



Health and Social Care: Staff Engagement Portal (SEP)

Team Managers
Manual

April 2021

Creating your Team Account

1. 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>
2. This is your own personal link and should not be shared with any one else
3. If you share a team with another manager they will receive their own unique team link
4. If you manage multiple teams you will only be required to click on 1 link to create your password to access all your teams
5. The first time you log in you will be required to set up a password
6. This password will be used for further access to the system

Please, set up your password

Password

Confirm Password

The correct password format is:

- Password must be Alphanumeric
- Must be at least 6 characters long
- Must contain 1 special character such as !#@&

Set password



Creating your Team Account

1. After your first login future access to the Staff Engagement Portal (SEP) will be from:

<http://nhsscotland-sep.webropol.com>

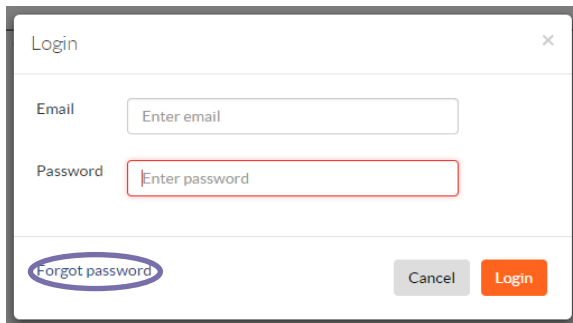
2. Click on Login
3. Your login details will be your email address and password created – see previous page

Click on the login button and enter your work email address and set up a password. This will give you access to the Staff Experience Team Homepage

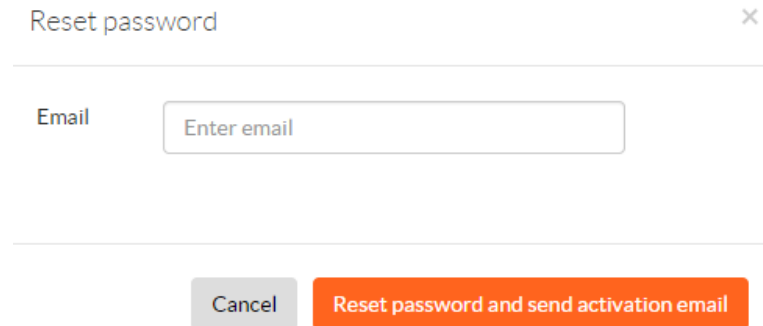
A screenshot of a 'Login' form. It has a title bar with 'Login' and a close button. The form contains two input fields: 'Email' with the placeholder text 'Enter email' and 'Password' with the placeholder text 'Enter password'. Below the password field is a 'Forgot password' link. At the bottom right, there are two buttons: a grey 'Cancel' button and an orange 'Login' button.

Forgot Password

1. If you forget your password do not attempt to enter an incorrect password more than 5 times otherwise you will be locked out of the system
2. Click on forgot password
3. In, “Reset password” pop up enter your email and click on “Reset password and send activation email”
4. You will receive an email with a link to reset your password
5. Click on the link and enter a new password
6. The link is only valid for 2 days, after which you will need to repeat this process again to reset your password



A screenshot of a login form titled "Login" with a close button (X) in the top right corner. It contains two input fields: "Email" with the placeholder text "Enter email" and "Password" with the placeholder text "Enter password". Below the fields are three buttons: "Forgot password" (circled in blue), "Cancel", and "Login".



A screenshot of a "Reset password" form with a close button (X) in the top right corner. It contains one input field: "Email" with the placeholder text "Enter email". Below the field are two buttons: "Cancel" and "Reset password and send activation email".

Team Manager help videos

- Click on the help icon to access more manuals or help videos
- A list of the help videos and manuals will be displayed
- Select the video or manual you want to view

The following videos are available for guidance:

- **Team confirmations:**
https://youtu.be/Qo_wQvb1NGI
- **Printing paper copies of the questionnaire:**
<https://youtu.be/B5p-SlIVLoE>
- **Viewing team reports:** <https://youtu.be/m-HQoFIfvXs>
- **Creating your team action plan and storyboard:**
<https://youtu.be/cMGPct1uScA> (with report)
<https://youtu.be/H2JxW5Rld3s> (without report)

Team 1 Manager

NHS help

board

Manuals

- Action Plan Template
- Board Chair Manual
- CEO Manual
- Directorate Manual
- Team Managers Manual
- Action Plan Template Blank
- Sample Report 1
- Sample Report 2

Instructional videos

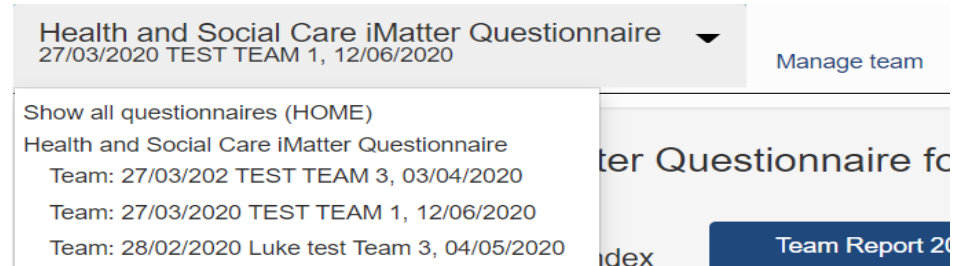
Viewing team reporting

Team Managers

| Statement | Progress | Feedback |
|---|--------------------|----------|
| I am clear about my duties and responsibilities | Green, Yellow, Red | Green |
| I get the information I need to do my job well | Green, Yellow, Red | Green |
| I am given the time and resources to support my learning growth | Green, Yellow, Red | Green |
| I have sufficient support to do my job well | Green, Yellow, Red | Green |
| I am confident my ideas and suggestions are listened to | Green, Yellow, Red | Green |
| I am confident my ideas and suggestions are acted upon | Green, Yellow, Red | Green |
| I feel involved in decisions relating to my job | Green, Yellow, Red | Green |

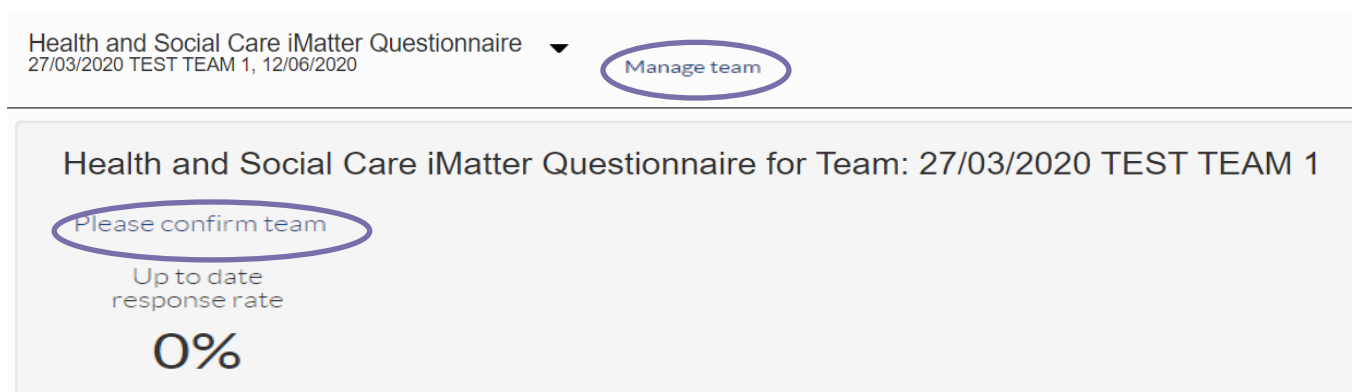
Accessing your Team Account

- Select the questionnaire and your Team from the drop down menu
- If you manage multiple Teams your Teams will show in the drop down menu
- If you share a Team with other managers they will have their own access to the Team Account.
- If you are a Sub Reporting Manager/Director/CEO/Board Chair you will be able to access Sub Reports/Director/CEO/Board chair details in addition to any Teams you manage - please refer to the Director-Sub Reporting Manager/CEO/Board Chair Manuals for more details on accessing these levels



Accessing your Team Account

- The first time you log in you will be able to go to your Team account directly from your homepage
- This link will no longer be visible on the home page once your Team is confirmed
- Click on the Manage Team link to access your Team Account (even after the team is confirmed)



Health and Social Care iMatter Questionnaire ▼
27/03/2020 TEST TEAM 1, 12/06/2020

[Manage team](#)

Health and Social Care iMatter Questionnaire for Team: 27/03/2020 TEST TEAM 1

[Please confirm team](#)

Up to date
response rate

0%

Confirming your Team

- Once you have received your link and created your account you can access your Team Account to ensure all team details are correct and edit any incorrect details
- You have 4 weeks to check and confirm your Team details
- If there are any unconfirmed Teams within a Directorate the entire Directorate will **not** be included in the iMatter questionnaire distribution, including Teams which have confirmed

Please check your team details and confirm by 17/04/2020

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 |
|------------------------|------------|-----------|--------------------------------|----------------------------|
| 27/03/2020 TEST TEAM 1 | test | manager 1 | luke.testing1321+110@gmail.com | Account created 16/01/2020 |

Team members

[Add manually](#) [Import Excel](#) Team members: 8

Search

Search for team members



| <input type="checkbox"/> | First name | Last name | Survey response method | Email | Address | SMS number | Assignment number |
|--------------------------|------------|-----------|------------------------|--------------------|----------------|--------------|-------------------|
| <input type="checkbox"/> | Alice | Mansell | Email | Testemail@test.com | | | |
| <input type="checkbox"/> | Jenny | Green | Paper | | 2 Test road | | |
| <input type="checkbox"/> | Kai | Powell | Paper | | 1 Test road | | |
| <input type="checkbox"/> | Luke | Gulliver | SMS | | United Kingdom | +44123456789 | |
| <input type="checkbox"/> | Mary | Elizabeth | Email | tets@test.com | | | |

[Exclude from survey](#)

[Remove](#)

[Print paper copies](#)



Confirm: Team up-to-date

Confirming your Team: Excluding Team Members

- Exclude any team members who are not eligible to complete the questionnaire (e.g. those on long term sick leave) by clicking in the square box next to their name
- You can select as many or as few names as are needed
- Once a name has been selected the Exclude button will show at the bottom of the screen
- Click on Exclude to confirm this action


Team members

[Add manually](#) [Import Excel](#) Team members: 8

Search  

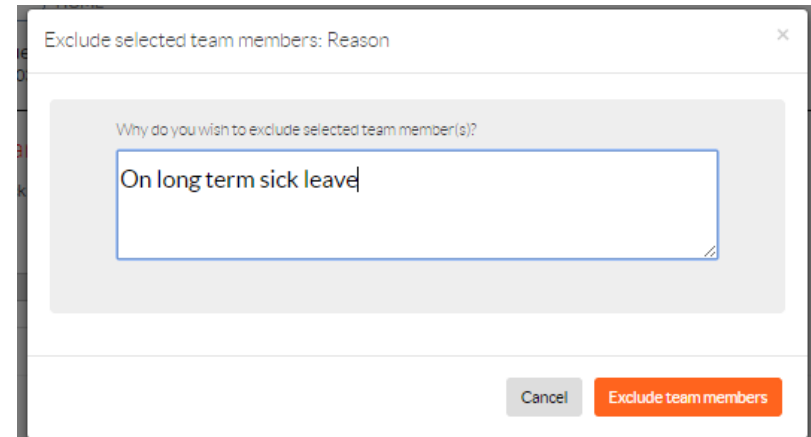
| <input type="checkbox"/> | First name | Last name | Survey response method | Email | Address | SMS number | Assignment number |
|-------------------------------------|------------|-----------|------------------------|--------------------|----------------|--------------|-------------------|
| <input type="checkbox"/> | Alice | Mansell | Email ▾ | Testemail@test.com | | | |
| <input type="checkbox"/> | Jenny | Green | Paper ▾ | | 2 Test road | | |
| <input checked="" type="checkbox"/> | Kai | Powell | Paper ▾ | | 1 Test road | | |
| <input type="checkbox"/> | Luke | Gulliver | SMS ▾ | | United Kingdom | +44123456789 | |
| <input type="checkbox"/> | Mary | Elizabeth | Email ▾ | tets@test.com | | | |

[Exclude from survey](#) [Remove](#) [Print paper copies](#) [Confirm: Team up-to-date](#)

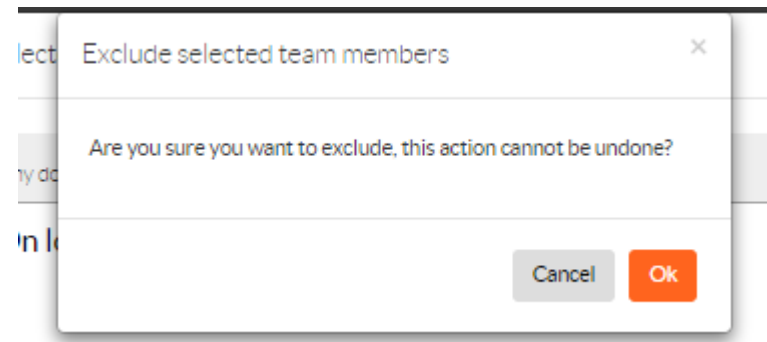
©  Webropol Oy 2015

Confirming your Team: Excluding Team Members

- A pop up window will open - you will need to specify the reason for excluding the team member
- Click on Exclude Team Members to confirm this action
- A warning will appear asking you to confirm this action
- The team member will be removed from the team page
- **Please note:** The exclude option does not permanently remove a team member. They are excluded from the current questionnaire during the current distribution and will be automatically reinstated in the next distribution.



The screenshot shows a dialog box titled "Exclude selected team members: Reason". Inside the dialog, there is a text input field with the text "On long term sick leave". Below the input field, there are two buttons: "Cancel" and "Exclude team members".



The screenshot shows a dialog box titled "Exclude selected team members". Inside the dialog, there is a text input field with the text "On long term sick leave". Below the input field, there are two buttons: "Cancel" and "Ok".


Please note: if you are excluding multiple team members you must provide a reason for each team member selected for exclusion.

Confirming your Team: Removing Team Members

- Remove any team members who are no longer part of your Team, including those who will have left your Team when the questionnaire is issued, by clicking in the square box next to their name
- You can select as many or as few names as are needed
- Once a name has been selected the Remove button will show at the bottom of the screen
- Click on remove to confirm this action


Team members

[Add manually](#) [Import Excel](#) Team members: 8

Search 

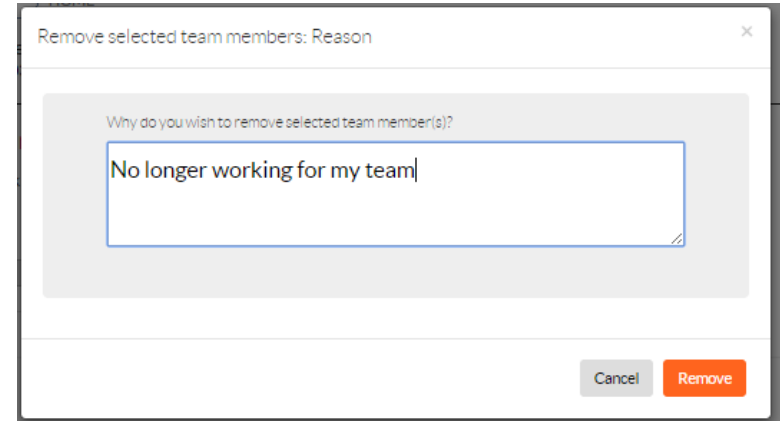
| <input type="checkbox"/> | First name | Last name | Survey response method | Email | Address | SMS number | Assignment number |
|-------------------------------------|------------|-----------|------------------------|--------------------|----------------|--------------|-------------------|
| <input type="checkbox"/> | Alice | Mansell | Email ▾ | Testemail@test.com | | | |
| <input checked="" type="checkbox"/> | Jenny | Green | Paper ▾ | | 2 Test road | | |
| <input type="checkbox"/> | Kai | Powell | Paper ▾ | | 1 Test road | | |
| <input type="checkbox"/> | Luke | Gulliver | SMS ▾ | | United Kingdom | +44123456789 | |
| <input type="checkbox"/> | Mary | Elizabeth | Email ▾ | tets@test.com | | | |

[Exclude from survey](#) [Remove](#) [Print paper copies](#) [Confirm: Team up-to-date](#)

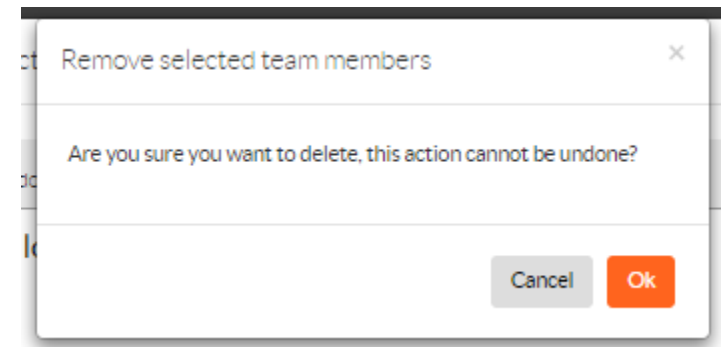
©  Webropol Oy 2015

Confirming your Team: Removing Team Members

- A pop up window will open - you will need to specify the reason for removing the team member
- Click on Remove to confirm this action
- A warning will appear asking you to confirm this action
- The team member will be removed from the team page
- **Please note:** The remove option permanently removes a team member from your team account, the team member will need to be added manually if the action needs to be undone.



A screenshot of a dialog box titled "Remove selected team members: Reason". The dialog box has a close button (X) in the top right corner. The main content area contains the question "Why do you wish to remove selected team member(s)?" followed by a text input field containing the text "No longer working for my team". At the bottom right of the dialog box, there are two buttons: "Cancel" (grey) and "Remove" (orange).



A screenshot of a dialog box titled "Remove selected team members". The dialog box has a close button (X) in the top right corner. The main content area contains the question "Are you sure you want to delete, this action cannot be undone?". At the bottom right of the dialog box, there are two buttons: "Cancel" (grey) and "Ok" (orange).

Please note: if you are removing multiple team members you must provide a reason for each team member selected for removal.

Confirming your Team: Amending Team Details

- Where an email address is provided an electronic questionnaire will be issued. Email addresses do not need to be work addresses - personal email can be used if preferred
- If an email address is not provided the team member will receive a paper copy of the questionnaire
- If an SMS number is provided, an electronic version of the survey will be sent to the respondents mobile where they can respond using their mobile phone. **Please ensure the mobile number is provided in the format of +447 (e.g. +447712345678). There should only be 9 digits after the +447. Any other amount will result in an error message.**
- If a team member's SMS number is incorrect, edit this by clicking on the current telephone number and making the changes.
- If a team member's email address is showing as incorrect, edit the email address, by clicking on the pencil icon next to the email address.

Confirming your Team: Adding New Team Members

- You can add team members to your Team manually, using the Add Manually button
- Enter the team member's first and last names in the fields provided - these are mandatory fields
- If they have an email address (this can be a personal email) select Response Method as Email
- Enter an email address - this is a mandatory field if the Email method is selected
- Click on save or save and add more if further additions are required

Team members

Add manually **Import Excel** Team members: 5

Add new team member

First name
Lizzie

Last name
Jordan

SMS number
SMS number

Survey response method
Email

Email
lizzietestemail@test.com

Cancel **Save and add more** **Save**

Confirming your team: Adding New Team Members

- If Paper is selected as the Questionnaire Response Method you will only be required to complete the team member's first name and last name as mandatory fields
- The address field(s) can be left blank as the paper copy is printed off by a team manager.

Add new team member ×

First name

Last name

SMS number

Survey response method

Address

Post code

City

Country

Confirming your team: Adding New Team Members

- If SMS is selected as the Questionnaire Response Method you will only need to fill out the team member's first name, last name and SMS mobile number as the mandatory fields.
- **Please note** – When filling in the SMS number, you need to use the +447 format and that you have **only** 9 digits after the +447, and to select the SMS response method.

Add new team member ×

First name

Teva

Last name

Maguire

SMS number

+447876543210

Survey response method

SMS ▼

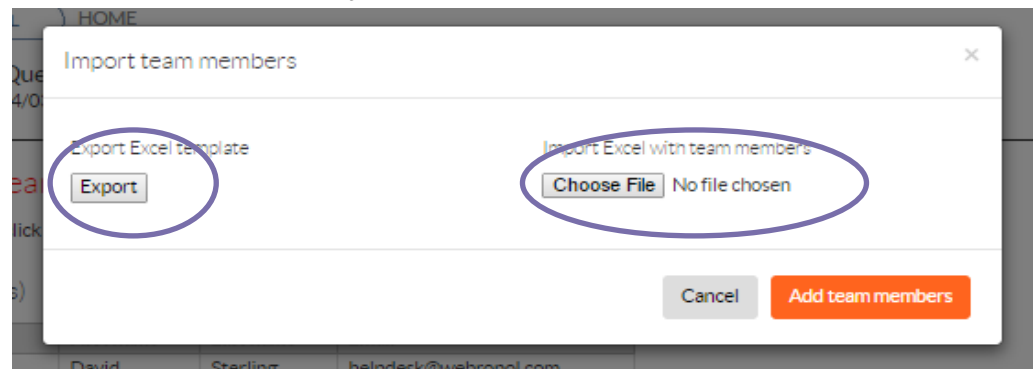
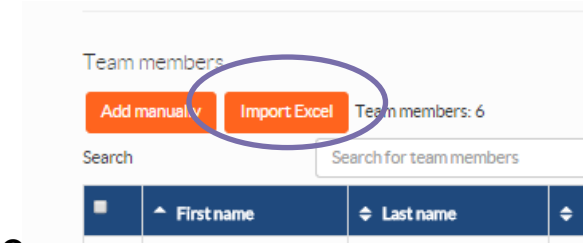
Cancel

Save and add more

Save

Confirming your Team: Adding New Team Members

- You can add team members to your Team using the Import function. This function is particularly useful if you have a large number of team members to add; for smaller amendments it is quicker to use the Add Manually function.
- Click on Import Excel
- Export the excel template, this will be required to ensure the correct headers are used in the spreadsheet when importing the team details to the system
- **Tip:** you can also import the excel containing existing team members and use this as a base to ensure you are entering the details correctly.

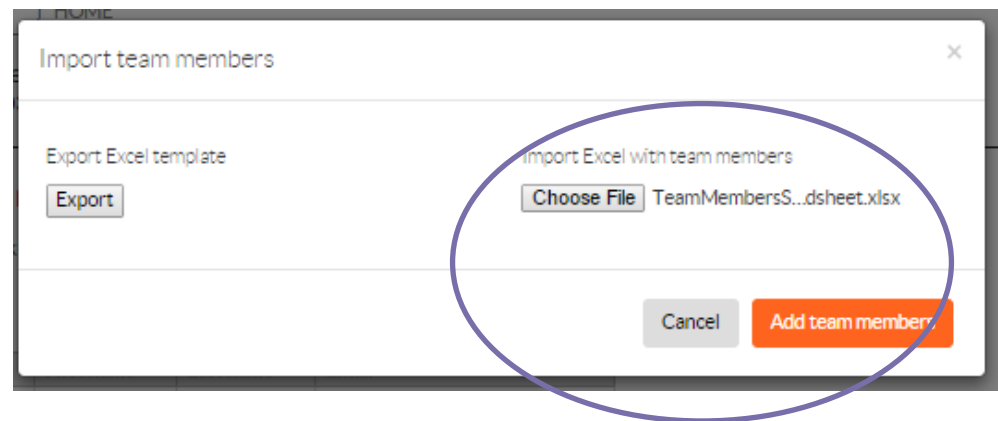


Confirming your Team: Adding New Team Members

- Complete the team details in the correct format (For SMS respondents make sure to have 9 digits after the +447)

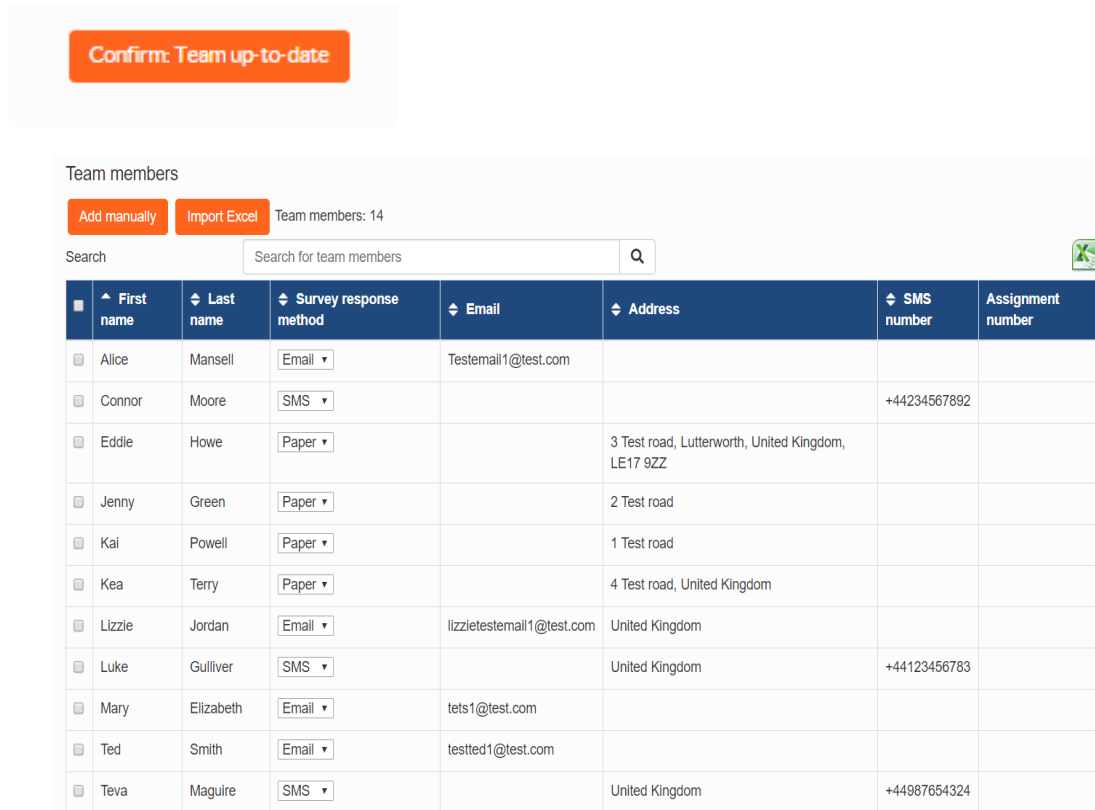
| | A | B | C | D | E | F |
|---|-------------------|------------------|-------------------------------|--|----------------|-------------------|
| 1 | First name | Last name | Survey response method | Email | Address | SMS number |
| 2 | Ted | Smith | Email | testted@test.com | | |
| 3 | Connor | Moore | SMS | | | +447876543210 |
| 4 | Kea | Terry | Paper | | | |

- Save the file
- Click on Import Excel
- Choose file: select the file you have just saved
- Click on Add team members
- The team members will be added to your team account
- **Please note:** column E of the spreadsheet does not need to be completed as managers will print off the paper copies



Confirming your Team

- Once you have completed any edits/amendments click on the “Confirm Team up-to-date” button to confirm your team
- **PLEASE NOTE: Once you have clicked on “Confirm team up to date” you will not be able to make any further changes to your team**
- If you require any further changes after you have confirmed please contact your local iMatter lead or administrator for further support
- **No further action is required from the Team Manager until you receive an email confirming paper copies of the questionnaire are ready to print**



The screenshot shows a user interface for confirming team members. At the top, there is an orange button labeled "Confirm: Team up-to-date". Below this, the "Team members" section is visible, featuring "Add manually" and "Import Excel" buttons, and a "Team members: 14" indicator. A search bar is present with the text "Search for team members". The main part of the screenshot is a table with the following columns: First name, Last name, Survey response method, Email, Address, SMS number, and Assignment number. The table contains 14 rows of team member data.

| First name | Last name | Survey response method | Email | Address | SMS number | Assignment number |
|------------|-----------|------------------------|---------------------------|--|--------------|-------------------|
| Alice | Mansell | Email | Testemail1@test.com | | | |
| Connor | Moore | SMS | | | +44234567892 | |
| Eddie | Howe | Paper | | 3 Test road, Lutterworth, United Kingdom, LE17 9ZZ | | |
| Jenny | Green | Paper | | 2 Test road | | |
| Kai | Powell | Paper | | 1 Test road | | |
| Kea | Terry | Paper | | 4 Test road, United Kingdom | | |
| Lizzie | Jordan | Email | lizzietestemail1@test.com | United Kingdom | | |
| Luke | Gulliver | SMS | | United Kingdom | +44123456783 | |
| Mary | Elizabeth | Email | tets1@test.com | | | |
| Ted | Smith | Email | testted1@test.com | | | |
| Teva | Maguire | SMS | | United Kingdom | +44987654324 | |

Manage Team

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

<<Back to Team confirmations

Team details have been confirmed 30/03/2020 by Amy Bassi

Reset team confirmation

Team name and manager(s)

| Team name | First name | Last name | Email | Team account status |
|---|------------|-----------|--------------------------------|----------------------------|
| Webropol Internal Test Team 1 - Amy Bassi | Amy | Bassi | amy.bassi@webropol.com | Account created |
| Webropol Internal Test Team 1 - Amy Bassi | aa | aa | igor.webropol.test+3@gmail.com | Account created 02/04/2019 |

Team members

Add manually Import Excel Team members: 11

Search Search for team members

| | First name | Last name | Survey response method | Email | Address | SMS number | Assignment number |
|--------------------------|------------|-----------|------------------------|---------------------------|----------------|---------------|-------------------|
| <input type="checkbox"/> | Reggie | Test | Email | reggietest@gmail.com | United Kingdom | | |
| <input type="checkbox"/> | Alice | Test | Email | alice@test.com | United Kingdom | | |
| | Amy | Bassi | Email | leanne.smith@webropol.com | | | SD021-11234570 |
| | Amv | CellPhone | SMS | | | +447951632913 | SD021-11234573 |

- 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.

The Questionnaire: Electronic format

- Once the 4 week team confirmation is completed, the electronic format of the questionnaire is automatically distributed to all team members where an email address was provided
- No further action is required from the Team Manager for electronic questionnaires
- The questionnaire will remain open for 3 weeks and reminders will automatically be sent once a week

The Questionnaire: Paper format

- The paper questionnaire will be available to print at the same time the electronic questionnaire is distributed - it will not be available before this time
- Team managers will receive an email confirming the questionnaire is available to print
- To print the questionnaire, login in to your Team Account
- Click on the print paper copies button or click on the printer icon for the paper respondents.
- Team managers may want to contact their OP leads/BA, if they require support in printing paper copies

| <input type="checkbox"/> | ^ First name | ↕ Last name | ↕ Survey response method | ↕ Email | ↕ Address | ↕ SMS number | Assignment number |
|--------------------------|--------------|-------------|--------------------------|--------------------------|--|--------------|-------------------|
| <input type="checkbox"/> | Alice | Mansell | Email ▾ | Testemail@test.com | | | |
| <input type="checkbox"/> | Connor | Moore | SMS ▾ | | | +44234567891 | |
| <input type="checkbox"/> | Eddie | Howe | Paper ▾ | | 3 Test road, Lutterworth, United Kingdom, LE17 9ZZ | | |
| <input type="checkbox"/> | Jenny | Green | Paper ▾ | | 2 Test road | | |
| <input type="checkbox"/> | Kai | Powell | Paper ▾ | | 1 Test road | | |
| <input type="checkbox"/> | Lizzie | Jordan | Email ▾ | lizzietestemail@test.com | United Kingdom | | |
| <input type="checkbox"/> | Luke | Gulliver | SMS ▾ | | United Kingdom | +44123456789 | |
| <input type="checkbox"/> | Mary | Elizabeth | Email ▾ | tets@test.com | | | |
| <input type="checkbox"/> | Ted | Smith | Email ▾ | testted@test.com | | | |
| <input type="checkbox"/> | Teva | Maguire | SMS ▾ | | United Kingdom | +44987654321 | |
| <input type="checkbox"/> | Kea | Terry | Paper ▾ | | 4 Test road, United Kingdom | | |

Exclude from survey Remove

[Print paper copies](#)

The Questionnaire: Paper format

- A PDF file will open with all respondents requiring paper copy
- Managers may want to print the first few pages of the pdf to ensure all formatting is correct
- Please note the QR code is unique to each respondent and therefore the correct cover letter should be accompanied with the correct questionnaire to avoid any input errors

Cover Letter

Dear

Your team manager test manager 1 has confirmed you are part of their team and invites you to participate in the iMatter questionnaire.

Please note you are required to answer every question using one tick. If you change your mind, clearly score out one tick and tick another.

NOTE: The questionnaire takes between 5-10 minutes to complete. It is anonymous, and your answers are collected by an external company, called Webropol. Your responses will be treated confidentially. No one in your Board, including your line manager, will see anything other than aggregated and anonymised team results.

Please note the QR barcode only matches the response to your team, not you as an individual. Please do not photocopy the questionnaire or share with anyone else.

Your feedback is very important and will help monitor and improve staff experience in your team.

Please note the deadline for responding is Monday XXX. Your completed questionnaire must be returned in the envelope provided. Please remove the cover letter.

Thank you for taking the time to respond.

Best Wishes
iMatter Programme Team

The Questionnaire: Paper format QR Code

- Team members may be concerned that the QR code will mean the questionnaire is not anonymous. The QR code like the email link holds specific data which allows us to ensure the responses are uploaded to the correct team. Also it ensures that answers are not given multiple times. The link for the QR code will look similar to this but the same principle applies to both the email questionnaire and the paper questionnaire:

Sample QR Code (please note this is a test code and does not reflect any real data):

```
{"UserId":"4b2a9517-a939-4054-b2c4-3cfa529716a2","DistributionTeamId":"e13f580d-f693-4d57-8fa4-3e1604784c2e"}
```

- The questionnaire has been set as anonymous so that respondent details cannot be linked to the response, each link is unique and no 2 links will never be the same. The link has 3 main purposes:
 - UserID is used to identify the response NOT the respondent. This means that both in the paper and email questionnaire once that UserID has been used it cannot be used again and will therefore eliminate any duplicate responses from both the email and paper questionnaire.
 - With the email questionnaires, if a UserID has not been used, this allows us to send the reminders to any UserIDs which have not been submitted. A reminder is then automatically generated by the system. Since we are unable to link a respondent to a UserID we cannot send reminders to the paper questionnaire.
 - DistributionTeamID has one specific purpose and that is to ensure that any responses received are allocated to the correct team. This is essential to ensure all reporting is correct. Again this ID identifies the team not the respondent.

The Questionnaire: SMS format

Once the 4 week team confirmation is completed, the electronic format of the questionnaire is automatically distributed to all team members where SMS was selected and an SMS number was provided, in a text with a link for the respondent to access the questionnaire

No further action is required from the Team Manager for electronic questionnaires

The questionnaire will remain open for 3 weeks and reminders will automatically be sent once a week

Follow up: Response Rates

- Team Manager logs in to the portal and is directed to the homepage
- The home page will show the Response Rate for their Team

The screenshot displays the 'STAFF EXPERIENCE PORTAL' interface. At the top, there is a navigation bar with 'Home', 'test manager 1', and a help icon. Below this, the main content area is titled 'Health and Social Care iMatter Questionnaire' for '27/03/2020 TEST TEAM 1, 12/06/2020'. A dropdown menu is set to 'Manage team'. On the right, it shows 'Reports for year 2020 (01/01/2020 - 31/12/2020)'. The main dashboard features a large circular gauge showing an 'Up to date response rate' of 78%. To the right of the gauge are five blue buttons: 'Team Report 2020', 'Directorate Report 2020', 'Yearly EEI & Response Rates', 'Team Yearly Components Report', and 'Directorate Yearly Components Report'.

Follow up: Response Rates:

Team Managers with Multiple Teams

- Team Manager logs in to the portal and is directed to the homepage
- The home page will show the Response Rate for all the Teams they manage

Health and Social Care iMatter Questionnaire for Team: 27/03/2020 TEST TEAM 1

Up to date
response rate

33%

Health and Social Care iMatter Questionnaire for Team: 27/03/202 TEST TEAM 3

Up to date
response rate

0%

Health and Social Care iMatter Questionnaire for Team: 28/02/2020 Luke test Team 3

Up to date
response rate

80%

Viewing reports


- 2 weeks after the electronic question is closed reports will become available – Managers and staff will receive an email notifying them reports are available
- Team reports will only be published if the Team achieves a response rate of 60% or more - small teams of less than 5 must achieve a 100% response rate
- The following reports will be published:
 - Team report
 - Aggregated Directorate report: if the overall Directorate has achieved a response rate of 60% or more
 - A yearly EEI and Response Rates report
 - A Yearly Components report
 - A yearly directorate components report
- If you have not achieved the required minimum Response Rate, reports will not be published and you will need to contact your iMatter Operational Lead for further advice and support

Viewing reports

- You can access your reports directly from your home page dashboard - all the reports that are available will be displayed here as direct links to the report

Health and Social Care iMatter Questionnaire for Team: 27/03/2020 TEST TEAM 1

Up to date response rate
78%



- Team Report 2020
- Directorate Report 2020
- Yearly EEI & Response Rates
- Team Yearly Components Report
- Directorate Yearly Components Report

- Alternatively select the questionnaire and click on the view results tab

Health and Social Care iMatter Questionnaire 27/03/2020 TEST TEAM 1, 12/06/2020 ▼

Manage team **View results** Action plan Storyboard

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

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

Team Report 2020

Directorate Report 2020

Yearly EEI & Response Rates

Team Yearly Components Report

Directorate Yearly Components Report



PDF

The Team report

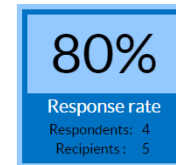


Team Report 2020

27/03/2020 TEST TEAM 1

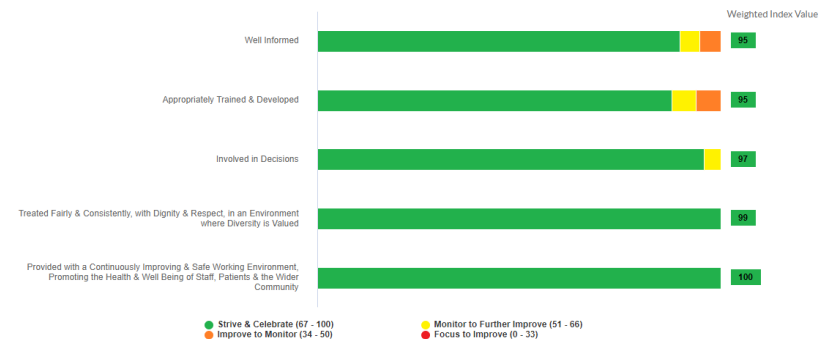
Your Team report will show the following:

- Your Team Response Rate
- Your team 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



Employee Engagement Index

Staff Governance Standards - Strand Scores



Calculating the Average Score

The number of responses for each point on the scale (Strongly Agree - Strongly Disagree) is multiplied by its number value (6-1) (see right). These scores are then added together and divided by the overall number of responses to the question.

| | |
|---|-------------------|
| 6 | Strongly Agree |
| 5 | Agree |
| 4 | Slightly Agree |
| 3 | Slightly Disagree |
| 2 | Disagree |
| 1 | Strongly Disagree |



The Team report

You will also see 3 sections in your 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

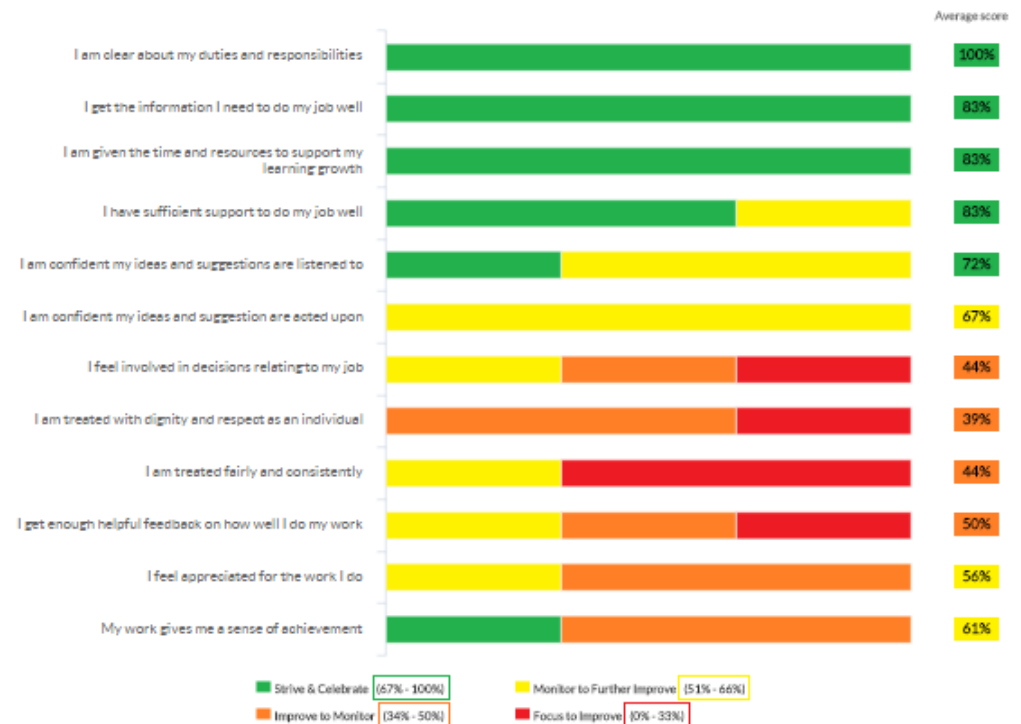
Calculating the Average Score

The number of responses for each point on the scale (Strongly Agree – Strongly Disagree) is multiplied by its number value (6-1) (see right). These scores are then added together and divided by the overall number of responses to the question.

| | |
|---|-------------------|
| 6 | Strongly Agree |
| 5 | Agree |
| 4 | Slightly Agree |
| 3 | Slightly Disagree |
| 2 | Disagree |
| 1 | Strongly Disagree |

Experience as an Individual:

Responses count: 3

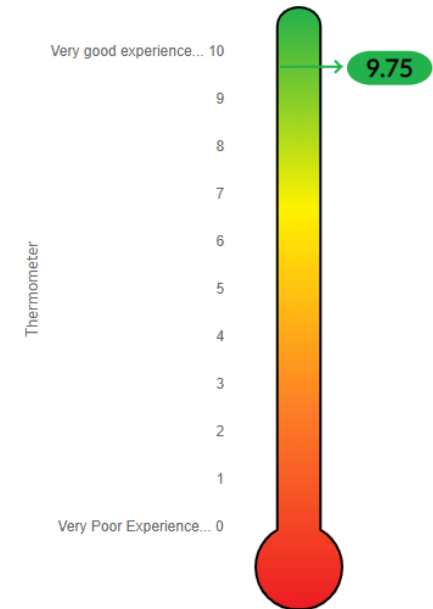


The Team report

- The thermometer shows the Team average for the overall experience of working within your organisation
- The final table shows the benchmark overview of your directorate - you can also access your aggregated Directorate report for a more detailed comparison by clicking on the Directorate report tab in your reporting screen

Overall, working within my organisation is a

Number of respondents: 4



EEI number for teams in the same directorate

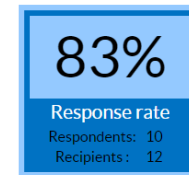
| EI Threshold | (66-100) | (50-66) | (33-50) | (0-33) | No report | Total |
|---------------------|----------|---------|---------|--------|-----------|-------|
| Number of Teams | 2 | 0 | 0 | 0 | 1 | 3 |
| Percentage of Teams | 66.7% | 0% | 0% | 0% | 33% | 100% |

The Directorate report

- All Teams will receive a copy of their Directorate report as long as your Directorate has also achieved a response rate of 60%
- For teams who receive a report, this can be used for comparing your team feedback with your overall Directorate and use this for benchmarking
- If you have not received a report this is an opportunity to see a report and consider using this when shaping your action plan with your team

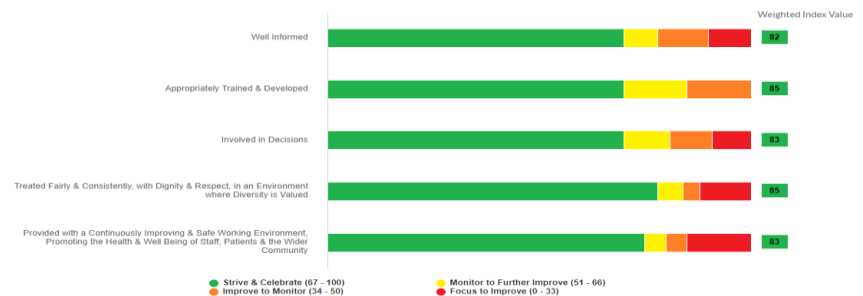


Directorate Report 2020
27/03/2020 TEST DIRECTORATE



Employee Engagement Index

Staff Governance Standards - Strand Scores



Calculating the Average Score

The number of responses for each point on the scale (Strongly Agree - Strongly Disagree) is multiplied by its number value (6-1) (see right). These scores are then added together and divided by the overall number of responses to the question.

| | |
|---|-------------------|
| 6 | Strongly Agree |
| 5 | Agree |
| 4 | Slightly Agree |
| 3 | Slightly Disagree |
| 2 | Disagree |
| 1 | Strongly Disagree |

Yearly EEI Scores & Response Rates Reports

Yearly EEI & Response Rates

27/03/2020 TEST TEAM 1

EEI numbers and improvement from last year

EEI

| | EEI |
|------------------------|------|
| Organisation | 2020 |
| 27/03/2020 TEST TEAM 1 | 97 |

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

Response rate

| | Response rate |
|------------------------|---------------|
| Organisation | 2020 |
| 27/03/2020 TEST TEAM 1 | 80% |

- You will be able to see the current year EEI score for your Team
- 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

- The report will also show the current year response rate for your team.
- You will eventually be able to see a table with up to 5 year's response rates.

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

| 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 | 76 | 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 | Health 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



Directorate yearly component report

1. iMatter Components 2020

| iMatter Questions | Staff Experience Employee Engagement Components | Average Response |
|--|--|------------------|
| | | 2020 |
| I feel my direct line manager cares about my health and well-being | Assessing risk and monitoring work stress and workload | 84 |
| I have confidence and trust in my direct line manager | Confidence and trust in management | 79 |
| I feel appreciated for the work I do | Recognition and reward | 79 |
| My direct line manager is sufficiently approachable | Visible and consistent leadership | 78 |
| I get the information I need to do my job well | Clear, appropriate and timeously communication | 77 |
| I am confident performance is managed well within my team | Performance management | 77 |
| My work gives me a sense of achievement | Job satisfaction | 76 |
| I am clear about my duties and responsibilities | Role Clarity | 75 |
| I feel involved in decisions relating to my team | Empowered to influence | 75 |
| I am treated fairly and consistently | Consistent application of employment policies and procedures | 75 |
| My team works well together | Effective team working | 75 |
| I get enough helpful feedback on how well I do my work | Performance development and review | 75 |
| I would recommend my team as a good one to be a part of | Additional Question | 74 |
| I feel involved in decisions relating to my job | Empowered to influence | 73 |
| I understand how my role contributes to the goals of my organisation | Sense of vision, purpose and values | 73 |
| I feel my organisation cares about my health and wellbeing | Health and well being support | 73 |
| I am given the time and resources to support my learning growth | Learning & growth | 72 |
| I would recommend my organisation as a good place to work | Additional Question | 72 |
| I feel that board members who are responsible for my organisation are sufficiently visible | Visible and consistent leadership | 71 |
| I have confidence and trust in Board members who are responsible for my organisation | Confidence and trust in management | 71 |
| I am confident performance is managed well within my organisation | Performance management | 71 |
| I feel sufficiently involved in decisions relating to my organisation | Partnership working | 71 |
| 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 | 71 |
| I have sufficient support to do my job well | Access to time and resources | 68 |
| I am confident my ideas and suggestions are listened to | Listened to and acted upon | 68 |
| I am treated with dignity and respect as an individual | Valued as an individual | 67 |
| I would be happy for a friend or relative to access services within my organisation | Additional Question | 67 |
| I am confident my ideas and suggestion are acted upon | Listened to and acted upon | 66 |

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

- The Directorate 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
- The report shows the average scores for all of the teams combined

Action Plan

- You will have 4 weeks to feedback and reflect on your report prior to your Team Action Plan being completed
- You can access the Action Plan directly from your home page dashboard by clicking on the Action Plan icon
- All teams are required to complete the action plan, even if you have not achieved the response rate and report has not been produced.
- Alternatively select the questionnaire and click on the Action Plan tab.

The screenshot displays the iMatter dashboard for the 'Health and Social Care iMatter Questionnaire' for the team '27/03/2020 TEST TEAM 1'. The dashboard includes a header with the questionnaire name, dates, and a 'Manage team' link. The main content area shows the 'Up to date response rate' at 90% and the 'Employee Engagement Index' at 73. A central column of buttons lists reports: 'Team Report 2020', 'Directorate Report 2020', 'Yearly EEI & Response Rates', 'Team Yearly Components Report', and 'Directorate Yearly Components Report'. To the right of these buttons is a green 'Action Plan' icon with a document and checkmark, which is circled in purple. The bottom navigation bar contains 'Manage team', 'View results', and 'Action plan' tabs, with the 'Action plan' tab also circled in purple. The top right corner indicates 'Reports for year 2020 (01/01/2020 - 31/12/2020)'.

The Action Plan

- When reports are published the Teams must continue to fill in the Action Plan for their Team
- If you have not received a report consider using your Directorate report (if produced) as an opportunity to see a report and consider using this when shaping your action plan with your team

Health and Social Care iMatter Questionnaire
27/03/2020 TEST TEAM 1, 12/06/2020

Manage team View results Action plan

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

iMatter Action Plan

Step 1: Read guidance

[Open Action Plan Guidance](#)

Step 2: Action plan

Team name: 27/03/2020 TEST TEAM 1

What we do well

What we do well:

| 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 |
|----------------------|---|---|--|
| 1 | | | |
| 2 | | | |
| 3 | | | |

[Save and continue](#) [Complete Action Plan & Create Storyboard](#)

Action Plan

- Complete the Action Plan with your Team Members
- Identify what you do well – this is a mandatory field
- Identify up to a maximum of 3 areas of improvement, 1 area of improvement is mandatory
- Up to a maximum of 3 desired outcomes and actions, 1 desired action is mandatory
- Assign responsibility and specify a completion date

Team name: 27/03/2020 TEST TEAM 1

What we do well

What we do well: The team have a good working relationship and support each other to get things done

| 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 for team members to help them better understand their roles and what is required from them | With appropriate training team members should understand their roles better as well as working more effectively and efficiently | Contact HR for a TrainingNeeds session, which will identify any skill gaps | Team manager - End of April 2020 |
| Communication within the team | be more up to date about decisions regarding the team so that everyone what is happening and what is required from them | Hold a regular weekly team meeting so we can discuss the upcoming week and discuss outstanding issues, Starting immediately | Team manger - April 27 2020 |
| Communication with other teams | Communicate better with other teams as it helps makes everyone's work easier and can have a direct effect on work | Identify the teams we work with closely the most. Create a more effective communication strategy and begin to use. | Team manager - June 30 2020 |

Complete action plan & create storyboard: You can not click this option unless the mandatory fields are completed. No further changes can be made to the Action Plan - the storyboard and record of progress are generated.

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

Team name: 27/03/2020 TEST TEAM 1

What we do well

What we do well: The team have a good working relationship and support each other to get things done

| 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 for team members to help them better understand their roles and what is required from them | With appropriate training team members should understand their roles better as well as working more effectively and efficiently | Contact HR for a TrainingNeeds session, which will identify any skill gaps | Team manager - End of April 2020 |
| Communication within the team | be more up to date about decisions regarding the team so that everyone what is happening and what is required from them | Hold a regular weekly team meeting so we can discuss the upcoming week and discuss outstanding issues, Starting immediately | Team manger - April 27 2020 |
| Communication with other teams | Communicate better with other teams as it helps makes everyone's work easier and can have a direct effect on work | Identify the teams we work with closely the most. Create a more effective communication strategy and begin to use. | Team manager - June 30 2020 |

- Once all progress has been logged Team managers can complete and Lock the action plan.

Step 3: Record of Progress

| Area for Improvement | Progress Made | Date |
|---|--|------------|
| Appropriate training for team members to help them better understand their roles and what is required from them | An assessment has been carried out and a variety of training methods have been presented and discussed | 23/04/2020 |
| Communication within the team | We have began and continued to use weekly team meetings | 20/04/2020 |
| Communication with other teams | | |

Save changes

Complete and Lock

- No further changes can be made to the action plan.

Storyboard

- As soon as you click on Complete Action Plan and Create Storyboard, the Storyboard will be generated
- You can access the storyboard directly from your home page dashboard by clicking on the Storyboard icon

Health and Social Care iMatter Questionnaire
27/03/2020 TEST TEAM 1, 12/06/2020

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

Manage team

Health and Social Care iMatter Questionnaire for Team: 27/03/2020 TEST TEAM 1

| | | | |
|--|--|--------------------------------------|-----------------------|
| Up to date response rate 90% | Employee Engagement Index 73 | Team Report 2020 | STORYBOARD |
| | | Directorate Report 2020 | |
| | | Yearly EEI & Response Rates | |
| | | Team Yearly Components Report | |
| | | Directorate Yearly Components Report | |

- Alternatively select the questionnaire and click on the Storyboard tab.

Health and Social Care iMatter Questionnaire
27/03/2020 TEST TEAM 1, 12/06/2020

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

Manage team View results Action plan **Storyboard**

Storyboard

- The storyboard contains outcomes and desires which were added to the Action Plan.
- It also shows your Team EEI and overall result of working within the organisation from the questionnaire results
- A PDF of the storyboard can be downloaded and printed



Storyboard

27/03/2020 TEST TEAM 1

What we do well

What we do well: The team have a good working relationship and support each other to get things done

Staff Experience Improvement Journey

Desired Outcome: With appropriate training team members should understand their roles better as well as working more effectively and efficiently
Action: Contact HR for a TrainingNeeds session, which will identify any skill gaps

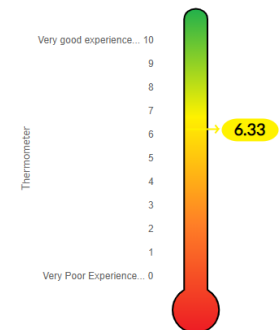
Desired Outcome: be more up to date about decisions regarding the team so that everyone what is happening and what is required from them
Action: Hold a regular weekly team meeting so we can discuss the upcoming week and discuss outstanding issues, Starting immediately

Desired Outcome: Communicate better with other teams as it helps makes everyone's work easier and can have a direct effect on work
Action: Identify the teams we work with closely the most. Create a more effective communication strategy and begin to use.

27/03/2020 TEST TEAM 1

73
Employee Engagement Index

Overall, working within my organisation is a
Number of respondents: 15



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

Repeating the process next year

- As part of your continuous improvement journey the iMatter process will be repeated each year
- You will still be able to access your reports next year to monitor and compare your improvement