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About Webropol

- Most used questionnaire and analytics tool in the Nordic countries
- Our customers gain knowledge by asking and analysing the important questions to develop their organisations successfully
- Offices and resellers in 8 countries
- Head Office in Helsinki

Founded in 2002

70 000 registered users worldwide

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The Staff Engagement Portal (SEP)& iMatter

Why does employee engagement matter?

Higher staff morale & motivation

Less absenteeism & stress

Greater efficiency, productivity & effectiveness

Strong financial management

"A workplace approach designed to ensure employees are committed to their organisations' goals and values, motivated to organisation success, and are able at the same time to enhance their own sense of well-being"

(Engaging for Success 2009 authors; Nita Clarke and David MacLeod)

Staff engagement portal is system designed to enable team managers to easily & effectively implement iMatter, thereby supporting positive staff experience.

i Matter

Automated questionnaires integrated to the portal

Automated reporting specific to the hierarchy

Organisation Management

Easy distributions

Email & paper questionnaires

Plan & Compare

Support

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Logging in to the Staff Engagement Portal

- Webropol will set up a user account for the National Administrators and all Board Administrators (BA) and Operational Leads (Op Leads) to access SEP

- Webropol will assign the National Administrator user rights

- You will receive an email with a personal link similar to: http://nhsscotland-sep.webropol.com/EN/Account/SetPassword?userId=EAC285C8-3ACF-4BBD-A491-A8514EB122BB

- This is your own personal link and should not be shared with any one else.

- The first time you log in you will be required to set up a password.

- Future access to SEP will be from:

    http://nhsscotland-sep.webropol.com

- If you are experiencing difficulty logging in, check your email address is entered correctly. Alternatively, click "Forgot Password" and follow the instructions to reset the password. If you still have issues contact the Webropol Helpdesk for support.

Board Administrator / Op Lead Rights

- Access Rights are assigned by the National Administrator for Op Leads and Board Admin. National Administrator's rights are created by Webropol.

Board Administrator

- Upload & Amend Board, Directorate, team manager and team details for their own organisations only.
- View which managers have updated their team details
- Confirm team details on behalf of managers
- View response rates and follow up statistics
- View which teams have completed Action plans and Storyboard
- **CANNOT:** Access any reports other than the overall Board/Organisation reports. Cannot view any team reports, action plans or storyboards.

iMatter Op Leads

- Upload & Amend Board, Directorate, team manager and team details for their own organisations only.
- View which managers have updated their team details
- Confirm team details on behalf of managers
- View response rates and follow up statistics
- View which teams have completed Action plans and **open** Storyboards
- **CAN:** Access any reports such as Team reports, EEI scores, Directorate, Board and Organisation reports. Can also view Storyboards.

The Role of iMatter System Administrators

Board Administrator (BA):

- Board Administrators (BA): will be responsible for managing the set up for their own Organisations ONLY.

- BA's are assigned access to the portal and assigned user rights by the National Administrator

- From the portal BA's can:

  – Upload Board, SMT, Directorate, team manager and team details for their own organisations only.

  – Amend Board, SMT, Directorate, team manager and team details for their own organisations only.

  – The BA's cannot access any reports such as Team reports, EEI scores, Directorate, CEO Reports but will see the overall Board reports.

  – They will be able to see which managers have updated their team details.

  – They will be able to view response rates and follow up statistics.

  – They will be able to see how many teams have completed action plans, the date action plans were created, and how many teams created storyboards at all levels within the board.

  – They do not have access to the storyboard and action plans.

  – Provide support to manager etc. who may have problems accessing the system, e.g. confirm teams.

The Role of iMatter System Administrators

Operational Lead (Op Lead):

- iMatter Operation Lead (Op Lead) role is similar to that of the Board Administrator but with additional access rights for reporting.

- iMatter Op Leads have been assigned for each Organisation (22 Organisations). Op Leads will be responsible for their own Organisation only and will be the main point of contact for Boards (Senior Management Team (SMT), Directorates and Team Managers within their Organisation.

- They will be responsible for dealing with any problem areas. iMatter Op Leads will be the only users who will have access to all the reports which are otherwise restricted to the relevant hierarchical level. Op Leads will be able to see how many teams have completed action plans and created storyboards at all levels within the board and are the only admin level that can view links to storyboard.

- iMatter Op Leads with assigned rights will have links and access to the following reports for their own Organisations only:
    - Team reports
    - Directorate reports
    - Board reports
    - Organisation reports
    - Action Plans
    - Links to storyboards

Organisation Management: Updating the hierarchies

Organisation hierarchy		First name	Last name	Email
▼ The Training Board	⚙	Amy	Bassi	amy.bassi@webropol.com
▶ SMT Name: A Black Board SMT	⚙	Adam	Black	ablack@test.com
▶ SMT Name: J Green Board SMT	⚙	Jane	Green	jgreen@test.com
▼ Training Board (Amy Bassi SMT 1)				dummy@webropol.com
▼ Training Board (Amy Bassi Directorate 1)				dummy@webropol.com
Training Board: Amy Bassi Team				amy.bassi@webropol.com

Menu: Rename / Add / Remove / Edit managers / Move / Send email

To update hierarchies click on the "User Management" icon in the top right corner of the screen.

- There are 2 ways to update the hierarchies:

1. Add /edit manually from the Organisation hierarchy column in "user management". Click on the Cog Wheel next to the hierarchy you wish to edit – ideally for making a small volume of changes.

2. You can also use the spreadsheet which can be generated from SEP – ideal for a larger volume.

   Any changes made will update the hierarchies with immediate effect. However, any new teams that have been added to the hierarchy will not be included in a distribution that is currently underway. Any changes to distributions such as including new teams need to be approved by the iMatter Programme Manager prior to contacting Webropol Helpdesk for support.

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Organisation Management: Updating the hierarchies with the Spreadsheet:

- **Tip:** Download the excel from SEP which will include all the hierarchy data for your Organisation (Board).

- E.g. if adding a new team to a directorate and the Organisation already exists, the spreadsheet must still show this information. Download the spreadsheet. Remove all data not relating to the hierarchy for the new team.

- Keep the Organisation, SMT, Directorate associated with the team and add your new team directly below.

- This ensures you avoid any typing mistakes and the spelling for each structure is correct.

- **PLEASE NOTE:** Any typos will result in SEP not recognising an existing structure, and will assume a new structure has been added.

- When adding SMS respondents to the hierarchy spreadsheet, please ensure you use only 9 digits after +447 with no spaces. Incorrect number formats will result in an error message and the information will not be updated.

Assignment number	First name	Last name	Email	Mobile number	NHS Scotland	Organisation	SMT	Directorate	Team	Respondent
	Amy	Bassi	leannesmith.testing+450@gmail.com		NHS Scotland	The Training Board				
	Adam	Black	ablack@test.com		NHS Scotland	The Training Board	SMT Name: A Black Board SMT			
	Testa	User	dummy@webropol.com		NHS Scotland	The Training Board	SMT Name: A Black	A Black Board SMT (Directorate)		
	Dummy	User	leannesmith.testing+710@gmail.com		NHS Scotland	The Training Board	SMT Name: A Black	A Black Board SMT (Directo	ADD NEW TEAM HERE	
	Tim	Test		+447458603492	NHS Scotland	The Training Board	SMT Name: A Black	A Black Board SMT (Directo	A Black Boards Team (Te	Respondent

Organisation Management: The Spreadsheet

- A person cannot jump from Organisation to Team level directly. The full path must always be present, a team must belong to a directorate, which in turn must belong to a SMT, which must belong to a Board belonging to NHS Scotland.

- To add an Email respondent, only fill out the email field for them.
- To add a SMS respondent, only fill out the mobile number field.
- To add a paper respondent, leave both the Email and SMS field blank.

- Team name must be identical for shared teams.

- Refer to Excel Spreadsheet Format Instructions for more details – this will be emailed to you separately and will be available under user manuals.

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Organisation Management: Uploading the Spreadsheet

- Click on User Management (top right of screen) to access organisation management

- Select import Hierarchy

- Export excel template can be used to complete the data, save to file to upload back to the system

- Select Choose File and select the saved file

- Click "Add Team Members" to complete the upload.

- If uploading your own spreadsheet the headers in your file must be the same as the template

Organisation Management: Uploading the Spreadsheet

Organisation hierarchy		First name	Last name	Email
▼ The Training Board	⚙	Amy	Bassi	amy.bassi@webropol.com
▸ SMT Name: A Black Board SMT	⚙	Adam	Black	ablack@test.com
▸ SMT Name: J Green Board SMT	⚙	Jane	Green	jgreen@test.com
▼ Training Board (Amy Bassi SMT 1)	⚙	Dummy	User	dummy@webropol.com
▼ Training Board (Amy Bassi Directorate 1)	⚙	Dummy	User	dummy@webropol.com
Training Board: Amy Bassi Team	⚙	Amy	Bassi	amy.bassi@webropol.com

- Completed hierarchy will be uploaded and added to organisation management.
- Each Board Administrator can upload and manage their own Board hierarchy.
- Other boards will not be visible.

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Changes to hierarchy structure

The iMatter portal is now integrated with eESS which means there has been some changes to the process for uploading new hierarchy information.

Figure 1 is an example of a completed hierarchy spreadsheet which is in the correct format to upload to the iMatter portal

1. Assignment number can be provided in column A. This information will be found in eESS. This number is unique to each respondent and must be provided in the correct format for the spreadsheet to upload successfully. Providing an assignment number is not mandatory.

2. Column E, Mobile number, must be formatted using the country code (+447) and no spaces with 9 digits following +447.

Changes to hierarchy structure continued

Assignment number	First name	Last name	Email	Mobile number	NHS Scotland	Organisation	SMT	Directorate	Team	Respondent
	NHS Scotland	NHS Scotland	NHSScotland@Webropol.com		NHS Scotland					
	Test	test	luke.testing1321+250@gmail.com		NHS Scotland	05/01/2020 Test Org				
	Test	SMT	luke.testing1321+251@gmail.com		NHS Scotland	05/01/2020 Test Org	05/01/2020 Test SMT			
	Test	Directorate1	luke.testing1321+252@gmail.com		NHS Scotland	05/01/2020 Test Org	05/01/2020 Test SMT	05/01/2020 Test Directorate1		
	Test	Directorate10	luke.testing1321+249@gmail.com		NHS Scotland	05/01/2020 Test Org	05/01/2020 Test SMT	05/01/2020 Test Directorate1		
	Jack	Black	test@test.com		NHS Scotland	05/01/2020 Test Org	05/01/2020 Test SMT	05/01/2020 Test Directorate1	25/01/2021 Test team 1	
	SMS2	people		+447198765432	NHS Scotland	05/01/2020 Test Org	05/01/2020 Test SMT	05/01/2020 Test Directorate1	25/01/2021 Test team 1	Respondent
	John	Smith		+447539815430	NHS Scotland	05/01/2020 Test Org	05/01/2020 Test SMT	05/01/2020 Test Directorate1	25/01/2021 Test team 1	Respondent
	Nicole	Mansell		+44 957091630	NHS Scotland	05/01/2020 Test Org	05/01/2020 Test SMT	05/01/2020 Test Directorate1	25/01/2021 Test team 1	Respondent

Figure 2 is an example of a completed hierarchy spreadsheet which is in the correct format to upload to the iMatter portal

3. Columns F-K must be fully completed with the hierarchy path completed in full for each row. Previously, hierarchy columns only contained an entry for the manager of each level.

Downloading information from eESS

	A	B	C	D	E	F	G	H	I	J	K
1	iMatter Report as at 11/03/2020										
2											
3	Assignment Number	First Name	Last Name	Email	Work Mobile	Health and Social Care	NHS Board	CEO	Directorate	team name – manager name	Respondent
4	SD021-10482285	Karl	Logan	karl.logan@eESStest.com		eESS Test NHS Scotland	NHS National Services Scotland				
5	SD021-10263098	Shelly	Vaughan	svaughan@eESStest.com	+447879433090	eESS Test NHS Scotland	NHS National Services Scotland	Sinclair, Colin (Colin)			
6		Bobby	Preston	bobbypreston@eESStest.com		eESS Test NHS Scotland	NHS National Services Scotland	Sinclair, Colin (Colin)	ARHAI (Dir)		
7	SD021-10250031	Ray	Jones	rayjones1@eESStest.com		eESS Test NHS Scotland	NHS National Services Scotland	Sinclair, Colin (Colin)	ARHAI (Dir)	HAI - AMR, ICT, SSHAIP (Sub-Dept) - French, Sofia (Sofie)	
8	SD021-10268515	Hannah	Davies	h.davies3@eESStest.com	+447711122036	eESS Test NHS Scotland	NHS National Services Scotland	Sinclair, Colin (Colin)	ARHAI (Dir)	HAI - AMR, ICT, SSHAIP (Sub-Dept) - Chapple, Paul (Paul)	
9	SD021-10268813	Tim	Daffey	timdaffey1@eESStest.com		eESS Test NHS Scotland	NHS National Services Scotland	Sinclair, Colin (Colin)	ARHAI (Dir)	HAI - AMR, ICT, SSHAIP (Sub-Dept) - McIntyre, Jackie (Jackie)	
10	SD021-10358919	Michelle	Brown	michellebrown@eESStest.com		eESS Test NHS Scotland	NHS National Services Scotland	Sinclair, Colin (Colin)	ARHAI (Dir)	HAI - AMR, ICT, SSHAIP (Sub-Dept) - Morris, Alison (Alison)	
11	SD021-10352155	William	Jennings	williamjennings@eESStest.com		eESS Test NHS Scotland	NHS National Services Scotland	Sinclair, Colin (Colin)	ARHAI (Dir)	HAI - AMR, ICT, SSHAIP (Sub-Dept) - Gibbons, Cheryl	
12	SD021-10263053	Frederick	Murray	fmurray1@eESStest.com	+447887737184	eESS Test NHS Scotland	NHS National Services Scotland	Sinclair, Colin (Colin)	ARHAI (Dir)	HAI - AMR, ICT, SSHAIP (Sub-Dept) - Murdoch, Fiona (Fiona)	
13	SD021-10268313	Mary	Bailey	mbailey@eESStest.com	+447896374336	eESS Test NHS Scotland	NHS National Services Scotland	Sinclair, Colin (Colin)	ARHAI (Dir)	HAI - AMR, ICT, SSHAIP (Sub-Dept) - McNeish, Jane (Jane)	
14	SD021-10267515	Hugh	McCleod	hmccleod1@eESStest.com	+447791457763	eESS Test NHS Scotland	NHS National Services Scotland	Sinclair, Colin (Colin)	ARHAI (Dir)	HAI - AMR, ICT, SSHAIP (Sub-Dept) - Wilson, Julie (Julie)	
15	SD021-10266643	Rachel	White	rwhite@eESStest.com		eESS Test NHS Scotland	NHS National Services Scotland	Sinclair, Colin (Colin)	ARHAI (Dir)	HAI - AMR, ICT, SSHAIP (Sub-Dept) - Cairns, Shona (Shona)	
16	SD021-10383278	Sarah	Gregson	sarahgregson@eESStest.com		eESS Test NHS Scotland	NHS National Services Scotland	Sinclair, Colin (Colin)	ARHAI (Dir)	HAI - AMR, ICT, SSHAIP (Sub-Dept) - Hooker, Emma	
17	SD021-10386805	Richard	Berry	rberry1@eESStest.com		eESS Test NHS Scotland	NHS National Services Scotland	Sinclair, Colin (Colin)	ARHAI (Dir)	HAI - AMR, ICT, SSHAIP (Sub-Dept) - Hooker, Emma	Respondent
18	SD021-10503839	Valerie	Jenkins	valeriejenkins1@eESStest.com		eESS Test NHS Scotland	NHS National Services Scotland	Sinclair, Colin (Colin)	ARHAI (Dir)	HAI - AMR, ICT, SSHAIP (Sub-Dept) - Hooker, Emma	Respondent
19	SD021-10503835	Kevin	Potter	kpotter@eESStest.com		eESS Test NHS Scotland	NHS National Services Scotland	Sinclair, Colin (Colin)	ARHAI (Dir)	HAI - AMR, ICT, SSHAIP (Sub-Dept) - Hooker, Emma	Respondent
20	SD021-10506408	Bethany	Doyle	bdoyle1@eESStest.com		eESS Test NHS Scotland	NHS National Services Scotland	Sinclair, Colin (Colin)	ARHAI (Dir)	HAI - AMR, ICT, SSHAIP (Sub-Dept) - McDaid, Kirsty (Kirsty)	Respondent

Figure 3 is an example of the format used when downloading information from eESS

Errors in eESS data

- It is the responsibility of the BA/OpLead to ensure that the data downloaded from eESS is correct before the information is transferred to the iMatter hierarchy spreadsheet for uploading.

- eESS data contains the following errors. BA/OpLeads must ensure that these areas are checked and amended to avoid problems when uploading to iMatter:

  - Directorate information is not held on eESS so BA/OpLeads will have to add this manually

  - Manager info (name/email etc) may be missing on eESS so BA/OpLeads will have to add this manually where the error appears

  - Respondents may not have a manager assigned. BA/OpLeads should check the spreadsheet as there may be a manager assigned in eESS but this may be in a different directorate. BA/OpLeads will need to amend this manually.

  - Manager emails may not be held in eESS, but the manager must always have an email to login to the portal, so Op Leads will have to add this manually

- eESS files can be large and as key errors have already been identified, the eESS team will provide an exception log detailing any identified errors if required which will make it easier to find the information and correct it.

- Please note that any staff changes must be made in eESS first to ensure that the data held is accurate. Ensuring that this information is updated and maintained will mean that there are fewer changes required in subsequent years.

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Import Hierarchy in Organisation Management

Import organisation hierarchy

If the imported team name already exists, the entire team member list will be replaced with the imported file.

Export Excel template

[Export]

Description of Excel file for importing

Hierarchy >

Single level >

Import organisation hierarchy

[Choose File] No file chosen

[Cancel] [Add team members]

Please note: If the team already exists in the portal but has a different name in eESS, team names must be changed in the portal before uploading the eESS data, otherwise new teams will be created and historical data for that team will be lost.

When adding new teams to the portal please ensure that they are also added to eESS so it is continually kept up to date.

Continued on next slide

Note: Please use the template provided in the staff engagement portal as this is xlsm format and not xls because a macro is enabled, this ensures the file is saved as the correct file type

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Import Hierarchy in Organisation Management continued

Import organisation hierarchy   ×

If the imported team name already exists, the entire team member list will be replaced with the imported file.

Export Excel template   Import organisation hierarchy

Export   Choose File   No file chosen

Description of Excel file for importing
Hierarchy >
Single level >

Cancel   Add team members

To test uploading new information via a spreadsheet please follow the steps below.

1. Log into the iMatter portal using BA/OL credentials

2. Select User Management from top right-hand corner and then select the Organisation Management tab

3. Click import hierarchy. Click on the export excel template button to download a spreadsheet template.

4. Complete the excel spreadsheet in the new format, ensuring that:
Assignment number is provided in the correct format, if assignment number is used
Mobile number is in +447 format with no spaces
Hierarchy path columns F-K are fully completed with no spaces

5. Save file and click choose file to import organisation hierarchy back into the portal.

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Import Hierarchy in Organisation Management – Prefill +447

When completing the spreadsheet template to import hierarchy information into the portal, the SMS column can be prefilled with +447.

To activate:
1. Export excel template in Import hierarchy on organisation management page

2. Open excel file on desktop and click to enable editing

3. Click enable content

4. Click in mobile column cell and +447 will appear

To add an SMS respondent successfully, leave the email field blank, and put 9 digits after +447 with no spaces

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Organisation Management: Manually updating the hierarchies: Adding a SMT/Directorate/Team
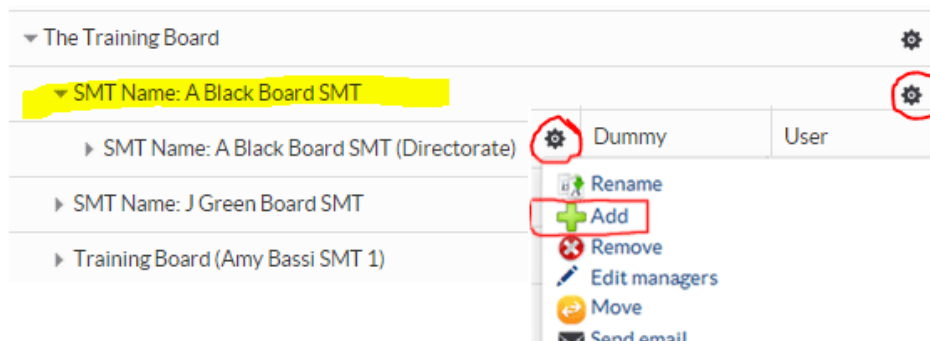
- To Add a new Directorate to an SMT.
1. Next to the SMT click on the cog wheel
2. Select the Add icon
3. In the pop up window enter the directorate name
4. Complete the directors contact details in the remaining fields
5. You are also able to confirm that the Director can delegate a Sub Directorate Level if this is applicable
6. Confirm entry by clicking on Add
7. The new directorate will show in the relevant hierarchy
8. Add teams to the directorate by following the instructions above.
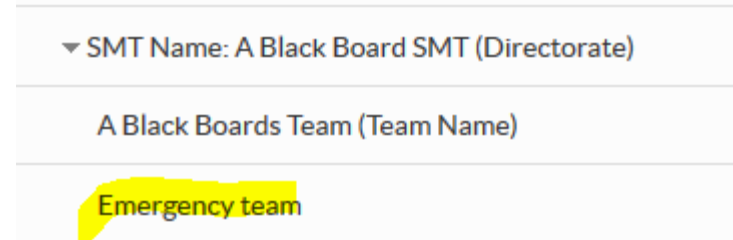
A team cannot be added to a distribution once the distribution process has started.

Organisation Management: Manually updating the hierarchies: Edit/Add/Remove a Chair/SMT/Directorate/Team Manager

- To Edit/Add/Remove Chair/SMT/Directorate/Team manager details in the hierarchy:
1. Next to the level you wish to edit click on the cog wheel
2. Select the Edit Managers icon. In the pop up window you will see the details of the level you are editing
3. **Edit:** Click in the fields you wish to edit and make the required changes. If the managers email has changed you will need to add them as a new manager and then delete the existing entry
4. **Add:** Click on the Add icon and complete the relevant fields
5. **Remove**: Click on the remove icon to remove a manager. **NOTE:** At least one manager must exist in order to use the remove function
6. Click on save changes to confirm your changes

Renaming a SMT/Directorate/Team
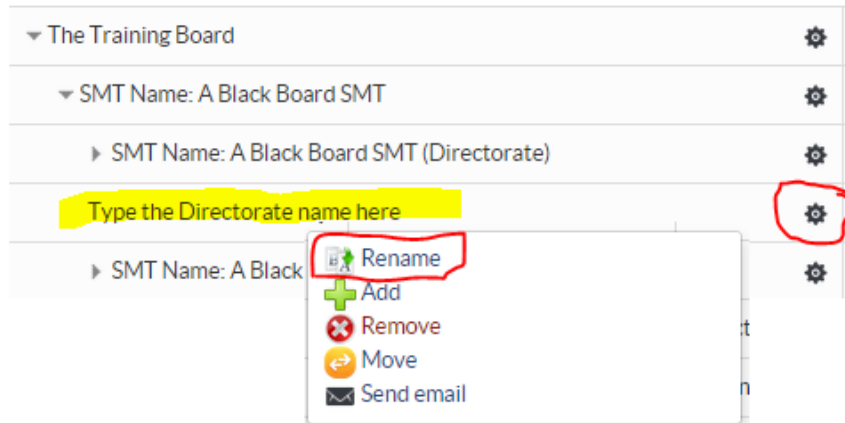
- To Rename any level in the hierarchy select the SMT/Directorate or Team you want to rename.

1. Select the Rename icon

2. In the pop up enter the new name in the field provided.

3. Confirm entry by clicking on Save

4. The new name will show in the relevant hierarchy

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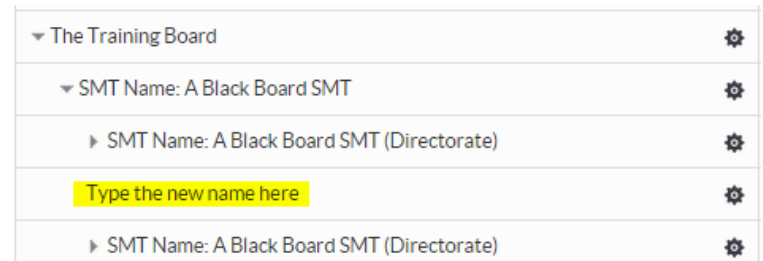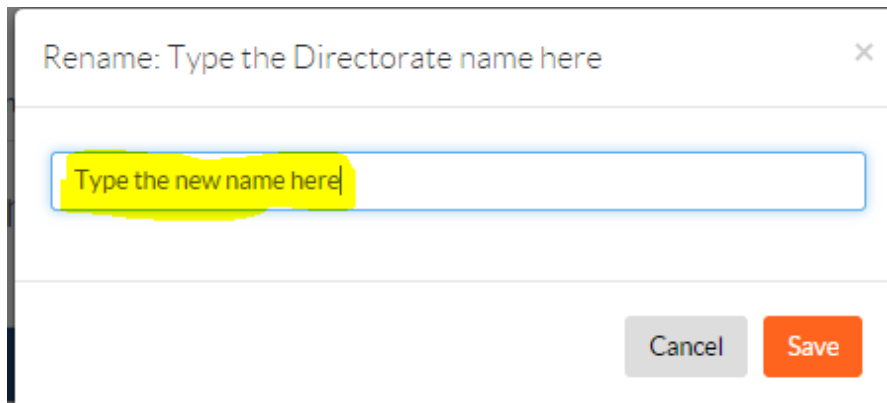
Removing a SMT/Directorate/Team
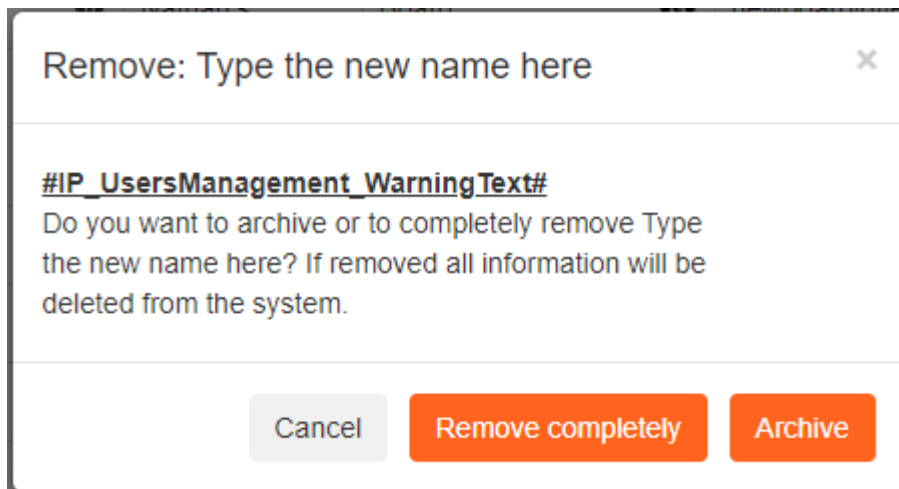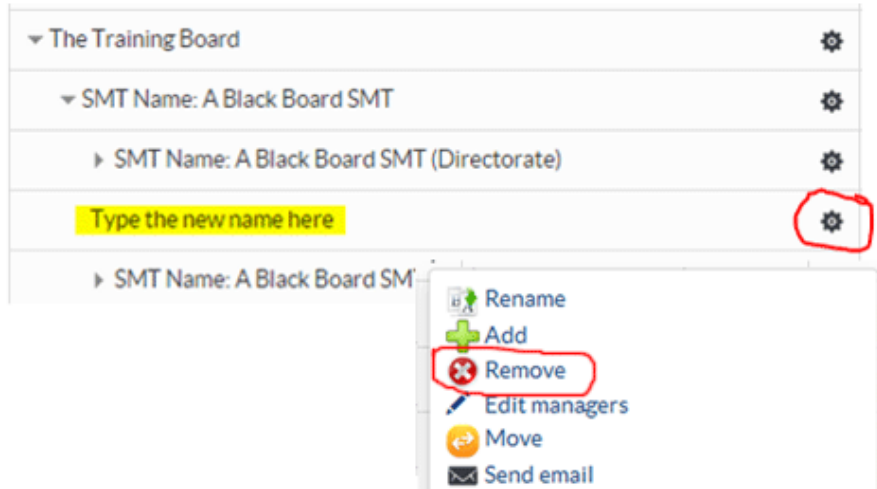
- To Remove any level in the hierarchy select the SMT/Directorate or Team you want to remove.

1. Select the Remove icon

2. Confirm the deletion by clicking on Remove completely or Archive in the confirmation pop up.

3. By removing the level completely all historic information relating to this level will be removed from the portal completely

4. By archiving the data, previous information will be stored

5. By selecting either option above, the level will no longer appear in the relevant hierarchy

6. **PLEASE NOTE: Any hierarchy levels below the removed level will also be removed. Please move first the levels that should remain and only after that delete the unnecessary levels.**

Moving a SMT/Directorate/Team

To Move any level in the hierarchy select the SMT/Directorate or Team you want to move.
1. Select the move icon
2. From the drop down menu select the location you wish to move them to
3. Click on "Move" to confirm your action

Organisation Management Logs

Improvements have been made to the logs to include any actions undertaken in organisation management.

Select Organisation management and click on display.

The new logs include the following:
- **Filter**: Allows you to filter your results by a specific Directorate / team or user. You can also
- filter your results by specific dates.
- **Remove:** Team / directorate / CEO / Board - removed from the hierarchy
- **Edit:** Team / directorate / CEO / Board - amended in the hierarchy
- **Move:** Team / directorate / CEO / Board - moved to a different part of the hierarchy

The distribution process

- When board hierarchies have been set up by the BA/Op Lead or the National Administrator, then the National administrator will begin the distribution cycle

- The distribution cycle steps are:
  - Team confirmation (4 weeks)
  - Questionnaire responding (3 weeks)
  - Additional time to input paper answers (2 weeks)
  - The dates reports are published to Op Leads and managers

Follow up: Team confirmations

- The Team confirmations page will only show the **<u>deadline</u>** for those included in a distribution.
- Expand the hierarchies to see all levels.
- Teams which have not confirmed will clearly be identified in **red** with the deadline date.
- Manage team page can be accessed from here.
- The follow up pages will only show teams/directorates that have been included in a distribution. If the team has not been included it will not show in the follow up but may still exist (if added) in organisation management.

Managers account creation status

Please check your team details and confirm by 12/04/2016

Edit your team information and click Confirm to complete

Confirm: Team up-to-date

Team name and manager(s)

Team name	First name	Last name	Email	Team account status
Ed King Team	Edmond	Shark	ed@silentshark.com	Account unconfirmed ⚙

Available in Follow up tab / Team confirmations / Manage team page
- Account shows as unconfirmed
- This means the manager has not used the link to create their account (not to be confused with confirming team)
- The cog wheel only shows if the manager has not used the link/if email amended/manager changed (and does not exist on the system already with a valid created account)
- *Tip: If you receive queries from managers saying they are unable to log in, check this first. 90% of queries we receive regarding log in errors is because managers have not actually clicked on the link and created their accounts*
- If the account is created no cogwheel will be available to click

	Team account status
om	Account created

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Managers Team confirmation links

Please check your team details and confirm by 12/04/2016

Edit your team information and click Confirm to complete

Team name and manager(s)

Team name	First name	Last name	Email	Team account status	
Ed King Team	Edmond	Shark	ed@silentshark.com	Account unconfirmed	⚙

Resend link & email
Copy link to clipboard
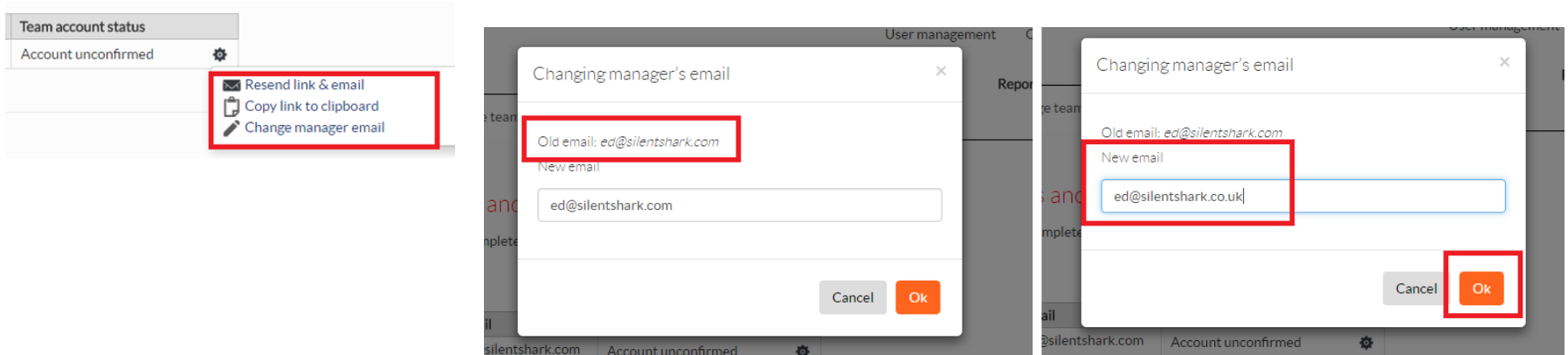Change manager email

Team members

Add manually | Import Excel | Team members: 4

- If the account status is unconfirmed click on the cogwheel
- Resend link and email: this will resend the team confirmation email which includes the link to create their account
- Copy link to clipboard: copy the link and send to the manager using your own email system
- Change manager email: incorrect emails can be amended here. This will automatically update the database and the organisation management page. Please note you can only edit the email, to change the managers full details you will need to do this from User management.

Change managers email

- Click on the cogwheel and select Change Managers email
- In the pop up window replace the existing email with the new email
- Select ok
- Managers email will change and will also be updated in organisation management and the database

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Manage team as Administrator

- The Manage team page has the same view as the team managers access when confirming teams. Admin can:

  - Confirm teams

  - Add, remove and exclude team members

  - Edit managers emails and resend links

  - Print paper copies (even before responding starts)

  - Reset team confirmation

  - Edit respondent emails

  - Resend respondent links (please note this action can only be performed during questionnaire stage. The cog wheels will not be visible unless the team is in questionnaire stage and will disappear once the questionnaire is closed).

Adding respondents and editing respondents email

Adding a respondent
- To add missing respondents after the team has been confirmed (even if you are now in questionnaire stage sent out) reset the team and then click on add manually and add the missing respondent. Remember the team needs to be reconfirmed.
- The database and respondents will automatically update. Allow 30 mins for this to update in the response rates screen.
- Please note that the Manager cannot enter assignment number here- this can only be done from a spreadsheet upload.
- The Manager should also be encouraged to update eESS if adding new team member to iMatter for consistency

Incorrect email for respondent
- If the respondents email is incorrect click on the edit icon next to their name

Incorrect telephone number for SMS respondent
- If the respondents telephone number is incorrect click in the SMS number box to edit

Editing Respondents email

- Edit the email and click on save and send link
- The link and cover email will automatically be sent to the respondent
- The new email will automatically be updated to the database.
- Please note that the Manager cannot enter assignment number here- this can only be done from a spreadsheet upload.
- The Manager should also be encouraged to update eESS if adding new team member to iMatter for consistency

Resending respondent links

Team members

Add manually **Import Excel** Team members: 6

Search [Search for team members] 🔍

☐	⏶ First name	⇕ Last name	⇕ Survey response method	⇕ Email	⇕ Address	⇕ SMS number	Assignment number
☐	Eddy	Jones	Email ▾ ⚙	eddytest@test.com ✏	United Kingdom		
☐	Edmond	Shark	Email ▾ ⚙	edmond@test.com ✏	United Kingdom		
☐	George	Russell	Paper ▾ 🖨 ⚙	✏	Test House, United Kingdom		
☐	Harry	Gray	Paper ▾ 🖨 ⚙	✏	United Kingdom		
☐	Rose	Thorne	Paper ▾ 🖨 ⚙	✏	United Kingdom		

Exclude from survey **Remove** **Print paper copies** **Reset team confirmation**

- The cogwheels next to each respondent will only display when you are at questionnaire stage and will disappear when the questionnaire closes. The following amendments can only take place during questionnaire stage.
- Resend link: will automatically resend the link and questionnaire to the respondent
- Copy link to clipboard: copy the link and send from your own email

Copy to clipboard: Ctrl+C, Enter ✕

http://www.webropolsurveys.com/R/C0D285E713738DD9.par

Manage Team

The Manage team page has been updated in follow up to include a column for assignment number.

- Note that the assignment number cannot be amended on the manage team page.

- Note that, if Import Excel is used to upload multiple respondents, the excel spreadsheet template provided does not contain the assignment number. Therefore to use Assignment numbers you must upload this information by importing an excel template in organisation management.

- If managers add/remove team members they should also update eESS at the same time, to ensure eESS is kept up to date.

Logs Team confirmations

Improvements have been made to the logs to include any actions undertaken in team confirmations. The new logs include the following:

- **Add:** when a new team member is added
- **Change member email:** team members email has been amended
- **Change manager email:** managers email has been amended
- **Resend team confirmation link:** the confirmation link and email ... portal
- ... ...ation link: the team confirmation link has been copied to clipboard
- **Resend questionnaire link:** questionnaire link and email have been sent from the portal
- **Request link:** questionnaire link has been copied to the clipboard
- **Download paper questionnaire:** when a paper questionnaire has been downloaded

Follow up: Response Rates

Health and Social Care iMatter Questionnaire demo
Super User

Distribute questionnaire   Follow Up   Log   View results

Reports for year   2020 (01/01/2020 - 31/12/2020) ▾

Team confirmations   Teams / Respondents   Response rates   Spoiled responses   Reports / Action plan / Storyboard   General statistics

Total Statistics

Team ▾ | Brown | Search

NHS Scotland	Sent surveys				Responses				Response rates				Deadline
	Email	Paper	SMS	Total	Email	Paper	SMS	Total	Email	Paper	SMS	Total	
▸ NHS Scotland	112	35	57	204	62	16	30	108	55%	46%	53%	53%	⇗
▸ The Training Board	2	6	1	9	1	5	1	7	50%	83%	100%	78%	⇗
▸ SMT Name: A Black Board SMT	2	6	1	9	1	5	1	7	50%	83%	100%	78%	⇗
▾ SMT Name: A Black Board SMT (Directorate)	2	6	1	9	1	5	1	7	50%	83%	100%	78%	⇗
A Black Boards Team (Team Name)	1	4	0	5	1	3	0	4	100%	75%	0%	80%	22/05/2020 ⇗
Brown team	1	2	1	4	0	2	1	3	0%	100%	100%	75%	22/05/2020 ⇗

- The Response rates Page will only show the **deadline** for those included in a distribution.

- Expand the hierarchy to see all levels

- A team of 5 or more team members must achieve a minimum response rate of 60% to view reports. Teams not achieving this response rate will be identified in red. Teams of less than 5 must have a response rate of 100%

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Follow up: Response Rates

- This shows the number of questionnaires sent using email, paper and SMS method with the overall total
- Also shows the number of questionnaires received using email, paper and SMS method with the overall total
- The response rate for the email and paper method with the overall total response rate
- Teams of less than 5 not achieving the response rate of 100% are also highlighted in red
- The arrows in the deadline column can be expanded to confirm the deadline date for each team.
- Expanding the large white arrow at the top will confirm the deadline dates for all teams in the hierarchy automatically. Expanding the smaller blue arrow will confirm the deadline date of an individual team.
- *Due to the amount of information contained in this screen report links cannot be accessed from this tab*

Teams/Respondents Tab

- The Teams/Respondents tabs shows the number of teams and respondents at the beginning of the distribution – when team confirmations first started
- It also shows the number of teams/respondents at the end of the distribution so you can monitor any significant changes at a glance.

Follow up: Reports/Action Plan/Storyboard

- As of 2021, SMT and Directorates can complete action plans in addition to team level. In the reports/action plan/storyboard tab, administrators can see data about action plan completion for each hierarchy level.

- This allows you to see which levels achieved reports, and whether their action plans, storyboards and records of progress have been completed.

Reminder emails

- The system is set up to send the following automatic reminders once per week

    - For team managers with unconfirmed teams
    - For respondents, who have not responded to the questionnaire

- Additionally team managers get a reminder when paper copies are available for printing

- Team managers will also receive an email when reports are published and to remind them to complete their team action plans

Sub reporting

Access sub reporting levels tab

The sub reporting levels tab within the iMatter portal contains all of the information about current sub reporting levels (assistants) and is where new sub reporting levels can be added.

1. Select User Management from top right-hand corner

2. Select "Sub reporting levels" tab. On this page all of the information for current sub reporting levels will be shown. This page is also used to add new assistants (sub reporting levels)

Add new sub reporting levels

Click add "new sub reporting level" on the left-hand side.
Complete the form to add a new sub reporting level (see screenshot below).

Add new sub reporting levels

Add sub reporting level   ✕

Hierarchy level type	Organisation ⌄
Hierarchy level	The Training Board ⌄
Manager	Bassi Amy (leannesmith.testing+450@gmail.com) ⌄
First name	First name
Last name	Last name
Email	Email
Report title	Report title

Cancel   **Save**

<mark>Please note that all of the fields must be completed in order to add a new sub reporting level correctly:</mark>
a) Hierarchy level type. **DIRECTORATE** must always be selected from the dropdown for this functionality to work correctly.
b) Hierarchy level. **BOARD NAME** must always be selected from the dropdown for this functionality to work correctly. The image above shows NHS 24 but other boards from the dropdown can be chosen. Note that, you should only be able to choose directorates from the board you belong to.
c) Manager. This is usually pre-filled.
d) Enter First, last name and email address for the sub reporting level.
e) Report title. This is the name given to the report, that the sub reporting level will see, for the delegated teams they have been given access to. You may choose to name the report title with the same name as the sub reporting level, or use something else.
Click save to add the new sub reporting level or cancel to discard any changes.

Add new sub reporting level

Once the new sub reporting level has been added successfully they will appear on the sub reporting page.

When a sub reporting level has no teams delegated, the pencil next to their name in the "set delegated levels" column, will appear red. Once access to their specific teams has been delegated, the pencil will appear blue.

Important testing Note:
With this development, the logic within the system has changed. Previous sub reporting levels/sub directors, which were created prior to this development, have ORGANISATION as the HIERARCHY LEVEL TYPE. These sub reporting levels need to be amended to DIRECTORATE as their HIERARCHY LEVEL TYPE, in order to see the reports correctly. Therefore, any current sub reporting levels created previously will need to be edited.
If the teams that the sub reporting level currently has access to are correct, and you do not wish to edit the sub reporting level further, please follow the steps below to ensure that you do not lose the list of delegated teams they currently have access to when you amend their hierarchy level type.

To edit existing sub reporting levels:

1. Click SET DELEGATED LEVELS pencil for the sub reporting level. There should be a number of teams with a tick in the tick box, these are the teams they have access to. You will need to keep the teams they currently have access to for future reference – unless you want to start from scratch.

2. Click IMPORT DELEGATED TEAMS and EXPORT. Export the excel template (see screenshot below) this should provide an excel export with the current delegated teams listed. Save this file on your computer safely as you will need this later. Do not import the file yet.

3. Press cancel to return to the main screen. For the same sub reporting level, click EDIT SUB REPORTING LEVEL. Change the HIERARCHY LEVEL TYPE to DIRECTORATE and select the correct directorate from HIERARCHY LEVEL dropdown. Remember to update changes.

To edit existing sub reporting level 2:

Set levels for delegating

▼ The Training Board	☐
▼ SMT Name: A Black Board SMT	☑
▼ A Black Board SMT (Directorate)	☑
A Black Boards Team (Team Name)	☑
▼ A Blue Boards Directorate	☑
Blue Team	☑
Red Team	☑
▼ A Red Boards Directorate	☑

All the teams from the file won't be delegated if at least one of the team isn't found in the database

Export Excel template   Import delegated teams

Export   Choose file   No file chosen

Cancel   Import

4. Now that the hierarchy level type has changed, access to delegated teams will have been removed, as the sub reporting level has been edited. From the main screen, click SET DELEGATED LEVELS, the pencil should be red coloured.

5. Click IMPORT DELEGATED TEAMS. Click the CHOOSE FILE button and select the excel spreadsheet you saved on your computer earlier, in step 2. This excel should contain the teams that the sub reporting level previously had access to. Click IMPORT.
6. The sub reporting level should now have a tick in the box next to each team which they previously had access to. Remember to save any changes.
7. All sub reporting levels with ORGANISATION in their HIERARCHY LEVEL TYPE need to be changed to DIRECTORATE following this process, to ensure that reports display correctly.

Editing sub reporting levels

Set levels for delegating

- ▼ testing teams ☐
- Dummy Team Grampian ☐
- Dummy team Lanarkshire ☐
- Dummy Team Lothian ☐
- Dummy team Tayside ☐
- DummyTeam A&A ☑
- I Test ☑

Import delegated teams   Move levels   Cancel   Save

- To edit sub reporting level information, such as amending their name or hierarchy level, click on the pencil in the 'Edit assistant' column. This will show the same "add new sub reporting level" screen as seen previously, where the details for that assistant can be amended.

- **Setting Delegated Levels**

  To edit the delegated teams for a sub reporting level, click on the pencil in the "set delegated levels" column. Note that, when a new sub reporting level is added, before any teams are delegated, the pencil will be red. Once teams are delegated the pencil will be blue.

- To manually assign teams, tick in the box next to the team name that the sub reporting level is to be given delegated access to, and remember to save changes. Clicking in the box next to the team name will remove the tick so that the sub reporting level no longer has delegated access to this team.

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Editing Sub reporting levels 2

- To delegate access for a lot of teams, tick in boxes next to appropriate team names and select "IMPORT DELEGATED TEAMS". Click export to download an excel template containing this information. Amend the information within the excel template:
- remove a row to remove delegated access to this team
- ensure team names are exactly the same as they appear within the portal and teams already exist within the portal, otherwise the spreadsheet upload will not work successfully.
- Clicking a team prior to exporting the template means that the exported excel template will contain an example of the correct format that is to be used. If no teams are selected and the excel is exported, the excel will be empty. If information is entered in the incorrect format, the excel import functionality will not work correctly.
- Save the template and import this back into the system using "choose file" and save changes by clicking "import".

Move teams to another sub reporting levels and remove sub reporting levels

- If the sub reporting level changes to a different member of staff, the "move levels" button can be used to give delegated access for teams to a new sub reporting level. The MOVE LEVELS functionality means that you do not need to manually delegate access to the same teams for a new sub reporting level.

- Create new sub reporting level by clicking "ADD NEW SUB REPORTING LEVEL". Once this has been created successfully the set delegated levels pencil will be red as they currently have no delegated teams

- Click SET DELEGATED LEVELS for the existing sub reporting level that will be removed, that you need to move the teams from. Select MOVE LEVELS button. Please note that, you will need to have more than 1 sub reporting level, for the same board, for the move levels functionality to work.

- From the dropdown, select the name of the sub reporting level to move the levels to. Click MOVE to save changes. SET DELEGATED LEVELS for the new sub reporting level will now appear blue.

- To remove a sub reporting level which is no longer required, select the tick box next to their name and select DELETE underneath the table listing sub reporting level information. Please note that this will remove permanently with no option to archive.

Move teams to another sub reporting level and remove sub reporting levels 2

Search

Use the SEARCH BY drop down to search for existing sub reporting levels in the system. Select search criteria from the dropdown, such as "email". In the box on the right hand side, enter the text used to search, then click "SEARCH". The page will then update to show information matching the search criteria.
Please note that the following search criteria can be used:

SUBREPORTING LEVEL OF
FIRST NAME
LAST NAME
EMAIL

Page Numbering

- Sub reporting level information may be organized across several pages. Choose PREVIOUS or NEXT to scroll through several pages. Choose the options 5, 20 or 100 to show a specific amount of information per page.

Viewing Sub reporting level reports as Oplead or Board Administrator

OpLeads and Board Administrators can view the reports that the sub reporting levels receive, in addition to their own reports. Note that other admin types such as directorate admins do not have access to this feature.

In the View results tab, a dropdown with a list of available sub reporting levels will be shown. Use the dropdown to choose a sub reporting level and click view reports. This will show the reports that the sub reporting level receives.

The report title shown for the sub reporting level can be edited using the "report title" field in edit sub reporting level, on the sub reporting level tab.

Viewing sub reports as a DA

- Directorate admins now will be able to have access to sub reports (if they are given access)

- This is done when a DA is set up, and a sub reporting level for that directorate is also created.

- To view this, log in as a DA, and click view results.

Viewing follow up for SRL

- Admins can now view all follow up stats for their SRL's

- Click on the follow up tab to see all the different tabs that you can find the stats for the SRL's

- They can access – Team Confirmation, Teams/Respondents, Response Rates, Spoiled Responses, Reports/Action Plan/Storyboard, General Stats

Access for Sub reporting levels
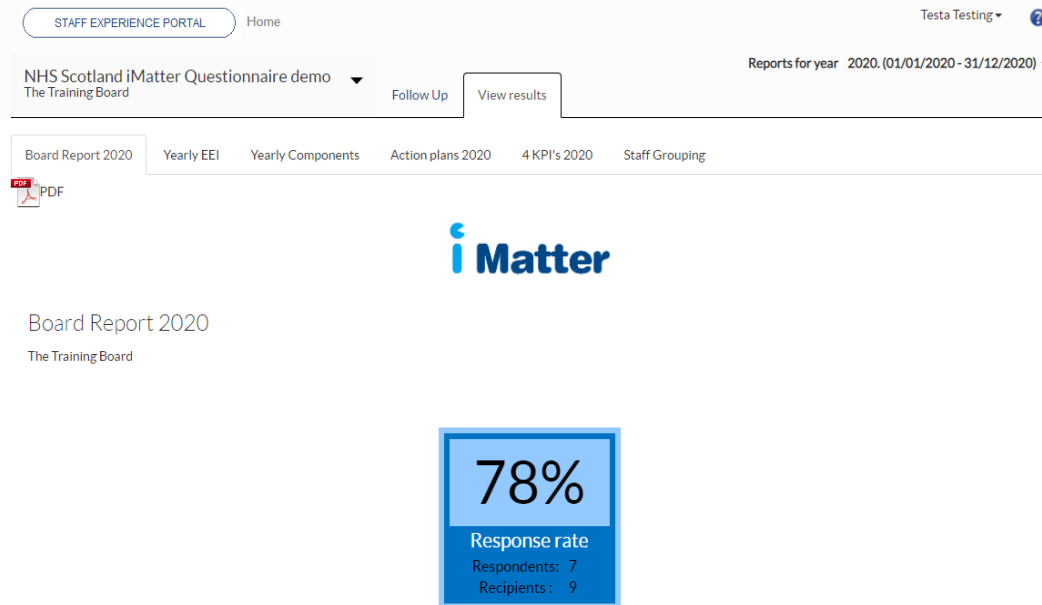
- Sub reporting levels will have their own login to access the portal. When they log in to the iMatter portal, the follow up tab will only show the teams they have been given delegated access to.

- Sub reporting levels will see reports relating to the teams they have been given delegated access to. If they have been set up using directorate hierarchy level type, charts in reports such as Yearly EEI, Action plans and 4KPI will show a breakdown of the teams they have been given delegated access to. If the sub reporting level has been set up using a different hierarchy level type such as organisation, charts will show the hierarchy level they have access to instead of individual team names.

Reporting

- Managers can access reports either directly from the home page dashboard, or by clicking on View results
  - Op Leads can also access individual reports from Follow-up: Reports/Action Plan/Storyboard Tab
- For team with 5 team members or more a minimum 60% response rate is required for a report to be published
- For teams with less than 5 team members a 100% response rate is required for a report to be published

NHS Scotland iMatter Questionnaire demo for Administrator (The Training Board)

Up to date response rate
78%

Employee Engagement Index
65

Board Report 2020
Yearly EEI
Yearly Response Rates 2020
Yearly Components
Action plans 2020
4 KPI's 2020
Staff Grouping

Follow Up – Reports/Action plan/Storyboard

Team confirmations	Teams / Respondents	Response rates	Spoiled responses	Reports / Action plan / Storyboard	General statistics

Total Statistics

SMT ▾		black		Search	

NHS Scotland	**Response rates achieved**		**Response rate not achieved**	**Action plan and storyboard created**	**Record of Progress completed** ⤶
▸ NHS Scotland	25	View report	23	18 out of 48 team completed	17 out of 48 team completed ⤴
▸ The Training Board	1	View report	1	1 out of 2 team completed	1 out of 2 team completed ⤴
▾ SMT Name: A Black Board SMT	1	View report	1	1 out of 2 team completed	1 out of 2 team completed ⤴
▾ SMT Name: A Black Board SMT (Directorate)	1	View report	1	1 out of 2 team completed	1 out of 2 team completed ⤴
A Black Boards Team (Team Name)	1	View report	0	Link to storyboard 🔓	Completed 01/05/2020 🔓 ⤴
Brown team	0	View report	1	Not completed ⓘ	Not completed ⓘ ⤴

- Reports/Action plan/Storyboard tab shows the total number of teams in a board which have achieved the response rate (aggregated up the hierarchy)
- Also shows the total number of teams in a board which have not achieved the response rate (aggregated up the hierarchy)
- The report links are now visible from this tab (no longer available in response rates)
- Action plan stats are also visible from this screen

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Follow Up – Reports/Action plan/Storyboard

Statistics per Distribution

Select Distribution and "Show statistics" button to show distribution specific statistics

Test Distribution 01.05.20 ▼

Show statistics

NHS Scotland	Response rates achieved		Response rate not achieved	Action plan and storyboard created	Record of Progress completed
▼ NHS Scotland	1	View report	1	1 out of 2 team completed	1 out of 2 team completed
▼ The Training Board	1	View report	1	1 out of 2 team completed	1 out of 2 team completed
▼ SMT Name: A Black Board SMT	1	View report	1	1 out of 2 team completed	1 out of 2 team completed
▼ SMT Name: A Black Board SMT (Directorate)	1	View report	1	1 out of 2 team completed	1 out of 2 team completed
A Black Boards Team (Team Name)	1	View report	0	Link to storyboard 🔓	Completed 01/05/2020 🔓
Brown team	0	View report	1	Not completed ⊗	Not completed ⊗

- The same stats report links are also available per distribution.
- Select the distribution from the drop down and click Show Statistics
- Only the stats and report links for the distribution selected will be visible.

Follow Up – Reports/Action plan/Storyboard

Statistics per Distribution

Select Distribution and "Show statistics" button to show distribution specific statistics

[Test Distribution 01.05.20 ▼]

Show statistics

NHS Scotland	Response rates achieved		Response rate not achieved	Action plan and storyboard created	Record of Progress completed
▼ NHS Scotland	1	View report	1	1 out of 2 team completed	1 out of 2 team completed
▼ The Training Board	1	View report	1	1 out of 2 team completed	1 out of 2 team completed
▼ SMT Name: A Black Board SMT	1	View report	1	1 out of 2 team completed	1 out of 2 team completed
▼ SMT Name: A Black Board SMT (Directorate)	1	View report	1	1 out of 2 team completed	1 out of 2 team completed
A Black Boards Team (Team Name)	1	View report	0	Link to storyboard	Completed 01/05/2020
Brown team	0	View report	1	Not completed	Not completed

- The numbers in the stats are clickable

Response rate achieved: NHS Scotland

Hierarchy level	Amount of response rate achived	Amount of response rate not achived
NHS Scotland	0	1
Organisation	6	5
SMT	6	6
Directorate	9	6
Team	25	23
Total	46	41

Close

- When you click on any number it will show you the total response rates achieved at all hierarchy levels.
- The total shows the number of response rates achieved across all levels of the hierarchy for the board
- This figure is the same as the number of reports produced
- These stats can be viewed for the entire board or per distribution

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Viewing reports

- By clicking on the report links from the dashboard, or selecting the View Results tab, you will be directed to the reporting page
- You will see tabs for all the reports that are available to you
- You can also download all the reports to PDF

Board Report 2020   Yearly EEI   Yearly Response Rates 2020   Yearly Components   Action plans 2020   4 KPI's 2020   Staff Grouping

PDF

i Matter
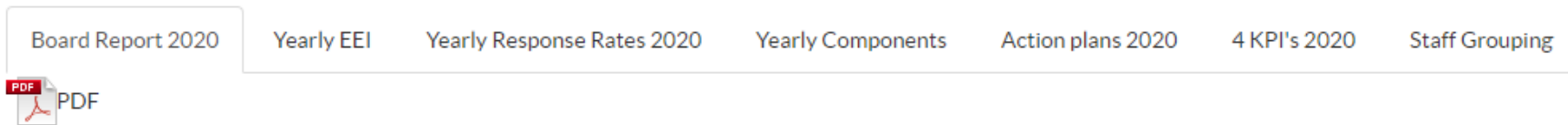
The Aggregated Board Report

The Aggregated Board report will show the following:

- The aggregated Board Response Rate

- The aggregated Board Employee Engagement Index (EEI) - the colour of the EEI is reflected in the thresholds key below each chart

- The report will also show the NHSScotland Staff Governance Strands which underpin the iMatter Continuous Improvement Model

- Reports will be in a similar format at each level

i Matter

78%
Response rate
Respondents: 7
Recipients: 9

65
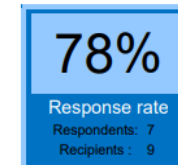
Staff Governance Standards - Strand Scores

Weighted Index Value

Well Informed — 66

Appropriately Trained & Developed — 68

Involved in Decisions — 64

Treated Fairly & Consistently, with Dignity & Respect, in an Environment where Diversity is Valued — 67

Provided with a Continuously Improving & Safe Working Environment, Promoting the Health & Wellbeing of Staff, Patients & the Wider Community — 64

- ● Strive & Celebrate (67 - 100), Strive & Celebrate (67- 100)
- ● Improve to Monitor (34 - 50)
- ● Monitor to Further Improve (51 - 66)
- ● Focus to Improve (0 - 33)

The Aggregated Board Report

You will also see 3 sections in the Board report which are:

- Experience as an individual
- Experience within your team
- Experience within your organisation

- You will see the average score for each question within each of the 3 sections.
- The colour of the score is reflected in the threshold key below each chart

Experience as an Individual:

Number of respondents: 7

Average score

- Strive & Celebrate (67 - 100)
- Monitor to Further Improve (51 - 66)
- Improve to Monitor (34 - 50)
- Focus to Improve (0 - 33)
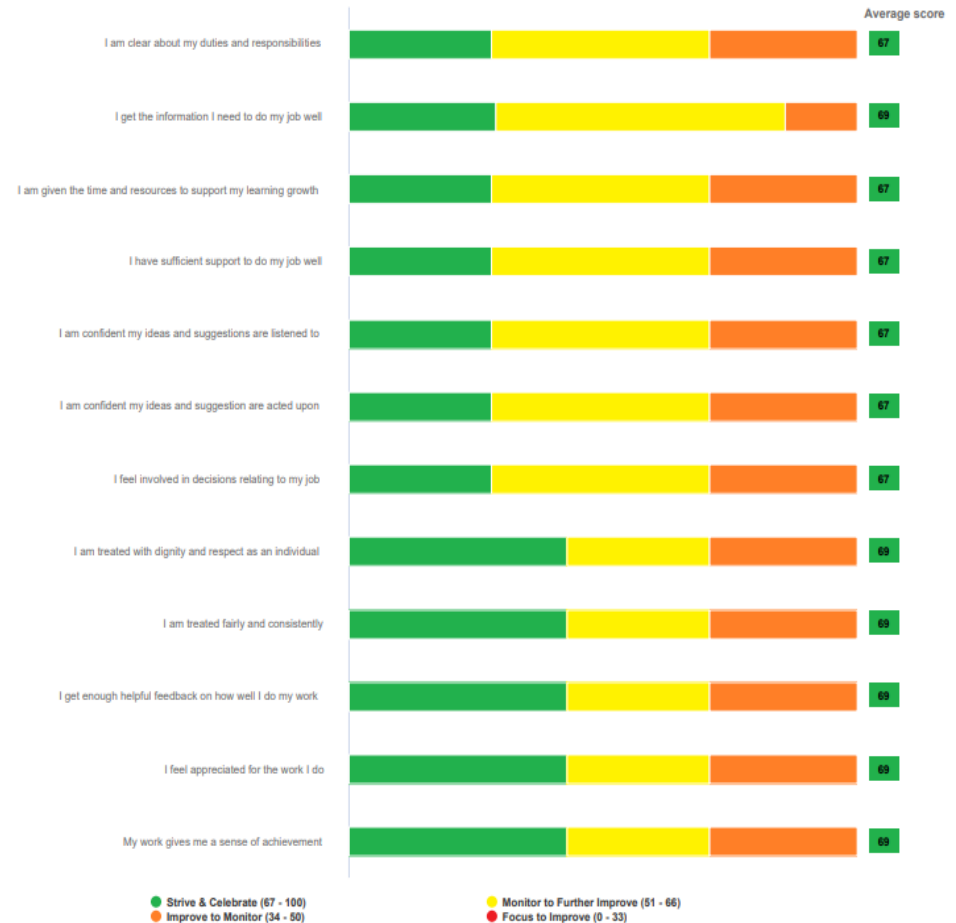
The Aggregated Board Report

- The thermometer shows the aggregated Board average for the overall experience of working within your organisation

Overall, working within my organisation is a ......

Responses count: 3
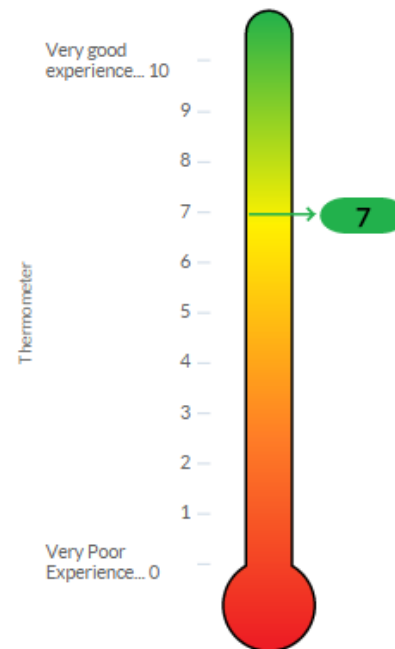
Threshold Table

- Reports for all levels will also show a threshold table

EEI number for teams within NHS Scotland

EEI Threshold	(67-100) %	(51-66) %	(34-50) %	(0-33) %	No report	Total
Number of Teams	1171	184	16	0	544	1915
Percentage of Teams	61.1%	9.6%	0.8%	0%	28%	100%

The table shows the benchmark overview of teams NHS Scotland. A similar report is available for Team/Directorate/CEO/Board level

Yearly EEI Scores Report

- You will also see an Aggregated Board report showing the Yearly EEI score for the CEO within the Board, as well as an aggregated score for the Board

- The colour of the score is reflected in the threshold key below the table

- You will eventually be able to see a table with up to 5 year's improvements and comparisons

- If a response rate of 60% is not achieved for the CEO then no score will show for the CEO

- Reports will be in a similar format at each level

EEI numbers and improvements from last year

Organisation	2017	Improvement	2018	Improvement	2019	Improvement	2020
A Black Board SMT (Directorate)	76	↑	77	→	77	↓	76
A Blue Boards Directorate	86	↓	81	↑	83		No report
SMT Name: A Black Board SMT	76	↑	77	→	77	↓	76

67 - 100	Strive & Celebrate	51 - 66	Monitor to Further Improve	34 - 50	Improve to Monitor	0 - 33	Focus to Improve

Yearly Response Rates Reports

- You will also see an Aggregated Board report showing Yearly Response Rates for the CEO within the Board, as well as an aggregated response rate for the Board
- If the CEO has a response rate of less than 60% this will be highlighted in red
- You will eventually be able to see a table with up to 5 years response rates
- Reports will be in a similar format at each level

Yearly Response Rates

Executive

	Response rate	Response rate		Response rate		Response rate	
Organisation	2017	Improvement	2018	Improvement	2019	Improvement	2020
The Training Board	100%	↓	86%	↑	100%	→	100%

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Yearly Components Reports

- The yearly components table shows the 28 questions which are marked to the 20 Staff Experience Components which are linked to the 5 Governance Strands

- The report shows the average score received for each component

- The colour of the score is reflected in the threshold key below the table

- You will eventually be able to see a table with up to 5 year's improvements and comparisons

- Reports will be in a similar format at each level

iMatter Components Report

iMatter Questions	Staff Experience Employee Engagement Components	Average Response			
		2017	2018	2019	2020
My direct line manager is sufficiently approachable	Visible and consistent leadership	87	87	87	91
I feel my direct line manager cares about my health and well-being	Assessing risk and monitoring work stress and workload	84	85	85	89
I have confidence and trust in my direct line manager	Confidence and trust in management	84	84	84	88
I am clear about my duties and responsibilities	Role Clarity	88	89	88	87
I am treated with dignity and respect as an individual	Valued as an individual	82	83	83	86
I am treated fairly and consistently	Consistent application of employment policies and procedures	81	82	81	84
My team works well together	Effective team working	82	83	83	83
I understand how my role contributes to the goals of my organisation	Sense of vision, purpose and values	83	83	83	83
I would recommend my team as a good one to be a part of	Additional Question	83	84	84	83
I get the information I need to do my job well	Clear, appropriate and timeously communication	82	82	82	82
My work gives me a sense of achievement	Job satisfaction	80	81	81	81
I am confident my ideas and suggestions are listened to	Listened to and acted upon	75	75	75	80
I am confident performance is managed well within my team	Performance management	78	79	78	80
I feel appreciated for the work I do	Recognition and reward	73	74	74	80
I have sufficient support to do my job well	Access to time and resources	78	79	79	79
I feel involved in decisions relating to my team	Empowered to influence	75	76	76	79
I get enough helpful feedback on how well I do my work	Performance development and review	74	75	74	79
I would be happy for a friend or relative to access services within my organisation	Additional Question	78	78	78	78
I am given the time and resources to support my learning growth	Learning & growth	73	74	74	76
I would recommend my organisation as a good place to work	Additional Question	75	75	75	76
I am confident my ideas and suggestion are acted upon	Listened to and acted upon	71	71	71	75
I feel my organisation cares about my health and wellbeing	Heath and well being support	72	72	72	75
I feel involved in decisions relating to my job	Empowered to influence	71	71	71	74
I get the help and support I need from other teams and services within the organisation to do my job	Appropriate behaviours and supportive relationships	72	72	72	73
I have confidence and trust in Board members who are responsible for my organisation	Confidence and trust in management	66	65	65	66
I am confident performance is managed well within my organisation	Performance management	66	66	65	63
I feel that board members who are responsible for my organisation are sufficiently visible	Visible and consistent leadership	63	63	63	62
I feel sufficiently involved in decisions relating to my organisation	Partnership working	58	58	58	59

Text field | 67 - 100 | Strive & Celebrate | 51 - 66 | Monitor to Further Improve | 34 - 50 | Improve to Monitor | 0 - 33 | Focus to Improve

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Different Report Publishing Dates

	NHS Scotland	Sent surveys				Responses				Response rates				Deadline	
		Email	Paper	SMS	Total	Email	Paper	SMS	Total	Email	Paper	SMS	Total		
▸	The Training Board	2	6	1	9	1	5	1	7	50%	83%	100%	78%		⇗

- Op Leads will view reports at the same time as managers, directorates, the CEO and Board Chair. For some Teams within a Board, the date and time the iMatter process begins may vary

- The Response Rates shown in the Follow Up screen are in real time

- Board reports are only updated once the reports for Teams are published

- The data in the reports may vary from the Follow Up Response Rates page as it will not include the results of Teams whose reports are not published

- **Remember:** Team reports are published 5 weeks after the electronic questionnaire closes each time

Board Report 2020

The Training Board

The EEI score on the dashboard will always be the same as the Published report.
The response rate on the dashboard will be real time and will not affect the published EEI.

78%

Response rate
Respondents: 7
Recipients :   9

65
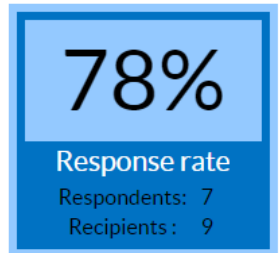
Please note this will vary across the boards so check your schedules for the correct timeframes.

Action Plan

- When reports are published the Team, Directorate and SMT must continue to fill in the Action plan for their evel

- All teams are required to complete the action plan even if they have not met the required response rate threshold.

Action Plan

- Managers must complete the action plan with their team members.
- Identify as a team what they do well
- Identify at least 1 area of improvement and a maximum of 3
- At least 1 desired outcome and action and a maximum of 3

- Assign responsibility and specify a completion date
- The action plan cannot be completed until the What we do well field is complete and a minimum of 1 improvement, outcome and action are entered in each box.

- **Complete action plan & create storyboard:** No further changes can be made to the plan. The storyboard and record of progress are generated.

iMatter Action Plan

Step 1: Read guidance

Open Action Plan Guidance

Step 2: Action plan

Team name: Team FEB 4

What we do well

The team have a good working relationship and we support each other to ensure we can get our work done effectively.

Area for Improvement	Desired Outcome (pulled through to Storyboard)	Actions (pulled through to Storyboard)	Responsible for Action Plan and Target Completion Date – who and when
Appropriate training to help team members to understand their roles better and what is required from them	With appropriate training team members will have a better understanding of their roles and should be able to work more efficiently and more effectively.	Contact HR to discuss the need for a Training Needs Analysis for team members, which will identify any skills gaps.	Team Manager. End April 2015
Communication within the team	Be more up to date on decisions affecting the team so we all have an understanding of what is required from all team members.	Hold a regular weekly meeting to keep team member updated of any new or outstanding issues. Arrange weekly meetings with immediate effect, starting Monday 23/3/2015	G McGuire, by 23/3/15
Communication between other teams	Communicate more effectively with other teams, especially since this often has a direct impact on our own work.	Identify the 3 core teams we work most closely with so that we can commence a more effective communication strategy. Janet Graham to compile list and contact 3 main teams. End March 2015	J Graham,. End March 2015

Save and continue   Complete Action Plan & Create Storyboard

Action Plan

- Once the action plan is completed and a storyboard is generated, Teams can keep a record of their progress.
- This should include the results of the action taken and the date the progress was completed.

Step 2: Action plan

Team name: TestTeam1

What we do well

The team have a good working relationship and we support each other to ensure we can get our work done effectively.

Area for Improvement	Desired Outcome (pulled through to Storyboard)	Actions (pulled through to Storyboard)	Responsible for Action Plan and Target Completion Date – who and when
Appropriate training to help team members to understand their roles better and what is required from them	With appropriate training team members will have a better understanding of their roles and should be able to work more efficiently and more effectively.	Contact HR to discuss the need for a Training Needs Analysis for team members, which will identify any skills gaps.	Team Manager. End April 2015
Communication within the team	Be more up to date on decisions affecting the team so we all have an understanding of what is required from all team members.	Hold a regular weekly meeting to keep team member updated of any new or outstanding issues. Arrange weekly meetings with immediate effect, starting Monday 23/3/2015	G McGuire, by 23/3/15
Communication between other teams	Communicate more effectively with other teams, especially since this often has a direct impact on our own work.	Identify the 3 core teams we work most closely with so that we can commence a more effective communication strategy. Janet Graham to compile list and contact 3 main teams. End March 2015	J Graham, End March 2015

Step 3: Record of Progress

Area for Improvement	Progress Made	Date
Appropriate training to help team members to understand their roles better and what is required from them	TNA conducted and several areas of where training is required has been identified. Training options have been provided by HR.	23rd April 2015
Communication within the team	Weekly team meetings being held.	
Communication between other teams		

Save changes   Complete and Lock

- Once all progress has been logged Team managers can complete and Lock the action plan.
- No further changes can be made to the action plan.
- The action plan cannot be locked until a minimum of 1 improvement and progress of action are entered.

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Storyboard

- Once the Action plan is completed, the team manager can open the storyboard.

- The storyboard contains some information from Action plan and EEI and overall result of working within the organisation from the questionnaire results

- Op Leads can open and view individual Storyboards.

Storyboards for teams not achieving response rate

Ed King Team

What we do well

> **What we do well:** The team have a good working relationship and we support each other to ensure we can get our work done effectively.

Staff Experience Improvement Journey

> **Desired Outcome:** With appropriate training team members will have a better understanding of their roles and should be able to work more efficiently and more effectively.
> **Action:** Team manager is responsible for contacting HR to discuss the need for a Training Needs Analysis for team members, which will identify any skills gaps, to be completed by end April 2016.

> **Desired Outcome:** Be more up to date on decisions affecting the team so we all have an understanding of what is required from all team members.
> **Action:** Hold a regular weekly meeting to keep team member updated of any new or outstanding issues.

> **Desired Outcome:** Communicate more effectively with other teams, especially since this often has a direct impact on our own work.
> **Action:** Identify the 3 core teams we work most closely with so that we can commence a more effective communication strategy. Janet Graham to compile list and contact 3 main teams.

- The storyboard is produced but only shows the action plan information
- The EEI score and thermometer are not visible as the team has not achieved the response rate required

Following up on action plans

- Board Administrators and Op Leads can follow-up on the Action plan completions from the follow up Reports/ Action plan / storyboard tab. Board administrators will see the date teams have created the action plan and storyboard. Op Leads will see a link to the storyboard. Board administrators and Op Leads will see the date the progress of actions is completed. See page 35 for more information on this screen.

Processes

- **Please follow the processes highlighted below to ensure we are all working towards reducing the level of support required both from you and Webropol:**

1. Email organisation charts and spreadsheets to the iMatter Programme Manager, **no later than Monday 12 noon 3 weeks prior to distribution**

2. Email spreadsheet to Webropol and uploaded **no later than Monday 5pm 2 weeks prior to distribution**: Webropol will check them to ensure they are set up correctly before uploading and to provide initial support in this process.

3. Once a distribution is underway **DO NOT add/remove** any teams – this must be agreed by the iMatter Programme Manager and carried out by Webropol who will remove the team from all areas of the system. A distribution starts from the moment team confirmations are sent.

4. Manage teams: Op Leads and BA's should monitor their logs to ensure staff have not been removed or excluded without a reason being specified. This is now a mandatory field. If a manager has not specified a reason the BA or Op Lead should reset the team and notify the manager. If multiple team members are removed then a reason must be specified for each team member.

Distributions

- Do not add teams to a distribution once the distribution process has started. Any teams added after the distribution cannot be included in the distribution and has to be dealt with manually by Webropol.

- The distribution process can only be carried out by the National Administrator or Webropol and is not a function that is available to Op Leads/ BA's.

- If new teams are to be added during this process you must complete a team amendment spreadsheet and submit this to Webropol helpdesk., before Webropol can manually make these adjustments to the system.

- Any requests should be sent directly to Webropol Helpdesk, retain a copy of your team amendments spreadsheet should this need to be updated or required later

Distributions

- These types of amendments are very time consuming and require a manual fix which can take 1-2 hours for a small change and half day for more complex changes. This will impact on the level of support provided by Webropol.

- A roll out plan has been developed for each distribution, iMatter Programme Manager and Webropol will require **30 days notice** if there are any changes to this schedule.

- If there are exceptional circumstances please discuss directly with iMatter Programme Manager. We will make every effort to try and support you where possible.

Adding teams after a distribution has started

Adding teams during the team confirmation stage:

- If a new team is added once the distribution has started the following steps will be required:

- BA/Op Lead can only add the Team Name and team managers details to the hierarchy. Team members cannot be added at this stage.

- Once Webropol have added the team, the team activation link can be accessed directly from the portal. Team members will need to be added manually either by the manager or BA/OP Leads from the manage team page.

- The team must then be confirmed in order for respondents to be created.

Adding teams during the Questionnaire stage:

- Complete the steps above.

- Once the team has been confirmed inform Webropol Support Team

- Webropol will generate the respondent links for team members completing the electronic copy. Links can be accessed from the portal, manage team page.

- Webropol will generate paper copies which can be printed from the manage team page for team members requiring the paper format.

Support

- 1st Line Helpdesk support:
  - Team managers, Directorates etc. must contact their Op Lead or Board Administrator for support. They must not contact Webropol directly. Any communication to Webropol will be redirected to the Op Lead or Board Administrator.

- 2nd Line Helpdesk support:
  - Support for all Organisation Administrators and iMatter Op Leads will be provided by the Webropol.
  - If you have any issues you must contact the Webropol Helpdesk on **iMatter@Webropol.com** **or** **helpdesk@Webropol.co.uk** (please **do not** email helpdesk@Webropol.com as these will be directly to the Finnish helpdesk which can cause delays in responding to your query.

Support Procedures

- **To ensure helpdesk issues are dealt with as efficiently as possible please ensure you follow the procedures set out below:**

1. In the spirit of efficiency and to provide you with effective support issues must be directed to Webropol helpdesk using the email iMatter@Webropol.com or helpdesk@Webropol.co.uk

2. A ticket is generated to deal with your case. Please send a separate email for each issue submitted. Do not email Heather Cotton, Project Manager directly as your issue may be undetected.

3. All tickets are checked by the Webropol project team and are either responded to directly or assigned to the relevant support person for handling.

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Support Procedures

4. To deal with your query efficiently please ensure the following information is provided for any new support issues submitted:

    – Directorate name

    – Team Name & Email (as it appears in the system)

    – Email of person issue is related to as it appears in the system)

    – If you require a removal / exclusion / addition of a team member please ensure reasons for the action are provided.

5. Please provide screen shots where possible. The more details we have the easier it is to investigate.

6. Any issues which need to be discussed further will be sent to the iMatter Programme Manager.

7. A number of new features have been introduced, when contacting helpdesk please consider whether you can perform these actions locally before contacting Webropol Support.

Support Procedures

7. When emailing helpdesk, please email <u>iMatter@webropol.com</u> or <u>helpdesk@webropol.co.uk</u>. Please do not copy multiple people in to the email as this creates duplicate tickets of an existing issue when each person cc'd in to the issues starts to reply. Any additional people will be removed from the ticket.

8. The iMatter Programme Manager will receive a monthly report of all issues received so that she is able to monitor and identify common support issues.

9. Any contact to the support team must be made by Op Leads and BA's, team managers should not be contacting the helpdesk. If a number of people are experiencing similar issues this case can be handled as 1 support issue.

Support Deadlines

Deadlines for team confirmation:

- Managers have 4 weeks to confirm their team details and complete team confirmations

- By Week 3 any issues which may require additional support should have been identified and sent to Webropol

- In order to ensure Webropol have sufficient time to provide support for any issues relating to team confirmations, requests must be submitted no later than 4pm on the Wednesday prior to the team confirmation end date.

- Any issues submitted after this time may not be responded to in time for the team confirmations closing.

Support Deadlines

Deadlines for Questionnaire response:

- Respondents are given 3 weeks to complete the questionnaire

- By Week 2 any issues which may require additional support should have been identified and sent to Webropol

- In order to ensure Webropol have sufficient time to provide support for any issues relating to responding to the questionnaire, requests must be submitted no later than 4pm on the Wednesday prior to the questionnaire end date.

- Any issues submitted after this time may not be responded to in time for the questionnaire response closing.

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