



Line Manager Guide

NHS Grampian

2026 Version

1. Preparing for Distribution

iMatter team sends list of previous year's Directorate/HSCP iMatter teams to Local NHSG iMatter administrators approx. 8 weeks before Team Confirmation



Administrators 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



Administrators make updates on the system by the agreed date (2 weeks before Team Confirmation begins)

2. Team Confirmation

First day of Team Confirmation: 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 edit, remove and add staff, and they can also amend preferred response methods



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, Administrators can reset team confirmation

3. Questionnaire

First day of Questionnaire, 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 unique questionnaire. Managers print staff's paper copies (copies are unique to each staff member).



If a manager has confirmed an incorrect email address/SMS mobile number for a staff member, Administrators can amend these



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

4. Reports and Action Planning

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

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



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



Managers access their team's report* by logging in to their iMatter portal

*Managers will also receive an email from Webropol to view the team report for the team in they participated in as a team member (as a 'respondent') under their own line manager

This report is not available to managers via their accounts



A discussion between manager and team should take place - the manager then adds the team's Action Plan via their iMatter portal

5. Progress Update

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

Contents

Line Manager Actions

1. Preparing for Distribution	4
2. Team Confirmation	4
2.1 Accessing your iMatter account	4
2.2 Updating staff details	6
2.2.1 Adding staff and amending staff's details	6
2.2.2 Excluding staff from current year's run	7
2.2.3 Removing staff	7
2.3 Confirming the team	7
3. Questionnaire	8
4. Reports and Action Planning	10
4.1 Report publication	10
4.2 Action planning	12
5. Progress Update	14
6. Help and Assistance	14

Line Manager Actions

1. Preparing for Distribution

Before Team Confirmation begins, administrators 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

Administrators will make the necessary changes in the system.

2. Team Confirmation

2.1 Accessing your iMatter account

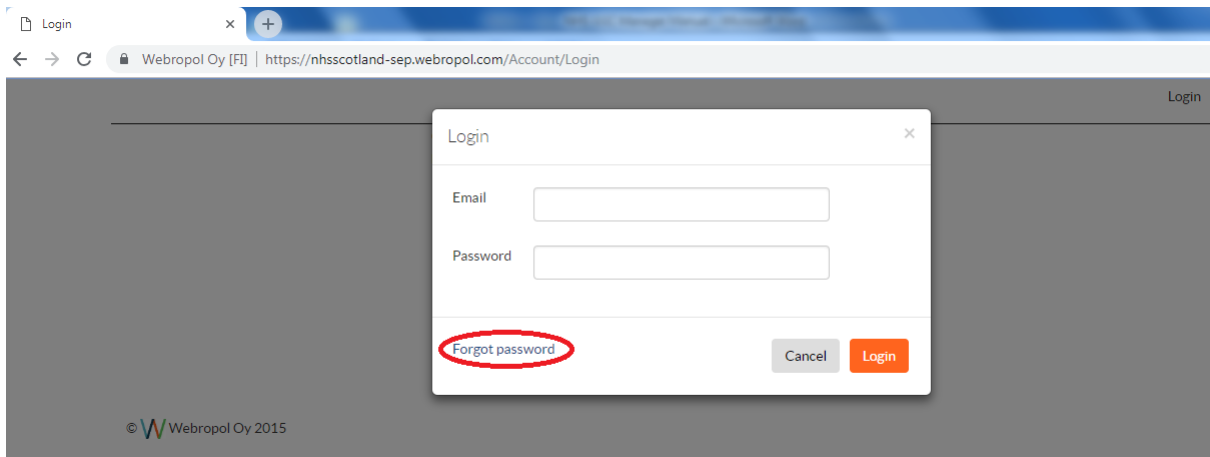
On the day team confirmation opens you will receive an email from Webropol containing your login link inviting you to update and confirm your team. You are required to log in to your iMatter account ('portal') and amend any staff details within your team and confirm the team by the agreed deadline.

The schedule dates can be found on [the NHSG iMatter intranet page](#).

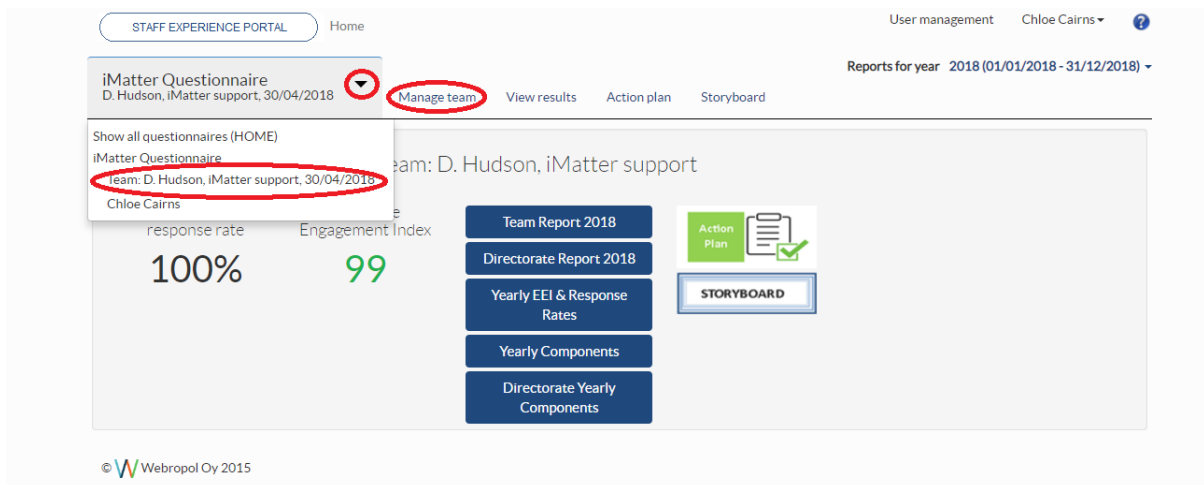
If you are already registered on the system you will be able to login via <https://nhsscotland-sep.webropol.com/Account/Login> using the email address and password you used to set up your account.

If you are not yet registered on the iMatter 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's details via the homepage by clicking 'iMatter Questionnaire' followed by the team that you wish to amend and confirm (if you are assigned to more than one team), 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

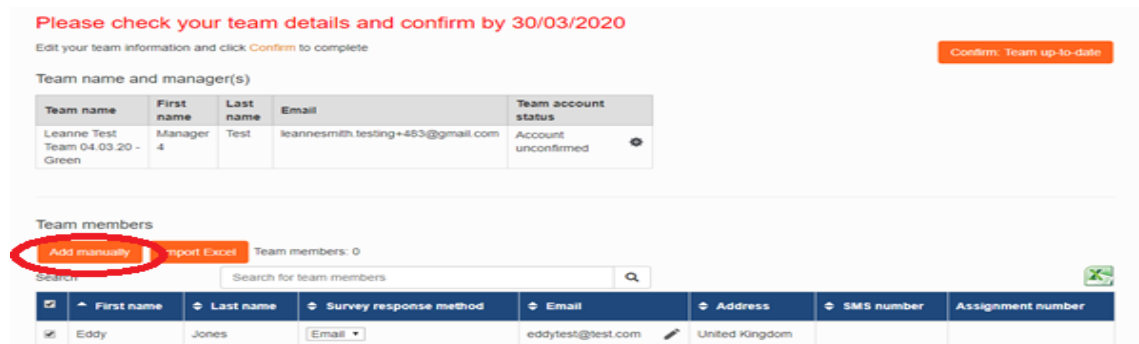
<input checked="" type="checkbox"/>	^ First name	⇅ Last name	⇅ Survey response method	⇅ Email	⇅ Address	⇅ SMS number	Assignment number
<input checked="" type="checkbox"/>	Eddy	Jones	Email	eddytest@test.com	United Kingdom		

2.2 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.

2.2.1 Adding staff and amending staff's 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 Team 04.03.20 - Green	Leanne	Test	leannesmith.testng+483@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.

To amend staff's email addresses you will need to remove the staff member and then re-add them with their correct email address.

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 unique 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.

2.2.2 Excluding staff from current year's run

If your staff member 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 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 gram.imatter@nhs.scot

2.2.3 Removing staff

If a staff member 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 Q

	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

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 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		

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 gram.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, please contact gram.imatter@nhs.scot or your Local iMatter Administrator to remove the team. Please do **not** confirm or leave a team with no staff added, in the system.

3. Questionnaire

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

However, for those participating via paper copy, you will require to log in and print off the staff's unique paper. This should be done via the 'Manage Team' page (as above) once the questionnaire has gone live - for those participating via paper copy a printer icon will appear next to their name.

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.

The paper copies will download as a PDF to print off and you are required to hand them out to staff along with the pre-paid envelopes supplied by the iMatter administrator (email gram.imatter@nhs.scot to arrange).

Paper copies are unique to each staff 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 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:

The screenshot shows a 'Team members' management interface. At the top, there are buttons for 'Add manually' and 'Import Excel', and a text indicator 'Team members: 6'. Below is a search bar with the placeholder 'Search for team members'. The main part of the interface is a table with the following columns: First name, Last name, Survey response method, Email, Address, SMS number, and Assignment number. The table contains five rows of staff data:

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		

At the bottom of the table, there are buttons for 'Exclude from survey' and 'Remove'. On the right side, there are two buttons: 'Print paper copies' (highlighted with a red circle) and '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 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:

The screenshot shows the 'STAFF EXPERIENCE PORTAL' interface. At the top, there is a 'HOME' link and a user profile for 'David Sterling'. Below this is a 'Select Questionnaire' dropdown menu. The main content area displays 'NHS Scotland iMatter Questionnaire for Team: Manual Development Team' and 'Up to date response rate' with a large '87%' figure.

In order to generate a 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 report.

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 gram.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

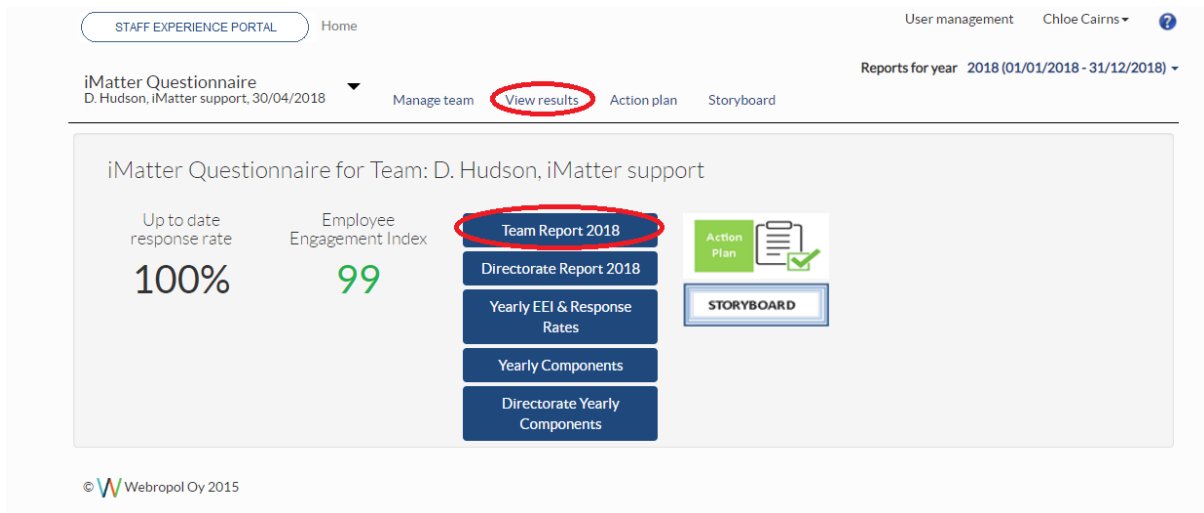
4.1 Report publication

Staff automatically receive the team report via email/SMS on the day reports are available.

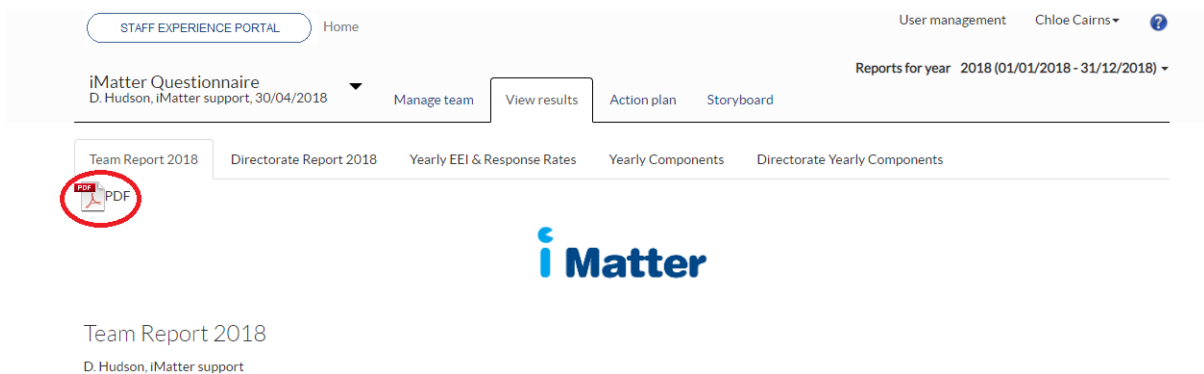
This will either be the day following the questionnaire closing (where all teams in a Directorate/HSCP are fully electronic) or 2 weeks after, where there are any paper copies in the Directorate/HSCP.

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 Webropol inputs the paper copies they received.

To view your team's report, 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 portal:



You can also download a PDF copy of your team’s 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:



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

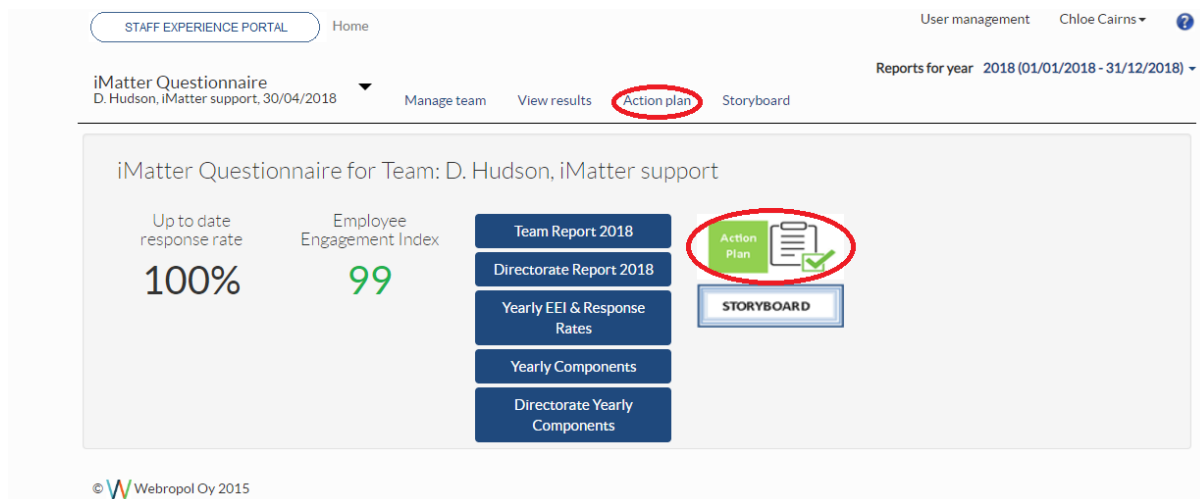
Following the report being distributed, please arrange a discussion with your team around the results, and develop an Action Plan with your

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 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 the [iMatter internet page](#) for more information) 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.

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:

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 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.

Should you have locked the Action Plan in error or need to make amendments, Administrators can unlock and reset the Action Plan for you. You will need to re-confirm the plan once updated. (Please ensure this is done within the 8 week timeframe, as if reconfirmed after this, the completion rate will be affected).

More details on action planning can be found in the Action Planning Guide on the [iMatter internet page](#).

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. The Storyboard 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:



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		

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

6. 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

gram.imatter@nhs.scot