



Line Manager Guide

1. Preparing for Distribution

Approximately eight weeks before Team Confirmation, the iMatter team send Local Leads a list of last year's Directorate/HSCP iMatter teams.



Local Leads contact line managers to review and update team names, assigned managers, and identify any teams to be archived or added.



System Administrators ensure that all changes are entered into the system at least two weeks before Team Confirmation starts.

2. Team Confirmation

On the first day of Team Confirmation, you will receive an email from Webropol with a link to access the system. The Team Confirmation period lasts four weeks.



Log in to your portal and review and update your team, including adding, removing, or editing staff details and preferred response methods. Staff may choose to provide a personal email address or mobile phone number - these details will be used solely for the purpose of the survey.



Once all updates are complete, confirm your team in the system.



If you need to make further changes after confirming, contact your Local Administrator to reset your Team Confirmation.

3. Questionnaire

On the day the Questionnaire opens, staff will receive a unique link from Webropol via email or SMS, as provided by you. You are responsible for printing and distributing paper copies and prepaid envelopes for staff who participate via this method.



If any contact details are incorrect, or if staff have been missed or added in error, please contact an Administrator to make the necessary amendments.

4. Reports and Action Planning

Reports are generated either the next day for fully electronic Directorate/HSCPs, or two weeks after the Questionnaire closes if paper copies are used anywhere in the Directorate/HSCP.



Staff will receive their team's report via email or SMS. Ensure you print reports for staff who did not participate electronically.



You can access your team report by logging into the iMatter portal.

*You will also receive an email from Webropol to view the team report for the team in which you participated as a respondent under your own line manager. This report is **not** available to you in your portal.



After reviewing the report, arrange a team discussion to identify strengths and areas for improvement, and record your team's agreed Action Plan in the iMatter portal.

5. Progress Update

Three to four months after submitting your Action Plan, meet with your team to review progress. Record the Progress Update in the iMatter system to track achievements and next steps.

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1. Preparing for Distribution

Before Team Confirmation 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 iMatter system administrators to make changes in the system.

Schedule dates can be found on [HR Connect](#).

2. Team Confirmation

2.1 Accessing your iMatter account

If your login is linked to a previous email address (e.g. the ggc.scot format), it will not update automatically; you can request to change your login email and set a new password by contacting your Local Administrator or ggc.nhsggc.imatter@nhs.scot.

Line managers within HSCPs who have a local authority email address (i.e. a Council address), should use this to set up their iMatter account.

When Team Confirmation opens, you will receive an email from Webropol with your login link. Log in to your iMatter portal to update staff details and confirm your team by the deadline.

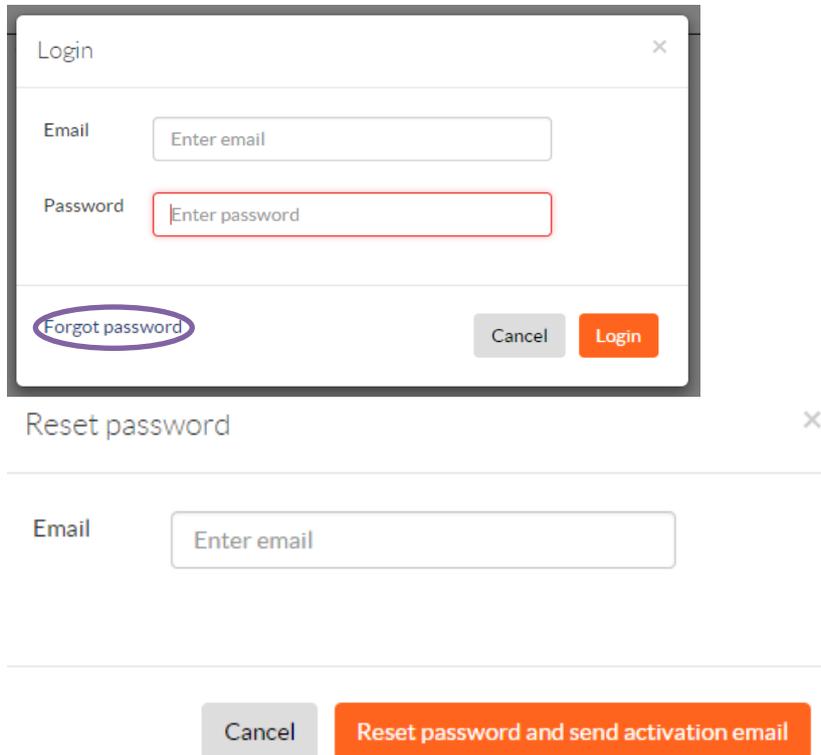
If you are registered, log in using the link in the email or directly via <https://nhsscotland-sep.webropol.com/Account/Login>

If you are not registered, follow the instructions in your email to set up your account - you will receive an email from Webropol containing a link for you to set up your account.

The first time you log in you will be required to set up a password. This password will be used for further access to the system.

If you manage multiple teams, you will only be required to click on one link to create your password to access all your teams.

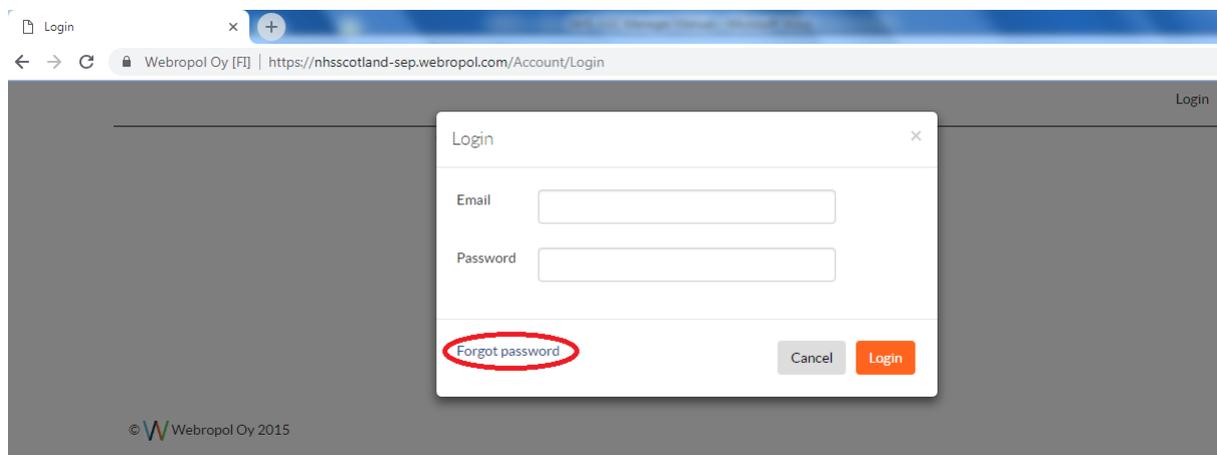
Should you need to reset your password, use the 'forgot password' option on the login page.



The image shows two overlapping forms. The top form is titled "Login" and contains two input fields: "Email" with the placeholder "Enter email" and "Password" with the placeholder "Enter password". Below these fields are three buttons: "Forgot password" (circled in purple), "Cancel", and "Login". The bottom form is titled "Reset password" and contains one input field: "Email" with the placeholder "Enter email". Below this field are two buttons: "Cancel" and "Reset password and send activation email".

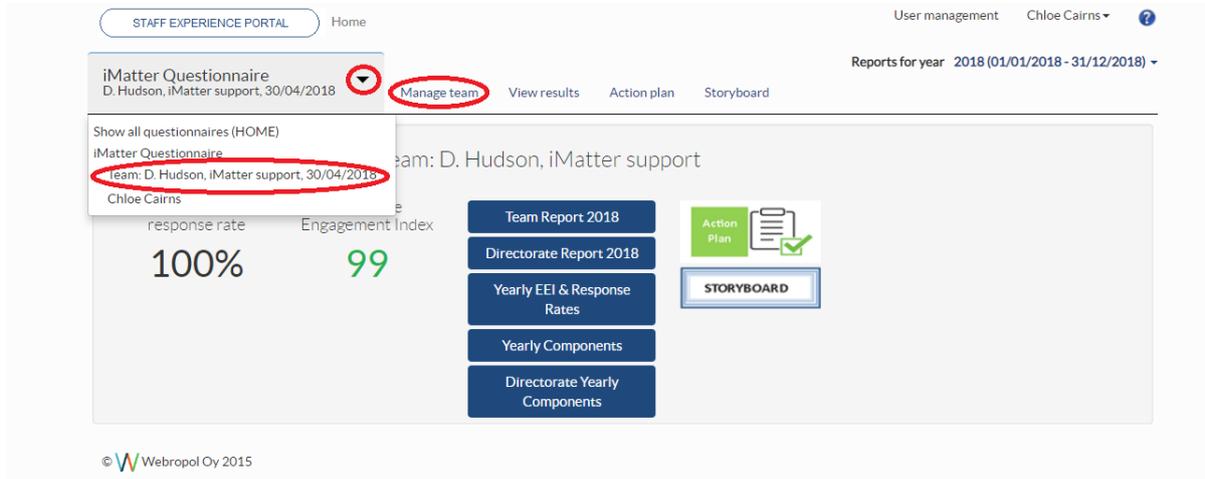
You will receive an email with a link to reset your password. Click on the link and enter a new password. The link is only valid for 2 days, after which you will need to repeat this process again to reset your password.

The screenshots below show you the logging in process, however you can also refer to the YouTube video: [Logging in](#)



The image shows a browser window with the URL "https://nhsscotland-sep.webropol.com/Account/Login". The page title is "Login". A "Login" form is overlaid on the page, containing two input fields: "Email" and "Password". Below these fields are three buttons: "Forgot password" (circled in red), "Cancel", and "Login". The footer of the page reads "© Webropol Oy 2015".

Once logged in to your account, you can access your team's 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:



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 Team 04.03.20 - Green	Manager 4	Test	leannesmith.testing+483@gmail.com	Account unconfirmed

Team members

Add manually

Import Excel

Team members: 0

Search

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		

At team confirmation stage, if the line manager is on secondment/long-term absence etc., another manager can be assigned to the team temporarily and confirm the team in the system. Once the temporary access is no longer required, inform a system administrator to remove their details.

2.2 Updating staff details

Teams and their assigned managers are reviewed and agreed in preparation for iMatter beginning each year. Within iMatter teams are assigned based on the line management structure, however if you wish to discuss changes to this, please contact your Local Administrator or

ggc.nhsggc.imatter@nhs.scot or as soon as possible as this should be done prior to the questionnaire launching.

Please note, manager and team names can be updated at any point throughout year (e.g. new manager in post) - contact your Local iMatter Administrator or ggc.nhsggc.imatter@nhs.scot.

Open your team list to add, exclude, or remove staff members, ensuring your staff list is accurate before the Questionnaire begins.

Follow the steps below to edit and confirm your staff list, or refer to the YouTube video for guidance: [Editing and Confirming your Team](#)

2.2.1 Adding staff and amending staff's details

To add a staff member, click 'Add Manually' 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 Team 04.03.20 - Green	Manager	Test	leannesmith.testing+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		

- For email responses, select 'email', enter the address, and save.
- Update staff email addresses to the nhs.scot format, where staff are responding by email.
- To update an email address, remove the staff member and re-add them with the correct details.
- For SMS responses, select 'SMS' and enter the mobile number in the format '+441234567890'.
- Staff may choose to provide a personal email address or mobile number, e.g. they might not have a work email or work phone. These details will be used solely for the purpose of the survey.
- For paper responses, select 'paper' and leave the address blank.
Paper copies will not be sent out to any postal address entered. Print paper copies within the first few days of the questionnaire going live.
- 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.

2.2.2 Excluding staff from current year's run

If a staff member is temporarily unavailable (e.g. on long-term sick leave or maternity leave), you can exclude them from this year's run.

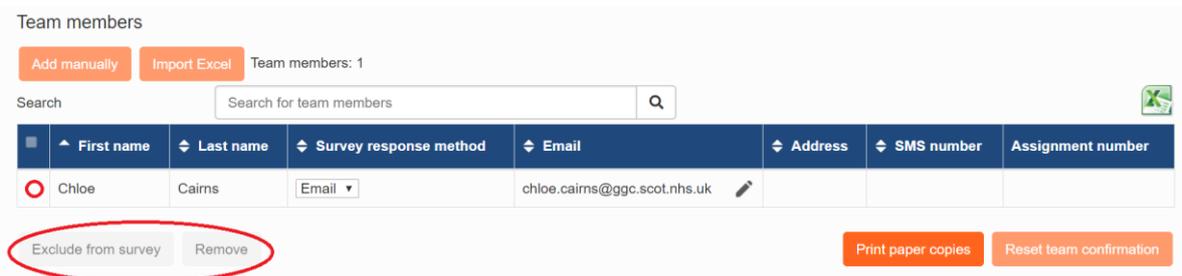
Tick the box next to their name, click 'exclude', and enter the reason. Excluded staff will be automatically included next year.

Ensure you have communicated with the staff member and agreed exclusion before progressing, as staff are able to participate via personal email/mobile number/paper copy when not at work should they wish to do so.

If you are unsure whether to exclude or remove a staff member, please contact ggc.nhsggc.imatter@nhs.scot.

2.2.3 Removing staff

To remove a staff member who has left your team, tick the box next to their name and click '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

2.3 Confirming the team

After updating your team details, click 'Confirm: Team up to date' on the right 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 Team 04.03.20 - Green	Manager 4	Test	leannesmith.testing+483@gmail.com	Account 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		

If you need to make changes after confirming, contact your Local iMatter Administrator or ggc.nhsggc.imatter@nhs.scot to reset your Team Confirmation. When you have made the up-date, click 'Confirm: Team up to date'.

If you have changes to make to the structure of your team set up (disaggregating or aggregating your team), contact your Local iMatter Administrator or ggc.nhsggc.imatter@nhs.scot 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 your Local Administrator or ggc.nhsggc.imatter@nhs.scot 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, please consider whether you still require a team. If so, please add in your staff details, and if you no longer require a team, contact your Local iMatter Administrator or ggc.nhsggc.imatter@nhs.scot to remove the team. Please do **not** confirm or leave a team with no staff added, in the system.

3. Questionnaire

When the Questionnaire opens, staff who chose email or SMS will receive their link from Webropol shortly after 11am.

For those participating via paper copy a printer icon will appear next to their name. Log in and print each staff member's unique questionnaire.

You can print papers individually by using the printer icon next to the staff's name, or print all by using the 'print paper copies' button at the bottom of the staff list.

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
Eddy	Jones	Email	eddytest@test.com	United Kingdom		
Edmond	Shark	Email	edmond@test.com	United Kingdom		
George	Russell	Paper		Test House, United Kingdom		
Harry	Gray	Paper		United Kingdom		
Rose	Thorne	Paper		United Kingdom		

Exclude from survey Remove Print paper copies Reset team confirmation

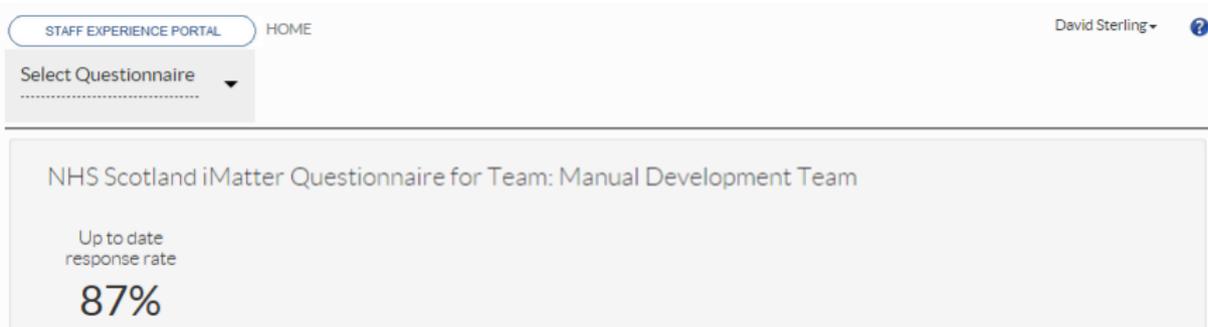
The paper copies will download as a PDF to print off and you will need to hand them out to staff along with the pre-paid envelopes supplied by Local Leads.

Paper copies are unique to each staff member and therefore should not be photocopied. The cover letter will have the staff's name on it - this part is removed when sending it to Webropol but checking this before handing out the copies ensures that staff have the correct copy for them.

Printed questionnaires and pre-paid envelopes (envelopes are available from Local Leads) should be provided to staff within the first few days of the questionnaire going live in order to give staff time to complete and return to Webropol.

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 their response to the system.

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



In order to generate a report for a team of less than 5, all staff must complete the survey (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 report.

Please encourage your team to participate as it's important to gather feedback on their experiences to support continuous improvement.

Contact your Local Administrator or ggc.nhsggc.imatter@nhs.scot with any queries as soon as possible (for instance, a staff member has been missed from the team, unexpectedly leaves and needs to be removed from the list, would like to change their response method etc.).

4. Reports and Action Planning

4.1 Report publication

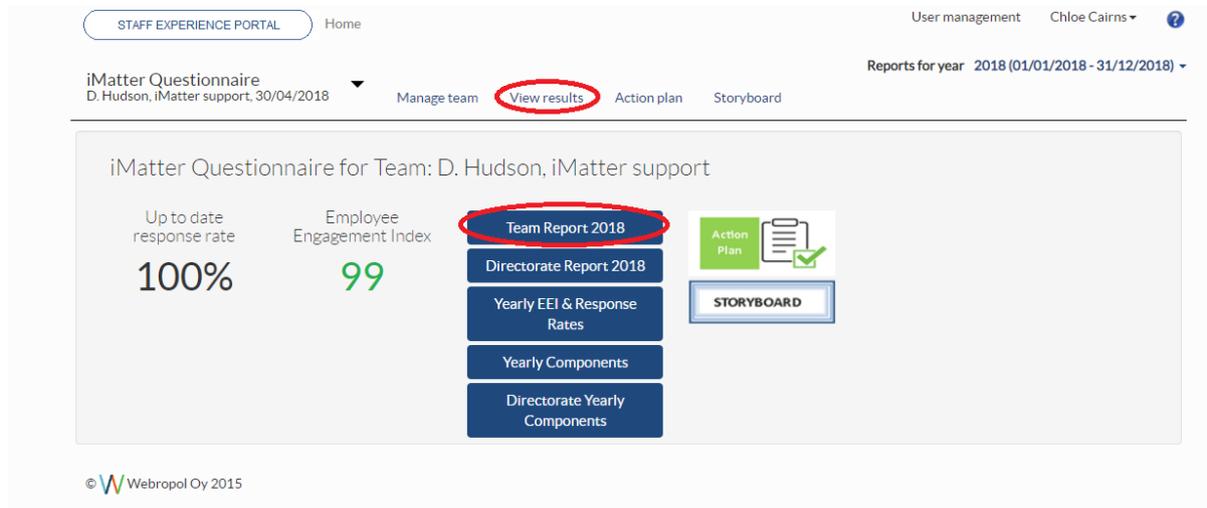
Team reports are sent to staff via email or SMS as soon as they are available.

This will either be the day following the Questionnaire closing where all teams in a Directorate/HSCP are fully electronic, or 2 weeks after where there are paper copies anywhere in the Directorate/HSCP.

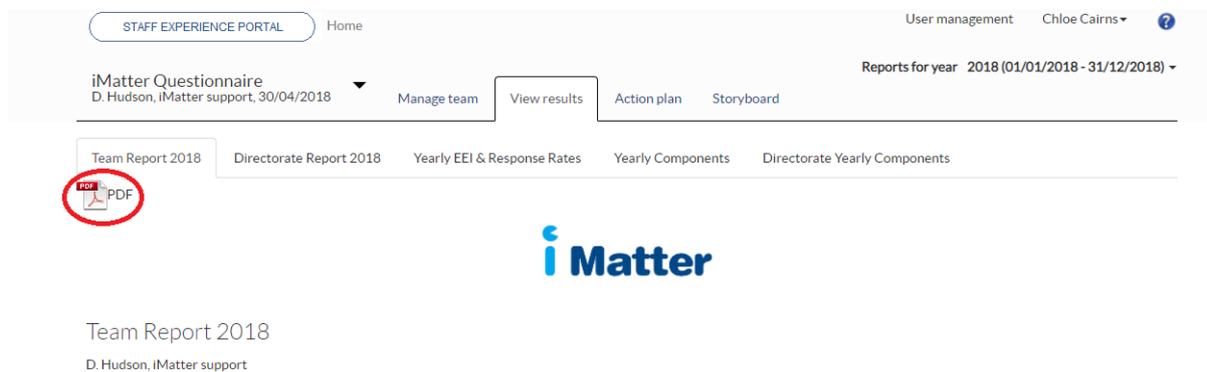
If paper copies were used, response rates may change as Webropol process these after the closing date.

Log in to your account to view and download your team's report.

If your team has generated a report you will be able to access the report via the homepage of your portal:



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



You will also receive an email from Webropol to view the team report for the team in which you participated as a respondent under your own line manager. This report is **not** available to you in your portal.

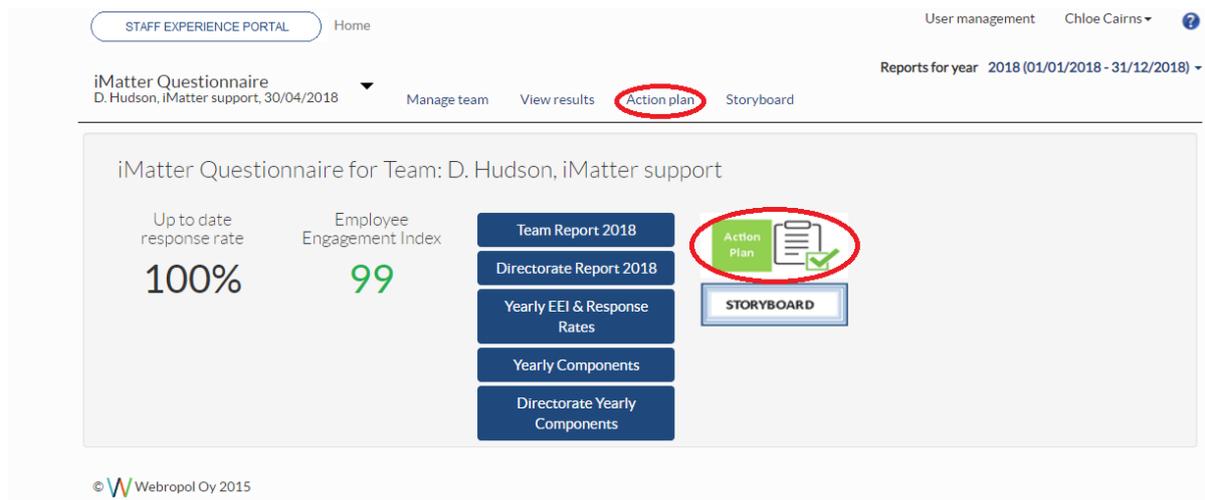
4.2 Action Planning

Arrange with your team to discuss the results and agree on an Action Plan (this can be included in meetings that you already have planned, i.e. huddles, team meetings etc.).

During this discussion, identify strengths to celebrate and agree up to three improvement actions to progress over the next 12 months.

You may also link these actions to any other ongoing plans where themes overlap, to support progress and avoid duplication. Enter your strengths and agreed actions in to the Action Planning section on the iMatter portal.

If your team has not generated a report, you should use either the Directorate Report or the Components Report which are available on your portal to discuss and develop an Action Plan with your team:



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](#)) in order for it to be included in the Action Planning KPI, reported on nationally.

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. Please note that it will not count in the figures calculated for the Action Planning KPI.

If you have locked your team's Action Plan in error or need to make amendments, contact ggc.nhsggc.imatter@nhs.scot (Local Administrators cannot unlock and reset an Action Plan.)

You must make the changes and re-save the plan within the 8-week action planning period.

Please note: Unlocking Action Plans after the 8-week stage will affect the action planning rate reported nationally.

More details on action planning can be found in the Action Planning and Team Engagement Guides on [HR Connect](#).

5. Progress Update

Over the next few months after implementing your Action Plan, log in to the iMatter portal and record a Progress Update under ‘Step 3: Record of Progress’. Use ‘save changes’ for each area, and ‘complete and lock’ when finished:

Step 3: Record of Progress

Area for Improvement	Progress Made	Date
Service Improvement		
Quality improvement		
3		

Save changes Complete and Lock

The ‘Record of Progress’ should be filled in throughout the year.

6. LearnPro Module

Refresh your knowledge by completing the iMatter LearnPro module, available under the Role Specific category, titled: **GGC: 339 NHSGGC iMatter Awareness for Managers**. It is set as a one-time pass (no assessment).

For Local Authority Managers within HSCPs, you will be able to access this course on your Council e-learning platform.

7. Help and Assistance

For support, email the NHS Greater Glasgow and Clyde iMatter mailbox at ggc.nhsggc.imatter@nhs.scot or contact your Local Administrator if there is one assigned in your area. You can find Local Administrators contact details on Staffnet [iMatter](#).

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Date for review:	7 January 2027
Replaces previous version:	‘2025 Version’