



NHS Scotland:
Staff Engagement
Portal (SEP)
Board Chair
Manual
May 2015

Creating your Board Chair 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 manage multiple teams you will only be required to click on 1 link to access all your teams
4. The first time you log in you will be required to set up a password
5. 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 Board Chair account

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

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

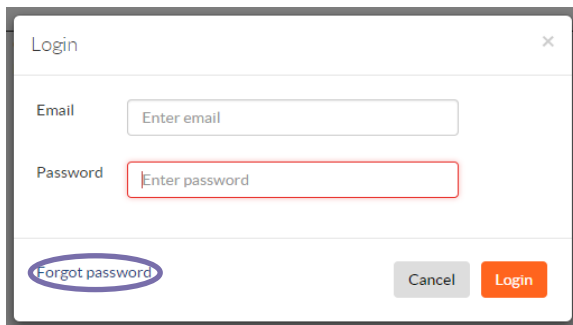
2. Click on Login
3. Your login details will be your email address and password created - see previous page

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

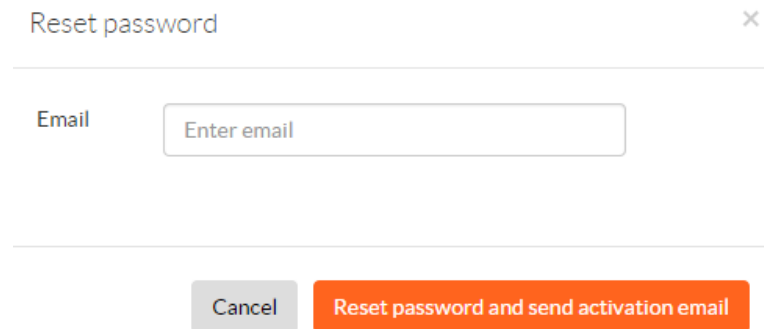
A screenshot of a web browser login form. The form has a title 'Login' and a close button (X) in the top right corner. It contains two input fields: 'Email' with the placeholder text 'Enter email' and 'Password' with the placeholder text 'Enter password'. Below the password field is a link for 'Forgot password'. 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



The screenshot shows a 'Login' dialog box 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 input fields, there is a 'Forgot password' link circled in blue, a 'Cancel' button, and a 'Login' button.



The screenshot shows a 'Reset password' dialog box with a close button (x) in the top right corner. It contains one input field: 'Email' with the placeholder text 'Enter email'. Below the input field, there is a 'Cancel' button and a 'Reset password and send activation email' button.

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:

- **Viewing Board Chair Reports:**
<https://youtu.be/-VDRUzKyn4>

NHS help

Board Chair



Manuals

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

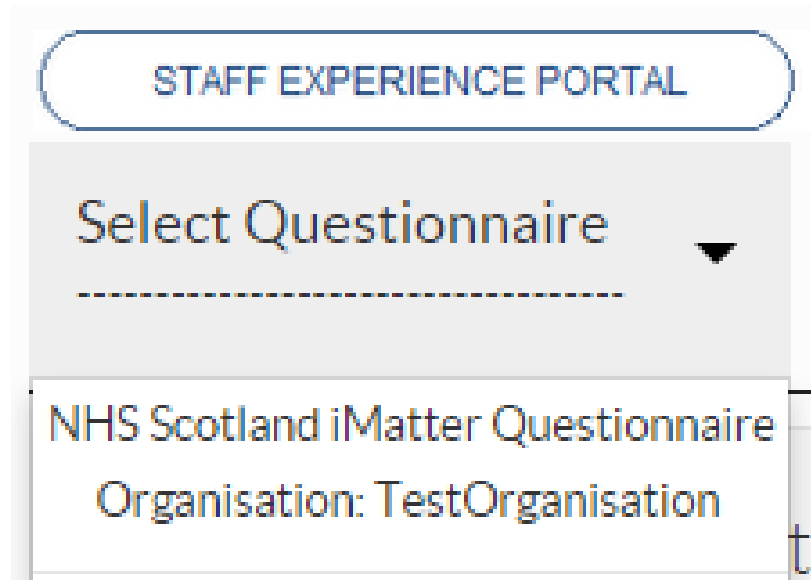
Instructional videos

Viewing Board reports



Accessing your Board Chair account

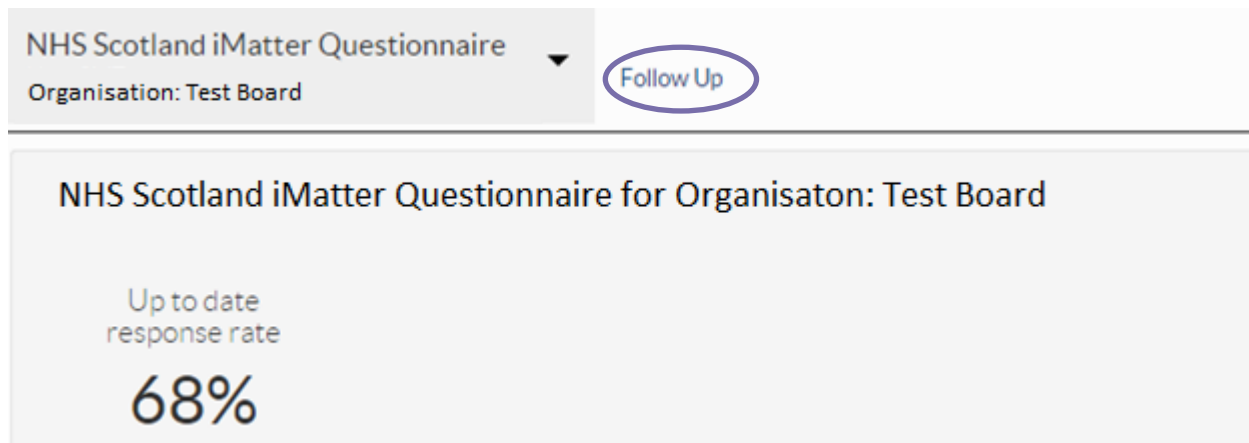
- Select the questionnaire and your Board from the drop down menu
- If you manage multiple Teams your Teams will show in the drop down menu



- Please refer to the Team Managers Manuals for more details on accessing the team manager level



Follow up: Team Confirmations

- Teams within your Board will be sent a link to set up their Team Accounts and confirm their Teams
- You can follow up on the progress of Team confirmations within your Board Account
- Click on the Follow Up tab and you will be directed to the Follow Up screen



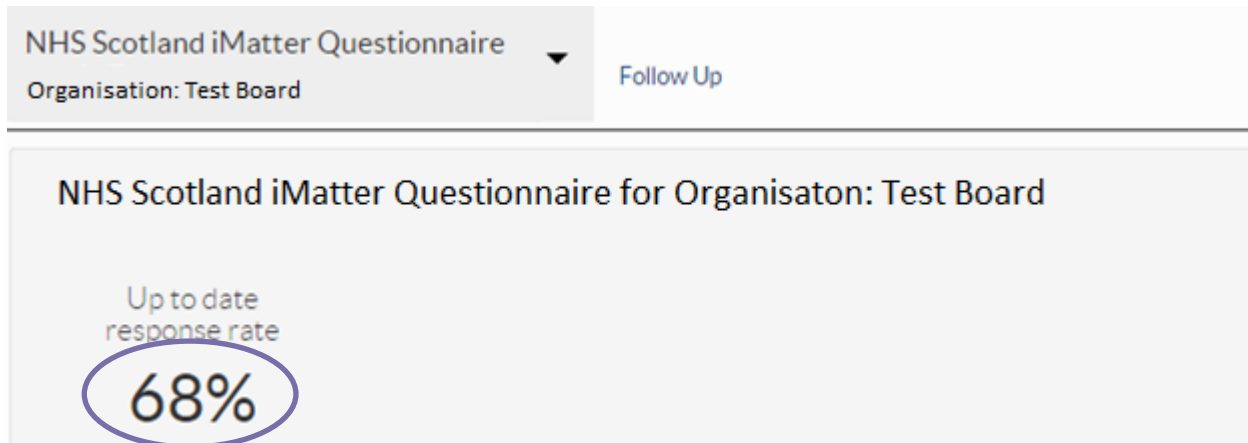
Follow up: Team Confirmations

- Click on the Team Confirmations tab and expand the hierarchy to view the CEO, Directorates and Teams within your Board
- Teams which have confirmed will show the date they confirmed
- Teams which have not confirmed are clearly identified in **red**
- Click on +icon to expand list

Team confirmations		
Search by		Search
 NHS Scotland	Team member information updated and confirmed	Deadline
▼ TestOrganisation	2 out of 3 teams confirmed	
▼ TestSMT	2 out of 3 teams confirmed	
▼ TestDirectorate	2 out of 3 teams confirmed	
TestTeam1	Confirmed 22/02/2015	22/02/2015
TestTeam2	Confirmed 22/02/2015	22/02/2015
Manual Development Board Team	Not confirmed 	22/02/2015

Follow up: Response Rates

- Board Chairs can log in to the portal and view the overall Board Response Rate directly from the home page



- To view the response rates of the CEO, Directorates & Teams within your Board click on the Follow Up tab
- Response show real time figures – see page 21

Follow up: Response Rates:

- To view the response rates of the CEO, Directorates and Teams within your Board click on the Follow Up tab
- From the Follow Up screen click on the Response Rates tab
- Expand the hierarchy to view the CEO, Directorates & Teams within your Board - click on +icon to expand list
- The minimum response rate to view reports is 60% - any Teams or Directorates or CEO not achieving 60% will be highlighted in red

Team confirmations		Response rates	Action plan / storyboard		
Search by			Search		
NHS Scotland		Sent surveys	Responses	Response rates	Deadline
▼ TestOrganisation		6	5	83% Report	
▼ TestSMT		6	5	83% Report	
▼ TestDirectorate		6	5	83% Report	
TestTeam1		3	3	100% Report	20/02/2015
TestTeam2		3	2	67%	20/02/2015
Manual Development Board Team		0	0	0%	20/02/2015

Follow up: Action plan / Storyboard

- Once reports have been generated (see next page Viewing Reports) Teams within your Board will also be required to create a team action plan and storyboard with their team members.
- They will be required to Identify what they do well as a team
- 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
- They will also be required to complete a record of progress in order to complete the action plan.
- You can follow up on your teams to see the date the action plan and story board were created and the date Action plan was completed.
- Any teams that have not completed will be clearly be identified in **Red**

iMatter Questionnaire Board Chair · Distribute questionnaire Follow Up Log View results

Team confirmations Response rates Action plan / storyboard

Search by Search

User tree	Action plan and storyboard created	Action plan completed
Board Chair ·	1 out of 9 teams completed	0 out of 9 teams completed
SMT	1 out of 9 teams completed	0 out of 9 teams completed
Directorate	1 out of 9 teams completed	0 out of 9 teams completed
▶ team 1 dir 2	Not completed !	Not completed !
▶ team 2 dir 2	Completed 18/05/2015	Not completed !

Viewing reports

- 5 weeks after the electronic question is closed reports will become available
 - Board Chairs will receive an email notifying them reports are available
- Aggregated Board reports will only be published if the Board achieves a response rate of 60% or more - all other yearly comparison reports will still be published and available to view
- The following reports will be published:
 - Aggregated Board report
 - Aggregated NHS Scotland report: if NHS Scotland has achieved a response rate of 60% or more
 - A yearly EEI Report
 - A Yearly Response Rates report
 - A Yearly Components report
- If you have not achieved the required minimum response rate your Aggregated Board report 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
- Alternatively select the questionnaire and click on the View Results tab

The screenshot shows a dashboard for the 'NHS Scotland iMatter Questionnaire demo' for the organization 'TestOrganisation'. At the top, there are navigation tabs for 'STAFF EXPERIENCE PORTAL' and 'HOME'. Below this, the organization name is displayed with a dropdown arrow, and two buttons: 'Follow Up' and 'View results' (the latter is circled in purple). The main content area is titled 'NHS Scotland iMatter Questionnaire demo for Organisation: TestOrganisation'. It features two key metrics: 'Up to date response rate' at 83% and 'Employee Engagement Index' at 72%. To the right of these metrics is a vertical stack of five report links, all circled in purple: 'Board Report 2015', 'NHS Scotland Report 2015', 'Yearly EEI', 'Yearly Response Rates', and 'Yearly Components'.

STAFF EXPERIENCE PORTAL HOME

NHS Scotland iMatter Questionnaire demo
TestOrganisation

Follow Up View results

NHS Scotland iMatter Questionnaire demo for Organisation: TestOrganisation

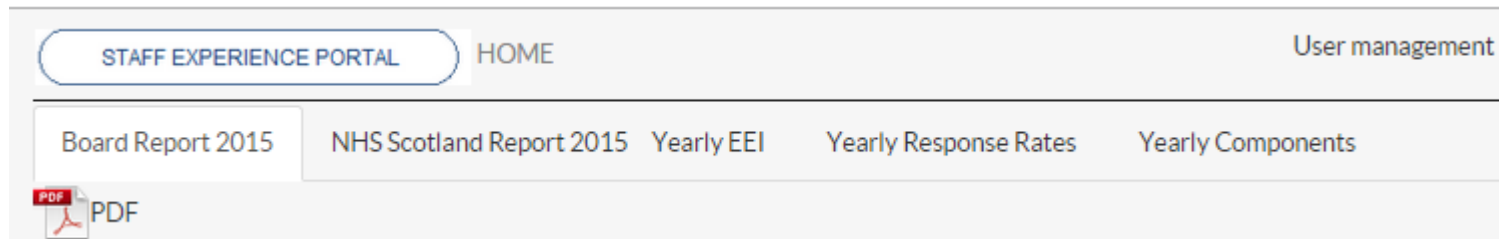
Up to date response rate
83%

Employee Engagement Index
72%

Board Report 2015
NHS Scotland Report 2015
Yearly EEI
Yearly Response Rates
Yearly Components

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



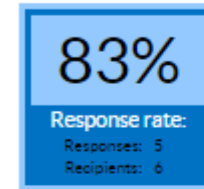
The Aggregated Board Report

Your Aggregated Board report will show the following:

- Your aggregated Board Response Rate
- Your 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

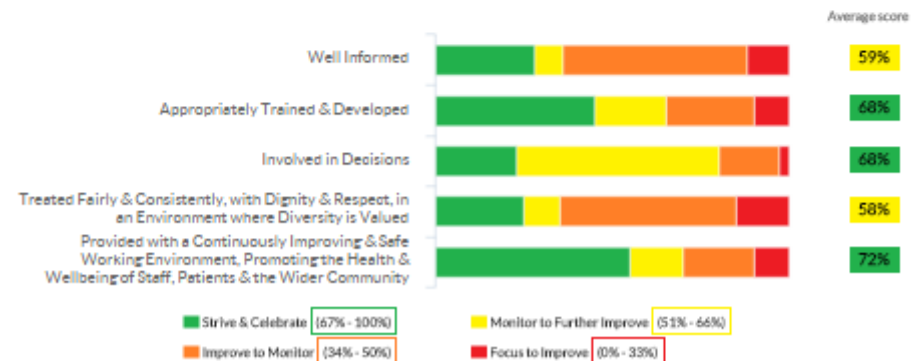


Board Report 2015
Test Board



Employee Engagement Index

Staff Governance Standards - Strand Scores



The Aggregated Board 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

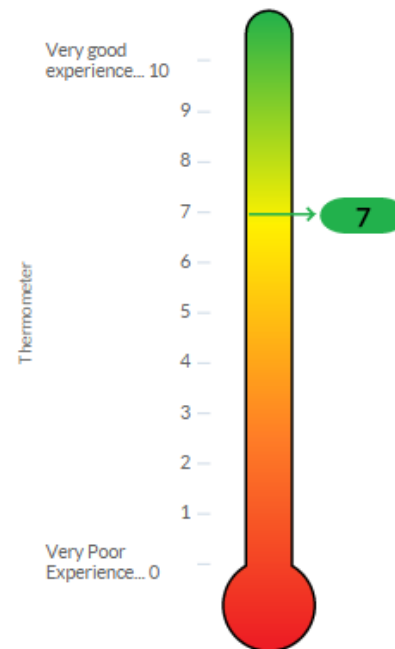


The Aggregated Board Report

- 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

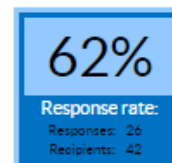


The Aggregated NHSScotland Report

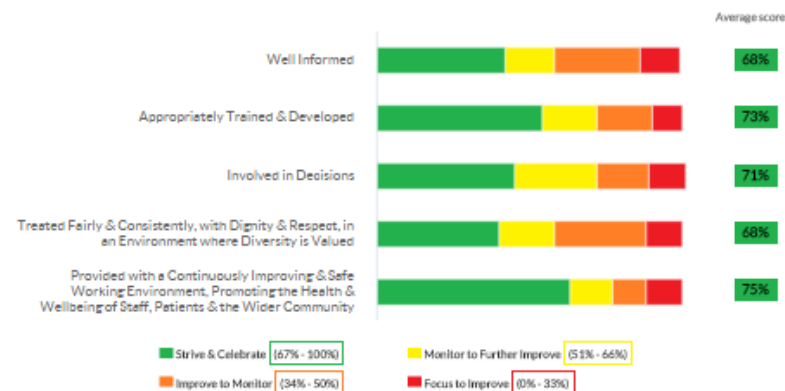
- All Board Chairs will receive a copy of the aggregated NHS Scotland report as long as NHS Scotland has also achieved a response rate of 60%
- The report can be used for comparing your Board feedback and for bench marking
- If you have not received a report this is an opportunity to see a report and consider using this when discussing iMatter Continuous Improvement with your CEO and Directors



NHSScotland Report 2015
NHS Scotland



Staff Governance Standards - Strand Scores



Yearly EEI Scores Report

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

EEI numbers and improvement from last year

	2015
Team	EEI
Test CEO	No report
Test Board	72%

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 your Board, as well as an aggregated response rate for your 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

Response rates

	2015
Team	Response Rate
Test SMT	100%
Test Board	100%

Yearly Components Reports

Questions, components and average score

- 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 Percentage
		2015
I am clear about my duties and responsibilities	Role Clarity	100%
I get the information I need to do my job well	Clear, Appropriate and Timely Communication	87%
I am given the time and resources to support my learning growth	Learning and Growth	87%
I understand how my role contributes to the goals of the organisation	Sense of Vision, Purpose and Values	87%
I have sufficient support to do my job well	Access to Time and Resources	83%
I feel my direct line manager cares about my health and well-being	Assessing Risk and Monitoring Work Stress and Workload	83%
I feel my organisation cares about my health and wellbeing	Health and Wellbeing Support	83%
I have confidence and trust in senior managers responsible for the wider organisation	Confidence and Trust in my management	83%
My direct line manager is sufficiently approachable	Visible and Consistent Leadership	80%
I feel senior managers responsible for the wider organisation are sufficiently visible	Visible and Consistent Leadership	80%
I would recommend my organisation as a good place to work	Additional question	80%
I would be happy for a friend or relative to access services within my organisation	Additional question	80%
I feel involved in decisions relating to my organisation	Partnership Working	77%
I am confident my ideas and suggestions are listened to	Listened to and Acted Upon	73%
I am confident performance is managed well within my organisation	Performance Management	73%
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	73%
I am confident performance is managed well within my team	Performance Management	70%
I would recommend my team as a good one to be a part of	Additional question	70%
I have confidence and trust sufficiently in my line manager	Confidence and Trust in my management	70%
I am confident my ideas and suggestion are acted upon	Listened to and Acted Upon	67%
I feel involved in decisions relating to my team	Empowered to influence	63%
My team works well together	Effective Team Work	63%
I get enough helpful feedback on how well I do my work	Performance Development and Review	53%
I feel involved in decisions relating to my job	Empowered to influence	50%
I feel appreciated for the work I do	Recognition and Reward	50%
My work gives me a sense of achievement	Job Satisfaction	50%
I am treated fairly and consistently	Consistent Application of Employment Policies and Procedures	47%
I am treated with dignity and respect as an individual	Valued as an Individual	43%

87% - 100% Strive & Celebrate
 51% - 66% Monitor to Further Improve
 34% - 50% Improve to Monitor
 0% - 33% Focus to Improve

Repeating the process next year

NHS Scotland	Sent surveys	Responses	Response rates	Deadline
▼ National Directorate1	146	127	87% Report	

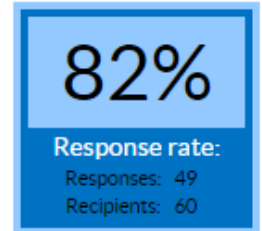
- For some Teams within a Board, the date and time the iMatter process begins may vary
- The Response Rates shown in the Follow Up are in real time
- Board reports are only updated once the reports for Teams are published
- The data in the reports may vary from the Follow Up Response Rates page as it 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

Real time response rates for a Board



Board Report 2015
Board 1

Published report for a Board varies from the real time response rates



Employee Engagement Index

Repeating the process next year

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