Line Manager Guide

NHS Greater Glasgow and Clyde

Preparation and Updating the System

iMatter team send on list of Directorate/HSCP teams to local leads approx. 8 weeks before Team Confirmation period begins

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Local leads liaise and discuss with line managers to determine any changes to the teams or the assigned line manager details. This includes noting teams to be archived or new teams to be added

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iMatter administrators make the identified updates to teams on the iMatter system. Changes should be made in User Management section of the system by 4pm, 2 weeks before Team Confirmation begins

Team Confirmation Stage

First Monday of Team Confirmation stage, managers in the system are emailed a link, confirming they can go into the system and review, edit and confirm their team

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During 4 week Team Confirmation, managers can: Edit, remove and add team respondents (and should identify or amend the questionnaire response method)

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

Questionnaire Stage

First Monday of questionnaire stage, staff will be sent links via the emails / SMS mobile numbers supplied to fill in their questionnaires and managers can log in and print off paper copies as required

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If a manager has confirmed an incorrect email address / SMS mobile number for a staff member, local administrators can amend within the 'manage team page' section. Or, if a staff member has been missed or added in error, local administrators can add/remove or exclude staff

Action Planning Stage

2 weeks (or next day*) after the questionnaire closes, report links will be emailed out to staff to view the team report which managers can access by logging in to their iMatter account. A discussion between the manager and the team should take place, and the action plan should be populated within the manager's account

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A progress update should be discussed with the team, and input approximately 3-4 months after filling in the team action plan within the system

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

Line Manager Guide

Stage 1: Preparing for the iMatter run - updating team information

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, managers should highlight:

- The team name and manager are to remain the same or provide updates
- If any of the teams have to be archived/removed as they are no longer required
- If any additional/new teams are required

This information will then be passed to local administrators to action any changes in the iMatter system.

Stage 2: Team Confirmation Stage

Managers are required to log in to their iMatter account and amend any **staff** details within their teams and confirm before the Friday deadline (the week prior to the questionnaire going live). You will be sent an email from Webropol containing the login link, and 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 your email address and password that you set up previously. If you are a new manager, you will receive an email containing a link for you to set up a password for 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 to your email address to change your password.
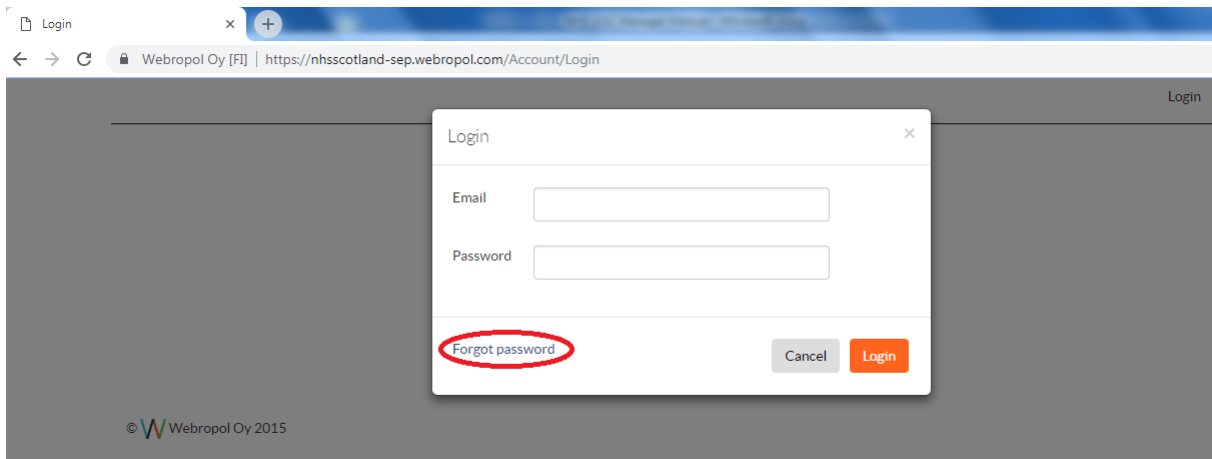
Once logged in to your account, you can access your team details via the homepage by clicking 'iMatter Questionnaire' followed by the team that you wish to amend and confirm, and then 'Manage Team' which will open the staff list within the chosen team (if you have more than one) - as shown below:

2.1   Updating Staff Details

Upon opening the team list, you will be able to add, exclude and 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 Members

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 correctly.

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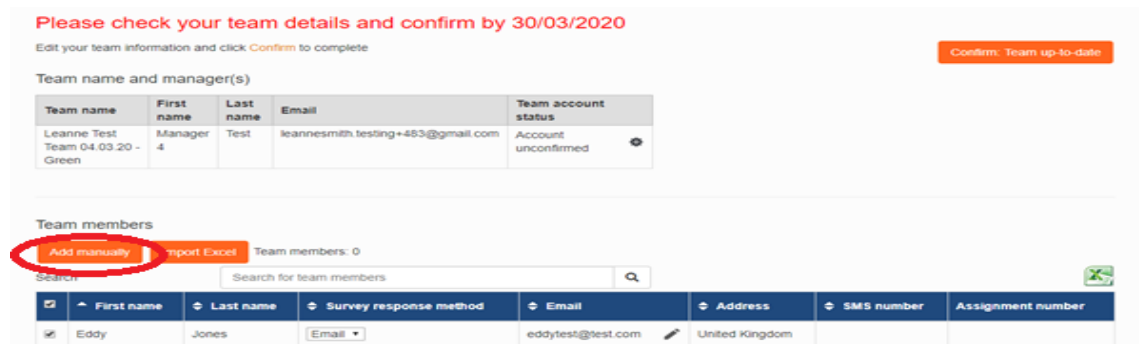
SMS: For staff who would like to participate via SMS, please select the 'SMS' option from the survey response method drop down list and ensure their mobile number is entered in the correct format, then save.

All mobile numbers should be formatted as **'+441234567890'** and will require access to the internet on their mobile (i.e. via wifi 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 paper copies and distribute to staff the day the questionnaire launches. **Paper copies will not be sent out to any addresses entered.**

2.1.2 Excluding Staff Members 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.

2.1.3 Removing Staff Members from the System

If a staff member has left, 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:

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).

If you log in and have changes to make to the structure of your team set up (disaggregating or aggregating your team), contact iMatter@ggc.scot.nhs.uk as soon as possible as this can only 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 etc then please email the iMatter inbox as ask us to remove your team.

Stage 3: Questionnaire Stage

On the Monday the questionnaire goes live for staff, those selected to participate via email or SMS should receive their link from 11am onwards.

However, for those participating via paper copy, managers should log in and print off the paper. 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 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 that paper copies are individual to the staff member and therefore should not be photocopied.

This should be done during the first week of the questionnaire launching 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 send their completed questionnaire in a pre-paid envelope to Webropol, who input paper responses to the system.

Although the questionnaire is anonymous, and therefore you will not be able to see which staff members have completed or not, you can check your 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 as 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.
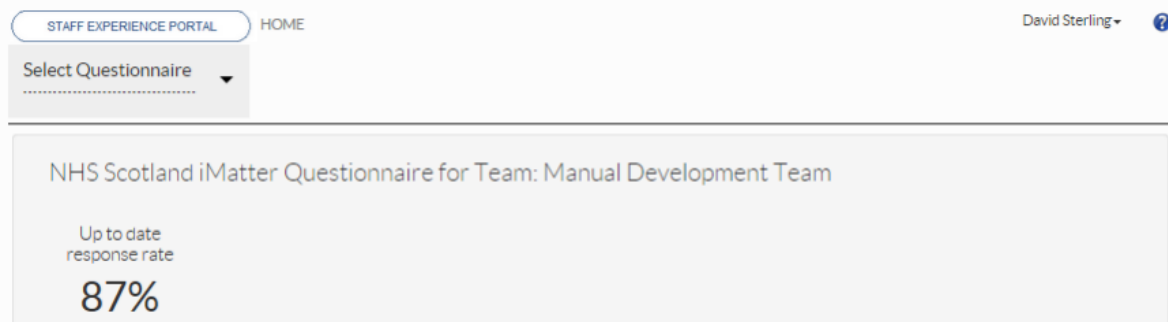
As line managers, please do encourage your team to participate whilst the questionnaire is live as it's important to gather feedback on the experiences of staff, to support continuous improvement.

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

4.1 Report Publication

Staff members will automatically receive the team report via email / SMS on the Monday when 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 any teams have paper copies.

You will also receive an email from Webropol to view the team report for the team which you participated in as a respondent under your own line manager, however 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

You have staff who have participated via paper copy within your team, the response rate can still change up until the reports are distributed
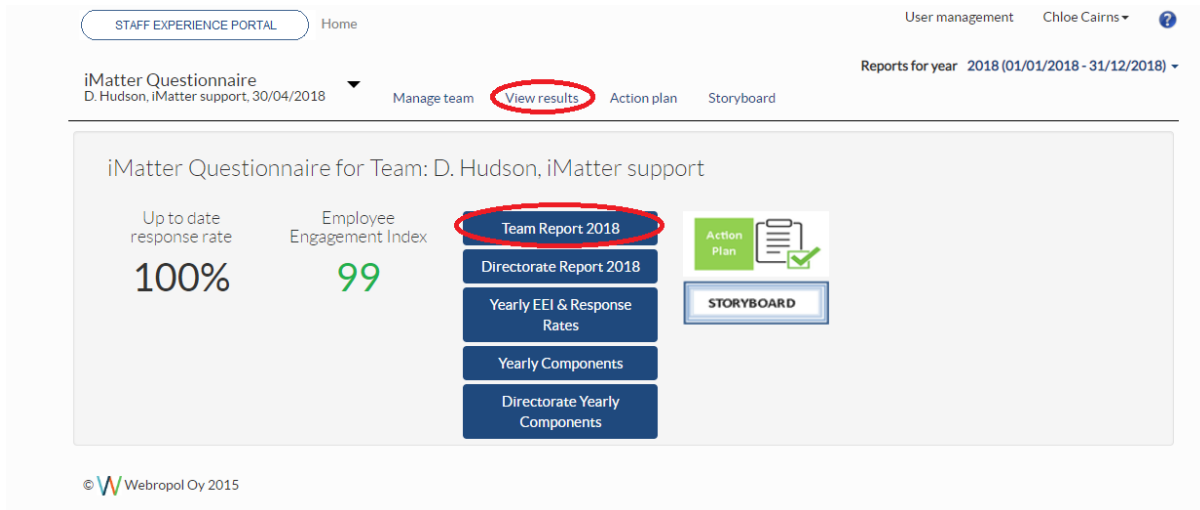
You can also download a PDF copy of your team report, for the staff who do not have an email address by using the PDF function at the top left hand side of the report:
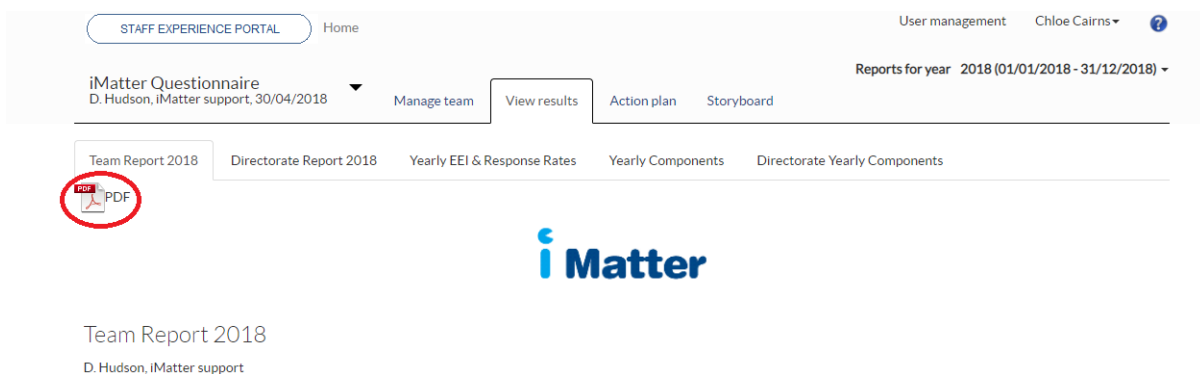

4.2 Action Planning

Following the reports being distributed, please arrange a discussion with your team around the questionnaire results, and develop an action plan with your staff members whichever way is convenient for you and your

staff (this can be included in meetings that you already have planned in with your staff i.e. weekly huddles etc).

You should discuss your team report and agree as a team, on 1 activity which the team does well, and up to 3 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.
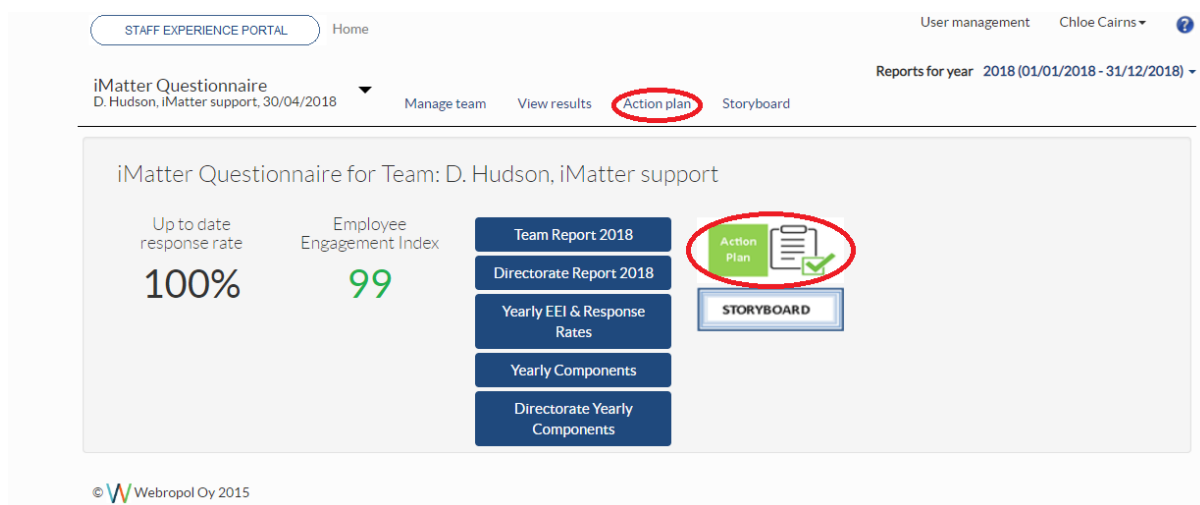
Ideally, action plans should be entered on the system by 11.59am on the 8 week Monday deadline given for your area. However, please still enter your action plan if completed after this deadline, as the system will not close and your action plan will still be saved in the same way.

When filling in your action plan, the 'What we do well' should be filled in as shown below in the green box, and the 1-3 improvement actions for the team should be entered in the table with all 4 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' which will lock your action plan and automatically create the storyboard. 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](#).

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 do not have email access and can be done using the PDF icon in the top left hand corner of the storyboard.

4.3   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 improvment		
3		

Save changes   Complete and Lock

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.