



# Line Manager Guide

NHS Greater Glasgow and Clyde

## 1. Preparing and Updating the System

iMatter send list of previous year's Directorate/HSCP iMatter teams to Local Leads approx. 8 weeks before Team Confirmation Stage



Local Leads liaise and discuss with line managers to determine any changes to team names or assigned line managers. This includes noting teams to be archived or new teams to be added



iMatter Administrators make updates on the system (in the User Management section) by the agreed date (2 weeks before Team Confirmation Stage begins)

## 2. Team Confirmation Stage

First day of Team Confirmation Stage: managers in the system are emailed a link by Webropol advising them that they can go into the system for the 4 week Team Confirmation Period



Managers can: edit, remove and add staff (they can also amend staff's preferred response method)



Managers confirm their team in the system once up-to-date



Should a manager confirm a team in error and need to make further amendments, those with admin access can reset team confirmation

## 3. Questionnaire Stage

First day of Questionnaire Stage, staff are sent links by Webropol via the email/SMS mobile number added to the system by their manager for them to fill in their questionnaire. Managers can log in and print off paper copies for distribution



If a manager has confirmed an incorrect email address/SMS mobile number for a staff member, Administrators can amend within the 'manage team' section



If a staff member has been missed or added in error during Team Confirmation Stage, Administrators can add, remove or exclude staff

#### 4. Reports and Action Planning Stage

**2 weeks (or next day\*) after the Questionnaire closes:**



**Links are emailed/sent via SMS from Webropol to staff to view their team's report; Managers print off report for those staff who have not participated electronically**



**Managers can access the report by logging in to their iMatter account**



**A discussion between manager and team should take place, and the team's Action Plan should be added within the manager's account**

\*reports are produced the next day if a Directorate/HSCP is fully electronic (i.e. has no paper copies in any teams)

#### 5. Progress Update

**A Progress Update should be discussed with the team and recorded in the system approximately 3-4 months after filling in the Action Plan**

## Line Manager Guide

### 1. Preparing and Updating the System

Before Team Confirmation Stage begins, Local Leads within each area will be in touch to discuss any changes to the hierarchy structure. At this point, you should highlight:

- If the **team name** and team's **assigned manager** are to remain the same or provide updates
- Any teams to be archived/removed
- Any additional/new teams required

This information will then be passed by Local Leads to system Administrators to make any changes in the iMatter system.

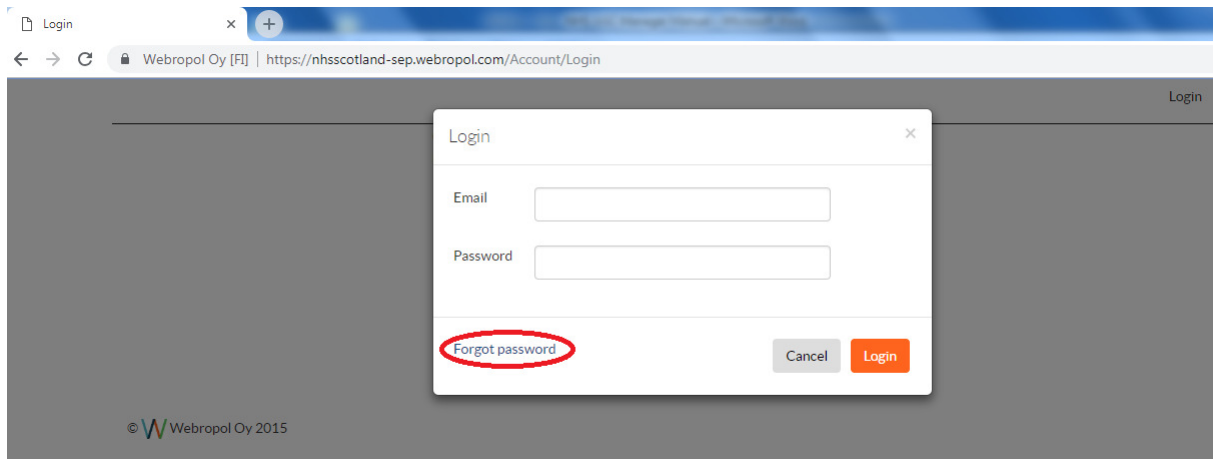
### 2. Team Confirmation Stage

You will receive an email from Webropol containing your login link. You are required to log in to your iMatter account and amend any **staff** details within your team and confirm by the agreed deadline.

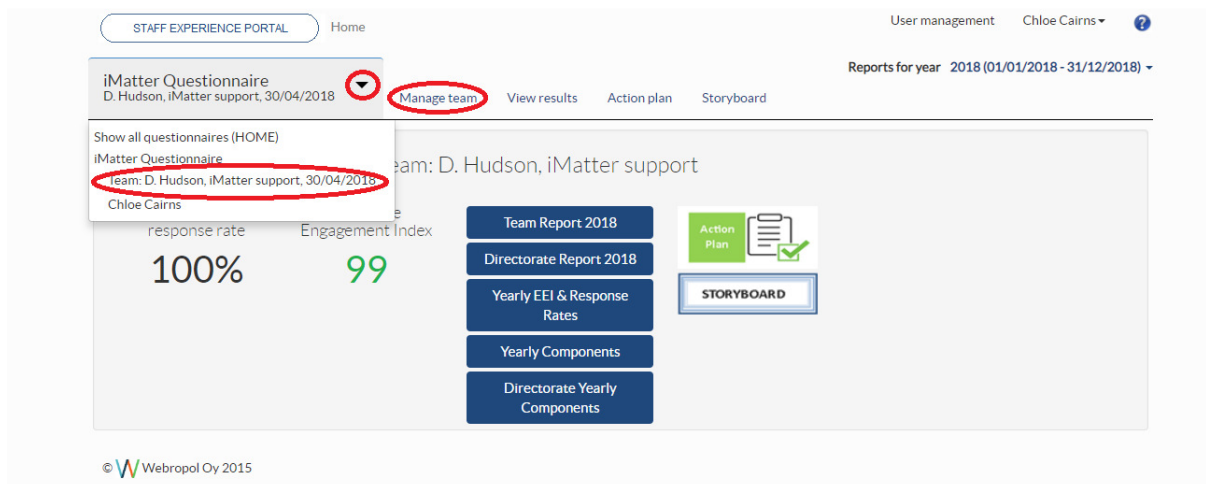
The current schedule dates can be found on [HR Connect](#).

If you are already registered on the system you will be able to login via <https://nhsscotland-sep.webropol.com/Account/Login> using the email address and password used to set up previously. If you are not yet registered on the system, you will receive an email from Webropol containing a link for you to set up your account.

Should you need to reset your password, you can do this by following the login link and using the 'forgot password' function – you will then be sent a link by Webropol to your email address to change your password.



Once logged in to your account, you can access your team details via the homepage by clicking 'iMatter Questionnaire' followed by the team that you wish to amend and confirm, and then 'Manage Team' which will open the staff list within the chosen team (if you have more than one):



**Please check your team details and confirm by 30/03/2020**

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    |
|---|--------------|-----------|-----------------------------------|------------------------|
| Leanne Test<br>Team 04.03.20 -<br>Green | Manager<br>4 | Test      | leannesmith.testing+483@gmail.com | Account<br>unconfirmed |

**Team members**

**Add manually** **Import Excel** Team members: 0

Search

| <input checked="" type="checkbox"/> | ^ First name | ⇅ Last name | ⇅ Survey response method | ⇅ Email           | ⇅ Address      | ⇅ SMS number | Assignment number |
|-------------------------------------|--------------|-------------|--------------------------|-------------------|----------------|--------------|-------------------|
| <input checked="" type="checkbox"/> | Eddy         | Jones       | Email                    | eddytest@test.com | United Kingdom |              |                   |

## 2.1 Updating Staff Details

Upon opening the team list, you will be able to add, exclude or remove staff members in order to ensure your staff list is up to date in preparation for the questionnaire starting.

### 2.1.1 Adding Staff & Amending Details

To add staff to your list you should use the 'Add Manually' button at the top left corner of the list and enter their details:

Please check your team details and confirm by 30/03/2020

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 |
|---|------------|-----------|--------------------------------|---------------------|
| Leanne Test<br>Team 04.03.20 -<br>Green | Manager    | Test      | leannesmith.test@453@gmail.com | Account unconfirmed |

Team members

**Add manually** Import Excel Team members: 0

Search for team members

| <input checked="" type="checkbox"/> | First name | Last name | Survey response method | Email             | Address        | SMS number | Assignment number |
|-------------------------------------|------------|-----------|------------------------|-------------------|----------------|------------|-------------------|
| <input checked="" type="checkbox"/> | Eddy       | Jones     | Email                  | eddytest@test.com | United Kingdom |            |                   |

**Email:** If the staff member wishes to complete their questionnaire via email, click the drop down menu and select 'email' as their response method, enter the email address and save – this will ensure they receive a link for their questionnaire.

**SMS:** For staff who would like to participate via SMS, select the 'SMS' option from the survey response method drop down list and ensure their mobile number is entered in the correct format, then save.

All mobile numbers should be formatted as **'+441234567890'** and will require access to the internet on their mobile (i.e. via Wi-Fi or mobile data) in order to complete the questionnaire.

**Paper:** If the staff member is completing on paper, please select 'paper' and leave the address blank, then save. The manager is required to print off the individual paper copies and distribute to staff on the day the questionnaire launches. **Paper copies will not be sent out to any address entered.**

To change the response method from paper to email/SMS, you will need to remove the staff member and then re-add as email/SMS.

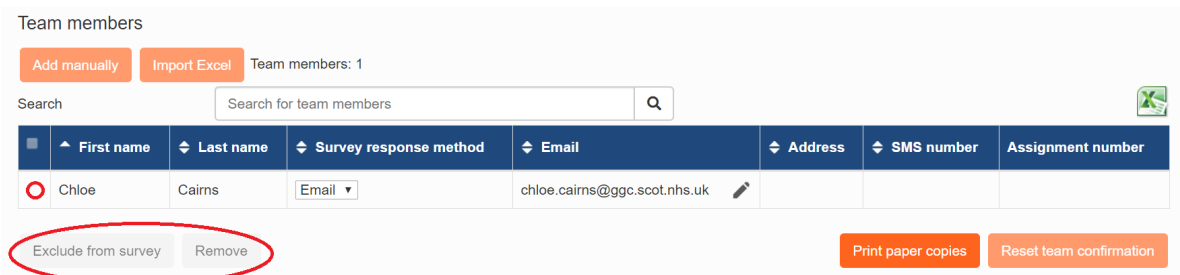
## 2.1.2 Excluding Staff for an iMatter run

If the staff is only temporarily off work and won't be taking part in the process in the current run (for example due to long term sickness absence, maternity leave etc.) then they can be '**excluded**', meaning they will automatically be added back into the team next year. To exclude a staff member, tick the box on the left hand side of their name and click exclude and enter the reason why.

Please ensure you have communicated with the staff member, and agreed exclusion before progressing, as staff could participate via personal email/mobile number/paper copy when not at work.

## 2.1.3 Removing Staff

If a staff member has left the organisation, or is no longer in your team, you should remove them. The check box down the left hand side of the name of the staff member's name to be removed should be ticked followed by either 'remove' at the bottom of the list:



Team members

Add manually Import Excel Team members: 1

Search Search for team members

|                          | First name | Last name | Survey response method | Email                        | Address | SMS number | Assignment number |
|--------------------------|------------|-----------|------------------------|------------------------------|---------|------------|-------------------|
| <input type="checkbox"/> | Chloe      | Cairns    | Email                  | chloe.cairns@ggc.scot.nhs.uk |         |            |                   |

Exclude from survey Remove

Print paper copies Reset team confirmation

## 2.2 Confirming the Team

Once your team details are up to date, you should click the 'Confirm: Team up to date' button on the right hand side of the page (this button can also be found at the bottom right hand side of the page):

Please check your team details and confirm by 30/03/2020

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    |
|---|--------------|-----------|-----------------------------------|------------------------|
| Leanne Test<br>Team 04.03.20 -<br>Green | Manager<br>4 | Test      | leannesmith.testing+483@gmail.com | Account<br>unconfirmed |

Team members

**Add manually** **Import Excel** Team members: 0

Search

| <input checked="" type="checkbox"/> | ^ First name | ↕ Last name | ↕ Survey response method | ↕ Email           | ↕ Address      | ↕ SMS number | Assignment number |
|-------------------------------------|--------------|-------------|--------------------------|-------------------|----------------|--------------|-------------------|
| <input checked="" type="checkbox"/> | Eddy         | Jones       | Email                    | eddytest@test.com | United Kingdom |              |                   |

Should you have confirmed your team and need to make further amendments, contact a system Administrator who will be able to reset Team Confirmation for you. Once happy with the up-date, you will need to confirm your team once again.

If you have changes to make to the structure of your team set up (disaggregating or aggregating your team), contact [iMatter@ggc.scot.nhs.uk](mailto:iMatter@ggc.scot.nhs.uk) as soon as possible as this should be done prior to the questionnaire launching.

Please note that if you log in and confirm your team with '0' staff listed, this will be considered as a 'live' team and will still show in reports. Therefore if you end up with no staff listed - whether they have been moved to another team or have left the organisation etc. - contact system Administrators and ask for removal of the team.

### Stage 3: Questionnaire Stage

On the day the questionnaire goes live for staff, those who have opted to participate via email or SMS should receive their link from Webropol 11am onwards.

However, for those participating via paper copy, managers should log in and print off the staff's individual papers. This should be done via the 'Manage Team' page (as above).

You can print individually by using the printer icon next to the staff member's name, or print all by using the 'print paper copies' button at the bottom of the staff list. The paper copies will download as a PDF to print off and hand out to staff along with the pre-paid envelopes which will be supplied by Local Leads. Please note paper copies are individual



to the staff member and therefore should not be photocopied. The cover letter will have staff's name on it - this part is removed when sending it to Webropol but checking this will ensure staff have the right copy for them.

Printed questionnaires should be provided to relevant staff during the first week of the questionnaire launching in order to give them time to complete and return to Webropol:

Team members

Add manually Import Excel Team members: 6

Search Search for team members

|                          | First name | Last name | Survey response method | Email             | Address                    | SMS number | Assignment number |
|--------------------------|------------|-----------|------------------------|-------------------|----------------------------|------------|-------------------|
| <input type="checkbox"/> | Eddy       | Jones     | Email                  | eddytest@test.com | United Kingdom             |            |                   |
| <input type="checkbox"/> | Edmond     | Shark     | Email                  | edmond@test.com   | United Kingdom             |            |                   |
| <input type="checkbox"/> | George     | Russell   | Paper                  |                   | Test House, United Kingdom |            |                   |
| <input type="checkbox"/> | Harry      | Gray      | Paper                  |                   | United Kingdom             |            |                   |
| <input type="checkbox"/> | Rose       | Thorne    | Paper                  |                   | United Kingdom             |            |                   |

Exclude from survey Remove Print paper copies Reset team confirmation

Those completing on paper have an additional week after the closing date, to allow their completed questionnaire to reach Webropol in time. Staff should use the pre-paid envelope to send their responses to Webropol. Webropol then inputs paper responses to the system.

The questionnaire is anonymous, therefore you will not be able to see which staff members have completed and which have not. However you can check your team's response rate on the home page during the Questionnaire Stage and encourage all staff to complete.

In order to generate a full team report for a team of less than 5, all staff must complete (a 100% response rate is required for teams of this size). For teams of 5 or more, there is no pre-required response rate to generate a full team report:

The screenshot shows the Staff Experience Portal interface. At the top, there are navigation links for 'STAFF EXPERIENCE PORTAL' and 'HOME'. The user's name, 'David Sterling', is displayed in the top right corner. Below the navigation, there is a dropdown menu labeled 'Select Questionnaire'. The main content area displays the title 'NHS Scotland iMatter Questionnaire for Team: Manual Development Team' and the 'Up to date response rate' as '87%'.

As line managers, please encourage your team to participate whilst the questionnaire is live as it's important to gather feedback on the experiences of staff, to support continuous improvement.

Please contact the [iMatter mailbox](#) with any questions as soon as possible (for instance, a staff member either unexpectedly leaves and needs to be removed from the list, would like to change their response method etc.).

## Stage 4: Reports and Action Planning Stage

### 4.1 Report Publication

Staff automatically receive the team report via email/SMS on the day reports are available, where those response methods were selected. This will either be the day following the questionnaire closing (where all teams in a Directorate/HSCP are fully electronic responses) or 2 weeks after, where there are any paper copies in the Directorate/HSCP.

If you have staff who have participated via paper copy within your team, the response rate can still change in the week following the closing date, as Webopol input the paper copies received.

To view your team report for the team you manage, you will need to log in to your account. If your team has generated a report you will be able to access the report via the homepage of your account:

STAFF EXPERIENCE PORTAL Home User management Chloe Cairns ?

iMatter Questionnaire D. Hudson, iMatter support, 30/04/2018 Manage team **View results** Action plan Storyboard

Reports for year 2018 (01/01/2018 - 31/12/2018) ▾

iMatter Questionnaire for Team: D. Hudson, iMatter support

Up to date response rate 100%

Employee Engagement Index 99

**Team Report 2018**

Directorate Report 2018

Yearly EEI & Response Rates

Yearly Components

Directorate Yearly Components

Action Plan

STORYBOARD

© Webropol Oy 2015

You can also download a PDF copy of your team report, for the staff who didn't participate via email / SMS by using the PDF function at the top left hand side of the report:

STAFF EXPERIENCE PORTAL Home User management Chloe Cairns ?

iMatter Questionnaire D. Hudson, iMatter support, 30/04/2018 Manage team **View results** Action plan Storyboard

Reports for year 2018 (01/01/2018 - 31/12/2018) ▾

Team Report 2018 Directorate Report 2018 Yearly EEI & Response Rates Yearly Components Directorate Yearly Components

**PDF**

**i Matter**

Team Report 2018

D. Hudson, iMatter support

You will also receive an email from Webropol to view the team report for the team in which you participated in as a team member (as a 'respondent') under your own line manager. This report is not available to you via your account.

## 4.2 Action Planning

Following the report being distributed, please arrange a discussion with your team around the questionnaire results, and develop an Action Plan with your team whichever way is convenient for you and your staff (this can be included in meetings that you already have planned, i.e. huddles, team meetings etc.).

You should discuss your team report and agree as a team on one activity which the team does well. You should also agree up to three

actions to progress, which are identified as improvement opportunities. These should then be entered in to the Action Planning section on your iMatter account. If your team has not received a report, you should use either the Directorate Report, or the Components Report which are available on your account to discuss and develop your Action Plan:

The screenshot shows the iMatter Staff Experience Portal interface. At the top, there is a navigation bar with 'STAFF EXPERIENCE PORTAL' and 'Home'. On the right, there are links for 'User management' and 'Chloe Cairns'. Below this, the page title is 'iMatter Questionnaire for Team: D. Hudson, iMatter support, 30/04/2018'. There are navigation links for 'Manage team', 'View results', 'Action plan' (circled in red), and 'Storyboard'. The main content area displays 'iMatter Questionnaire for Team: D. Hudson, iMatter support'. It shows two key metrics: 'Up to date response rate' at 100% and 'Employee Engagement Index' at 99. Below these are several report buttons: 'Team Report 2018', 'Directorate Report 2018', 'Yearly EEI & Response Rates', 'Yearly Components', and 'Directorate Yearly Components'. A green 'Action Plan' button with a checkmark icon is circled in red, and a 'STORYBOARD' button is also visible. The footer includes '© Webropol Oy 2015'.

Ideally, Action Plans should be entered on the system by 11.59am on the 8 week deadline given for your area (please see the iMatter schedule on HR Connect for more information). However, please still enter your Action Plan if completed after this deadline, as the system will not close and your Action Plan will still be saved in the same way.

However, please note that it will not count in the figures calculated for the Action Planning KPI, reporting nationally.

When completing your Action Plan, the (one) 'What we do well' should be filled in as shown below in the green box, and the (one, two or three) improvement actions for the team should be entered in the table with all four columns populated before saving.

If you wish to add more to the plan before finalising, use the 'Save and continue' button which will allow you to go back in at another time to edit further, otherwise click 'Complete Action Plan & Create Storyboard'. This will lock your Action Plan and automatically create the Storyboard.

The character limit per section/free text box is 200 characters including spaces. However you might add a summary of your Action Plan into the system and the team can create a more detailed version out with the

system (i.e. in Word, Excel etc.), this could then also be used as a fuller working document for the team.

Should you have completed the team’s Action Plan in error and need to make further amendments, Administrators can unlock and reset the Action Plan for you. You will need to re-confirm the plan once updated.

Step 3 of the Action Plan ‘Record of Progress’ should be filled in throughout the year.

More details on Action Planning can be found in the Action Planning Guide on [HR Connect](#).

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](#)

The Storyboard (i.e. Action Plan Summary) is automatically sent out to staff who completed the survey via email or SMS, allowing them to view the Action Plan Summary. This should be downloaded by the manager for staff who didn’t participate via email / SMS by using the PDF icon at the top left hand side of the report:

STAFF EXPERIENCE PORTAL Home User management Chloe Cairns

iMatter Questionnaire D.Hudson, iMatter support, 30/04/2018 Manage team View results Action plan Storyboard Reports for year 2018 (01/01/2018 - 31/12/2018)



Storyboard

D. Hudson, iMatter support  
 What we do well

## 5. Progress Update

Over the next few months once the team have had time to progress the agreed actions, managers should log in and enter a Progress Update which is 'Step 3: Record of Progress' within the Action Plan.

If you are updating one area at a time, the 'save changes' button should be used until all areas have been recorded on the Progress Update, then the 'complete and lock' button should be pressed.

Step 3: Record of Progress

| Area for Improvement | Progress Made | Date |
|----------------------|---------------|------|
| Service Improvement  |               |      |
| Quality improvement  |               |      |
| 3                    |               |      |

## Help and Assistance

Should you have any questions at any point of the iMatter run, please contact your Local Administrator if there is one assigned in your area; otherwise please contact the NHSGGC iMatter mailbox at [iMatter@ggc.scot.nhs.uk](mailto:iMatter@ggc.scot.nhs.uk).