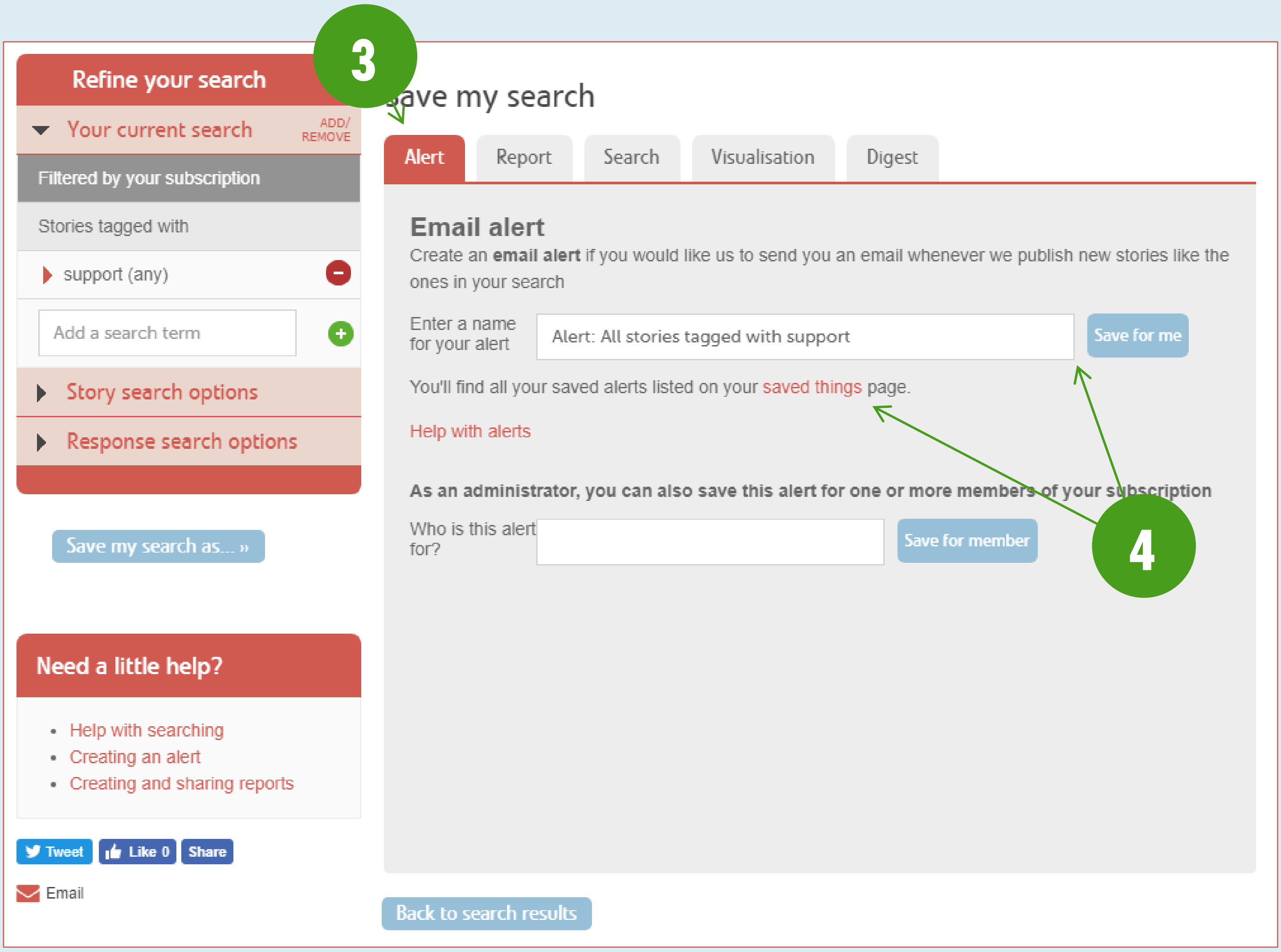


ALERTS

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 navigation drawer and below the 'Save for me' button

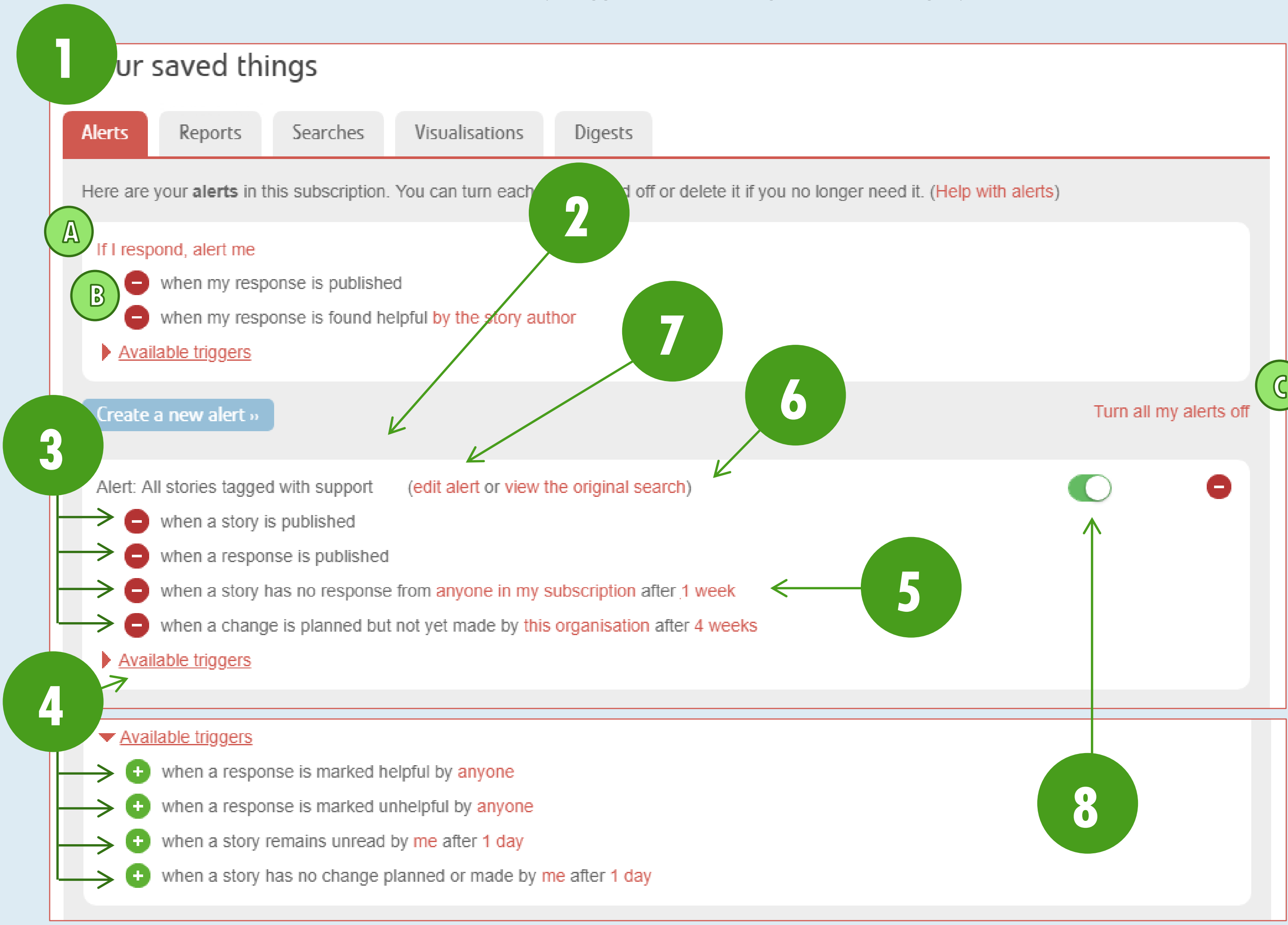



3
Refine your search
Your current search
ADD/ REMOVE
Filtered by your subscription
Stories tagged with
support (any)
Add a search term
Story search options
Response search options
Save my search as... »
Need a little help?
Help with searching
Creating an alert
Creating and sharing reports
Tweet
Like 0
Share
Email
Save my search
Alert
Report
Search
Visualisation
Digest
Email alert
Create an email alert if you would like us to send you an email whenever we publish new stories like the ones in your search
Enter a name for your alert
Alert: All stories tagged with support
Save for me
You'll find all your saved alerts listed on your saved things page.
Help with alerts
As an administrator, you can also save this alert for one or more members of your subscription
Who is this alert for?
Save for member
4
Back to search results

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



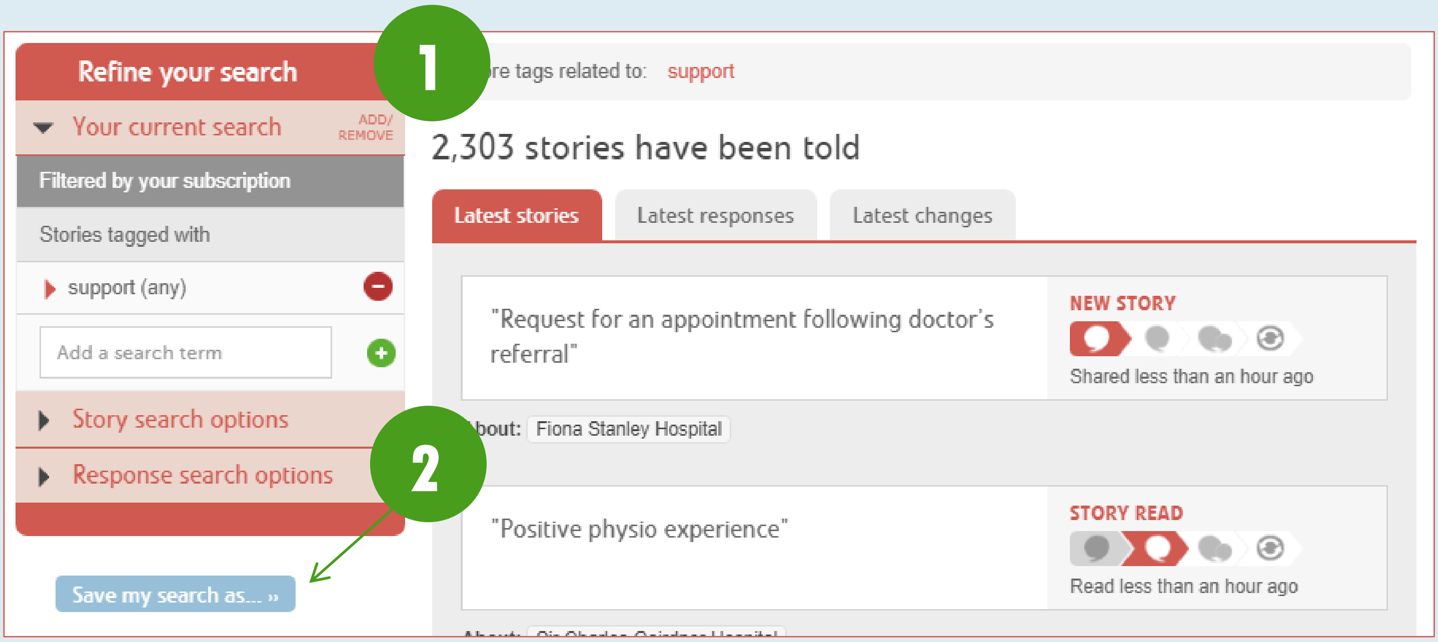
If you are a person with responding rights, such as a 'Responder' or an 'Administrator' you will also have an alert with triggers for when you post a response (A) – this alert is automatically added to your saved things, and can be deactivated by removing all active triggers (B).

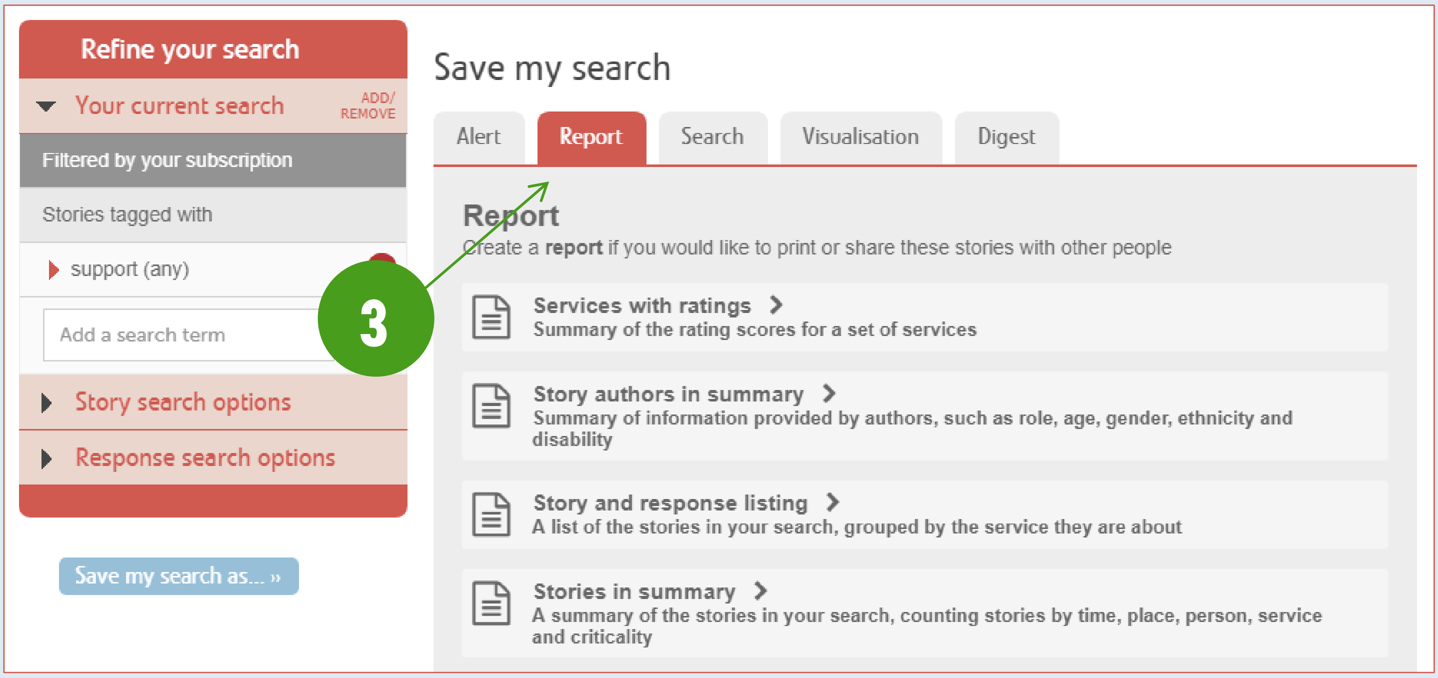
To deactivate all of your alerts (if you have multiple), click 'Turn all my alerts off' (C). This does not include your response alert.

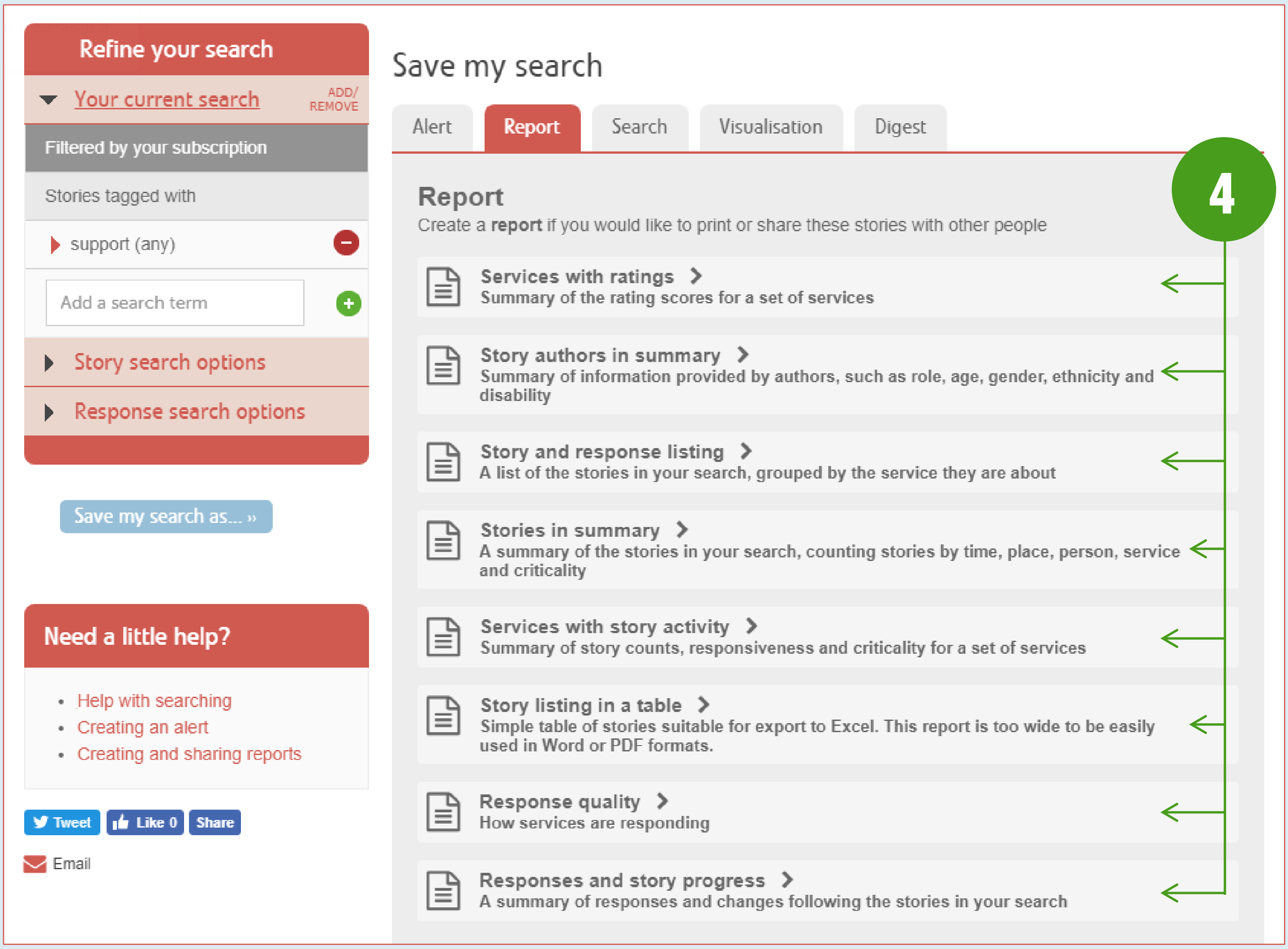
REPORTS

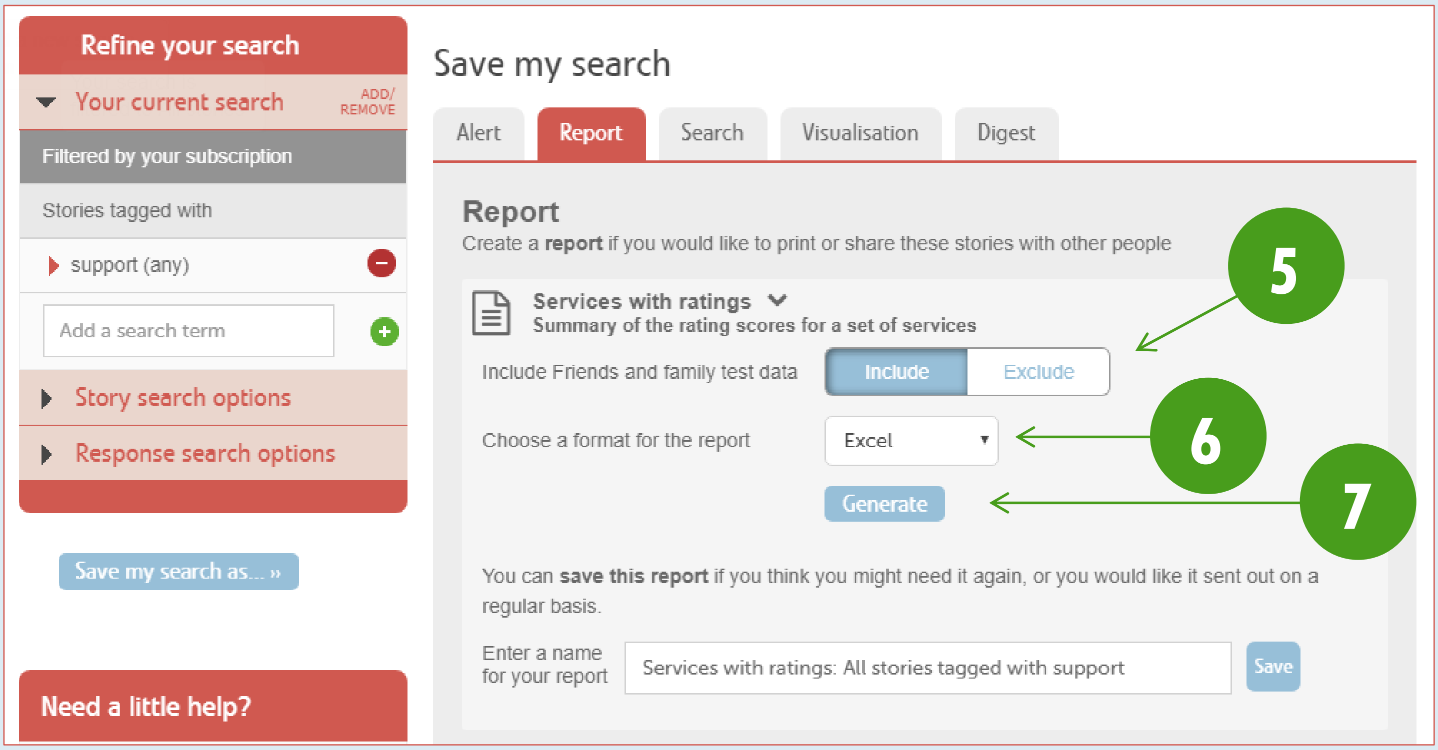
Reporting can be generated from any pool of stories refined from a search. This will allow you to generate data-driven information relevant to you and your organisation. To generate a report:

1. Create a search with the relevant filters
2. Click 'Save my search as...'
3. Click the 'Report' tab
4. Select your desired report
5. Select any report-specific options available
6. Select your desired file type from the drop-down options
7. Click ' Generate' – generation of the report may take a short while, depending on the number of stories filtered by the search; when the system has generated the report, it will begin downloading





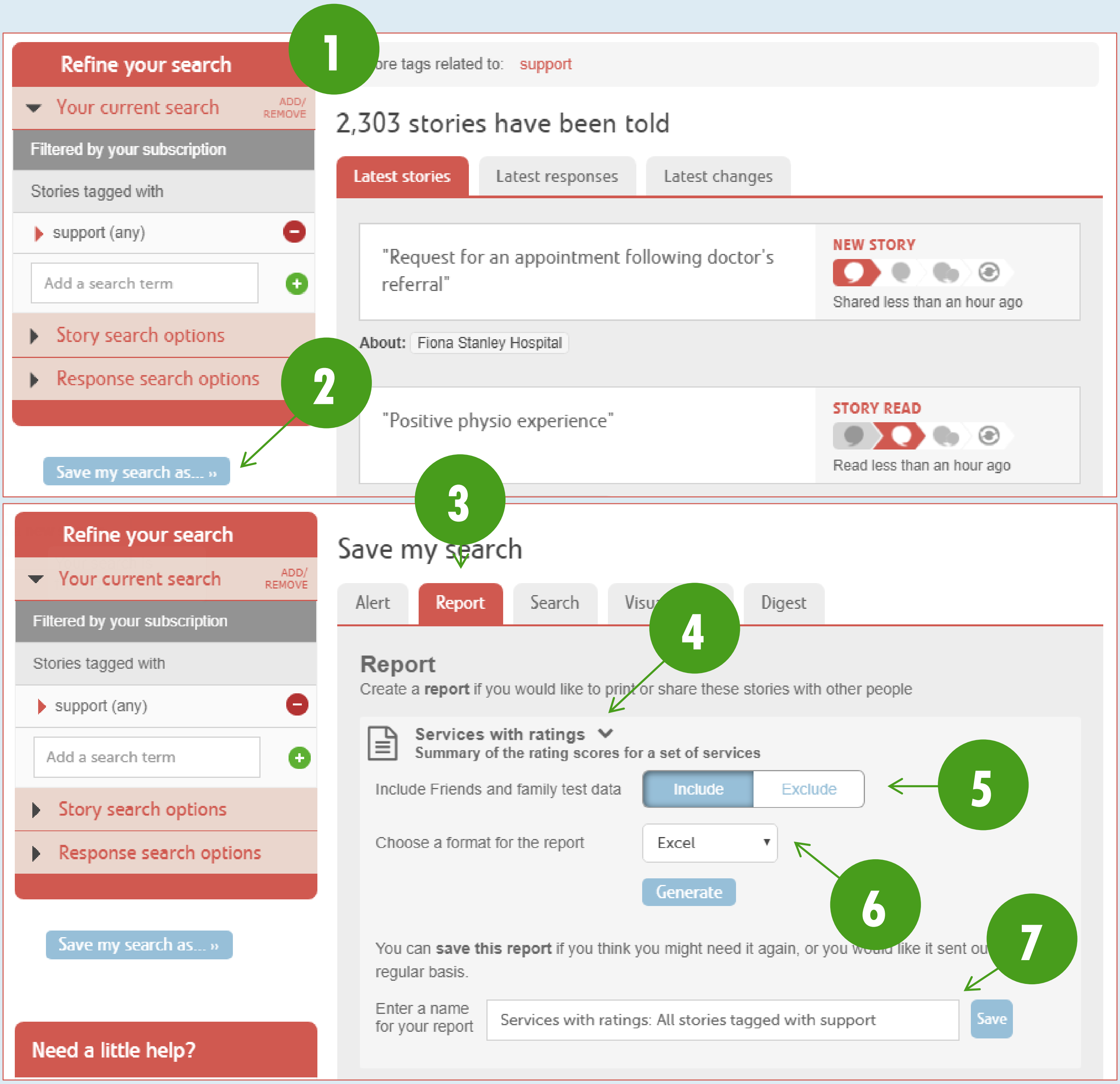

Refine your search
Your current search
ADD/ REMOVE
Filtered by your subscription
Stories tagged with
support (any)
Add a search term
Story search options
Response search options
Save my search as... »
Need a little help?
Help with searching
Creating an alert
Creating and sharing reports
Tweet
Like 0
Share
Email
Save my search
Alert
Report
Search
Visualisation
Digest
Report
Create a report if you would like to print or share these stories with other people
Services with ratings
Summary of the rating scores for a set of services
Story authors in summary
Summary of information provided by authors, such as role, age, gender, ethnicity and disability
Story and response listing
A list of the stories in your search, grouped by the service they are about
Stories in summary
A summary of the stories in your search, counting stories by time, place, person, service and criticality
Services with story activity
Summary of story counts, responsiveness and criticality for a set of services
Story listing in a table
Simple table of stories suitable for export to Excel. This report is too wide to be easily used in Word or PDF formats.
Response quality
How services are responding
Responses and story progress
A summary of responses and changes following the stories in your search
4


Refine your search
Your current search
ADD/ REMOVE
Filtered by your subscription
Stories tagged with
support (any)
Add a search term
Story search options
Response search options
Save my search as... »
Need a little help?
Save my search
Alert
Report
Search
Visualisation
Digest
Report
Create a report if you would like to print or share these stories with other people
Services with ratings
Summary of the rating scores for a set of services
Include Friends and family test data
Include
Exclude
Choose a format for the report
Excel
Generate
You can save this report if you think you might need it again, or you would like it sent out on a regular basis.
Enter a name for your report
Services with ratings: All stories tagged with support
Save
5
6
7

SAVING A REPORT

You can save a report if you may need that report again. To do this:

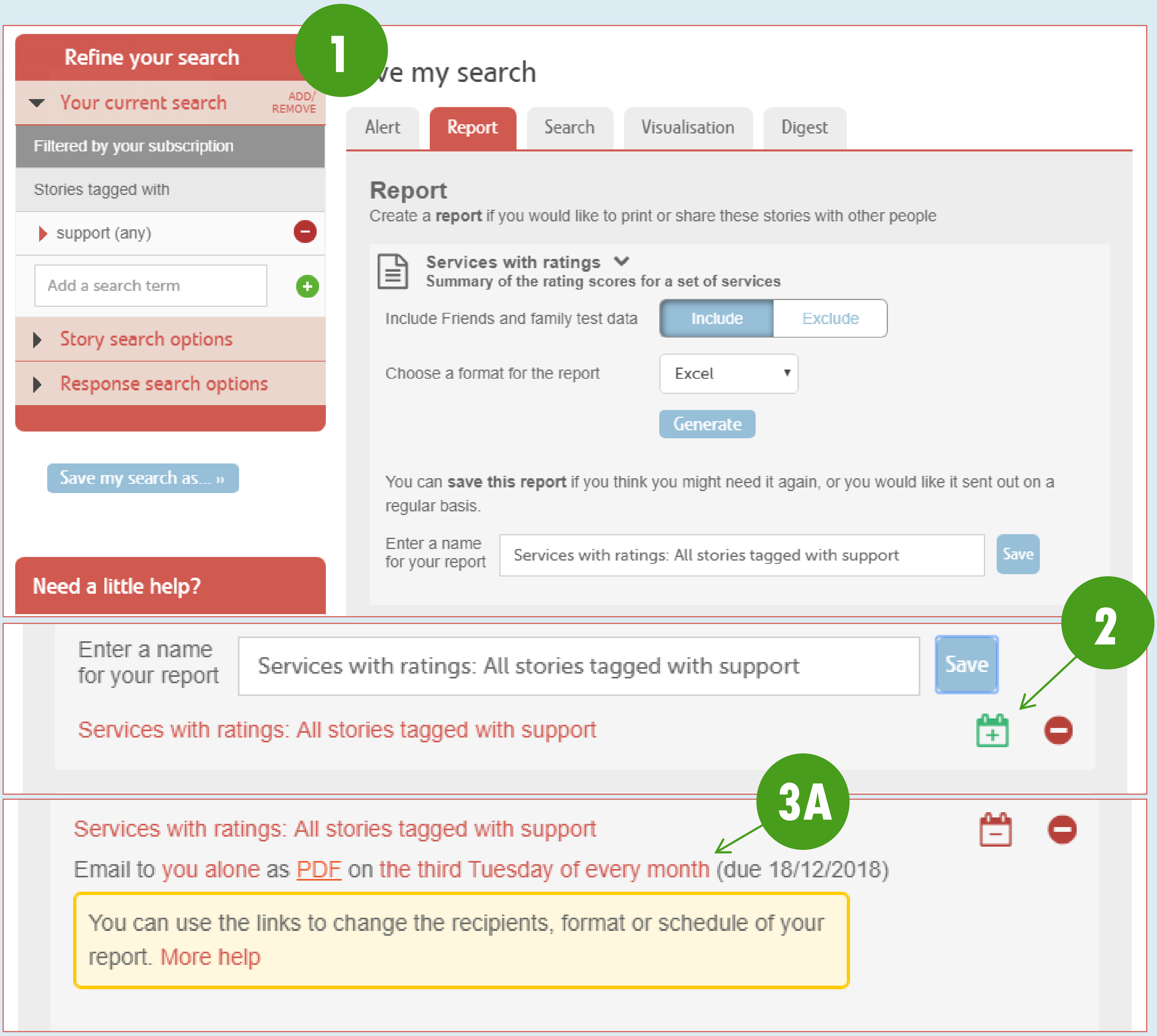
1. Create a search with the relevant filters
2. Click 'Save my search as…'
3. Click the 'Report' tab
4. Select your desired report
5. Select any report-specific options available
6. Select your desired file type from the drop-down options
7. Enter a name for your report and click 'Save' – saved reports are added to and can accessed through your 'Saved things' and a link to this is located in the navigation drawer and below the 'Save' button



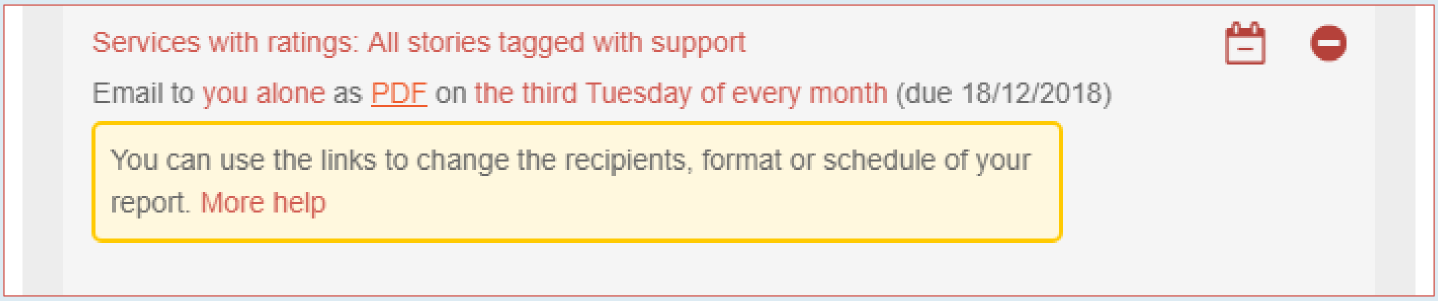
SCHEDULING A SAVED REPORT

You can also request that a saved report generate on schedule – for example, on the 1st of each month you may wish to pull a report for all stories published about your subscription in the previous month. To schedule a saved reports generation:

1. Create a search and save it as a report
2. Click on the calendar icon
3. To update the frequency of the report, click on the day and date, then select the appropriate frequency option from the pop-up menu and click 'Update' to save
4. Your automatic report is now set – to return to the search, click 'Back to search results'




Update delivery schedule
3B
Stories in summary: All stories tag
support
How often should this report be sent?
Weekly
Monthly
Day 8 of every 1 month(s)
Update
The Fourth Friday of every 1 month(s)
Update
Yearly
Cancel
3C

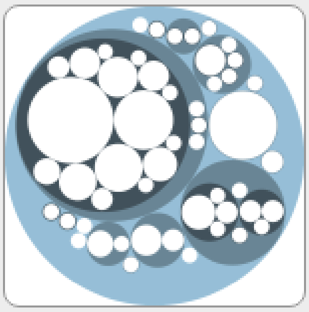

Services with ratings: All stories tagged with support
Email to you alone as PDF on the third Tuesday of every month (due 18/12/2018)
You can use the links to change the recipients, format or schedule of your report. More help

VISUALISATIONS

For a more visual representation of your data, you have access to visualisations. These are fully-interactive, data sets that allow you to focus on various aspects of the stories that are shared about your organisation. To generate a visualisation:

1. Create a search with the relevant filters
2. Click 'Save my search as…'
3. Click the 'Visualisation' tab
4. Select the visualisation you would like to generate and click 'Preview [visualisation type]'

Lily pad

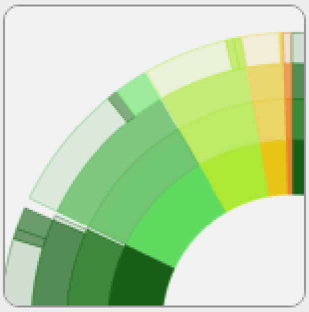


This shows how your stories are spread according to the services they relate to. Each circle represents an organisation or the services it provides. The more stories about a service, the larger the circle for that service.

Some stories are about multiple services, so you may see services outside your subscription scope on the lily pad.

Preview lily pad

Sunburst

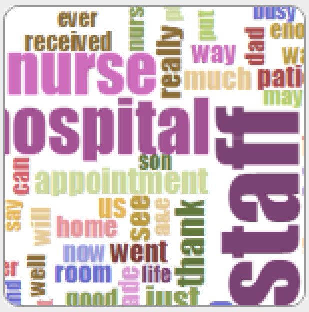


This shows how stories progress from being told to being read, responded to and perhaps leading to change too. Stories are grouped by criticality.

Preview sunburst

4

Tag word cloud

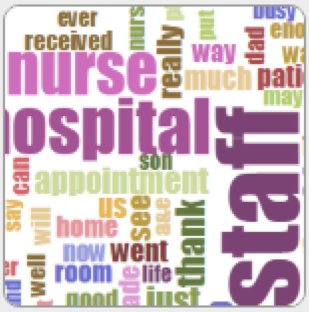


This shows the most popular tags for your stories as words, sized according to use. You can choose the tags people used to say "what was good", "what could be improved" or "how did you feel?"

What was good? ▾

Preview tag word cloud

Story word cloud



This shows the most commonly used words in the text of your stories, based on the last 100 stories.

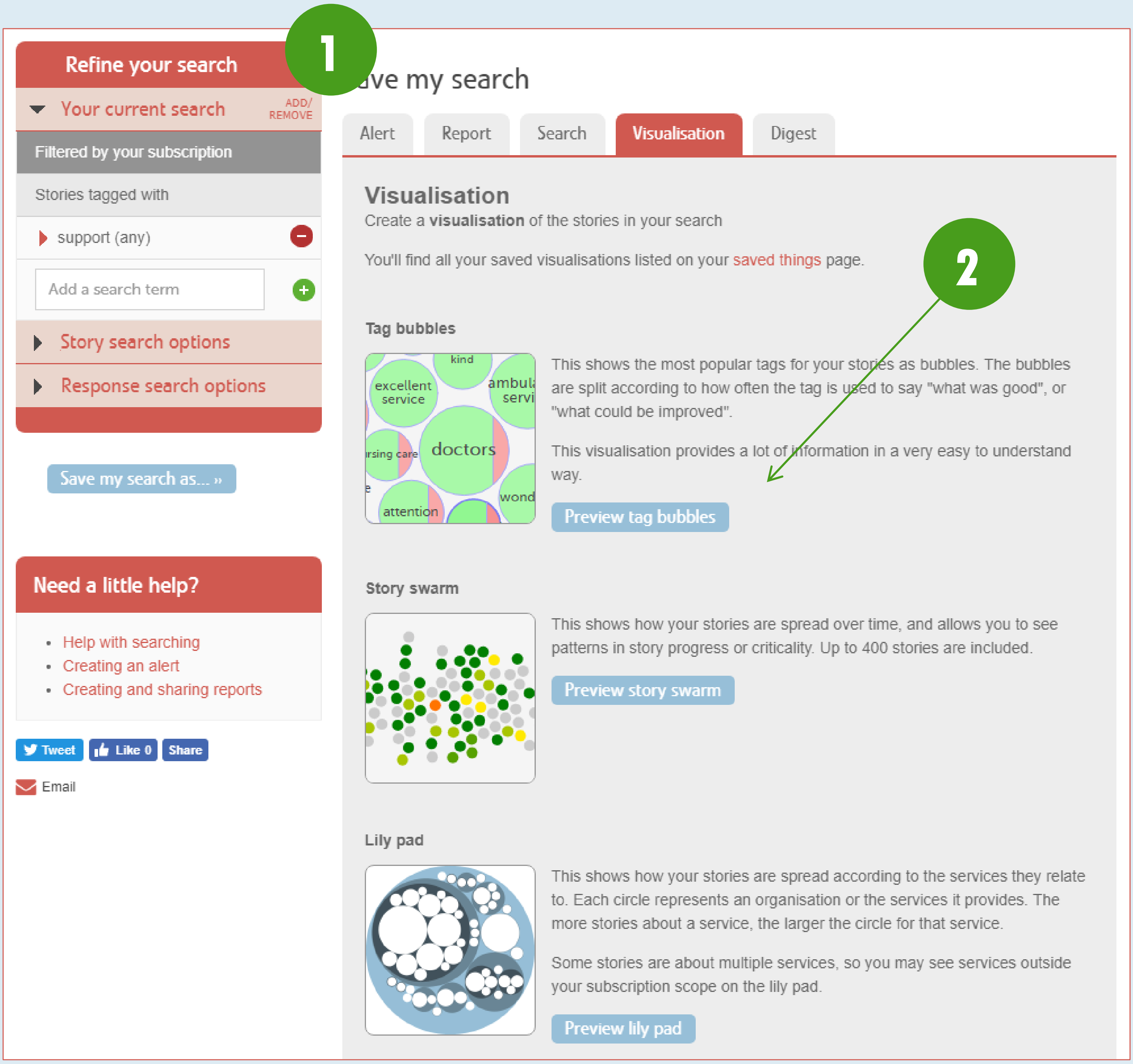
Preview story word cloud

Back to search results

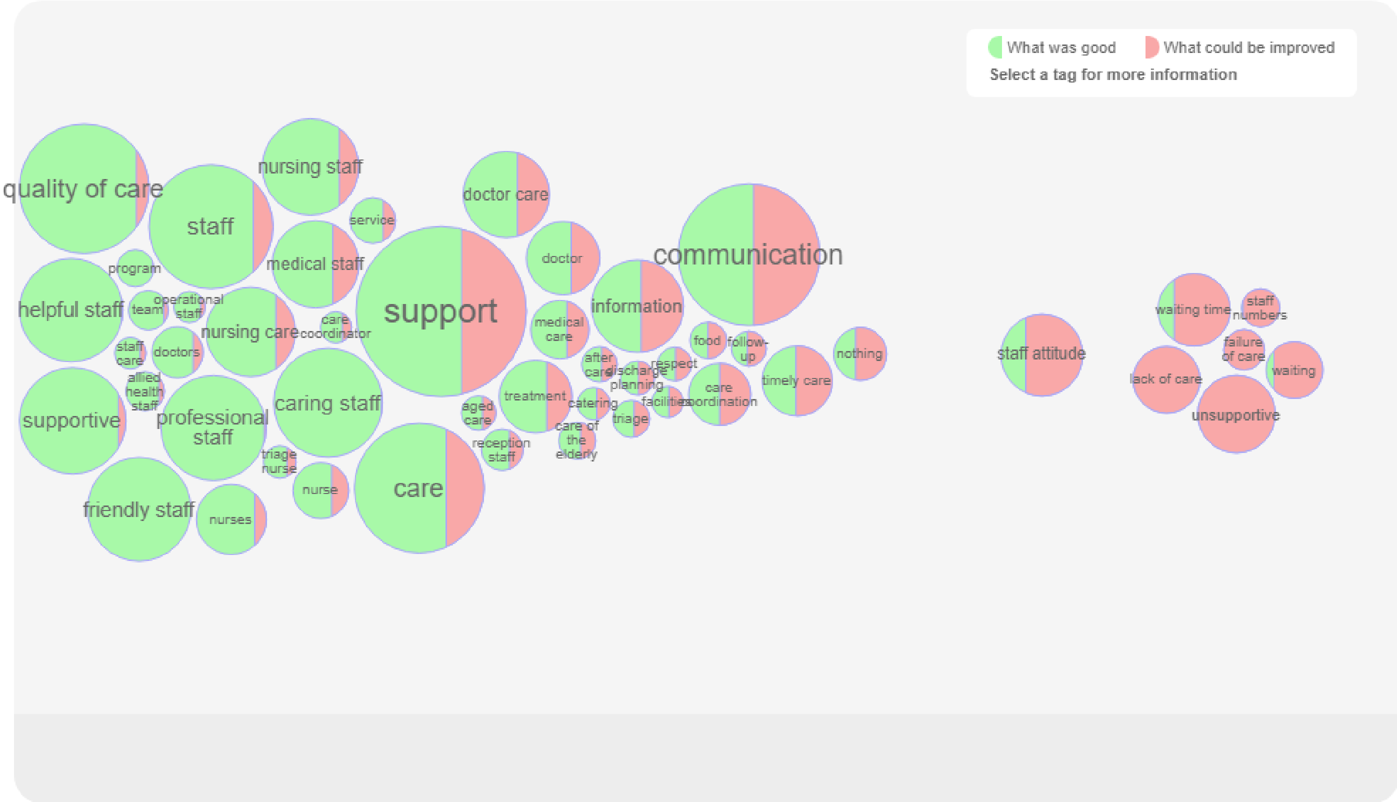
SAVING AND SHARING VISUALISATIONS

You can save your visualisations for later use, as well as generate a short-URL for sharing with others. To do this:

1. Create and save a search, and select the 'Visualisation' tab
2. Select the visualisation you would like to generate and click 'Preview [visualisation type]'
3. Enter a name for the visualisation
4. Enter a description for the visualisation
5. Select how you would like to sign the visualisation (this is how it is displayed when you share it publicly) – you can sign with your [name, role, organisation], [role, organisation], or just [organisation]
6. Click 'Save and share'
7. Click the link to view the visualisation or copy it and share it with others



Tag bubbles



Save and share

To share your tag bubbles with others, you save it with a name and a short description.

Once it is saved, we give you a simple link which you can share with *anyone* - no login to Care Opinion is needed.

You can see all of your saved visualisations on your saved things page.

Name 3

Enter a description for your tag bubbles visualisation: Interactive tag bubbles about All stories tagged with support 4

How would you like to sign your visualisation? Anthony Bishop, Project Officer, Care Opinion Australia 5

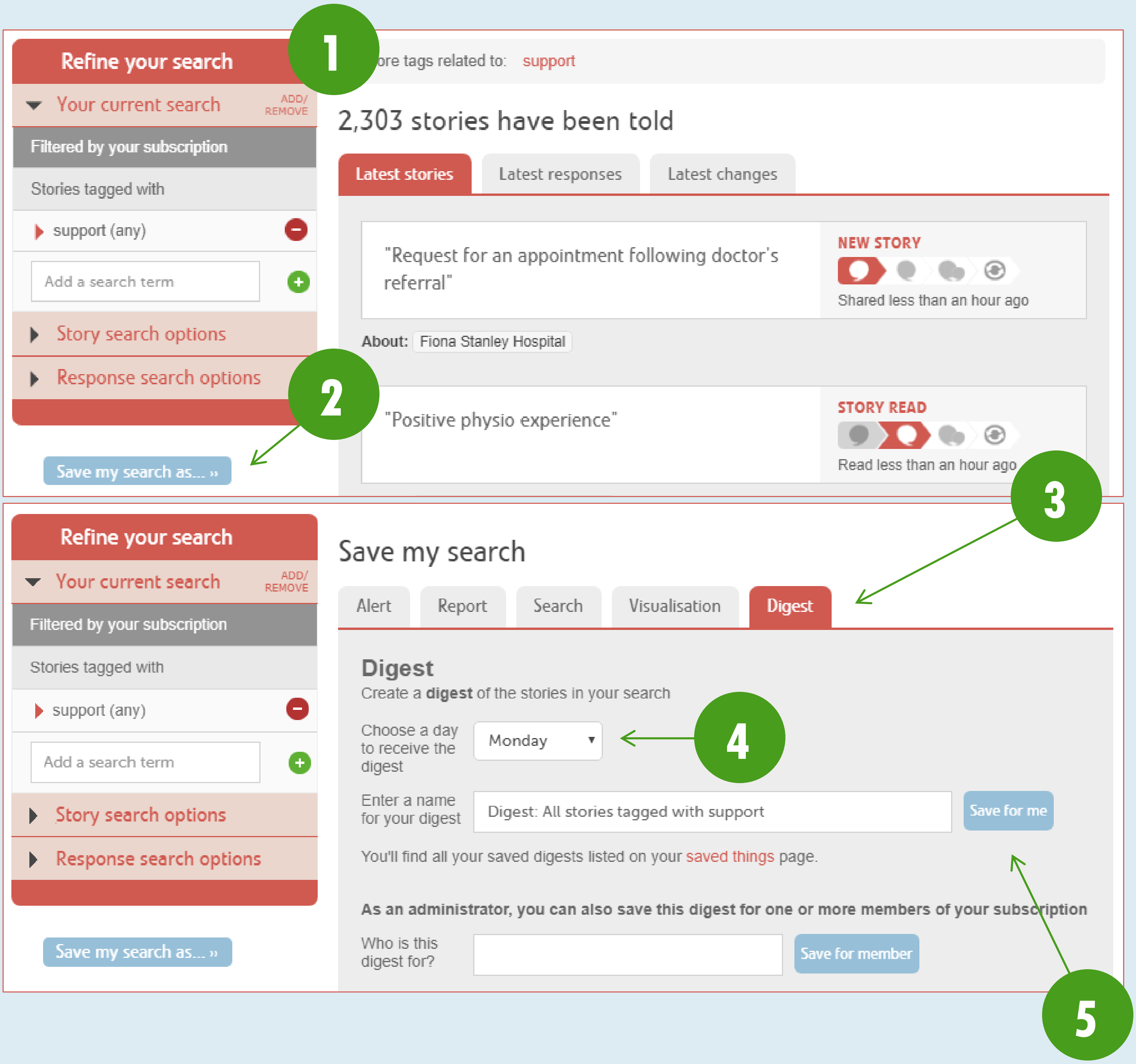
Save and share 6

Your visualisation is now available here: https://www.careopinion.org.au/vis/mp6nn 7

DIGESTS

Digests are available if you would just like to see a brief overview of the activity in your subscription over the past 7 days. It summarises the number of stories, responses and changes published about your subscription over this time period – and you can set up the digest to be sent to you weekly, on any day of the week you would like. To create a digest:

1. Create a search with the relevant filters
2. Click 'Save my search as...'
3. Click the 'Digest' tab
4. Select the day you want to receive the digest from the drop-down options
5. Type a name for your digest and click 'Save for me'



ADDITIONAL INFORMATION AND GUIDES

New features are added to the platform regularly – check out our blog to see the latest updates. You can access the 'Help' pages from your navigation drawer 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