



## What is an invitation link?

An invitation link is a way for you to ask for feedback about a specific service or issue. An invitation link is basically a URL link that takes the user straight to a simplified version of telling their story on Care Opinion, that is already linked to your chosen service.

We have now made it possible for you to also:

- Personalise a welcome message
- Ask for feedback about specific things
- Add a theme (such as monkey for children and young people)

An invitation link also gives you the option to generate a QR code and you can also link an external survey.

For example, you may wish to gather feedback about a diabetes outpatient clinic. You can create an invitation link for this specific service. This means that when the link is used, the diabetes outpatient clinic will already be linked to the person's story.

You can also add tags to an invitation link. So using the example above, you could add the tag 'Diabetes' to the invitation link. Every story shared when using the link will then automatically be tagged with 'diabetes'. This can make it easier for you to search and report on the stories at a later date.

An invitation link looks like this:

<https://www.careopinion.org.uk/invitationlinks/test-link>

You can also hyperlink it, like this:

[We'd love to hear your feedback, click here to share your story with Care Opinion](#)

## How can I use an Invitation Link?

Invitation links can be added to most correspondence that you have with patients and/or service users. Here are some ideas:

- Emails
- Texts – appointment reminders etc
- Letters
- On staff email footers



## Other features of an invitation link

### QR Codes

Once you have created your invitation link, you will have the option to create a QR code. A QR code allows easy navigation to a pre-determined URL for anyone who has the use of a smartphone. As long as the location of the QR code is in an area with **good mobile signal/internet connection**, it can be a really useful tool. QR codes have successfully been used on posters in waiting areas for example.



Key features:

1. Simple to use for authors with smartphones.
2. Can be used on a number of materials such as posters, leaflets, emails etc.

Here is an example of what an invitation link will do when it's used by someone:

When this link is used:

- this service will be pre-selected for story authors: [East Surrey Hospital / Breast surgery](#)
- these tags will be added to stories told with this link:
 

communication (public)

customer service (shared)

test-tag (shared)
- after an author tells their story we will offer this invitation for additional feedback:
  - *Thank you for sharing your story about maternity care at East Surrey Hospital. If you have a moment, could you help us by completing our short maternity survey? This will take less than 5 minutes.*
  - using your link: <https://www.oc-meridian.com/>

## Sounds great! But how do I create one?

First, make sure that you're **logged in**

Then, in your navigation panel on the left of the screen, click "**invitation links**"



You should now be looking at this page. Here is where you can find all of the invitation links that have been created previously.

Home **Tell your story** About us


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

## Invitation links

Create an invitation link if you want to invite feedback about a specific service, automatically tag new stories, or offer your own online survey after a story is shared.

 [Learn more about invitation links](#)

Search by link name, tag or service code 

 **New invitation link**

▼ Link name	▼ Description	▼ Date created	▼ Created by
<a href="#">discharge-lounge</a>	Use this link to request feedback about the discharge lounge.	21/07/2021	Danielle McEwan
<a href="#">Dischangelounge</a>		02/12/2020	Danielle McEwan

To create a new invitation link, click on the **"+ New invitation link"** button

Now for the exciting part, naming your invitation link! This is what will form the end section of your invitation link and will be visible to anyone who uses it. You can see below we are naming this link **"district-nursing-test-link"**

In the description box, give more information about when the link should be used, or any other helpful tips. You can write anything in here, it will only be visible to those in your subscription.

## New Invitation Link

**Name**

The name will be used to create the URL for the invitation. Changing this after creation will mean the old link will stop working, so choose wisely!


You can customise an invitation link after creation.


(between 3 and 60 characters, letters, numbers and dashes)

**Description**

The description will be shown to other members in your subscription to describe how it should be used.

(max 400 characters)




 **Create**

click on **"Create"** when done

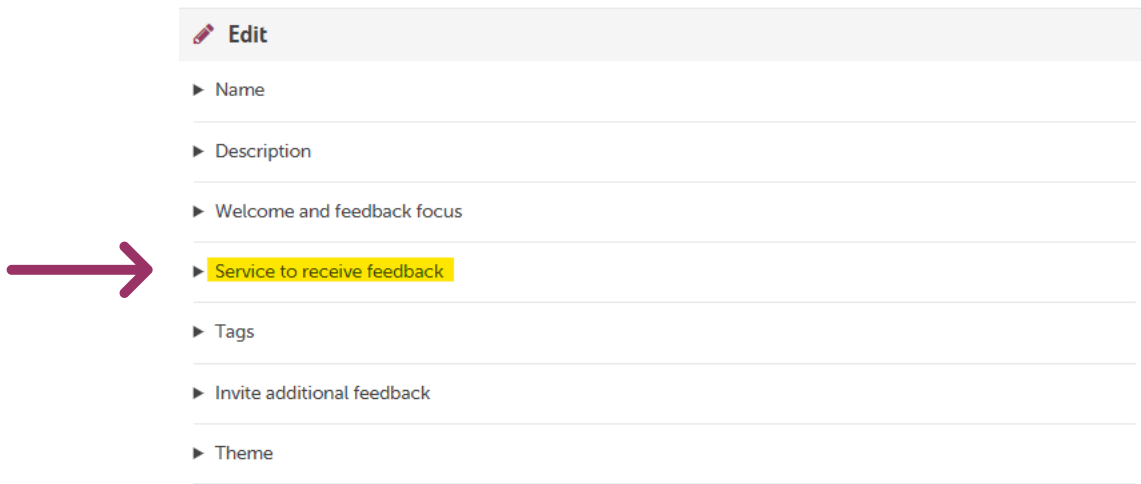
Almost there! You have now created an invitation link! However, we still need to link a service to it. Head on to the next page for instructions.

 **IMPORTANT!** Don't change the name of your invitation link after you have sent it out to people! 



 You now need to tell the website which service your invitation link is for. This is a vital step, if you don't complete this section, your invitation link won't work!

We are going to start by clicking the "service to receive feedback", highlighted below in yellow.



**Edit**

- ▶ Name
- ▶ Description
- ▶ Welcome and feedback focus
- ▶ **Service to receive feedback**
- ▶ Tags
- ▶ Invite additional feedback
- ▶ Theme

Type the name of your service in the "search for a service" box. A drop down menu with green + will then appear, like below:

▼ Service to receive feedback

If you want a specific service to be pre-selected in the "tell your story" workflow, add it here. (The story author can still choose other services their feedback is about.)

If you want to use your invitation link in kiosk mode, adding a service is required.

Search for a service


- + NHS Borders
  - + The Knoll Hospital
  - + Galavale House
  - + Hawick Community Hospital
  - + Andrew Lang Unit
  - + Kelso Hospital
  - + Hay Lodge Hospital
  - + Borders General Hospital
  - + Westport Day Unit
  - + Gala Day Unit
  - + Gala Resource Centre
  - + Scottish Borders Learning Disability Service
  - + Eyemouth Day Hospital
  - + Melburn Lodge
  - + Huntlyburn House
  - + Borders Community Services
  - + Borders General Practices
  - + Margaret Kerr Unit

Click on the **TITLE** of the service to move further down the tree. Once you are happy that you have the right service, click the **green +**.

In this case, we've chosen the district nursing service.

- + NHS Borders
  - + Borders Community Services
    - + CAMHS (Child & Adolescent Mental Health Service)
    - + Doing Well
    - + Covid 19 Vaccination Programme
    - + Borders quit your way / Stop Smoking Service
    - + Hospital to home service
    - + Borders Addiction Service
    - + Borders Crisis Team
    - + Dietetics
    - + District Nursing
    - + Mental Health for Older Adults Central and West, Firholm Day Unit

Once selected, a message will appear confirming your choice (highlighted below):

 **Edit**

▶ Name

---

▶ Description


---

▼ Service to receive feedback

If you want a specific service to be pre-selected in the "tell your story" workflow, add it here. (The story author can still choose other services their feedback is about.)

If you want to use your invitation link in kiosk mode, adding a service is required.

Borders Community Services / District Nursing will be pre-selected. ✕ Remove

 Save

←

▶ Tags

---

▶ Your survey or consultation

---

click on "Save" when done

Great work! You can now see that the invitation link will automatically tag stories to the district nursing team.

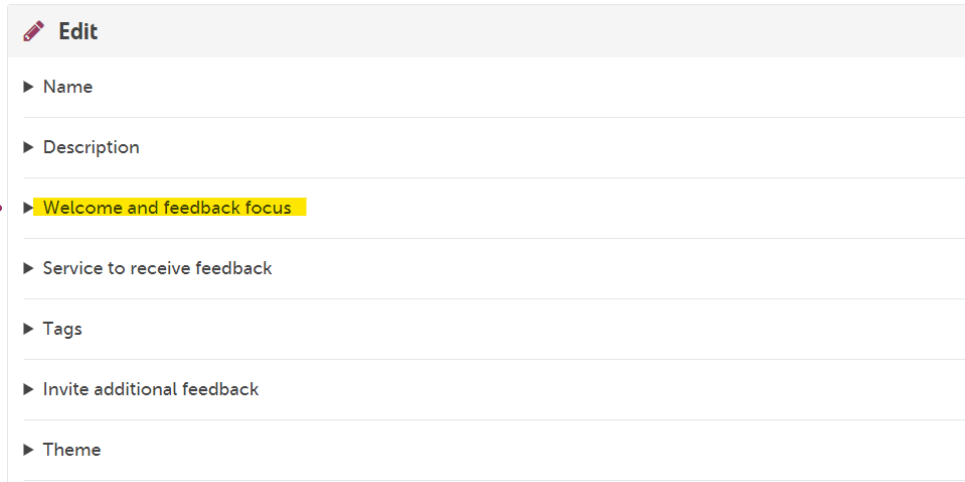
Now you have the opportunity to personalise your link, by adding a **welcome message** or adding a **theme**, such as Monkey for children and young people. If you wish to ask for feedback on a particular subject, for example waiting times or food, then you can also add what we call a **"feedback focus"** to your welcome message.

Find out how on the next page!



## How to personalise your invitation link (Optional – but highly recommended!)

To personalise our welcome message, we are going to click on “Welcome and feedback focus”, highlighted below:

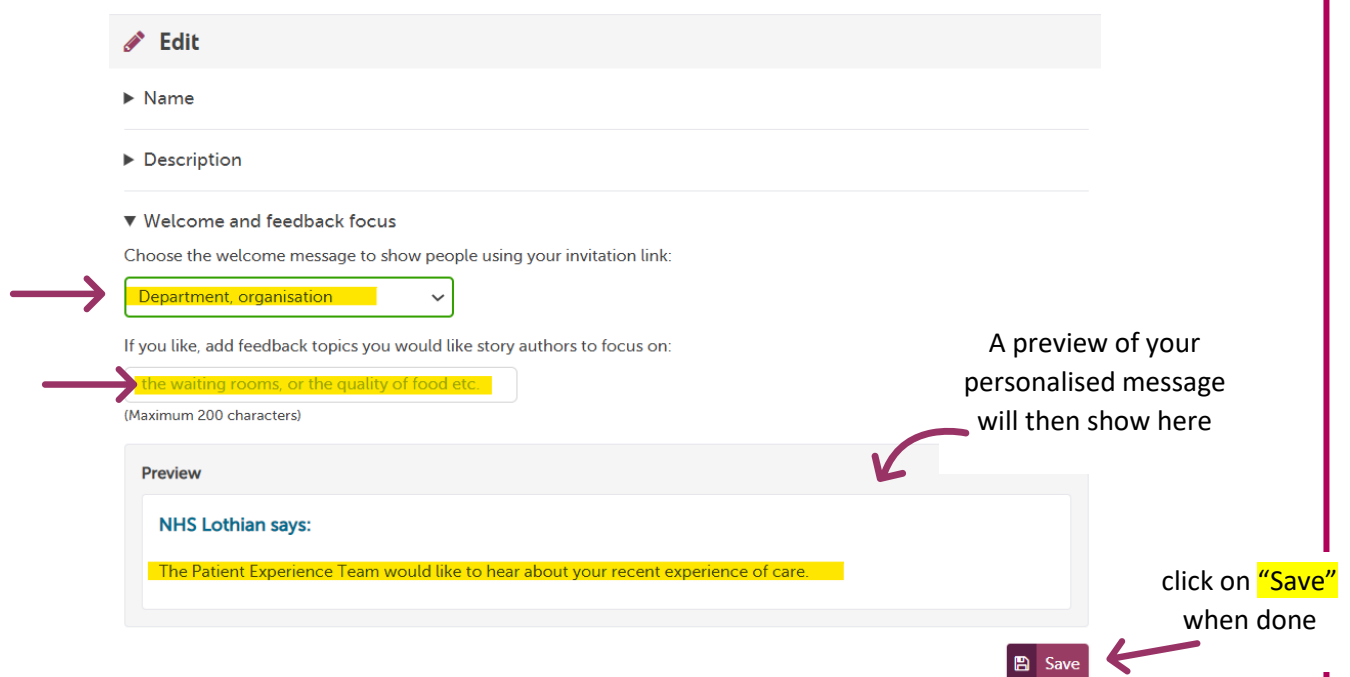


**Edit**

- ▶ Name
- ▶ Description
- ▶ **Welcome and feedback focus**
- ▶ Service to receive feedback
- ▶ Tags
- ▶ Invite additional feedback
- ▶ Theme

Now you can personalise the welcome message that people will see when they use your invitation link. Here you can:

- Choose who the message is from:
  - **Organisation** (E.g. NHS Lothian)
  - **Department and Organisation** (E.g. The Patient Experience Team, NHS Lothian)
  - **Job Title, Department and Organisation** (E.g. PE Team Leader, The Patient Experience Team, NHS Lothian)
- Add a “**feedback focus**” by asking people to tell you about specific aspects of their experience, such as waiting times, food, cleanliness etc



**Edit**

- ▶ Name
- ▶ Description
- ▼ **Welcome and feedback focus**  
Choose the welcome message to show people using your invitation link:
- If you like, add feedback topics you would like story authors to focus on:  
  
(Maximum 200 characters)

**Preview**

**NHS Lothian says:**  
 The Patient Experience Team would like to hear about your recent experience of care.

**Save**

A preview of your personalised message will then show here

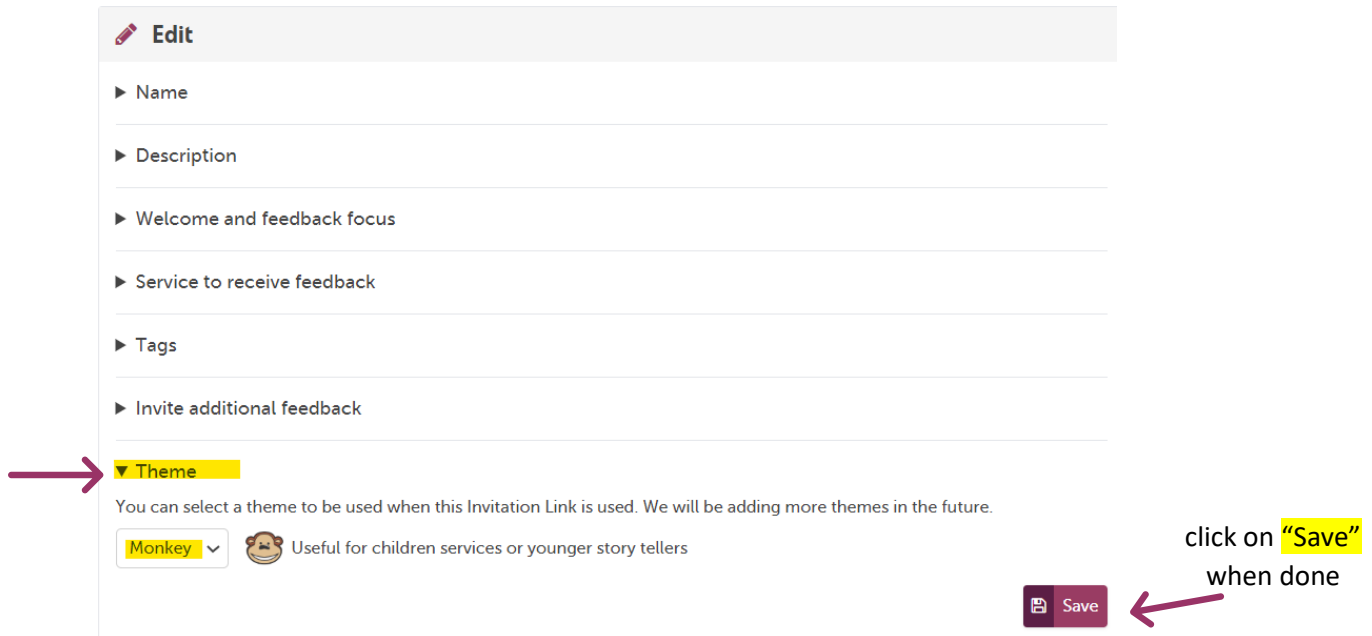
click on “Save” when done

### Adding a theme (Optional)

You can now add the Monkey Wellbeing theme to an invitation link. This can work really well when trying to engage children and young people.

We plan to add more themes in the future...so watch this space!

Here is how to add the Monkey theme to your link:



**Edit**

- ▶ Name
- ▶ Description
- ▶ Welcome and feedback focus
- ▶ Service to receive feedback
- ▶ Tags
- ▶ Invite additional feedback
- ▼ **Theme**

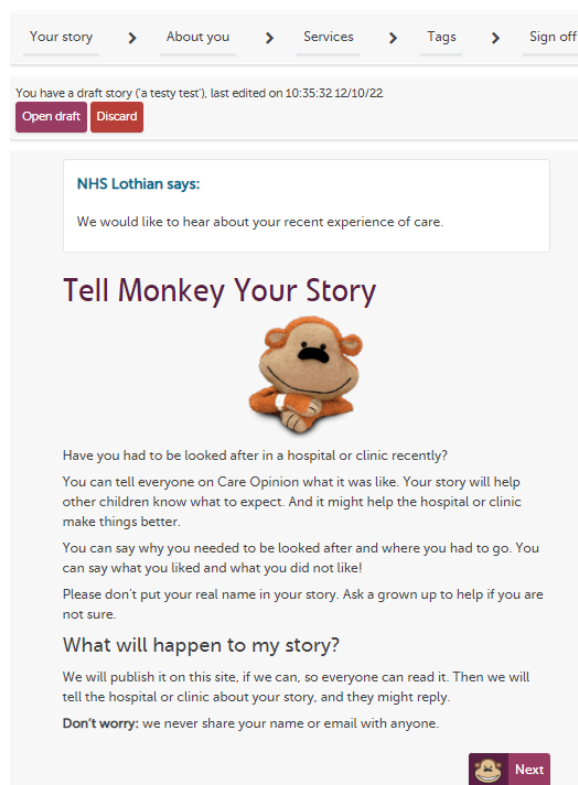
You can select a theme to be used when this Invitation Link is used. We will be adding more themes in the future.

Monkey Useful for children services or younger story tellers

**Save**

click on "Save" when done

Here is what people will see when they use your invitation link, when you select the Monkey theme

Your story > About you > Services > Tags > Sign off


You have a draft story ('a testy test'), last edited on 10:35:32 12/10/22

Open draft Discard

**NHS Lothian says:**

We would like to hear about your recent experience of care.

**Tell Monkey Your Story**



Have you had to be looked after in a hospital or clinic recently?

You can tell everyone on Care Opinion what it was like. Your story will help other children know what to expect. And it might help the hospital or clinic make things better.

You can say why you needed to be looked after and where you had to go. You can say what you liked and what you did not like!

Please don't put your real name in your story. Ask a grown up to help if you are not sure.

**What will happen to my story?**

We will publish it on this site, if we can, so everyone can read it. Then we will tell the hospital or clinic about your story, and they might reply.

**Don't worry:** we never share your name or email with anyone.

**Next**



### Adding tags (Optional)

Click on the “tags” heading next, and start to add any tags you’d like to automatically link to stories. You can add as little or as many as you’d like.

▶ Name


▶ Description

▶ Service to receive feedback


▼ Tags


If you want stories told with this link to have tags added automatically, add the tags here. Your tags can be added either as public tags (everyone can see) or as shared tags (only your subscription members can see).

→  (up to 50 characters)



▶ Your survey or consultation



When finished, remember to click the  button!

### Linking a survey (Optional)

You may have a separate survey you are carrying out about the same service, and would like to link this to your invitation link. You can do this here. After the author has shared their story, the site will invite them to complete the survey, you can personalise the message that will be shown below:

▼ Your survey or consultation

If you want to ask an author for additional feedback after they tell their story, add your own invitation and link. For example, you could add an invitation to complete an online survey or respond to an online consultation.

**Invitation text**  
This invitation will be shown to an author after they submit their story

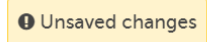

→

(up to 400 characters)

**Survey link**  
If the author accepts your invitation, we will direct them to this link

→

(max 400 characters)

  ←



## Sharing your invitation link

Congratulations! You should now have successfully created an invitation link! Now you can start sharing the link to generate more feedback.

### Using your link

You can use your link to invite feedback via our "tell your story" page, a kiosk page, or a widget on your own site.

For each of these, find the link you need, or download a QR code, below.

▶ Tell your story

▶ Kiosk

▶ Widget

Visit the "using your link" section. You will see that you have 3 options:

- **Tell your story** – here you can generate a QR code or copy the link to share
- **Kiosk** – here you can find a kiosk link for use with ipads etc
- **Widget** – code to add our "tell your story" widget to your own website

### Using your link

You can use your link to invite feedback via our "tell your story" page, a kiosk page, or a widget on your own site.

For each of these, find the link you need, or download a QR code, below.

▼ Tell your story

Use this link or QR code to invite feedback via the "tell your story" page on Care Opinion.

<https://www.careopinion.org.uk/799/district-nursing-test-link>



▶ Kiosk

▶ Widget



Use the buttons at the side to either **copy your link**, or **generate a QR code**. The site will give you a choice of QR code sizes which it will then download for you to use.



You can scroll up to the top of the page at any time to check the details of your invitation link:

## district-nursing-test-link

[View stories](#)

[Edit](#)

### Overview

Use this link to generate feedback about the district nursing service.

When this link is used:

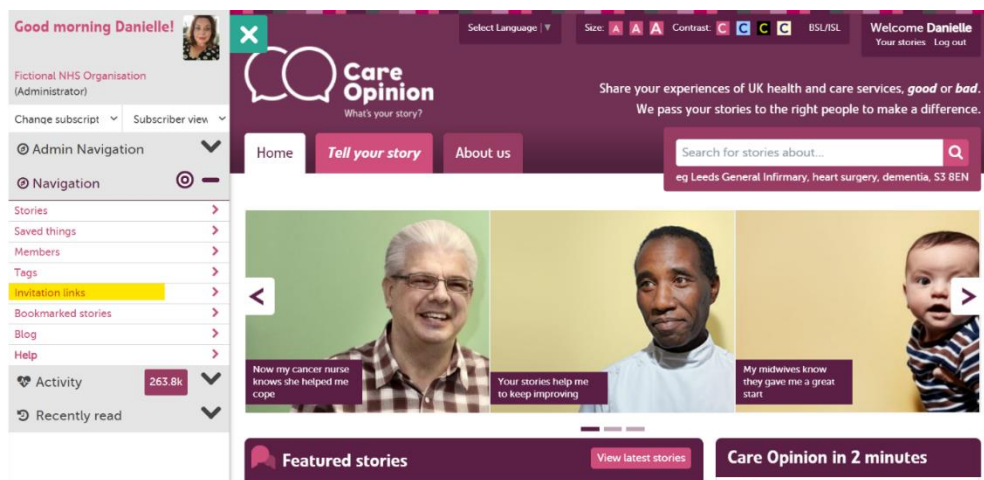
- this service will be pre-selected for story authors: [Borders Community Services / District Nursing](#)
- these tags will be added to stories told with this link:

district nurses (shared)

district nursing team (shared)

## Checking existing links, searching for stories and making changes

You can access existing invitation links from the navigation menu on the left hand side once you login.



The screenshot shows the Care Opinion administrator interface. On the left, the navigation menu is open, and 'Invitation links' is highlighted in yellow. A red arrow points to this menu item. The main content area shows the 'Home' page with a search bar and featured stories.

From here you can click on the chosen link name to make amendments or see stories that have been submitted using the link.

## Invitation links

Create an invitation link if you want to invite feedback about a specific service, automatically tag new stories, or offer your own online survey after a story is shared.

[Learn more about invitation links](#)

Search by link name, tag or service code

[+ New invitation link](#)

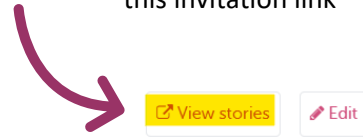
▼ Link name	▼ Description	▼ Date created	▼ Created by
district-nursing-test-link	Use this link to generate feedback about the district nursing service.	24/08/2021	Danielle McEwan




Click on **“View Stories”** to read any stories published by an author using this invitation link

Invitation links / district-nursing-test-link

 **district-nursing-test-link**



 **Overview**

Use this link to generate feedback about the district nursing service.

When this link is used:

- this service will be pre-selected for story authors: [Borders Community Services / District Nursing](#)
- these tags will be added to stories told with this link:

If you have any questions, please ask! We're here to help. You can also head over to our [‘Subscriber know how’ page](#) to get more help with managing your subscription and the features of the site.

The Care Opinion Team

