

# **OPOC Website**Navigation Guide

Fifth Edition

Introduction

Provincial System Support Program | October 2022

**Table of Contents** 



2

# **OPOC Website Navigation Guide**

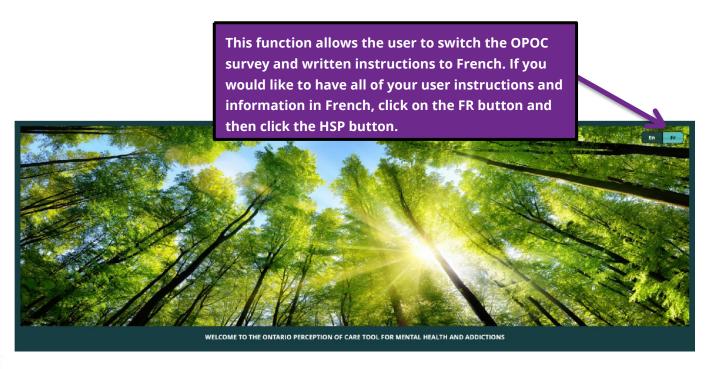
Ontario Perception of Care (OPOC) Home Page	2
Login Page	3
Forgotten Password	4
Password Reset Request	5
Health Service Provider Page	6
The OPOC Lead Tab	7
The Users Tab	7
How to Edit OPOC Users	7
How to Create a New OPOC User	8
How to Personalize a Message to Clients	10
Setting Programs to Inpatient or Outpatient	10
The OPOC Survey Administration Tab	11
OPOC Links	12
How to Create an OPOC Link	13
Deleting OPOC Links	15
OPOC Keys	16
How to Create an OPOC Key	17
Distributing and Downloading OPOC Keys	18
Deleting OPOC Keys	19
Changing OPOC Keys Site/Program Information	20
Recalling OPOC Keys	21
The OPOC Data Entry Tab	22
Appendix 1: Submitting a Service Desk Ticket	23
Appendix 2: Clearing Your Browser Cache	24

# Introduction

This **OPOC Website Navigation Guide** is a technical manual for users of the <a href="https://opoc.datis-camh.ca/">https://opoc.datis-camh.ca/</a> website. For more information about OPOC Implementation, please see the <a href="OPOC Implementation Guide">OPOC Implementation Guide</a>.

# **Ontario Perception of Care (OPOC) Home Page**

1. Go to <a href="https://opoc.datis-camh.ca/">https://opoc.datis-camh.ca/</a> and the home page will be displayed:



This survey should take approximately 10-20 minutes to complete. On the last page you will have a Submit Survey button, which once clicked, will expire the code you have for the survey, and the survey will not be accessible anymore. Your feedback will not be submitted until you click Submit Survey on the last page

If you don't have enough time to complete the survey all at once and would like to come back, you can do so by setting up a personal password. This will save what you have completed and will allow you to finish the rest of the survey at a later time. We encourage you to do this if you will not be able to finish the survey all at once.



- 1. Click on the **HSP** button from the www.opoc.ca home page.
- 2. Search for your organization (listed in alphabetical order).
- 3. Enter your User ID and Password (these are case sensitive).



# **Forgotten Password**

- 1. Click on the FORGOT PASSWORD button.
- 2. The following will be displayed.

Please enter your user id first, then click outside the User ID box.



- 3. Enter your User ID into the text box.
- 4. Pick your organization from the list.



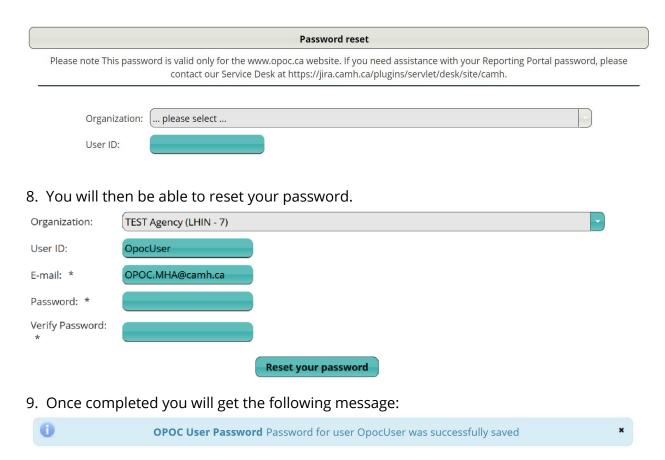
5. Type in the e-mail address that is connected to your OPOC account.



6. Click password reset. You should get this message:



7. You will receive an e-mail that allows you to reset your password. Please follow the instructions. The link will open the following page:



## **Password Reset Request**

1. You may also request a password reset if you enter the incorrect password. You will get this prompt.



- 2. You should then enter your user ID and e-mail. Please also ensure that you have picked the correct Organization.
- 3. Then press the **REQUEST PASSWORD RESET** BUTTON.

# Request Password Reset

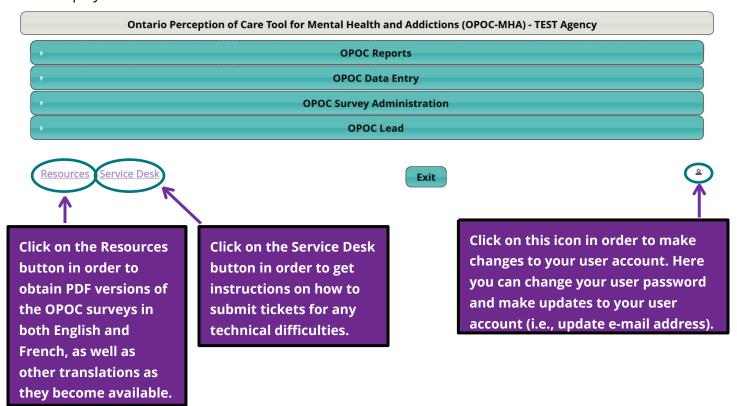
4. You should then receive the following message.



5. Follow the instructions in the e-mail to reset your password.

# **Health Service Provider Page**

Once you have logged in, you will see the **Health Service Provider (HSP)** page, which displays like this:



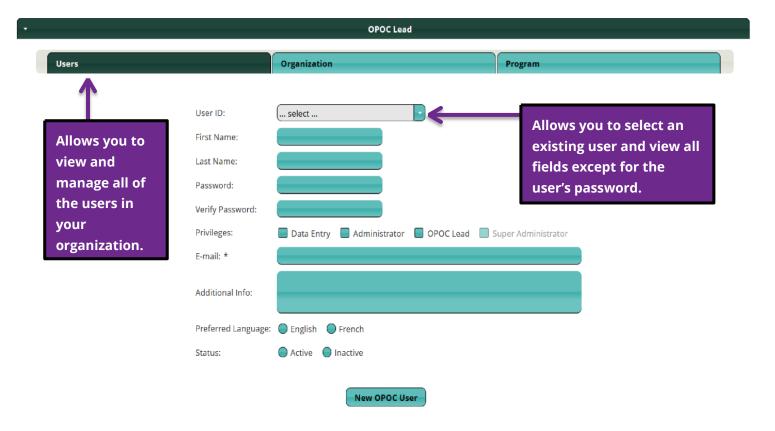
Depending on your user privileges, you may see up to four different tabs that you can expand or collapse as needed. The first tab "OPOC Reports" allows you access to the OPOC Reporting Portal platform – please note that the Reporting Portal requires a different User ID and password because not everyone who has access to <a href="https://opoc.datis-camh.ca/">https://opoc.datis-camh.ca/</a> will necessarily be granted access to the OPOC reports. To learn more about the OPOC Reporting Portal, please see the <a href="OPOC Reporting Platform Navigation Guide">OPOC Reporting Platform Navigation Guide</a>. If you would like to gain access to the OPOC reports, the OPOC Lead from your organization must send a request to the <a href="PSSP Implementation Specialist">PSSP Implementation Specialist</a> supporting your region.

The second tab "OPOC Data Entry" allows you to enter data from paper surveys. The third tab "OPOC Survey Administration" will allow you to create and distribute OPOC Links and

OPOC Keys. Lastly, the "**OPOC Lead"** tab allows you to create, edit or delete users at your organization. We will look at each of these tabs in more detail in the following sections.

## The OPOC Lead Tab

#### The Users Tab



#### How to Edit OPOC Users

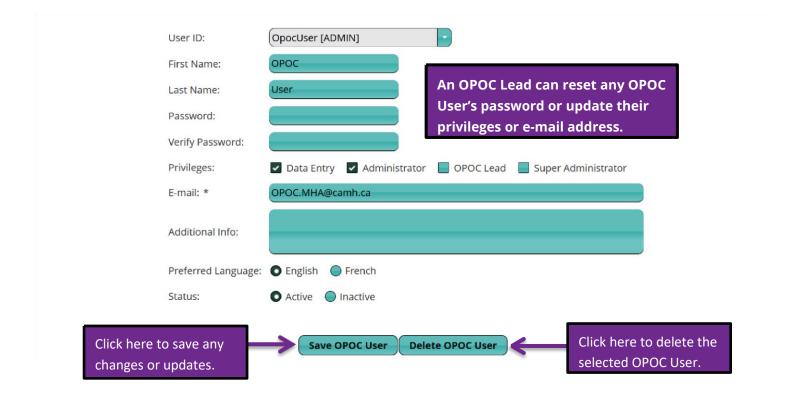
#### From the **Users** tab:

- 1. Click the drop-down arrow beside the **User ID** field to view all existing OPOC users in your organization. You will also see a few website administrators listed as "Super Administrators" these cannot be deleted.
- 2. Select the user you would like to edit or delete.
  - To change a user's privileges, click the appropriate boxes and then click
     Save OPOC User. In order to have all privileges, you must click all 3 boxes.

#### **OPOC Website Navigation Guide**

- To reset a user's password, you can type a new password in the password fields, then click Save OPOC User.
- To delete a user, click Delete OPOC User.

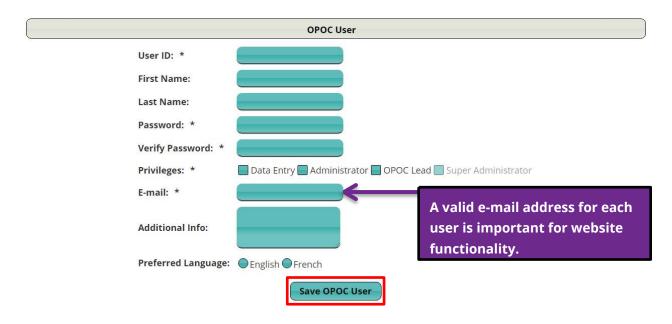
<sup>\*</sup>Please note - only individuals with OPOC Lead privileges can edit or delete users.



#### How to Create a New OPOC User

#### From the **Users tab:**

1. Click **New OPOC User.** The **New OPOC User** page displays:



This page allows the OPOC Lead to create new users within your organization. You will be required to fill in all of the mandatory fields that have an asterisk (\*) next to them. You will also need to be mindful of the privileges that you give to each of your new users.

#### **OPOC User Privileges:**

**OPOC Lead** = Ability to delete, edit, or create new users; ability to create or edit organization message; ability to edit program information (set to inpatient or outpatient)

**Administrator** = Ability to create new OPOC keys or links; ability to change OPOC key program and site information

#### Data Entry = Ability to enter data

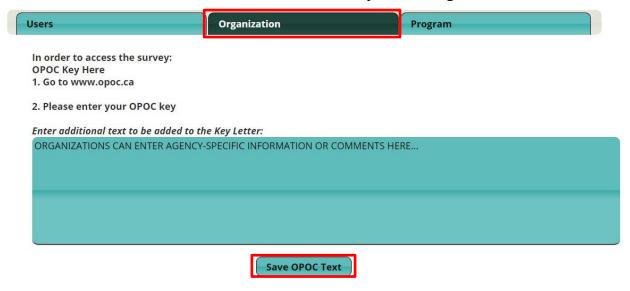
If a user will be performing more than one function at your organization, then you will need to give them multiple privileges depending on their role. For example, if someone will be creating OPOC keys or links and entering data, they will need both Administrator and Data Entry privileges. Once you have entered all of the required information, click on **Save OPOC User** in order to save the newly created user in the database. Next, you will need to send the login information to your new user, and they can change their password, if they choose.

**\*Please note** – only individuals with OPOC Lead privileges can create new users. Each new user must watch the <u>OPOC Orientation Webinar</u>, in compliance with the OPOC Memorandum of Understanding.

## How to Personalize a Message to Clients

- 1. Click on the "Organization" tab to write an organization specific OPOC message.
- 2. Write your personalized message in the text box shown below. This message will appear on the second page of the client information letter (PDF) that the system generates for each OPOC key or link. **PLEASE NOTE** that there is a 1024 character limit currently for this message. If you do go over the limit, you will receive an error message.

3. Press the **SAVE OPOC Text** button in order to save your message.



## Setting Programs to Inpatient or Outpatient

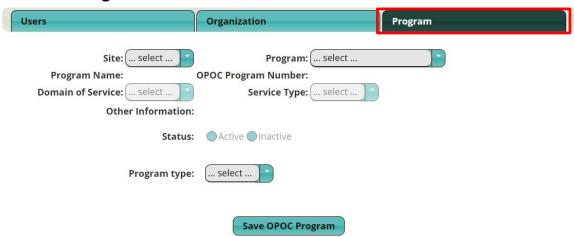
**PLEASE NOTE:** This section is optional. However, if you choose to complete this step it will ensure that your programs are identified as either being an inpatient/residential program or an outpatient/community program. This will **AUTOMATICALLY** fill out the following question in the Registered Client survey depending on what you select:

# Are you receiving services in a residential or inpatient program? Or Yes No

If you select **Outpatient/Community**, it will be an automatic **NO**; this means that the inpatient/residential questions (items #33 – 38 in the Registered Client version) will be skipped. If you select **Inpatient/Residential**, it will be an automatic **YES**; this means that the inpatient/residential questions (items #33 – 38 in the Registered Client version) WILL NOT be skipped. This can be helpful because sometimes the client might not know what this question means and inadvertently skip a section they should have seen, or complete questions that are actually not applicable to them.

Lastly, if you select **Unspecified** or do not edit this information, the question will be left for the client to answer (this is the default setting).

1. Click on the **Program** Tab.



- 2. Select SITE and PROGRAM.
- 3. Then select the **PROGRAM TYPE**.



4. Click on **SAVE OPOC PROGRAM** after you have selected a type.

## The OPOC Survey Administration Tab

The **OPOC Survey Administration** tab is where users can create and distribute OPOC links and OPOC keys. This page displays three tabs:

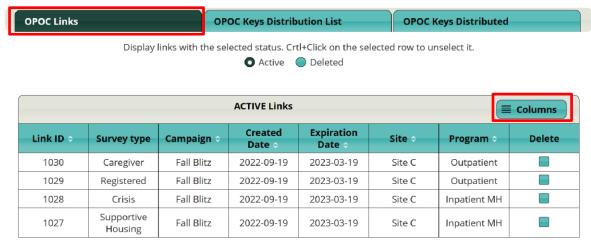


#### **OPOC Links**

"OPOC Links" allows you to create a URL for a specific program that you can send to multiple participants instead of individualized OPOC keys. As OPOC links are shareable, there is a potential for surveys to be completed multiple times or shared outside of intended recipients. We advise organizations to monitor data for unusual responses when using the OPOC links option.

This **OPOC Links** tab will display every active OPOC link created at your organization. The default is to show all ACTIVE links – you can also toggle to view Deleted links.

You can display or hide the columns pictured below by clicking the **Columns** button and selecting which columns you would like to see. You can view the Link ID, Survey Type, Campaign, Created Date, Expiration Date, Site, and Program for each link. There will also be a Delete option— this column is hidden by default, but you can display it if you have created a link in error and wish to delete it.



In order to select a specific OPOC link, click anywhere in that row until it turns orange. You can see below that we have selected Link ID 1030. Next, scroll to the bottom of the page to select an action.

#### **OPOC Website Navigation Guide**



At the bottom of the page, the URL for that OPOC link will appear along with the pertinent information for that link (organization, site, program, survey type, and expiration date). You can click **Copy Link** to simply copy the URL to your clipboard and paste it into another document or virtual space.



If you click **E-mail me** at the bottom of the page, the e-mail address stored under your user profile will receive a message containing the URL, along with the pertinent information described above. It will also include a sample e-mail message that you can adapt and edit to send to participants. When the participant clicks the URL and then PROCEED TO SURVEY, the system will generate a random OPOC key in the background. Instructions to record this OPOC key is included in the sample e-mail if participants choose to finish the survey in multiple sittings.

\*Please note – it is expected that you will edit this sample e-mail message to include relevant organization information where prompted before sending it to clients. The e-mail should include an OPOC contact at your organization for participant questions or concerns, and have the Client Letter attached.

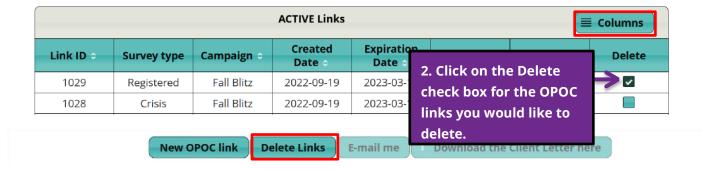
Click **Download the Client Letter here** to download a PDF of the Client Information letter specific to that survey type.

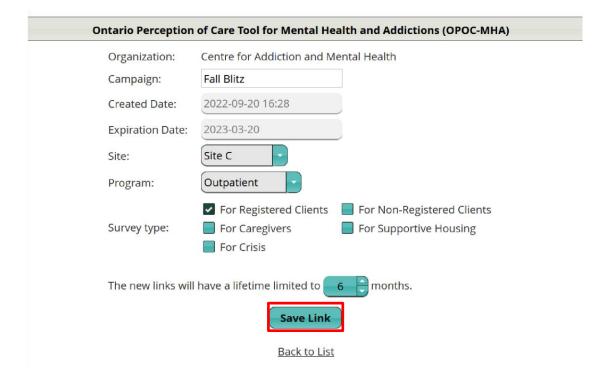
#### How to Create an OPOC Link

From the **OPOC Links** tab:

- 1. Click on New OPOC link
- 2. Select
  - a) "Site"
  - b) "Program"
  - c) "Survey type" you can create multiple survey types for this program at the same time. Each survey type will have a unique OPOC link.
  - d) "Lifetime" the default is for new OPOC links to expire in 6 months. You can change this to anywhere between 1 month and 12 months. The "Created Date" will be auto-filled, and the "Expiration Date" will be automatically calculated based on this value.
  - e) Optional: Add a "Campaign" name to group these surveys together in the OPOC Reports under the Campaign filter.
- 3. Click "Save Link" in order to create the new OPOC links.

Please see example below on how to create an OPOC link:



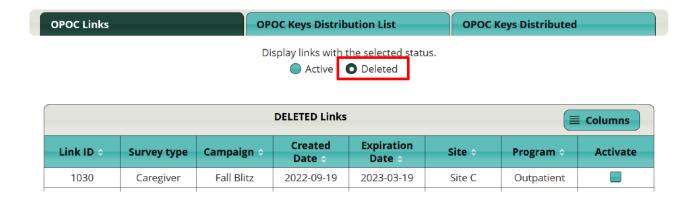


## **Deleting OPOC Links**

#### From the **OPOC Links** tab:

1. Make sure the "Delete" column is visible by selecting to display it with the **Columns** button.

- 3. Click "Delete Links" at the bottom of the page in order to delete the selected links. You can select multiple links and delete them all at once. WARNING: DO NOT delete links that are still in use once the link is deleted, the URL will no longer work for clients.
- 4. You can view all deleted links from the OPOC Links tab by selecting the **Deleted** button. Deleted links can also be reactivated if they were deleted in error.



## **OPOC** Keys

The next tab in the **OPOC Survey Administration** page allows you to create an individualized OPOC key for a specific program and survey type. This unique code allows a client to enter the OPOC website to complete the survey, or enables staff to manually enter paper survey data.

The **OPOC Keys Distribution List** tab displays all active OPOC keys that have not been distributed, expired, or deleted. OPOC keys automatically expire after 6 months. Each row displays the OPOC Key (case sensitive), the Site and Program, Campaign name and date (if you have entered these), and the Survey type.



## How to Create an OPOC Key

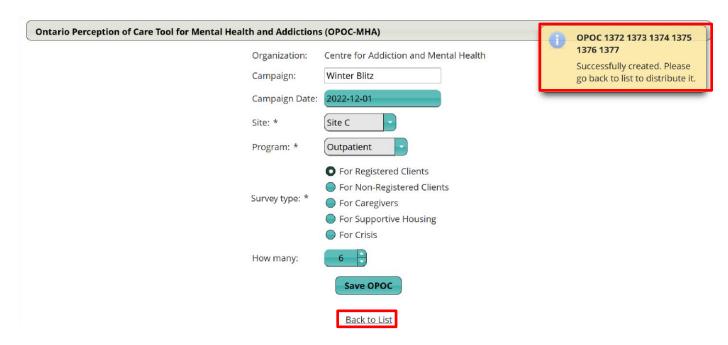
#### From the **OPOC Keys Distribution List** tab:

- 1. Click on New OPOC
- 2. Select
  - a) "Site"
  - b) "Program"
  - c) "Survey type" you can only create one survey type at a time.
  - d) "How many" individual OPOC keys you want to generate for that program and survey type.
  - e) Optional: Add "Campaign" and "Campaign date" to group these surveys together in the OPOC Reports under the Campaign filters.
- 3. Click "Save OPOC" in order to create the OPOC keys.

## Please see example below on how to create an OPOC key:

Ontario Perception of Care Tool for Mental Health and Addictions (OPOC-MHA)	
Organization:	Centre for Addiction and Mental Health
Campaign:	Winter Blitz
Campaign Date:	2022-12-01
Site: *	Site C
Program: *	Outpatient
Survey type: *	<ul> <li>For Registered Clients</li> <li>For Non-Registered Clients</li> <li>For Caregivers</li> <li>For Supportive Housing</li> <li>For Crisis</li> </ul>
How many:	Save OPOC
	Back to List

Once you have successfully created your OPOC keys, you should see a confirmation message.



4. Once you have created your OPOC keys, click on "Back to List" to return to the OPOC Survey Administration Page. Next, click the OPOC Keys Distribution List Tab to distribute and download your OPOC keys.

## Distributing and Downloading OPOC Keys



Under the **Distribution** heading, there are three buttons:

- This button will **download a PDF of the Client Information Letter with the specific OPOC key** that you have created.
- Once you have downloaded the Client Information Letter with the OPOC key,
   click this button to confirm that you have completed this step.
- Once you have confirmed that you have downloaded the OPOC key, this function will become active. Click this button to inform the database that you have distributed this OPOC key (i.e., a client has been given this OPOC key or will be given this OPOC key in the near future). This will allow you to enter the paper versions of the survey through the data entry function. Additionally, this will remove the OPOC key from the distribution list so that you don't run the risk of giving out the same OPOC key twice (distributed keys will move to the OPOC Keys Distributed tab). WARNING: if you skip these steps to distribute the OPOC key, you may encounter errors when trying to enter data.

**\*Please note:** If your organization is interested in keeping track of your response rates, you will need to manually record how many OPOC keys were given out to clients.

## **Deleting OPOC Keys**



2. Click "**Delete OPOCs**" at the bottom of the page in order to delete the selected keys. You can select multiple keys and delete them all at once. **WARNING: DO NOT** delete keys that

you have handed out. This will delete the key in the database and a client will not be able to use it to complete the OPOC survey.

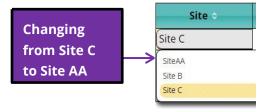
## Changing OPOC Keys Site/Program Information

1. Click on the **OPOC Keys Distributed** tab.



2. If you would like to change the site information for an OPOC key, click on the **Site** that you would like to change. You will see a drop down list of all the available sites. Select the site that you would like this OPOC key to fall under.

#### Example:



3. Click on the **Program** to follow the same process to change the program information for an OPOC key. You will see a drop down list of all the available programs under that site. Select the program you would like this OPOC key to fall under.

4. After you have made your changes, you MUST then click on the **SAVE OPOCS** 

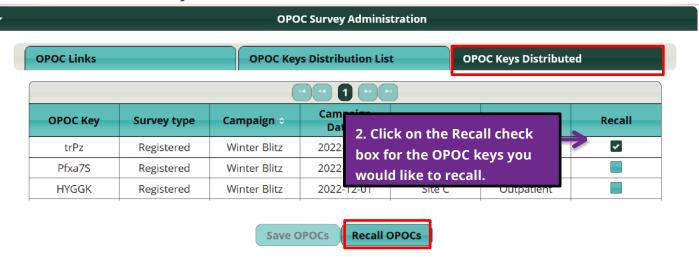
button. You will get a confirmation message.



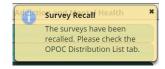
## **Recalling OPOC Keys**

If you distributed an OPOC key in error, or would like to recall a key back to the OPOC Keys Distribution List to download the letter again, you can recall that key.

1. Click on the OPOC Keys Distributed tab.



- 3. Click on the **Recall OPOCs** button.
- 4. You will then get a confirmation message on the top right corner.



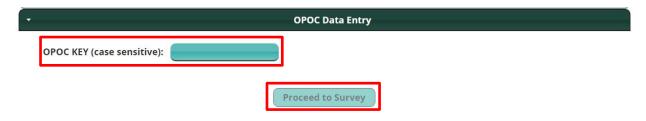
**\*Please note:** once a survey status changes to in progress or submitted, it will disappear from the OPOC Keys Distributed tab and you can no longer recall it.

# The OPOC Data Entry Tab

Users with "Data Entry" privileges have access to the **OPOC Data Entry** tab. This allows you to enter data from paper surveys using the OPOC keys. In your raw data, you can distinguish data entered by specific users. If surveys are entered from the main landing page with an OPOC key, or completed using an OPOC link, the survey will appear in the reports as being submitted by the CLIENT.



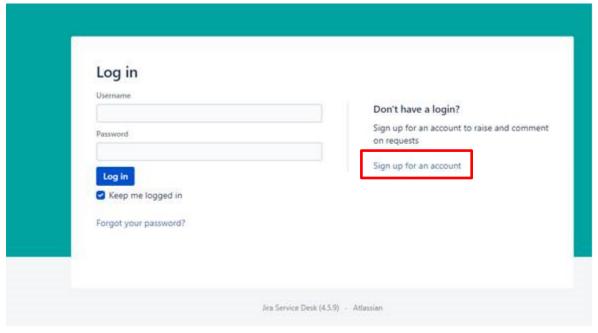
- 1. You will find the OPOC key attached to the paper copy of the OPOC. You can find this on the second page of the Client Letter PDF (check the process at your organization— if the letter was removed, the OPOC key may be indicated elsewhere).
- 2. Enter the OPOC key (case sensitive). Please ensure that you have distributed the key you are entering and that it is no longer under the "OPOC Keys Distribution List" tab. If you have not distributed it yet, entering the key will bring you to the OPOC homepage.
- 3. Click on "Proceed to Survey".
- 4. Enter the client's exact responses to all questions directly into the survey, including all comments. For more guidance on data entry recommendations, please see Section 3 (Entering data and running Reports) in the <a href="OPOC Implementation Guide">OPOC Implementation Guide</a>.



**\*Please note:** It is **VERY IMPORTANT** that you click the **SUBMIT SURVEY** button at the end of the survey. If you do not, the data will not be included in your organization's OPOC reports.

# **Appendix 1: Submitting a Service Desk Ticket**

For technical difficulties or website issues, you may contact: **OPOC Service Desk**. This service is available to all OPOC users by creating an account.



Once you have an account, you can submit tickets, view their progress, and communicate with the OPOC Service Desk team. The OPOC Service Desk can assist with issues, such as:

• **Technical difficulties** with the OPOC website or the OPOC Reporting Portal (i.e. you are experiencing a problem with the website functionality).

- **Difficulties using the "Forgot Password" function on the OPOC website** (i.e unable to update or reset your password for the OPOC website). *Please note that new users can be set up by your organization's OPOC LEAD.*
- Request to reset your password for the OPOC Reporting Portal this is a separate password from your OPOC website password and you cannot reset it yourself. If you have forgotten your User ID/password or have been locked out, please contact the Service Desk.

For implementation coaching support, please connect with your <u>PSSP Implementation</u> <u>Specialist</u>.

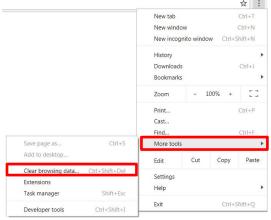
# **Appendix 2: Clearing Your Browser Cache**

Some of the most common website issues can be resolved by simply clearing your browser cache.

#### **Google Chrome**

1. At the top right, click the **MORE** button which looks like this





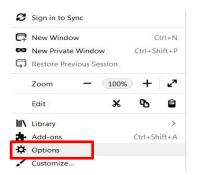
3. At the top, choose a time range. To delete everything, select **All time**.

4. Check the boxes next to "Cookies and other site data" and "Cached images and files".

5. Click Clear data.

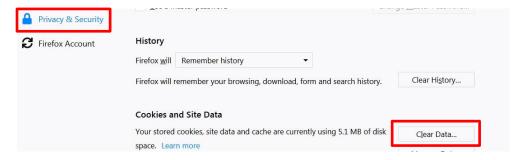
## **Firefox**

1. Click the menu button



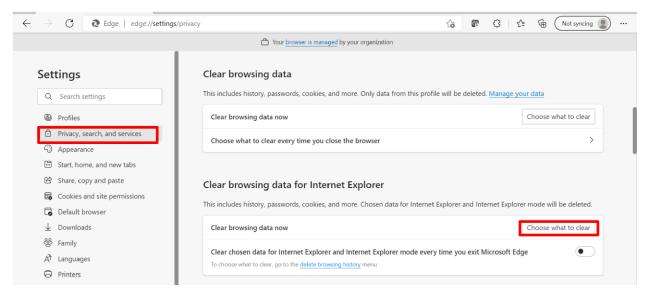
and choose Options.

- 2. Select the Privacy & Security panel.
- 3. In the **Cookies and Site Data** section, click Clear Data.



## **Microsoft Edge**

1. Click the menu button and choose Settings. Select **Privacy, search and services** and then scroll down to where it says **Clear browsing data for Internet Explorer**.



2. Click **Choose what to clear** and make sure to uncheck this box:

Preserve Favorites website data
Keep cookies and temporary Internet files that enable your favorite websites to retain preferences and display faster.

3. Click delete.