



NHS Scotland:  
Staff Engagement  
Portal (SEP)  
Team Managers  
Manual  
MAY 2015

# 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 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



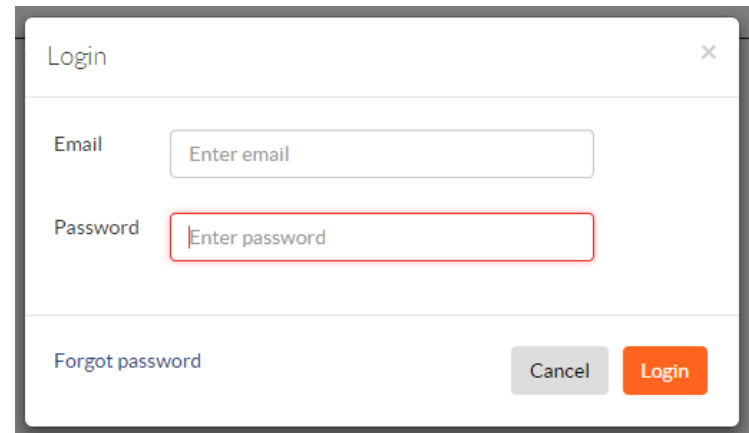
# Creating your Team Account

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

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

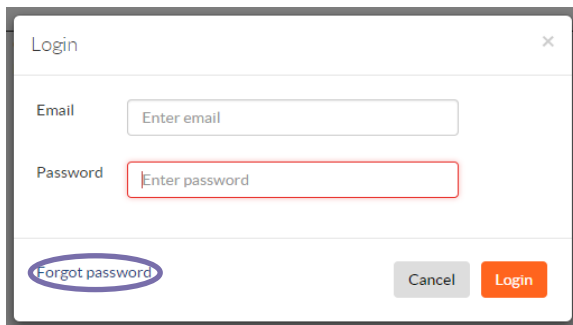
2. Click on Login
3. Your login details will be your email address and password created – see previous page

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

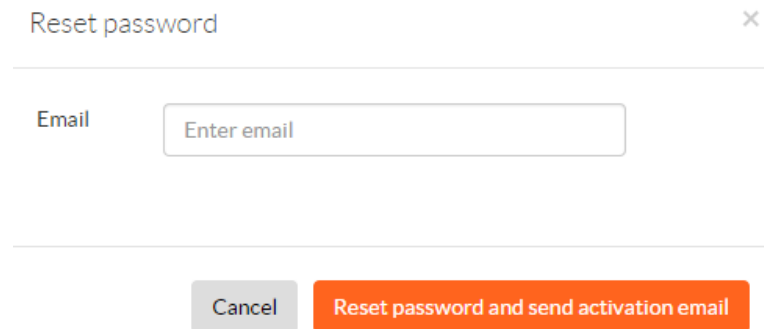
A screenshot of a login form titled 'Login'. It features two input fields: 'Email' with the placeholder text 'Enter email' and 'Password' with the placeholder text 'Enter password'. Below the fields, there is a link for 'Forgot password', a 'Cancel' button, and an orange 'Login' button.

# 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.

# 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

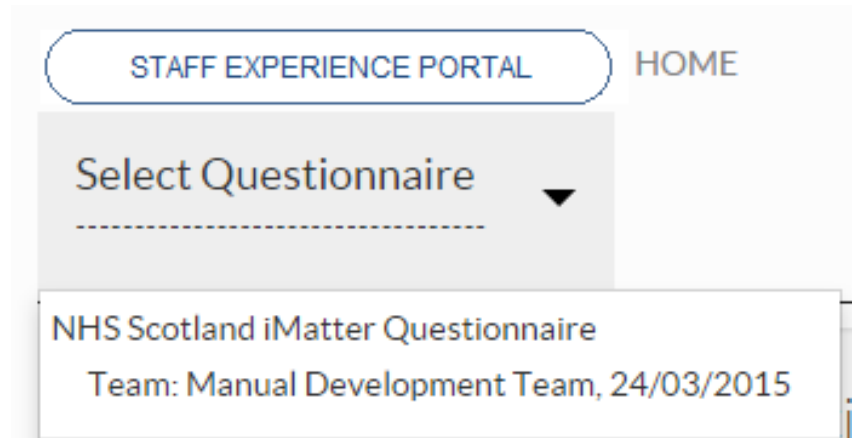
The following videos are available for guidance:

- **Team confirmations:**  
[https://youtu.be/Qo\\_wQvb1NGI](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)

The screenshot displays the NHS help interface for Team Manager. At the top right, there is a 'Team 1 Manager' dropdown menu with a help icon (a question mark in a circle). The main content area is divided into sections: 'Manuals' and 'Instructional videos'. The 'Manuals' section lists: ActionPlan Template, Board Chair Manual, CEO Manual, Directorate Manual, Team Managers Manual, Action Plan Template Blank, Sample Report 1, and Sample Report 2. The 'Instructional videos' section lists: Viewing team reporting. Below this, a video player is shown with a play button overlay. The video player displays a 'Team Managers' report with a progress bar and a play button overlay.

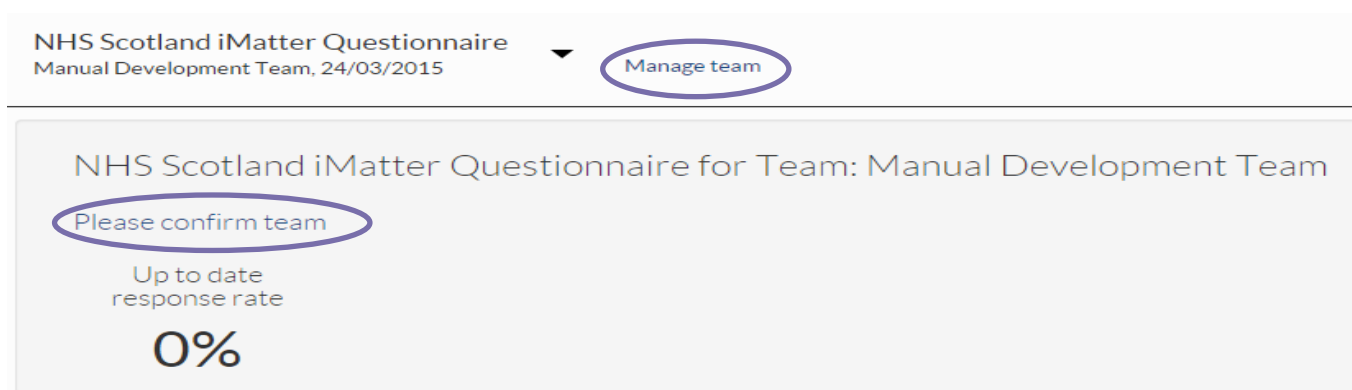
# Accessing your Team Account

- 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 Director/CEO/Board Chair you will be able to access Director/CEO/Board chair details in addition to any Teams you manage - please refer to the Director/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)



NHS Scotland iMatter Questionnaire  
Manual Development Team, 24/03/2015

[Manage team](#)

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NHS Scotland iMatter Questionnaire for Team: Manual Development Team

[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 28/03/2015


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
Manual Development Team	David	Sterling	helpdesk@webropol.com

Team members

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

Search  

<input type="checkbox"/>	First name	Last name	Survey response method	Email	Address
<input type="checkbox"/>	Charity	Forester	Electronic	nphilipsforester@test.com	
<input type="checkbox"/>	Gareth	Palin	Electronic	gpalin@test.com	
<input type="checkbox"/>	Grace	Granger	Electronic	ggranger@test.com	
<input type="checkbox"/>	Hope	Forest	Electronic	hforest@test.com	
<input type="checkbox"/>	Michael	Spence	Electronic	mspence@test.com	
<input type="checkbox"/>	Ruby	Stone	Electronic	rstone@test.com	

**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: 6

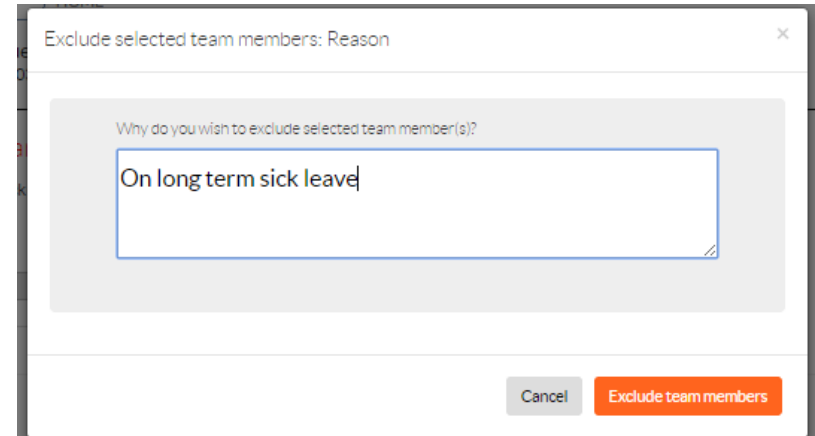
Search  

<input type="checkbox"/>	First name	Last name	Survey response method	Email	Address
<input checked="" type="checkbox"/>	Charity	Forester	Electronic	nphilipsforester@test.com	
<input type="checkbox"/>	Gareth	Palin	Electronic	gpalin@test.com	
<input type="checkbox"/>	Grace	Granger	Electronic	ggranger@test.com	
<input type="checkbox"/>	Hope	Forest	Electronic	hforest@test.com	
<input type="checkbox"/>	Michael	Spence	Electronic	mspence@test.com	
<input type="checkbox"/>	Ruby	Stone	Electronic	rstone@test.com	

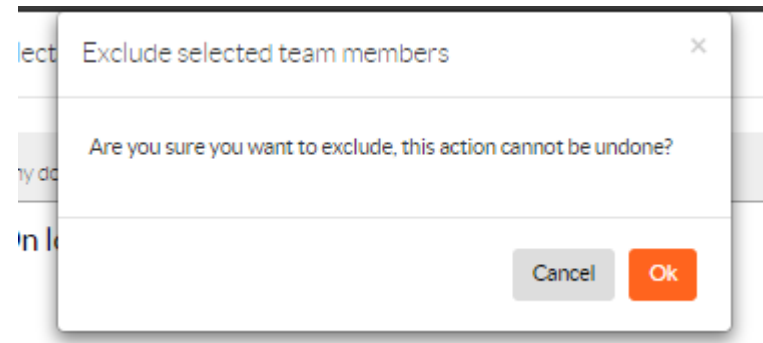
[Exclude from survey](#) [Remove](#) [Print paper copies](#) [Confirm: Team up-to-date](#)

# 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 "Are you sure you want to exclude, this action cannot be undone?". 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: 6

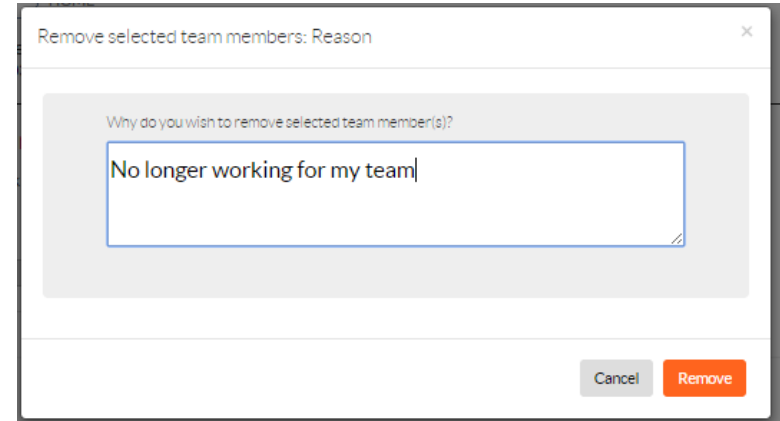
Search  

<input type="checkbox"/>	First name	Last name	Survey response method	Email	Address
<input checked="" type="checkbox"/>	Gareth	Palin	Electronic ▼	gpalin@test.com	
<input type="checkbox"/>	Grace	Granger	Electronic ▼	ggranger@test.com	
<input type="checkbox"/>	Hope	Forest	Electronic ▼	hforest@test.com	
<input type="checkbox"/>	Michael	Spence	Electronic ▼	mspence@test.com	
<input type="checkbox"/>	Ruby	Stone	Electronic ▼	rstone@test.com	

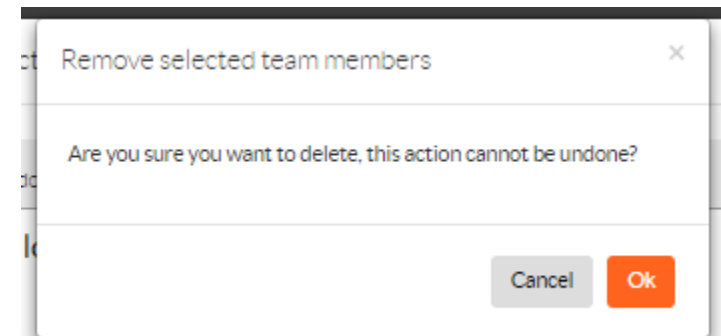
[Exclude from survey](#) [Remove](#) [Print paper copies](#) [Confirm: Team up-to-date](#)

# 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 text "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 text "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).

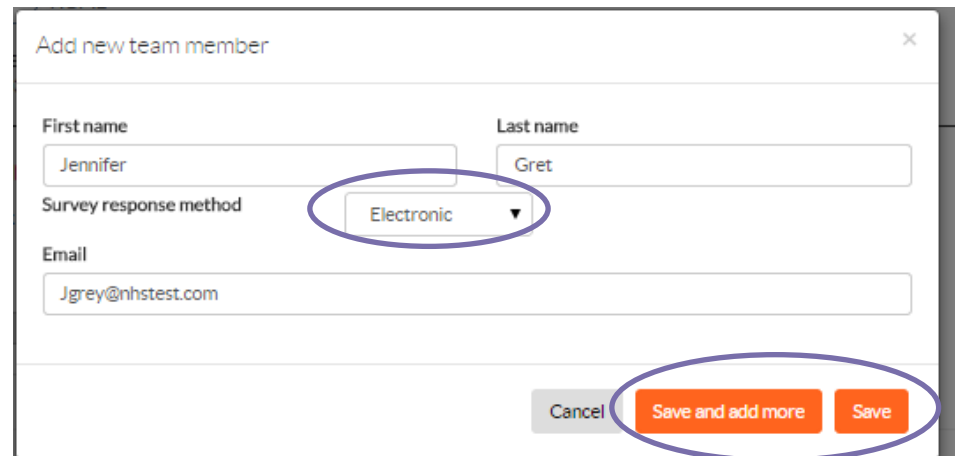
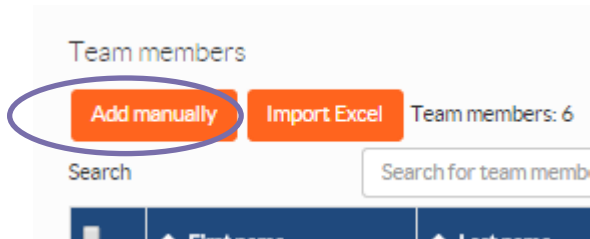
**Please note:** if you are removing multiple team members you must provide a reason for each team member selected for removal.

# 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 a team member's email address is showing as incorrect, remove the team member as shown on page 12 and re add them with the correct address - to add a new team member refer to page 14
- The survey response method can not be changed from paper to electronic. If you need to change the response method , remove the team member as shown on page 12 and re add them with the correct address - to add a new team member refer to page 14.

# 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 Electronic
- Enter an email address - this is a mandatory field if the electronic method is selected
- Click on save or save and add more if further additions are required



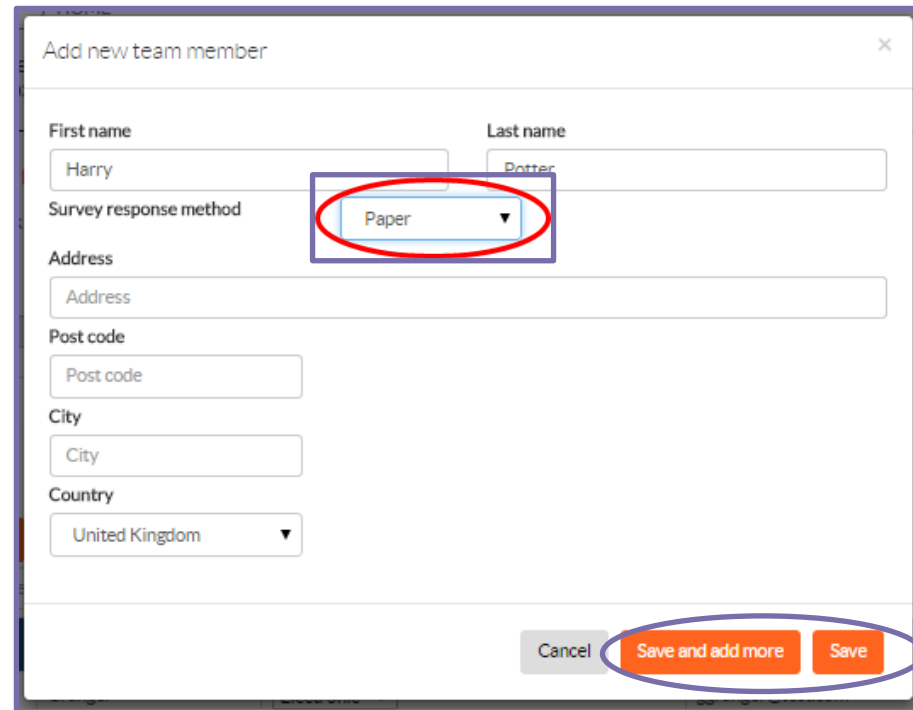
A screenshot of a form titled "Add new team member". The form contains the following fields and controls:

- First name:** Text input field containing "Jennifer".
- Last name:** Text input field containing "Gret".
- Survey response method:** A dropdown menu with "Electronic" selected. This dropdown is circled in blue.
- Email:** Text input field containing "Jgrey@nhstest.com".

At the bottom right of the form, there are three buttons: "Cancel", "Save and add more", and "Save". The "Save and add more" button is circled in blue.

# 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



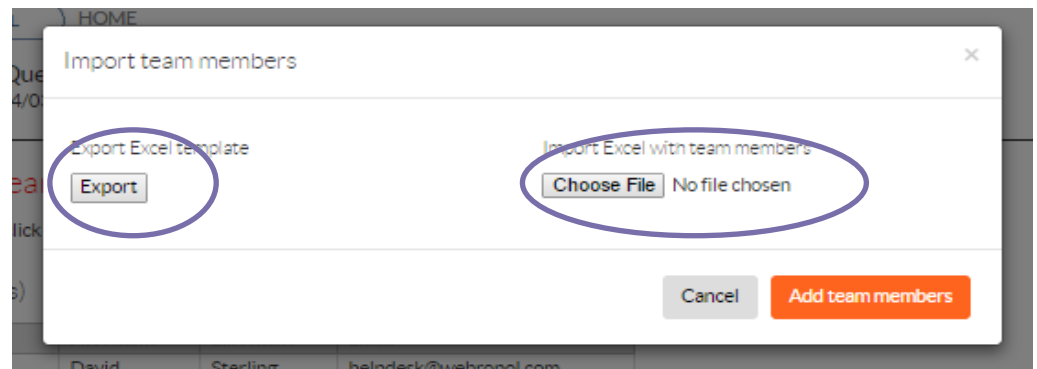
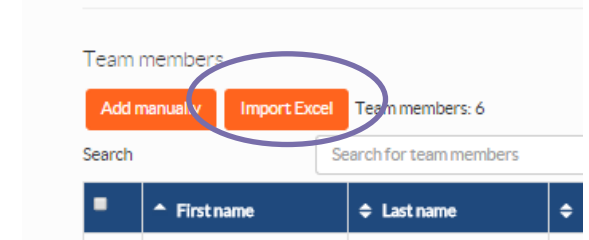
The screenshot shows a form titled "Add new team member" with the following fields and options:

- First name:** Harry
- Last name:** Potter
- Survey response method:** Paper (highlighted with a red circle)
- Address:** Address
- Post code:** Post code
- City:** City
- Country:** United Kingdom

At the bottom right, there are three buttons: "Cancel", "Save and add more" (highlighted with a blue circle), and "Save".

# Confirming your Team: Adding New Team Members

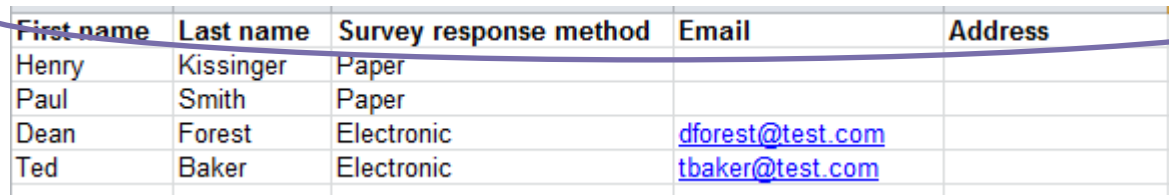
- You can add team members to your Team using the Import function. This function is particularly useful if you have a large number of team members to add - for smaller amendments it is quicker to use the Add Manually function.
- Click on Import Excel
- Export the excel template, this will be required 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.





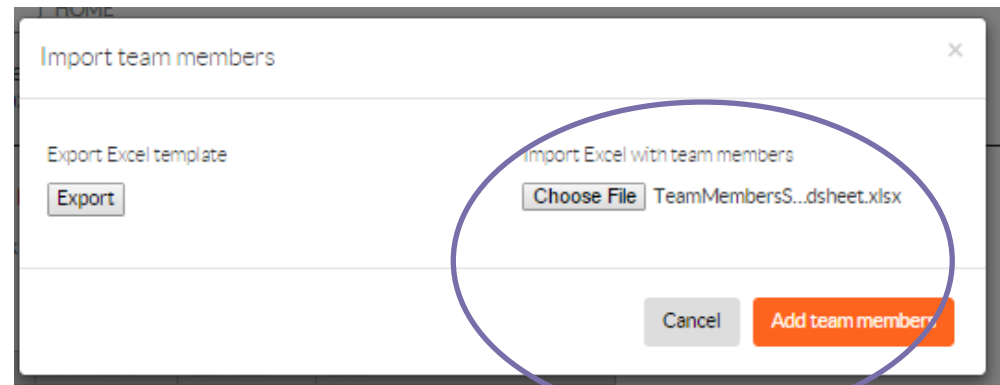
# Confirming your Team: Adding New Team Members

- Complete the team details in the correct format



First name	Last name	Survey response method	Email	Address
Henry	Kissinger	Paper		
Paul	Smith	Paper		
Dean	Forest	Electronic	<a href="mailto:dforest@test.com">dforest@test.com</a>	
Ted	Baker	Electronic	<a href="mailto:tbaker@test.com">tbaker@test.com</a>	

- 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



# 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 Op 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**

Confirm: Team up-to-date

Team details have been confirmed 26/03/2015 by David Sterling

Team name and manager(s)

Team name	First name	Last name	Email
Manual Development Team	David	Sterling	helpdesk@webropol.com

Team members

Add manually Import Excel Team members: 6

Search Search for team members

	First name	Last name	Survey response method	Email	Address
<input type="checkbox"/>	Grace	Granger	Electronic	ggranger@test.com	
<input type="checkbox"/>	Hope	Forest	Electronic	hforest@test.com	
<input type="checkbox"/>	Harry	Potter	Paper		United Kingdom
<input type="checkbox"/>	Ruby	Stone	Electronic	rstone@test.com	
<input type="checkbox"/>	Jennifer	Gret	Electronic	Jgrey@nhstest.com	
<input type="checkbox"/>	Michael	Spence	Electronic	mspence@test.com	
<input type="checkbox"/>	Henry	Kissingner	Paper		
<input type="checkbox"/>	Paul	Smith	Paper		
<input type="checkbox"/>	Dean	Forest	Electronic	dforest@test.com	
<input type="checkbox"/>	Ted	Baker	Electronic	tbaker@test.com	

Exclude from survey Remove Print paper copies

## 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

Team members

[Add manually](#) [Import Excel](#) Team members: 10

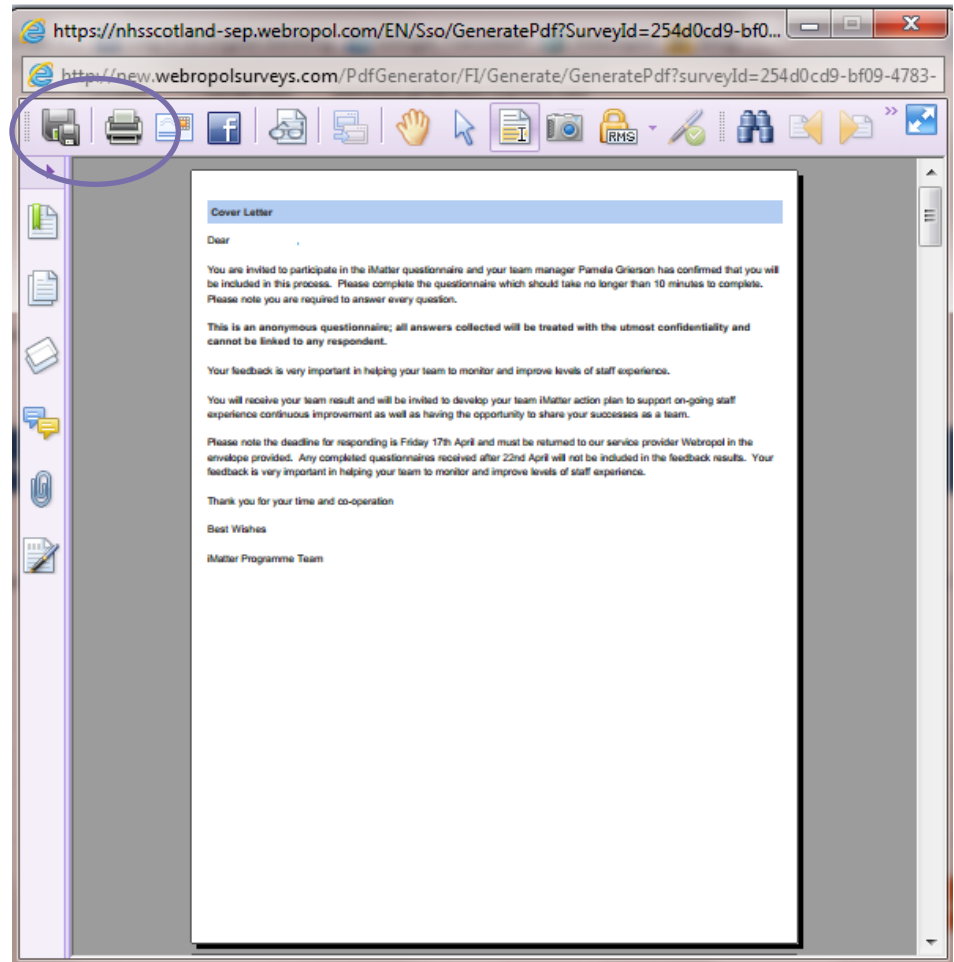
Search  

<input type="checkbox"/>	^ First name	↕ Last name	↕ Survey response method	↕ Email	↕ Address
<input type="checkbox"/>	Dean	Forest	Electronic ▼	dforest@test.com	
<input type="checkbox"/>	Grace	Granger	Electronic ▼	ggranger@test.com	
<input type="checkbox"/>	Harry	Potter	Paper ▼		United Kingdom
<input type="checkbox"/>	Henry	Kissinger	Paper ▼		
<input type="checkbox"/>	Hope	Forest	Electronic ▼	hforest@test.com	
<input type="checkbox"/>	Jennifer	Gret	Electronic ▼	Jgrey@nhstest.com	
<input type="checkbox"/>	Michael	Spence	Electronic ▼	mspence@test.com	
<input type="checkbox"/>	Paul	Smith	Paper ▼		
<input type="checkbox"/>	Ruby	Stone	Electronic ▼	rstone@test.com	
<input type="checkbox"/>	Ted	Baker	Electronic ▼	tbaker@test.com	

[Exclude from survey](#) [Remove](#) [Print paper copies](#)

# The Questionnaire: Paper format

- A PDF file will open with all respondents requiring paper copy
- 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



# 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 ever 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.



# 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 left, there is a navigation bar with 'STAFF EXPERIENCE PORTAL' and 'HOME'. On the top right, the user 'David Sterling' is logged in, with a help icon. Below the navigation bar is a 'Select Questionnaire' dropdown menu. The main content area shows the title 'NHS Scotland iMatter Questionnaire for Team: Manual Development Team' and the 'Up to date response rate' of 87%.

STAFF EXPERIENCE PORTAL HOME

David Sterling ?

Select Questionnaire ▼

NHS Scotland iMatter Questionnaire for Team: Manual Development Team

Up to date  
response rate

**87%**

# 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

NHS Scotland iMatter Questionnaire for Team: Team FEB 2 part 2

Up to date  
response rate

33%

NHS Scotland iMatter Questionnaire for Team: Team with paper copies

Up to date  
response rate

0%

NHS Scotland iMatter Questionnaire for Team: Test team 29 January

Up to date  
response rate

80%



# Viewing reports

- 5 weeks after the electronic question is closed reports will become available - Managers 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
- 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

STAFF EXPERIENCE PORTAL HOME Team 1 Manager ?

Select Questionnaire ▼

NHS Scotland iMatter Questionnaire Report testing Team: TestTeam1

Up to date response rate 100%

Employee Engagement Index 74%

Team Report 2015

Directorate Report 2015

Yearly EEI & Response Rates

Yearly Components

Action Plan

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

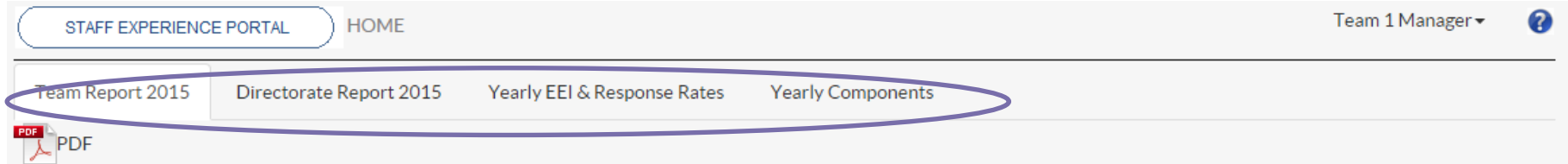
STAFF EXPERIENCE PORTAL HOME

NHS Scotland iMatter Questionnaire TestTeam1, 22/02/2015 ▼

Manage team View results Action plan

# 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 Team report

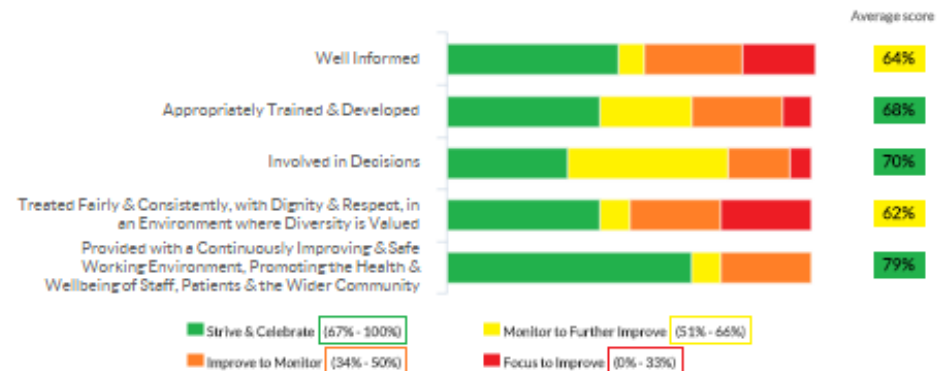
Team Report 2015  
TestTeam1

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



Staff Governance Standards - Strand Scores



# 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

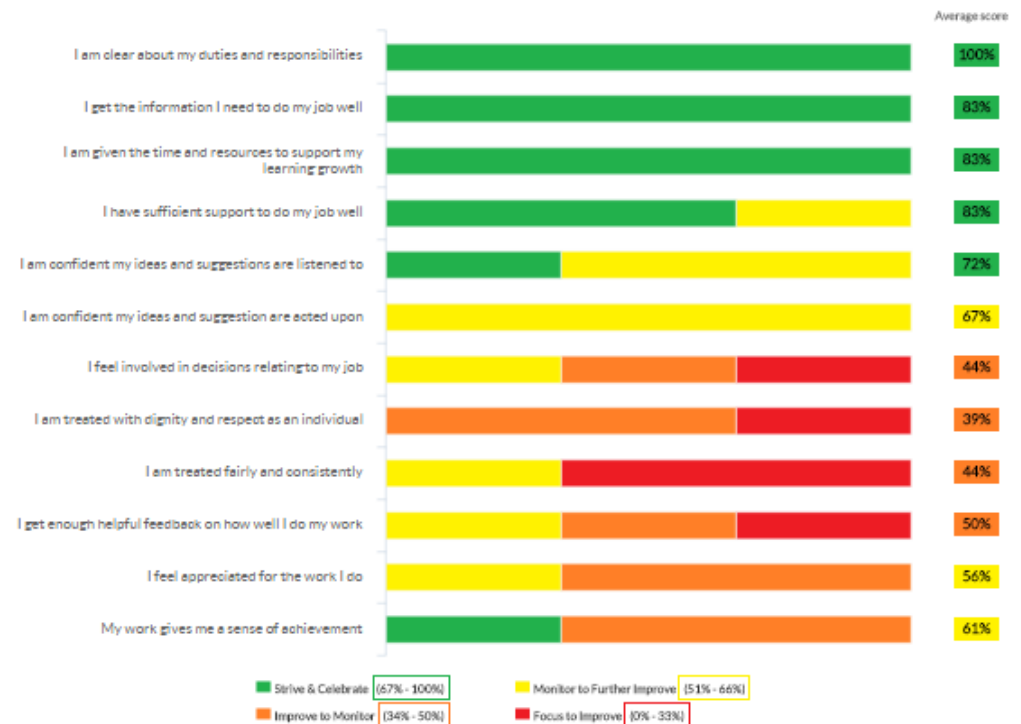
## Calculating the Average Score

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

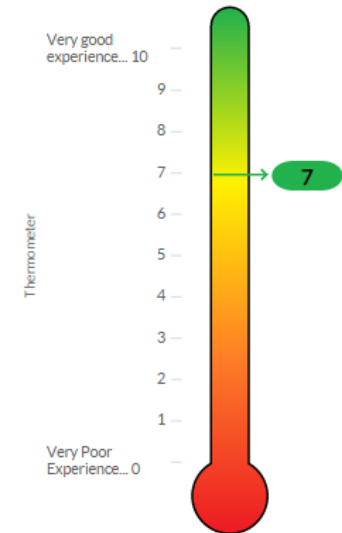


# The Team report

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

Responses count: 3

- 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



EI number for teams in the same directorate

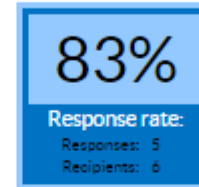
EI Threshold	(67-100) %	(51-66) %	(34-50) %	(0-33) %	Total
Number of Teams	2	0	0	0	2
Percentage of Teams	100 %	0 %	0 %	0 %	100 %

# The Directorate report

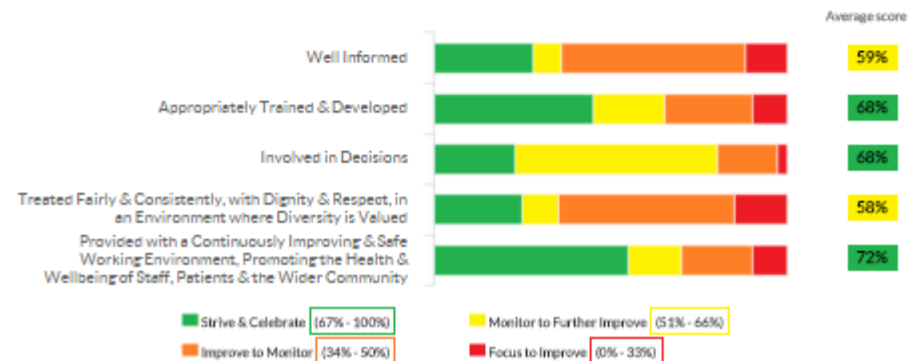
- All Teams will receive a copy of their Directorate report as long as your Directorate has also achieved a response rate of 60%
- For teams who receive a report, this can be used for comparing your team feedback with your overall Directorate and use this for benchmarking
- If you have not received a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



Directorate Report 2015  
TestDirectorate



Staff Governance Standards - Strand Scores



# Yearly EEI Scores & Response Rates Reports

## Yearly EEI & Response Rates

TestTeam1

EEI numbers and improvement from last year

	2015
Team	EEI
TestTeam1	74%

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

Response rates

	2015
Team	Response Rate
TestTeam1	100%

- 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

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



# 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

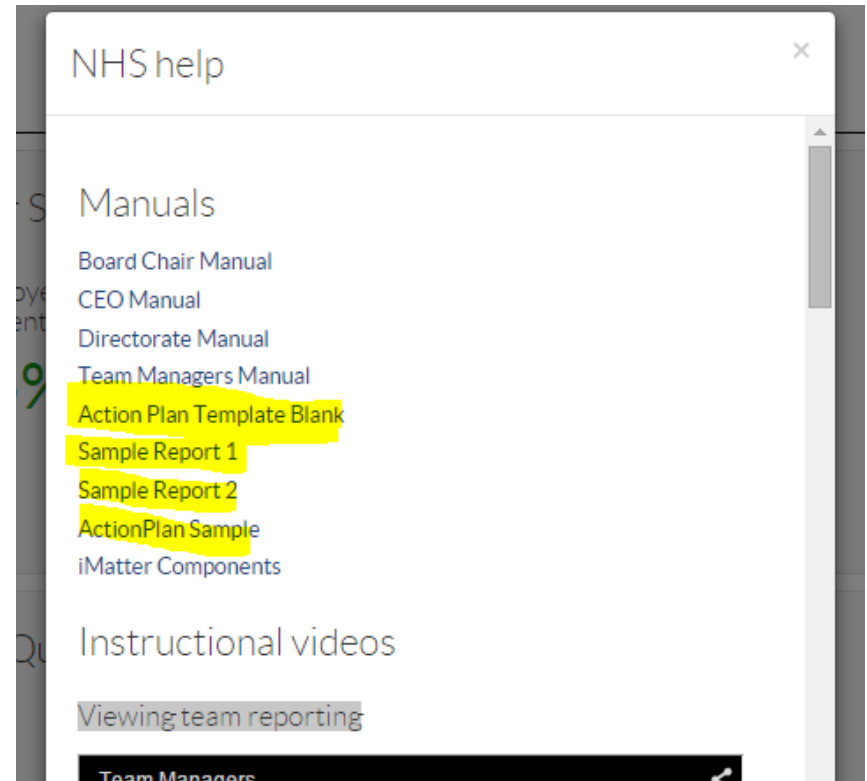


- Alternatively select the questionnaire and click on the Action Plan tab.



# Action Plan

- If you have not received a Team report you will not be able to access the Action Plan from the system
- You can print an action plan template from your iMatter account under the help icon in the top right of the screen which includes Guidance on creating an action plan
- You will also see some sample reports which can be used to discuss with your Team - which area they think they do well and also which areas they feel some improvement would benefit them as a team
- This should be completed with the Team and kept within the department
- At the moment this cannot be saved onto your iMatter account



# The Action Plan

- When reports are published the Teams must continue to fill in the Action Plan for their Team

STAFF EXPERIENCE PORTAL HOME Team 1 Manager - ?

NHS Scotland iMatter Questionnaire  
TestTeam1, 22/02/2015

Manage team View results Action plan

## iMatter Action Plan

Step 1: Read guidance

[Open Action Plan Guidance](#)

Step 2: Action plan

Team name: TestTeam1

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

## iMatter Action Plan

### Step 1: Read guidance

Open Action Plan Guidance

### Step 2: Action plan

Team name: TestTeam1

What we do well

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

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

Save and continue

Complete Action Plan & Create Storyboard

- 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

**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.

# Action Plan

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

## Step 2: Action plan

Team name: Team FEB 4

What we do well

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

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

- Once all progress has been logged Team managers can complete and Lock the action plan.
- No further changes can be made to the action plan.

## Step 3: Record of Progress

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

Save changes

Complete and Lock



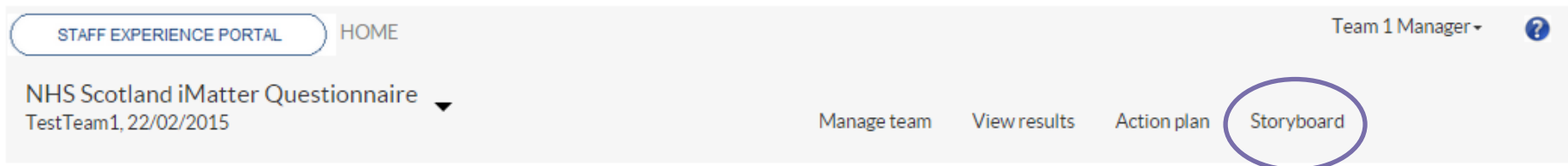
# Storyboard

- 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



The screenshot shows the Staff Experience Portal dashboard for Team 1 Manager. The page title is "NHS Scotland iMatter Questionnaire for Team: TestTeam1". The dashboard displays two key metrics: "Up to date response rate" at 100% and "Employee Engagement Index" at 74%. There are three main navigation buttons: "Team Report 2015", "Directorate Report 2015", and "Yearly EEI & Response Rates". A "Storyboard" button is highlighted with a purple circle, and an "Action Plan" icon with a green checkmark is also visible.

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



The screenshot shows the Staff Experience Portal dashboard for Team 1 Manager. The page title is "NHS Scotland iMatter Questionnaire TestTeam1, 22/02/2015". The dashboard displays a navigation menu with four tabs: "Manage team", "View results", "Action plan", and "Storyboard". The "Storyboard" tab is highlighted with a purple circle.

# 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





## 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