

The background consists of a repeating pattern of speech bubbles. Most are dark red outlines on a dark purple background. One speech bubble in the lower right quadrant is white with a white outline and contains the text "Managing your Subscription".

**Managing
your
Subscription**



Before we start!

This training is for **Operational Leads** and **subscription administrators**.

We will be **recording the session** and will share the slides and recording in a follow up email.

We sent a survey ahead of time, asking everyone what they would like us to focus on during this training. The winning topic was...

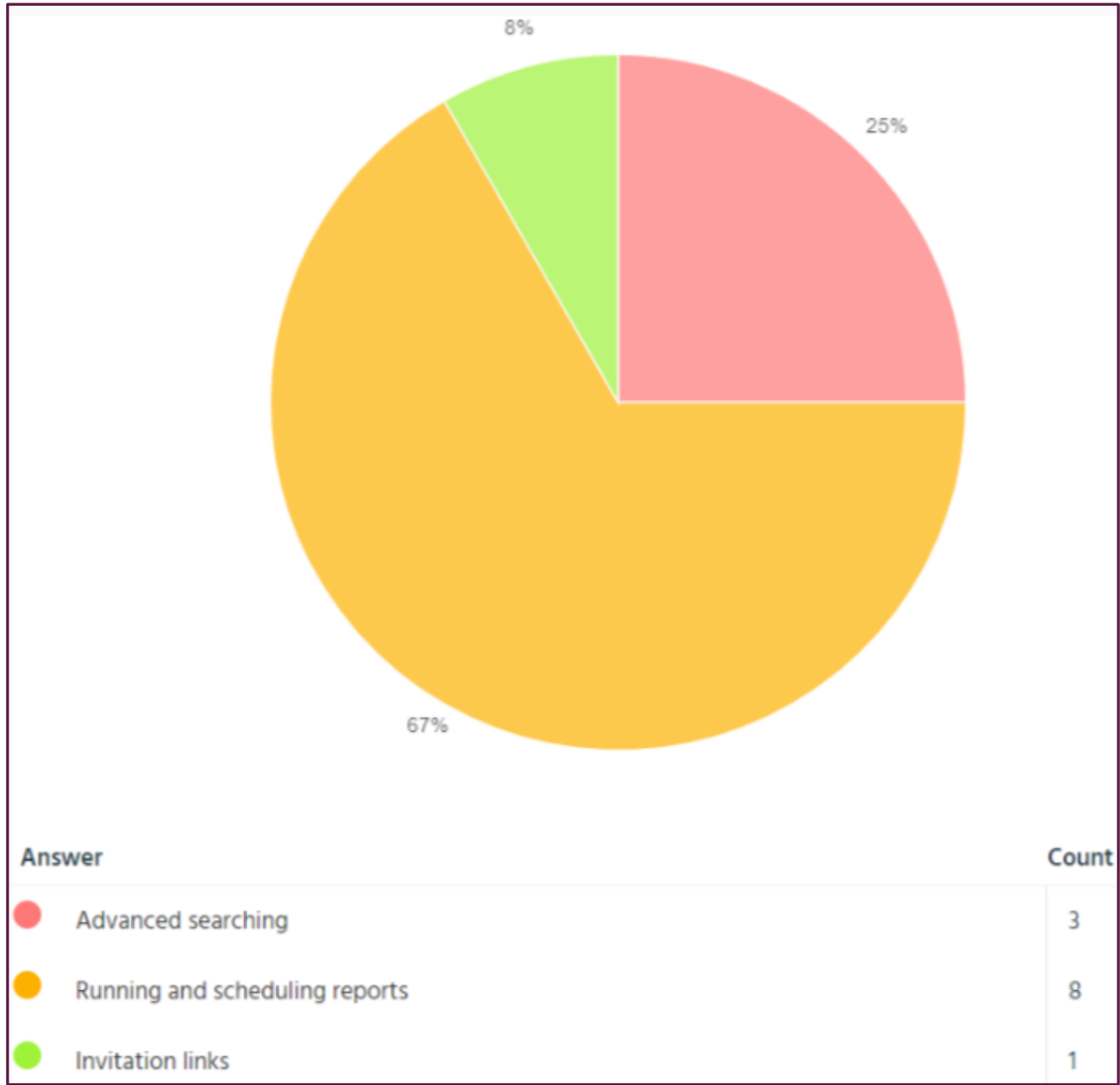
Running & scheduling reports

We aim to hold another session at a later date, covering a different topic.

We'd love for you to give us some feedback after the session so we can make these as helpful to everyone as possible.

Thanks!

Danielle & Lisa



In this session we will help you to:-

- Understand the role of the **Operational Lead** and how subscription queries are handled
- Understand the features of your role as an **Administrator** on the subscription
- Hints and tips for managing your members and **getting the most out of your subscription**
- **Advanced searching** and ways to **collate stories** for reporting
- Running and scheduling **reports**

Care Opinion Scotland history



All territorial health boards & special health boards



13 Partnerships and 3 Hospices



44,746 stories published*



19% increase in number of staff listening.



40% increase in number of stories told from the previous year.



In April 2022, the Scottish Government renewed the Care Opinion subscription for all health boards until March 2026.



37% increase in number of stories from the previous year



2021

2022

2023

2024

*As of 2nd February 2024

Lisa Dendy
Engagement & Support Officer



Who do I support?

NHS Ayrshire & Arran

NHS Dumfries & Galloway

NHS Highland

NHS Tayside

NHS Grampian

Angus Health & Social Care Partnership

Perth Health & Social Care Partnership

Dundee Health & Social Care Partnership

Aberdeen City Health & Social Care Partnership

North Ayrshire Health & Social Care Partnership

South Ayrshire Health & Social Care Partnership

East Ayrshire Health & Social Care Partnership

**DID YOU
KNOW?**

**That's approx
2,000
people!**



FUN FACT

I lived and worked in Thailand for 1 year and have a 4 month old border collie puppy

Danielle McEwan
Engagement & Support Officer



Who do I support?

NHS 24
NHS Lothian
NHS Borders
NHS Lanarkshire
Kilbryde Hospice
NHS Forth Valley
NHS Western Isles
Golden Jubilee National Hospital
Falkirk Health & Social Care Partnership
North Lanarkshire Health & Social Care Partnership
South Lanarkshire Health & Social Care Partnership



FUN FACT

I've many random skills! I'm trained in massage, facials and crystal therapy.
I'm a trained adult nurse (but no longer registered). I also know a little Spanish & BSL.



**The role of
the
Operational
Lead**

The role of the Operational Lead(s)



The **Operational Lead(s)** is central to the day to day running of the Care Opinion subscription for the organisation.

They are our **main contact** for any subscription related enquiries (we'll cover more specific examples in the following slides).

Essentially, **nothing happens to the subscription without the go ahead from the Operational Lead(s)!**

As the Operational Lead(s) you will be **coordinating** how Care Opinion is used throughout the organisation. This includes **member management, material management** and **training**. The great news about this, is that you can make the subscription your own!

An example of this is in NHS GGC – The Organisational Lead(s) have set up a process for new responders, that includes mandatory training before responding to stories.

Managing requests and enquiries



Requests for access/removal to the subscription (e.g. new responders)

We will forward all user requests to the Operational Lead(s) to action. Administrators can also add/remove users, the operational lead should field these requests.



Requests to add new services to the service tree

We will forward these requests to the Operational Lead(s) to action. Any additions/changes to the service tree must come to us from either the Operational or Executive Leads.



Requests for promotional materials

We will forward these requests to the Operational Lead(s) to action. The Operational Lead(s) has overall responsibility for the ordering & distribution of any materials for the organisation, including additional paid orders.




Requests for assistance with routine tasks

We will forward requests for help with routine tasks such as setting up/amending alerts & invitation links to the Operational Lead(s) to action.



Our wonderful development team have been working hard behind the scenes to **create a space on the website** for Operational Leads to **share key information** with new and current subscription members.

We'll provide more details in the coming weeks...

The background of the image is a dark purple color with a repeating pattern of speech bubbles. Each speech bubble is outlined in a lighter purple color. One speech bubble in the lower right quadrant is highlighted with a white outline and contains white text.

**The role of a
Care Opinion
Administrator**

Tasks you will come across as an administrator on Care Opinion...

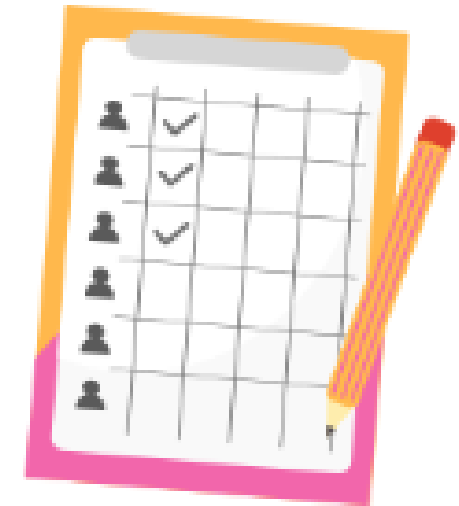
Subscription Member Management

- Adding or removing members from the subscription.
- Changing roles of staff members e.g from Member to Responder.
- Changing the member ownership of Invitation Links.
- Responding on behalf of your organisation or a specific service within this.
- Making sure stories are responded to well and are timely – monthly subscription checks



Other Tasks

- Sharing Care Opinion resources with staff– training recordings, information, links
- Keeping track of training needs of staff – new and refresher
- Assistance with setting up or amending alerts
- Assistance with creating and scheduling reports and visualisations
- Assistance with creating and customising Invitation Links/QR codes
- Customising Service pages with description and picture
- Communications with staff via, meetings, emails, social media
- Communications about learning, experience and development via Blog feature.
- Encouraging use of Profile details/profile picture.
- Communicating with Care Opinion Support Lead about any support needs



Understanding member roles

- Browse, search and view stories and responses
- Manage their own email alerts/assets
- Create, export and schedule reports
- Create, share and schedule data visualisations
- Add private and shared story tags

- Respond to stories and show changes
- Create and publish blog posts
- Create Invitation Links
- Add public story tags

- Add and remove subscription members
- Freeze and unfreeze subscription members
- Change the role of a member
- Edit a members profile details
- View, edit & amend members assets
- Respond on behalf of another member
- Manage assets/alerts for other members
- Create Invitation Links & transfer ownership
- Customise service pages
- Access API keys



Member

Responder

Administrator



Adding new members/responders

Step

1



Add the person to your subscription. You will need to give them one of the following permissions:

- Member
- Responder
- Administrator

Step

2

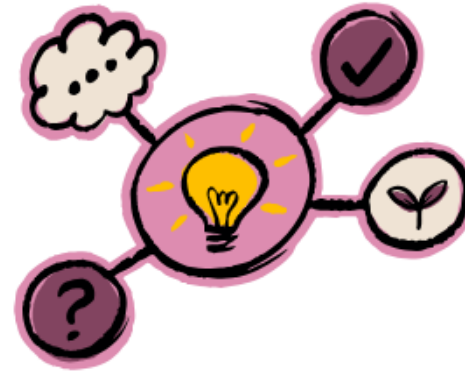


Set up an alert for the service(s) that the person wishes to be notified about.

N.b. Users can set up, manage and delete their own alerts too!

Step

3



Think about what training new users may need. You can find out what's available using the link below:

[Training and support webinars | Care Opinion](#)

Step

4



Find out if any Care Opinion materials are required and supply what you can.

If the service is new to using CO, have a chat about promoting stories and how you can support this.



Alerts

Your search

Your current search ADD/
REMOVE

Filtered by your subscription

Stories about

North Lanarkshire Health & Social Care Partnership / Community Services (refine)

Add a search term +

▶ Story search options

▶ Response search options

▼ Create in your subscription

Save search

Create alert

Create report

Create visualisation

Save my search

Alert Report Search Visualisation Digest Tagging Moderation

Alert

Your current search:
all stories about North Lanarkshire Health & Social Care Partnership / Community Services

Create an alert to be notified about new stories matching your search

Use our suggested alert name or enter your own (this will not change the alert itself):

Alert: all stories about North Lanarkshire Health & Social Care Partnership / **Save for me**

As an administrator, you can also save this alert for someone in your subscription

Save for member

Find all your saved alerts on your [saved things](#) page.

[Help with alerts](#)

[Back to search results](#)

[View this search on our new search page](#)

(Only site admins can see this, some filters might not be supported yet)

A few tips for setting up correct alerts:

- **Anyone** can set up, amend or delete their own alerts
- Our advice is to **always ensure that an alert is linked to a service**
- You can set up alerts for specific words that are mentioned in stories, but this is **not always 100% reliable** due to spelling mistakes or variations of words, e.g. 'Treatment room' and 'Treatment Rooms'
- Any queries regarding alerts will be passed onto the **Operational Lead to action**

As an Operational Lead/Administrator...


You can set up an alert for another member on your subscription, as shown here.





Updating member profile details





Beaker Beaker
Fictional NHS Organisation
beaker@invalid.com ⓘ


 Member details


Role
Administrator 

Job title
Chief Nurse 

Department
Dermatology 

Organisation
United Lincs 

Phone number
(No phone number) 

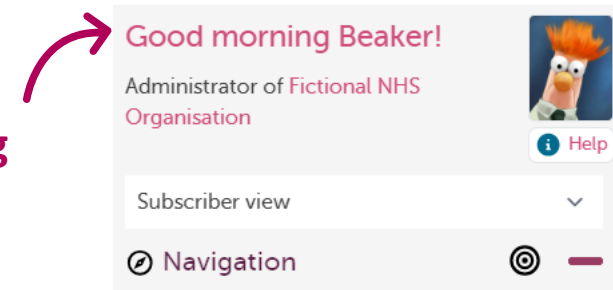
What I do
(No job description) 


It's really important as an administrator to encourage responders to **update and maintain their profile details**.

The information from here **is pulled over into responses and invitation links**, so it saves a lot of confusion when these things don't quite look right later on.

Anyone can update their own profile at any time (this doesn't have to be done by administrators).

Access your profile by **clicking the greeting** above the navigation panel, e.g. "Good morning..."



Good morning Beaker! 

Administrator of Fictional NHS Organisation ⓘ Help

Subscriber view ▾

Navigation ⓘ



Personalise your Care Opinion subscription

Create your own induction plan



You have the flexibility to decide upon your own induction plan for new CO members.

This may include:

- Ensuring new responders attend training
- Set your own goals for response times
- Discuss and provide any promotional materials the service may need

Update your service pages

Falkirk Health & Social Care Partnership

(Health and social care partnerships)

Description

We are one of 31 integration bodies in Scotland, serving a population of over 160,000 across Falkirk's rural and urban communities.

Resources

[Our website \[FalkirkHSCP.org\]](#)



Service pages can be customised so that they are more helpful for site users, as well as looking brighter.

Tell authors a little about each of your services, and add a wee picture if you'd like!

Create your own materials

NHS Somerset
NHS Foundation Trust

Please tell us about your care from Somerset NHS Foundation Trust

Share your story at [Careopinion.org.uk](https://careopinion.org.uk)

Care Opinion is an independent website. We make it safe and simple for people to share honest feedback about their care.

All our material is ready to be sent to commercial printers, simply download the files you want and send directly to your printers. You can customise the materials below for individual teams and departments. **Add your organisation logo, your customised invitation link and the name of the team or department.**



“This story isn’t for me...”

" Tea bag bins "

NEW STORY
This is a new story (less than two weeks old)

About: North Devon District Hospital / Fern Centre

Post: It was v bin for t

[Return to the story](#)

Alert: **We haven't notified you about this story**

Who has Care Opinion told about this story?

We have told 2 members in your subscription

- Fictional NHS Organisation
 - John Demo-Responder
 - Patient Experience Coordinator
 - Kermit Example-Admin
 - Head of Communications

Royal Devon University Healthcare NHS Foundation Trust 9 told

We get many queries from responders advising us that a story is not meant for them. This normally happens for a couple of reasons:

- Their **alerts** are incorrect
- The **incorrect service** has been linked

Using the “**who has Care Opinion notified about this story**” function can be really helpful in this situation.

You can find this on every story – on the right hand side under “**activity**”

Here you can see who has been **alerted, read** or **responded** to the story (within your subscription).

If we need to re-link the story to another service, we will send out **new email alerts** to the appropriate people.



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**Running
& Scheduling
Reports**



Ways to gather stories to report on...

Search Function

This is the main route to running reports. Use the search function to build your search, you can filter by:

- Dates
- Service(s)
- Changes planned/made
- Type of author

And many more...

Invitation Links

You can report on stories told directly via an invitation link. Ideal for anyone working on projects or asking for feedback on specific topics.


Story Tags

You can add tags to stories as you read them. The website then collects these together for you.

You can then report on the stories based on the tag you have allocated.


For e.g, this is a process used by a local HB to identify stories with key themes, for their own organisational reports.

Select Language Size: **A** **A** **A** Contrast: **C** **C** **C** **C** BSL/ISL Welcome **Danielle**
 Your stories Log out


 **Care Opinion**
 What's your story?

Share your experiences of UK health and care services, *good or bad*.
 We pass your stories to the right people to make a difference.

Home **Tell your story** About us

Search for stories about... 
 eg Leeds General Infirmary, heart surgery, dementia, S3 8EN



 **Featured stories** [View latest stories](#)

"After 20 weeks of the therapy *my self esteem has grown* massively" **STORY READ**

About: Community Mental Health / Adult Psychological Therapies

"Our daughter was so cared for throughout" **STORY HAS A RESPONSE**

Care Opinion in 2 minutes



"I think my story is rather different about phones! But I think it made a difference not just for my mother but for other visitors and patients on that ward."

Live website demo



Any questions?



**Thank
you**