



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

# Creating your Directorate 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 Director 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 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 Directorate account

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

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

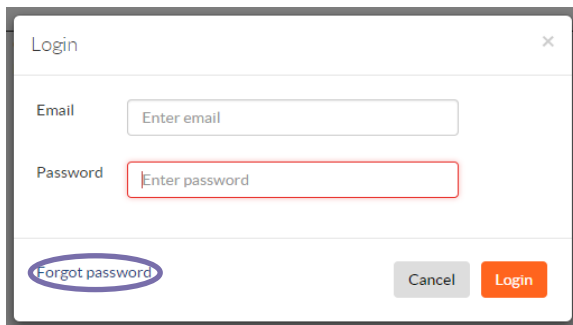
2. Click on Login
3. Your login details will be your email address and password created - see previous page

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

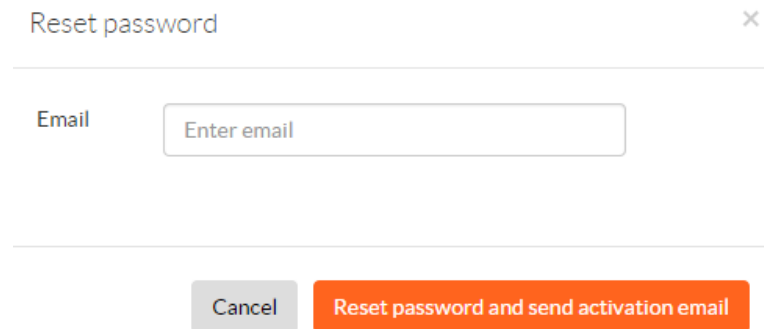
A screenshot of a 'Login' form. It has a title bar with 'Login' and a close button. The form contains two input fields: 'Email' with the placeholder 'Enter email' and 'Password' with the placeholder 'Enter password'. Below the fields, there is a 'Forgot password' link, a 'Cancel' button, and a 'Login' 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 are three buttons: 'Forgot password' (circled in blue), 'Cancel', and 'Login'.



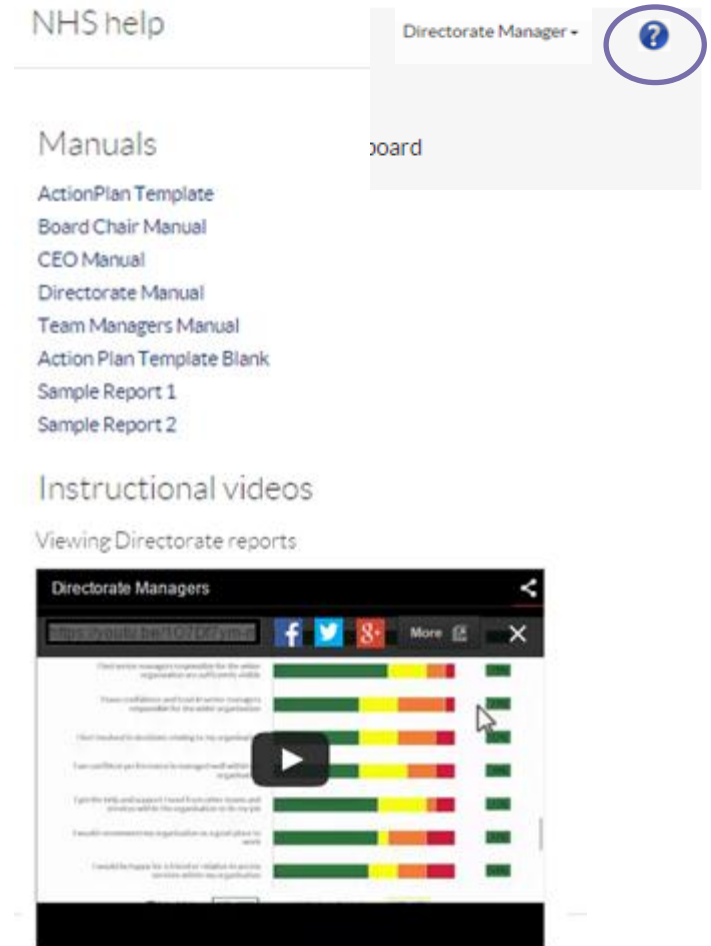
The screenshot shows a 'Reset password' dialog box with a close button (x) in the top right corner. It contains one input field: 'Email' with the placeholder text 'Enter email'. Below the input field, there are two buttons: 'Cancel' and 'Reset password and send activation email'.

# 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 Directorate Reports:**  
<https://youtu.be/1O7Df7ym-m8>



NHS help

Directorate Manager - ?

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 Directorate reports

Directorate Managers

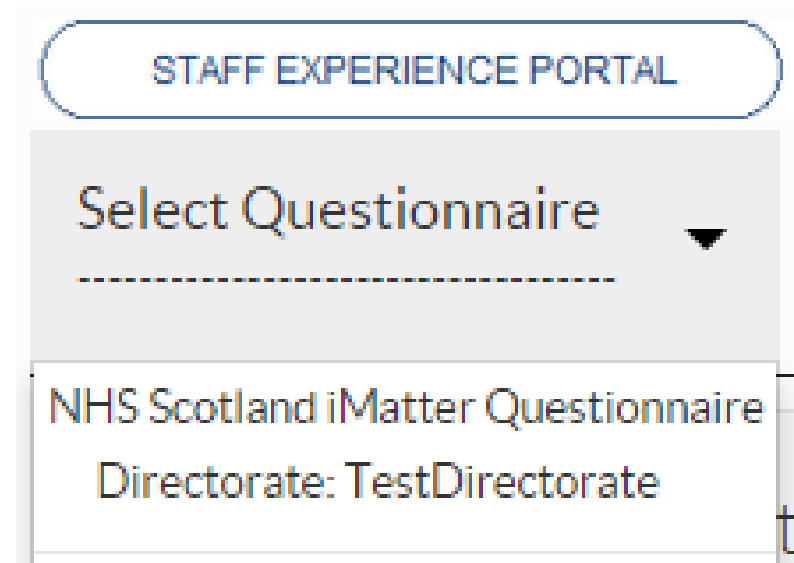
Viewing Directorate reports

The following table shows the content of the 'Viewing Directorate reports' video thumbnail:

Item	Progress
Viewing Directorate reports	100%
Viewing Directorate reports	100%
Viewing Directorate reports	100%
Viewing Directorate reports	100%
Viewing Directorate reports	100%
Viewing Directorate reports	100%
Viewing Directorate reports	100%
Viewing Directorate reports	100%
Viewing Directorate reports	100%
Viewing Directorate reports	100%

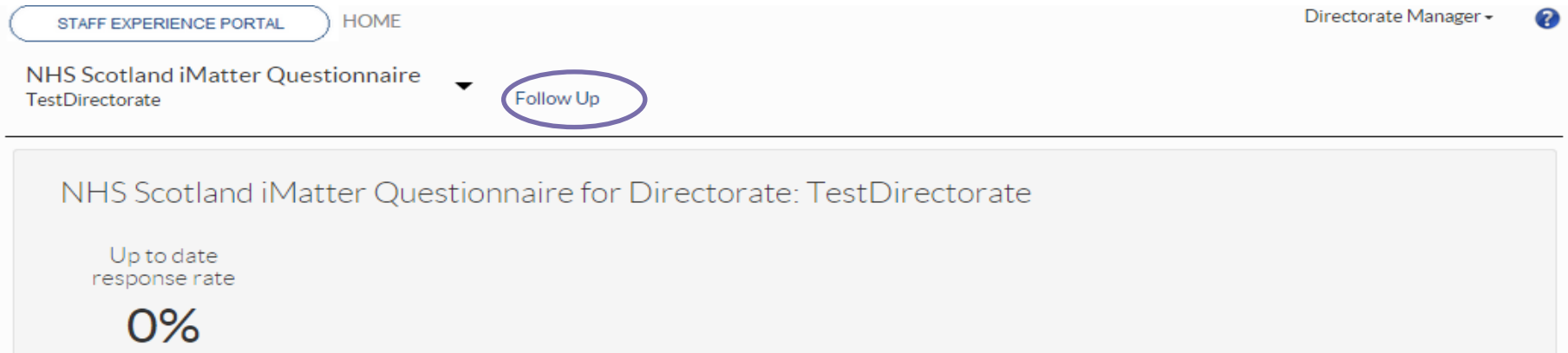
# Accessing your Directorate account

- Select the questionnaire and your Directorate 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 another Director they will have their own access to the team account
- Please refer to the Team Managers Manuals for more details on accessing the team manager level



# Follow up: Team Confirmations



- Teams within your Directorate 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 Directorate Account
- Click on the Follow Up tab and you will be directed to the follow up screen



The screenshot shows the NHS Scotland iMatter Questionnaire interface. At the top, there is a navigation bar with 'STAFF EXPERIENCE PORTAL' and 'HOME' on the left, and 'Directorate Manager' with a dropdown arrow and a help icon on the right. Below this, the text 'NHS Scotland iMatter Questionnaire TestDirectorate' is displayed. A 'Follow Up' tab is highlighted with a purple oval. Below the navigation bar, the main content area shows 'NHS Scotland iMatter Questionnaire for Directorate: TestDirectorate' and 'Up to date response rate 0%'.

# Follow up: Team Confirmations

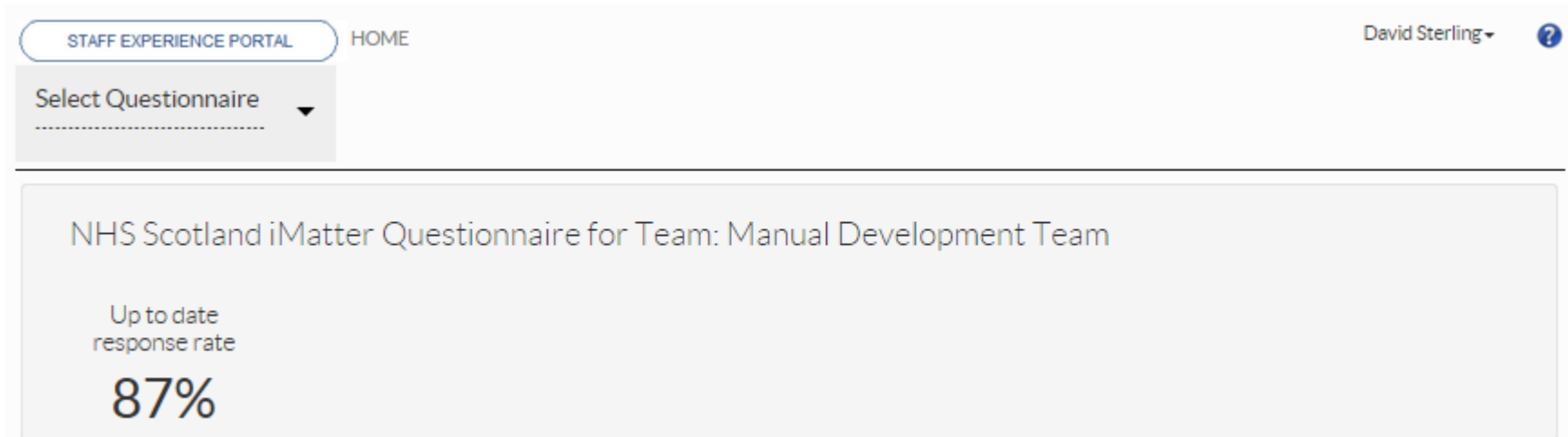
- Click on the Team Confirmations tab and expand the hierarchy to view all teams within your Directorate
- Teams which have confirmed will show the date they confirmed
- Teams which have not confirmed are clearly identified in red
- Click on +icon to expand list

Team confirmations			Response rates	Action plan / storyboard
Search by				Search
 NHS Scotland	Team member information updated and confirmed		Deadline	
▼ TestDirectorate	2 out of 2 teams confirmed			
TestTeam1	Confirmed 22/02/2015		22/02/2015	
TestTeam2	Confirmed 22/02/2015		22/02/2015	
Highland team 3	Not confirmed 		22/02/2015	



# Follow up: Response Rates

- Directors can log in to the portal and view the overall Directorate Response Rate directly from the home page.



STAFF EXPERIENCE PORTAL HOME David Sterling ?

Select Questionnaire ▼

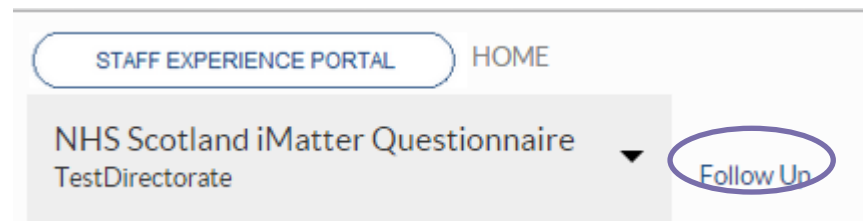
---

NHS Scotland iMatter Questionnaire for Team: Manual Development Team

Up to date response rate

**87%**

- To view the response rates of teams within your Directorate click on the follow up tab.
- Response rates show real time figures – see page 21



STAFF EXPERIENCE PORTAL HOME

NHS Scotland iMatter Questionnaire TestDirectorate ▼ **Follow Up**

# Follow up: Response Rates:

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

NHS Scotland	Sent surveys	Responses	Response rates	Deadline
▼ TestDirectorate	6	5	83%	
TestTeam1	3	3	100%	20/02/2015
TestTeam2	3	2	67%	20/02/2015
Highland team 3	3	2	0%	20/02/2015

# Follow up: Action plan / Storyboard

- Once reports have been generated (see next page Viewing Reports) Teams within your Directorate 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 Directorate

Distribute questionnaire Follow Up Log View results

Team confirmations Response rates Action plan / storyboard

Search by [input] Search

User tree	Action plan and storyboard created	Action plan 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
  - Directors will receive an email notifying them reports are available to view
- Aggregated Directorate reports will only be published if the Directorate achieves a response rate of 60% or more - all other yearly comparison Directorate reports will still be published and available to view
- The following reports will be published:
  - Aggregated Directorate report
  - Aggregated CEO report: if your CEO 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 Directorate 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

NHS Scotland iMatter Questionnaire Directorate: TestDirectorate

Up to date response rate **83%**

Employee Engagement Index **72%**

- Directorate Report 2015
- Chief Executives Report 2015
- Yearly EEI
- Yearly Response Rates
- Yearly Components

- Alternatively select the questionnaire and click on the View Results tab

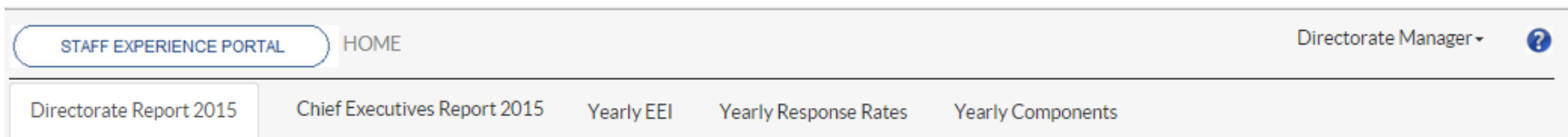
STAFF EXPERIENCE PORTAL HOME Directorate Manager ?

NHS Scotland iMatter Questionnaire TestDirectorate

Follow Up View results

# 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



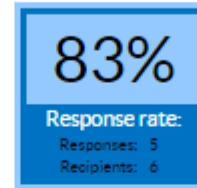
# The Aggregated Directorate Report

Your Aggregated Directorate report will show the following:

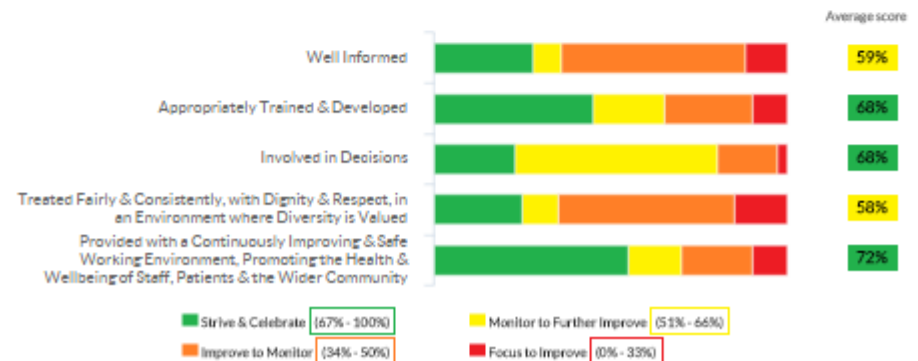
- Your aggregated Directorate Response Rate
- Your aggregated Directorate Employee Engagement Index (EEI) - the colour of the EEI is reflected in the thresholds key below each chart
- The report will also show the NHSScotland Staff Governance Strands which underpin the iMatter Continuous Improvement Model



Directorate Report 2015  
TestDirectorate



Staff Governance Standards - Strand Scores



# The Aggregated Directorate 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 (5-1) (see right). These scores are then added together and divided by the overall number of responses to the question.

5	Strongly Agree
4	Agree
3	Slightly Agree
2	Slightly Disagree
1	Disagree
0	Strongly Disagree

## Experience as an Individual:

Responses count: 3



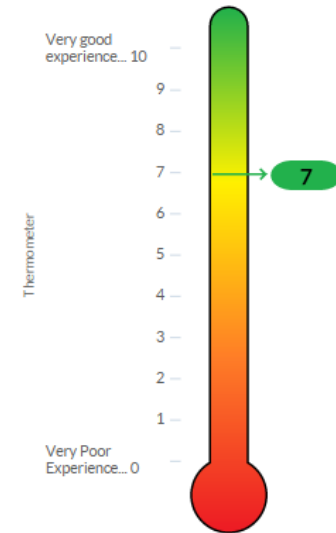


# The Aggregated Directorate Report

- The thermometer shows the aggregated Directorate average for the overall experience of working within your organisation
- The final table shows the benchmark overview of your directorate

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

Responses count: 3



EEl number for teams in the same directorate

EEl Threshold	(67-100) %	(51-66) %	(34-50) %	(0-33) %	Total
Number of Teams	2	0	0	0	2
Percentage of Teams	100 %	0 %	0 %	0 %	100 %

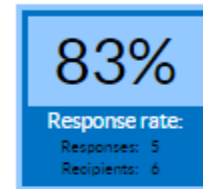
# The Aggregated CEO Report

- All Directorates will receive a copy of their CEO report as long as the CEO has also achieved a response rate of 60%
- The report can be used for comparing your Directorate 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 Team Managers



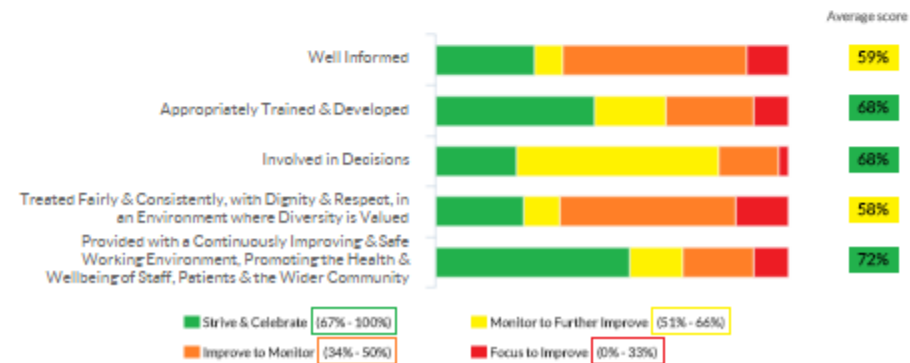
Chief Executives Report 2015

TestSMT



Employee Engagement Index

Staff Governance Standards - Strand Scores



# Yearly EEI Scores Report

- You will also see an Aggregated Directorate report showing the Yearly EEI scores for Teams within your Directorate, as well as an aggregated score for your Directorate
- 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 teams (or 100% for small teams of less than 5) then no score will show for that team

EEI numbers and improvement from last year

	2015
Team	EEI
TestTeam1	74%
TestTeam2	No report
TestDirectorate	72%

- If your Directorate response rate is less than 60% then the overall Directorate score will not show

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 Directorate report for Yearly Response Rates for Teams within your Directorate, as well as an aggregated response rate for your Directorate
- Any teams with a response rate of less than 60% will be highlighted in red
- You will eventually be able to see a table with up to 5 years of response rates

Response rates

	2015
Team	Response Rate
Test Team 1	100%
Test Team 2	88%
Test Team 3	57%
<b>Test Directorate</b>	<b>82%</b>

# 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

# Real-time Response Rates & Published Reports

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

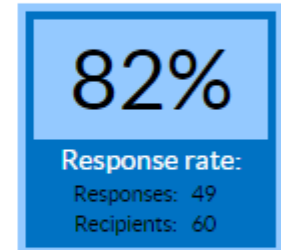
Real time response rates for a Directorate

- For some Teams within a Directorate, the date and time the iMatter process begins may vary
- The Response Rates shown in the Follow Up are in real time.
- Directorate 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



Directorate Report 2015  
Directorate 1

Published report for a Directorate 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