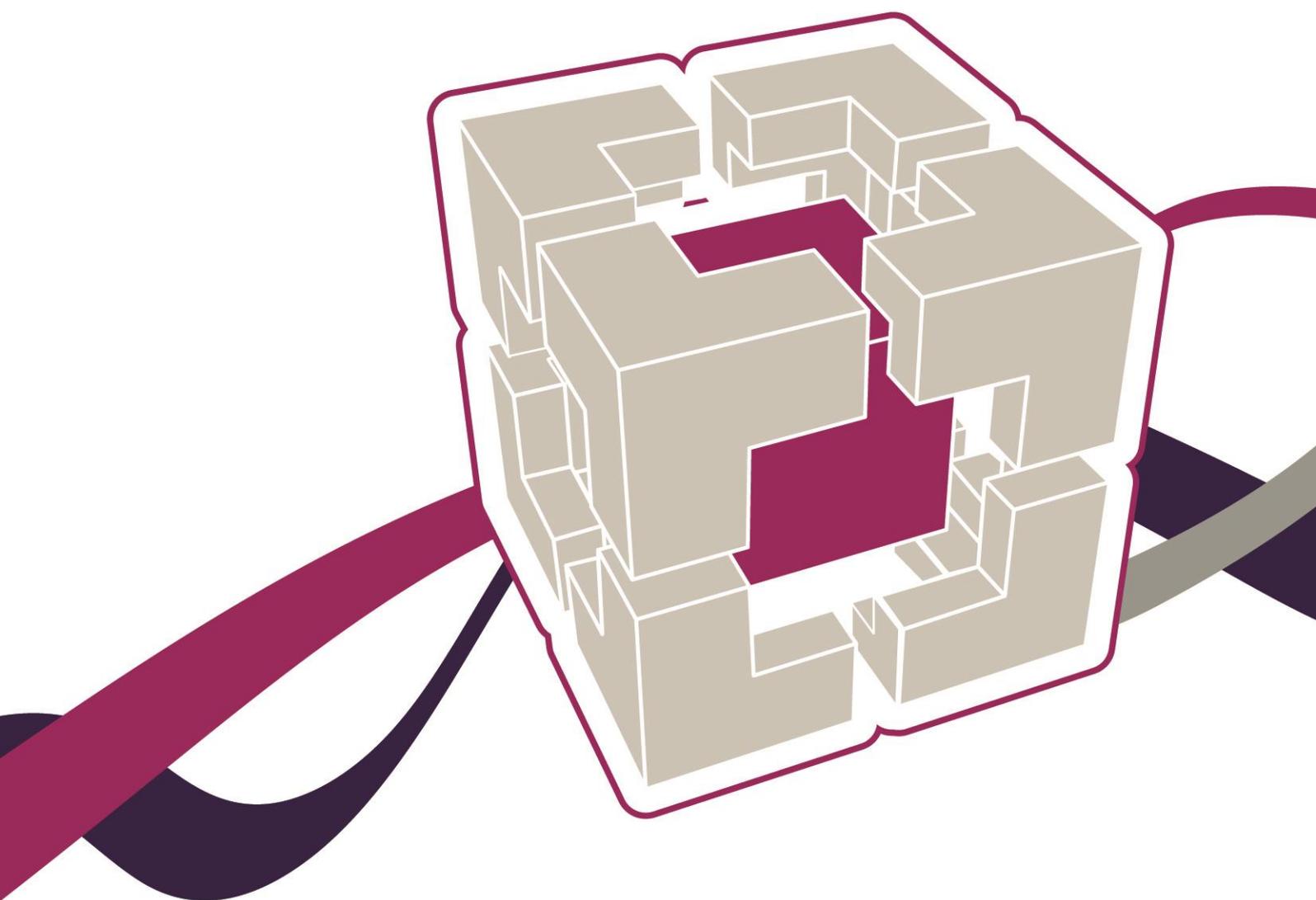


The Healthcare Leadership Model Appraisal Hub

Multiple 360° Questionnaires (Batches) & Group
Reports User Guide



Multiple 360° Questionnaires (Batches) & Group Reports User Guide

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The Healthcare Leadership Model Appraisal Hub is an online, user friendly system for measuring and providing leaders in healthcare with feedback on their individual behaviour and performance

Introduction

What is the Healthcare Leadership Model Appraisal Hub?

- The Healthcare Leadership Model Appraisal Hub is an online, **user friendly** system for **measuring** and **providing** leaders in healthcare with **feedback** on their **behaviour** and **performance**. The hub enables participants to complete a **questionnaire** based on the **Healthcare Leadership Model** that evaluates their **self-perception** of their leadership behaviour in the workplace.
- Individuals who have chosen to participate in the **360° Questionnaire** will also receive **feedback** from their '**raters**'; other people (Peers, Direct reports, Line manager, and others) whom they have invited to provide **observation** and **comment** on their leadership performance and behaviour. The report will give an **indication** of the individual's current leadership performance and behaviour as seen by themselves in **comparison** with their raters.
- Through **exploration** of the report in a **dedicated feedback session** with their accredited facilitator, they can gain a **real insight** into their areas of **strengths** and **limitations** and begin to construct a **development plan** from which to **enhance** their effectiveness as a **leader**.

Why would someone be asked to complete a Questionnaire?

- The questionnaire provides an **opportunity** for individuals and the people they work with to rate their leadership behaviours within the work place. This will help to **develop** and make **sustainable improvements** to performance at work.
- The questionnaire can be used to provide a **starting point for discussion** and **increased awareness** at an **individual, team or organisational level**.
- The report can provide an increased awareness of both **strengths** and **limitations** in the workplace. It can highlight areas where performance may have been **overestimated** as well as areas that may have been **neglected**.

Purchasing Multiple 360° Feedback Questionnaires (Batches)

- The Healthcare Leadership Model Appraisal Hub enables you to purchase **single** 360° feedback questionnaires, **multiple** 360° feedback questionnaires (batches) and **Group Reports**.
- Creating a **batch** of 360° questionnaires allows a local coordinator or administrator to buy as many 360° questionnaires as required in **one transaction** and **distribute** them throughout a **team or group of people**.
- They can pay for this via a **purchase order or credit/debit card** and can **monitor** the participants' progress by logging into the hub.

What should I do if I have any technical difficulties?

Please contact the helpdesk on +44 (0)1242 282 979 or email us:
360support@jcaglobal.com

What is a Group Report?

- A Group Report **combines** the findings from each chosen participant's 360° report **within a batch** to create a **collective report**.
- This demonstrates the **overall performance** of the participants and how they work as a **team**, identifying **strengths** and areas for **development** for the **group as a whole**.
- Each participant in the batch completes an **individual 360° Assessment**, complete with raters and a self-assessment. For more detailed information on this process, see the **360° Assessment User Guide**.
- This produces **performance data** for each individual **within the batch**, which, when processed as a Group report, is **merged** with the other individuals to produce an **average performance rating**.
- Gaining an **insight** into the **overall** performance of a team rather than just individuals encourages development to be planned at a **team level**, ensuring the group have a **cooperative shared goal** and a joined-up vision of their development needs.

What is a Batch?

- Creating a **batch** of 360° questionnaires allows a coordinator or administrator to **pre-pay** for as **many** questionnaires as required in **one transaction**.
- The batch can be used for **separate** participants who require their **own individual assessment** to be processed as it is, or **any number** of participants **within the same batch** can have their assessments **collated** to create a report of those people **as a group** (Group Report).
- If they wish to create a Group Report from the batch **at a later date**, they have the option **purchase Group Reports at a later date**.
- They can then **distribute** the questionnaires throughout a team or number of individuals by **adding** them as participants.

Step 1.

Accessing the Healthcare Leadership Model Appraisal Hub

- In order to create and begin a 360 assessment, you will need to access the Healthcare Leadership Model Appraisal Hub via the following link:
- <https://profile.leadershipacademy.nhs.uk> The link will take you to the **home page** of the NHS Leadership Academy where you will be required to enter your username and password.
- If you **do not** have a username and password you will need to create an account by clicking on Register

NHS Leadership Academy Profile

Home Register Login Contact Us

This is a NEW Service

Leadership Academy's Profile replaces Leadership Academy NHSX.uk website from the **17th Jan 2022**. If you would like to find out more about the new service please follow our [user guide](#).

Welcome to Academy Profile

If you already have an Academy Profile, please [login here](#).

[Login](#)

Alternatively, you can [register here](#) and create new Academy Profile to apply for our programme offer..

[Register](#)

→ Create an account using the **form** pictured below:

Account creation

First name

Last name

Email

Password

The password must contain at least one number and both uppercase and lowercase letters, we recommend using special characters as well

Confirm Password

What region do you live in?

Band

By proceeding with the account registration, you'll confirm that you've accepted our terms of [Data Privacy Policy](#) and agree for your data to be stored and processed in accordance with it.

If at any time you change your mind and want to withdraw your consent, or want any information we hold about you deleted, you can do this by emailing enquiries@leadershipacademy.nhs.uk

I confirm I have read and accept the Academy's [Data Privacy Policy](#) and above agreement

→ Once you click 'register' you will receive an **email** to the address you specified when you created an account, containing your **10-digit username**. Please see example screen shot below:

Example of email sent:



→ Once you have an account, you can now log in using your 10-digit user ID and the password you have just created.

Leadership
Academy Profile

Home Register Login Contact Us

This is a NEW Service

Leadership Academy's Profile replaces Leadership Academy NHSX.uk website from the **17th Jan 2022**.
If you would like to find out more about the new service please follow our [user guide](#).

Account created

Great news, you are almost there

To finish your registration process, please check your mailbox and confirm the email address so we know it's you.

You can [login](#) to access your profile, using your new account and password when you are ready.

Login

[← Back](#)

→ Please see example screen shot below:

The screenshot shows the NHS Leadership Academy Single Sign On page. At the top, there is a blue header with the NHS logo and the text "Leadership Academy Single Sign On". Below the header, the main heading is "Sign in to NHS Leadership Academy". A sub-heading reads: "If you do not have an NHS Leadership Academy account you may need to apply for one of [our programmes](#)." There are two input fields: "Academy ID" and "Password". Below these fields are two buttons: a green "Login" button and a grey "Reset Password" button.

→ Once you are logged in, click available Programmes:

The screenshot shows the NHS Leadership Academy Profile page. At the top, there is a blue header with the NHS logo, "Leadership Academy Profile", and "Logged in as: 1000228334". Below the header is a navigation menu with links: "Home", "Programmes", "Profile", "Logout", and "Contact Us". A yellow banner contains the text: "This is a NEW Service" and "Leadership Academy's Profile replaces Leadership Academy NHSX.uk website from the 17th Jan 2022. If you would like to find out more about the new service please follow our [user guide](#)." Below the banner, the main heading is "Welcome back Chloe". A sub-heading reads: "You are currently logged in as: Chloe Turnbull". There are three links: "View your Academy profile", "View available programmes" (highlighted with a red box), and "Logout here".

→ Then click complete missing and fill in the missing fields, please see example below:

Home Programmes Profile Logout

Programmes

Healthcare Leadership Model

A new digital tool for leadership learning.
The Healthcare Leadership Model programme provides access to a free self assessment tool, which helps you to assess your leadership behaviours and fully understand your leadership development helping you explore those behaviours using the dimensions of the Healthcare Leadership Model.

Programme Requirements:

- Your organisation name is required.
- The other organisation type is required.

 **Complete missing**

Dashboard

- [Personal details](#)
- [Email update](#)
- [Home address](#)
- [Employment details](#)
- [Demographics information](#)

Personal details

Primary email address chloe.turnbull@psionline.com [Change](#)

Alternative email address [Change](#)

First name

Last name

Band

Home address region

Organisation type

Other organisation type

Organisation

→ Once you have clicked on 'submit' click on the programmes button at the top of your screen, you should now see an 'access' button for the Healthcare Leadership model:

Leadership Academy Profile
Logged in as: 1000228334

Home
Programmes
Profile
Logout
Contact Us

Programmes

Healthcare Leadership Model

A new digital tool for leadership learning.
The Healthcare Leadership Model programme provides access to a free self assessment tool, which helps you to assess your leadership behaviours and fully understand your leadership development helping you explore those behaviours using the dimensions of the Healthcare Leadership Model.

➔ Access

→ Log in one final time and you can now access the Healthcare Leadership model:

 Leadership Academy Single Sign On

Sign in to NHS Leadership Academy

If you do not have an NHS Leadership Academy account you may need to apply for one of [our programmes](#).

Academy ID

Password

Click confirm details.

Step 2.

Creating a Batch

→ Once you have successfully gained access to the hub you will have the option to start a questionnaire for **yourself** or purchase **multiple** questionnaires for **others**:

Healthcare Leadership Model Appraisal Hub **NHS**
Leadership Academy

[Home](#) [Log out](#) [My account](#)

Need help? 01242 282979 or 360support@jcaglobal.com or visit the [support page](#)

Welcome to the Healthcare Leadership Model Questionnaire

This system will allow you to complete the Healthcare Leadership Model self assessment questionnaire and the 360 degree feedback questionnaire. Please click on one of the options below to get started.

What would you like to do?

Start or continue a self/360 questionnaire for YOURSELF >

- Start a new self or 360 questionnaire
- Access your existing self questionnaire
- Access your existing 360 questionnaire to add your raters, choose a facilitator and request your report

Purchase or manage multiple 360 questionnaires for OTHERS >

- Purchase multiple 360 questionnaires for others to complete about themselves (create a batch)
- Purchase group reports to compare feedback for 3 or more people

→ To create a batch click on **Purchase or manage multiple 360 questionnaires for OTHERS**.

Healthcare Leadership Model Appraisal Hub **NHS**
Leadership Academy

[Home](#) [Log out](#) [My account](#)

Need help? 01242 282979 or 360support@jcaglobal.com or visit the [support page](#)

Purchasing questionnaires for others: creating a batch

When you create a batch you will be given the option to pre-pay for any number of colleagues to take part in a 360 degree questionnaire and also pre-pay for group reports.

Batches - The cost of creating a Batch is £40+VAT per questionnaire.
You can buy any number of questionnaires, and a discount is offered for batches of 60 questionnaire - purchase 60 and you will be invoiced for 50 (i.e. receive 10 free).
You will be able to add participants now or later to your batch and monitor their progress.

Group reports - The cost of creating a Group Report is £35+VAT per report.
In addition to purchasing in advance, Group Reports may be purchased at any time of creating a report.

Create a batch

Back to start

- Once you have **read the message** select the **Create a batch** option to purchase multiple questionnaires.
- You will be asked to **create a name** for your **batch** of 360° questionnaires and enter the **number** of participants you wish to take part. This will be visible to participants when they join the batch.

Create a new batch

Batch name

Number of participants

Number of group reports

Custom message within invitation email

Please note: This text will appear within your participants' initial and reminder emails, throughout this batch, and cannot be changed once it has been set. [Where will this appear?](#)

✓ You can also add your own tailored message within the invitation email here.

- If you wish to create a Group Report from your Batch later on, you have the option here to **pre-purchase Group Reports**.
- Click **Create**.
- ✓ *Note: You must have a **minimum of three** participants in order to generate a Group Report and you **cannot alter the number** of places purchased in a batch once it has been created*

Making a Payment

- Once you have clicked **Create**, you will be presented with the **payment screen** displaying the total amount payable.
- Here you can select the **Pay by Credit or Debit Card** option, or **Pay by purchase order**.

Make a payment

You are required to make a payment for:

3 x 360 degree questionnaires - £120.00 + VAT

1 x Group Reports - £35.00 + VAT

The total amount payable is: £155.00 + VAT

The screenshot shows a payment screen with two main options in purple buttons with white text and right-pointing chevrons:

- Pay by credit card**: Immediately purchase individual reports using your credit or debit card.
- Pay by purchase order**: A valid purchase order reference is required and an invoice will be sent directly to your organisation's finance department.

Below these options is a grey button labeled "Cancel payment".

Paying by Purchase Order

- Once you have clicked **Pay by purchase order**, you will be presented with the following screen:

The screenshot shows the "Pay by purchase order" screen. At the top, it says "Find your organisation details and enter your purchase order number to complete payment".

There are two input fields:

- Amount (£)**: A text box containing the number "40" with "+ VAT" to its right.
- Your purchase order number**: A larger empty text box.

Below the input fields is a light blue note: "Please note - In order to access your 360 report you must enter a valid P.O. Number."

Underneath the note is a search prompt: "Search for the trust or organisation linked to the Purchase Order number".

At the bottom of the form are two buttons:

- A purple button with white text labeled "Search".
- A grey button with white text labeled "Cancel purchase".

- The figure in the **Amount** field will **default**.
- You will be required to enter your purchase order number to continue. If you **do not** have a valid purchase order number, you will need to **raise** one via your **finance department**.

- Lastly, you will be required to enter your **organisation**. Clicking on the **Search** button alongside the organisation field will present you with this screen:

Search for organisation

Enter your organisation's name or city to search

Can't find your organisation? [Click here](#)

Search name (whole or part)

Find by city

Cancel search **Search with these details**

✓ Here you can search by your organisation's **name** or by the **city** in which it is located. Once you have entered a name or city, select the **Search with these details** button to bring up a list of organisations which match your search.

- **Choose** your organisation from the list by clicking the **Select** button next to it.

Name	Address			Options		
130A SEWARDSTONE ROAD	MILE END	LONDON	GREATER LONDON	Select		
137 LODGE HILL	ABBAY WOOD	LONDON	GREATER LONDON	Select		
139 LODGE HILL	ABBAY WOOD	LONDON	GREATER LONDON	Select		
15 HOMERTON ROW	HOMERTON	LONDON	GREATER LONDON	Select		
15 THORNE CLOSE	THORNE HOUSE	LONDON	GREATER LONDON	Select		
181 LODGE HILL	GOLDIE LEIGH	LODGE HILL	ABBAY WOOD	LONDON	GREATER LONDON	Select
1A BEATRICE PLACE	MARLOES ROAD	LONDON	GREATER LONDON	Select		
2 WOLVERTON GARDENS	WEST LONDON MENTAL HEALTH TRUST	LONDON	GREATER LONDON	Select		

- Please note: If you **cannot** find your organisation details please select **Click here** above the search fields on the **Search for Organisation** page and fill in the form on the next page. The help desk will add your organisation to the database **as soon as possible** and **email** you once this has been done.
- Once you have selected your organisation, click the **Purchase now** button to **process** the payment.

Pay by purchase order

Find your organisation details and enter your purchase order number to complete payment

Amount (£)

40 + VAT

Your purchase order number

832489346

Your organisation details

JCA Search

Cancel purchase Purchase Now

- If your trust or organisation has **not previously** completed **any transactions with JCA Global** – the company with which the NHS Leadership Academy has partnered with to create the appraisal hub – you will need to **set JCA Global up as a supplier**.
- Please contact the 360 support team on 01242 282979 or at 360support@jcaglobal.com to request a supplier template if required.

Paying by Credit or Debit Card

- Once you have clicked **Pay by Credit Card**, you will be presented with the following screen:

Pay by credit card

Payments by credit cards are transacted by SagePay

Amount payable in pounds

40 + VAT

Cancel Continue

- All payments made by card within the Appraisal Hub are transacted through **SagePay**, an online secure payment service.
- The figure in the **Amount** field will **default** according to the **number** of participants and/or group reports entered **previously**.
- Next click **Continue** and you will be redirected to the SagePay **payment screen**, shown below:

sage | pay **jca®**

Transaction Details

To Pay For : Credits
Amount : 48.00 GBP

Select Payment Method

Please click below to select the type of card you wish to use.

VISA VISA DEBIT VISA ELECTRON MasterCard

Please only click the cancel button below if you intend to abort this payment process.

Cancel

[FAQs](#)

If your browser is not showing the secure padlock on your screen click on this padlock.

- The figure shown in the **Amount** field will change to the **full amount payable including VAT**. The 'credits' shown in the **To Pay For** field simply represents the 360 questionnaires and/or group reports that you have purchased within the system.
- Please select your card type, and you will be taken to the screen below where you will need to enter all your **payment details**:

sage | pay **jca®**

Transaction Details

To Pay For : Credits
Amount : 48.00 GBP

Enter Card Details

Card Number* (enter without spaces)

Payment type Visa

Firstname* (name as it appears on card)

Surname* (name as it appears on card)

Valid From Month: Year: (if not present, leave blank)

Expiry date* Month: Year:

Security Code*

Billing Address Line 1*

Billing Address Line 2

Billing City*

Billing Post Code*

Billing Country*

Back Proceed

Cancel

- Once you have entered all your details, please select **Proceed** and your payment will be arranged.
 - ✓ *Note: If you add an email address to the Sage Pay screen, you will be emailed a full receipt.*

Step 3.

Inviting Batch Participants

- Once your payment has been processed, you will be presented with a **summary** of the batch you have created.
- From here you will be able to **invite** participants to **complete** their 360° questionnaires. Select the **Set up a participant** option.

Your batch named Example Batch

This batch has been pre-paid to provide up to 3 questionnaires for participants and 1 group reports.

A batch place is only used when the participant confirms they want to join the group. Misspelt email addresses or inactive users do not use up a place.

You have not yet invited any participants to undertake a questionnaire within this batch. You will need their name and email address to do so. Please ensure you enter the correct email address, as we will not be able to verify this for you.



- The screen below will appear. Fill in the fields with the participant's **details** and then select the **Save** option.

Set up a participant to undertake a 360 degree questionnaire in Example Batch batch

Email Address

First Name

Surname

Cancel

- ✓ *Note: A batch place is **only** used up when a participant **accepts** the invitation to join the batch. Therefore, **misspelt** or **invalid** email addresses **do not** use up a place and can be **Removed**.*

- After selecting **Save**, you will be taken back to the screen where you can go ahead and **add** all of the other participants that you would like to **include** in the batch.
- Once you have added your participants, you **must** select the **Send Email** button on the **right hand side** to send the **invitation** to the relevant participants. Without sending this, the participants will **not** be invited to join the batch and will **not** be sent a link to begin their questionnaire.

Your batch named Example Batch

This batch has been pre-paid to provide up to 3 questionnaires for participants and 1 group reports.

A batch place is only used when the participant confirms they want to join the group. Misspelt email addresses or inactive users do not use up a place.

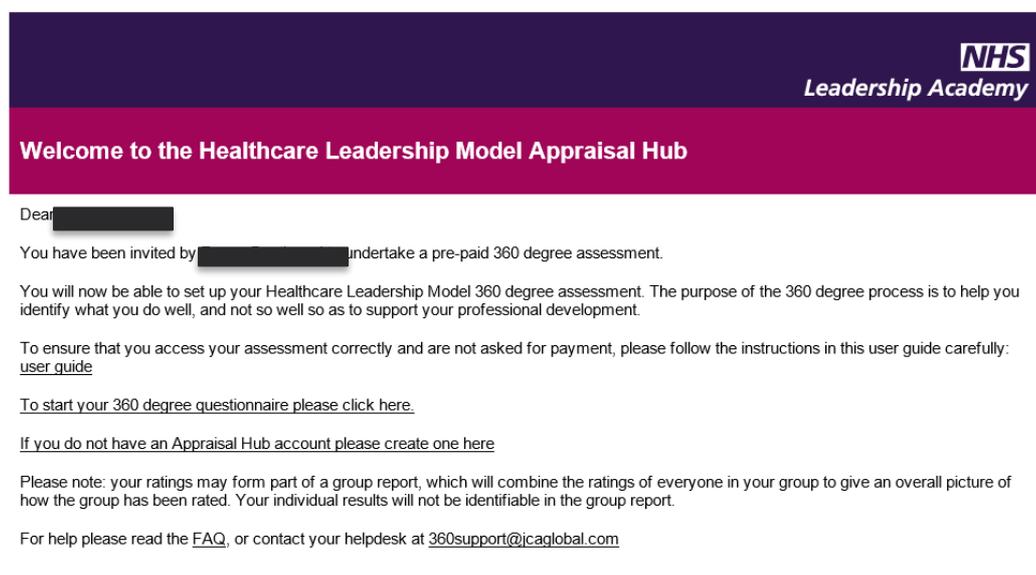


Group Reports Note: To set up a Group Report there must be a minimum of 3 participants who have completed their 360 questionnaire. Each of these participants must have invited a minimum of 3 raters who need to have completed their 360 questionnaires. At least 1 of the raters must be a line manager.

You have invited the following participants

First Name	Surname	Email	Invitation Status	Status	Actions
Example	Three	example3@nhs.net	Not sent	awaiting self	Send Email Manage Remove
Example	One	example1@nhs.net	Not sent	awaiting self	Send Email Manage Remove
Example	Two	example2@nhs.net	Not sent	awaiting self	Send Email Manage Remove

- Upon clicking **Send Email**, the participant will **receive** the following email:
- Once you have sent the email, the **Send Email** button will change to **Resend Email**. Use this button to **resend** the email if a participant **fails to start** their questionnaire. This email is identical to the one you sent originally.



Step 4.

Managing a Batch

- In order to check participant **progress** within any batches that you have created you can log back into the hub at **any point** and click on the “**Purchase or manage multiple 360 questionnaires for OTHERS**” on the main menu:

What would you like to do?

Start or continue a self/360 questionnaire for YOURSELF

- Start a new self or 360 questionnaire
- Access your existing self questionnaire
- Access your existing 360 questionnaire to add your raters, choose a facilitator and request your report

Purchase or manage multiple 360 questionnaires for OTHERS

- Purchase multiple 360 questionnaires for others to complete about themselves (create a batch)
- Purchase group reports to compare feedback for 3 or more people

- You will be taken to the following screen where you can **view** any batches you have created by clicking **View** alongside the batch which you would like to check progress.

Purchasing questionnaires for others: creating a batch

When you create a batch you will be given the option to pre-pay for any number of colleagues to take part in a 360 degree questionnaire and also pre-pay for group reports.

Batches - The cost of creating a Batch is £40+VAT per questionnaire.

You can buy any number of questionnaires, and a discount is offered for batches of 60 questionnaire - purchase 60 and you will be invoiced for 50 (i.e. receive 10 free).

You will be able to add participants now or later to your batch and monitor their progress.

Group reports - The cost of creating a Group Report is £35+VAT per report.

In addition to purchasing in advance, Group Reports may be purchased at any time of creating a report.

[Create a batch](#)

You have created the following batches

Name	Status	Paid By	
Example Batch	0 people added	JCA1234 Verified	View

[Back to start](#)

- The **Status** field shows you a **brief overview** of each participant's **progress**. Firstly whether they have completed their **self-assessment**, once they have done this it will show whether their **Line Manager** has completed, and once this has been done **how many raters** have completed, out of how many the participant has added.
- You can use the **Resend Email** option here to send the original invitation email again to any participants who have **not** started their assessment.

You have invited the following participants

First Name	Surname	Email	Invitation Status	Status	Actions
Example	Three	example3@nhs.net	Sent 20/10/2015 15:51:29	awaiting self	Resend Email Manage Remove
Example	One	example1@nhs.net	Sent 20/10/2015 15:51:32	awaiting self	Resend Email Manage Remove
Example	Two	example2@nhs.net	Sent 20/10/2015 15:51:34	awaiting self	Resend Email Manage Remove

More Detail

- To view each participant's progress in full, including whether or not they have **joined** the batch and how their raters are progressing, you can scroll down and click **More Detail**.

You have invited the following participants

First Name	Surname	Email	Invitation Status	Status	Actions
Example	Three	example3@nhs.net	Sent 20/10/2015 15:51:29	awaiting self	Resend Email Manage Remove
Example	One	example1@nhs.net	Sent 20/10/2015 15:51:32	awaiting self	Resend Email Manage Remove
Example	Two	example2@nhs.net	Sent 20/10/2015 15:51:34	awaiting self	Resend Email Manage Remove

More Detail

- You are also able to **Manage** Individual reports from this screen:

You have invited the following participants

First Name	Surname	Email	Invitation Status	Status	Actions
Example	Three	example3@nhs.net	Sent 20/10/2015 15:51:29	awaiting self	Resend Email Manage Remove
Example	One	example1@nhs.net	Sent 20/10/2015 15:51:32	awaiting self	Resend Email Manage Remove
Example	Two	example2@nhs.net	Sent 20/10/2015 15:51:34	awaiting self	Resend Email Manage Remove

More Detail

- For example, in the screenshot below, you can send reminder emails to raters who have not completed, set the close date for each individual's report and choose their facilitator if you would like them to choose someone in particular.

Participant Mira Sordillo

This 360 has the following raters

First Name	Surname	Email	Date Registered	Role	Status	Last Email Sent
Rater 1	Rater 1	Rater 1	26/08/2016 09:52:46	self	100 %	Sent 26/08/2016 09:53:16

Send reminder emails to the participant's raters that have not yet completed.

[Send reminder emails](#)

You have not selected a facilitator yet. Please choose one.

[Choose facilitator](#)

This questionnaire is due to be completed by Monday, 5 Sep 2016

[Change this date](#)

[Back](#)

- You will also be able to request their reports for them should they need assistance with this. **However**, please note that this is typically managed by the participants themselves so you should always seek approval from the participant first.
- You can log into The Healthcare Leadership Model Appraisal Hub at any time and **come back** to this screen to check the **status** of your batch participants' questionnaires.
- Individuals **cannot** be added to the batch once the chosen number of participants has been reached and they have all **begun** their questionnaires. You **cannot** increase the number of **places** within the batch.
- However, as stated earlier in this guide, a batch place is **only** used up when a participant **begins** their questionnaire. Therefore, **misspelt** or **invalid** email addresses **do not** use up a place. To update an incorrect email address, simply **Remove** the participant and add the participant again with the correct details.
- Once you have **at least three** 360° participants with completed questionnaires within a batch, you can create a **group report**.
 - *Note: A Group Report can **only** be created from participants who sit within the **same** batch*

Managing Completed 360° Questionnaires

→ When a participant has **completed** their self-assessment, their Line Manager has completed and they are **happy** with the amount of raters that have completed, their report is **ready** to be requested from the Facilitator. The next steps here depend on what you as the administrator intend to do with the batch.

1. If you are simply using the batch to purchase a **number** of questionnaires for individuals to **independently** complete, select their facilitator and receive their feedback, then you have no further actions that you need to take.
2. If you have set up the participants as part of a course and you know who they need to choose as their facilitator, you can either choose the facilitator for them by clicking **Manage** next to their name from within your batch or simply **inform** them of who to choose and they can do this within their own account.

Step 5.

Creating a Group Report

- To create a **group report**, click **Purchase or manage multiple 360 Questionnaires for OTHERS** from the Home Screen of the Healthcare Leadership Model Appraisal Hub, as you did when creating a **batch**. If you have **not yet** created a batch or logged in, please go back to **Step 1** of this guide, on **page 7**.
- Choose your batch from the table and select **View**, as shown below.

Purchasing questionnaires for others: creating a batch

When you create a batch you will be given the option to pre-pay for any number of colleagues to take part in a 360 degree questionnaire and also pre-pay for group reports.

You will be able to add participants to your batch at any time and monitor their progress.

Batches - The cost of creating a batch is £40+VAT per questionnaire.

You can buy any number of questionnaires and a discount is offered for batches of 60 questionnaires - when you purchase 60, you will be invoiced for 50 (i.e. receive 10 free).

Please note that credit card orders are limited to 49 questionnaires, if you would like to purchase 50 or more by credit card, you will need to contact 360 Support on 01242 282979.

Group Reports - The cost of creating a Group Report is £35+VAT per report.

In addition to purchasing in advance, Group Reports may be purchased at any time during or after the 360 process.

Create a batch

You have created the following batches

Name	Status	Paid By	
Batch 3 [?]	Waiting Payment (0 people added)	Not set	View
Batch 4 [?]	1 person added	JB0001 Verified	View
Sample Group Report [?]	5 people added	SARAHTEST Verified	View

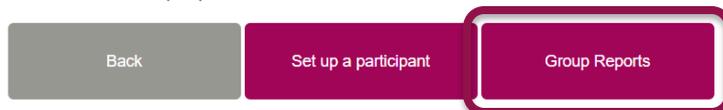
- Once you have clicked **View**, you will be able to see a **table** (see below) containing all the participants' **details, invitation status, completion status**, and your possible **action buttons**.
- Once all the participants have **completed** their 360 questionnaires and either all their **raters** have also completed or they are happy with the number of raters that have completed, (as seen above in **Status** column), you are **ready** to create a Group Report.
- To **generate** the report, simply click the **Group Reports** button above the table, which will take you to the screen shown on the next page of this guide, or if you have not yet purchased any Group Reports, you will be able to do this with exactly the same steps as you followed in paying for the batch by clicking **Purchase more Group Reports**.

Your batch named Sample Group Report

This batch has been pre-paid to provide up to 5 questionnaires for participants and 1 group reports.

There are 0 places remaining.

A batch place is only used when the participant confirms they want to join the group. Misspelt email addresses or inactive users do not use up a place.



You have invited the following participants

First Name	Surname	Email	Invitation Status	Status	Actions
Sam	Sample		Sent 02/12/2016 10:37:53	8/9 raters	Resend Email Manage
Alex	Sampler		Sent 02/12/2016 16:21:35	7/7 raters	Resend Email Manage
Jo	Example		Sent 05/12/2016 15:19:20	10/10 raters	Resend Email Manage
Jamie	Examples		Sent 02/12/2016 10:46:58	8/8 raters	Resend Email Manage
Jordan	Samples		Sent 02/12/2016 10:42:34	7/7 raters	Resend Email Manage

[More Detail](#)

→ The **Group Reports** button will **only** appear once **at least 3** participants have completed the **minimum** requirements. If this is not the case, this message will show above the table:

Group Reports Note: To set up a Group Report there must be a minimum of 3 participants who have completed their 360 questionnaire. Each of these participants must have invited a minimum of 3 raters who need to have completed their 360 questionnaires. At least 1 of the raters must be a line manager.

Healthcare Leadership Model Appraisal Hub

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Group Reports for Example Batch

Number of pre-paid reports: 1

Number of reports created: 0

Number of reports archived: 0

If you require further reports you will need to select the button below.

No reports have been created



[View Archive](#)

The following group reports have been created

Description	Details	Facilitator	Report
-------------	---------	-------------	--------

→ Select the **Set up a Group Report** option and enter your **chosen group name**, which can be anything of your choice. The name is used as a **reference** for you and will appear on the finished report.

- You will see a **table** on this screen with all the participants in the batch you created previously.
- To **add** the participants to the group report, select the **Add** box to the far right (see below). To select **all** of the participants, simply click **Add All** at the top of the table.
- The **Add** option will **only** appear next to a participant's name if they have completed the **minimum** requirements; their **self-assessment** and **at least 3** raters have completed, 1 of them being their line manager.
- Once you have ticked **Add** next to every participant you would like to include, click **Create Group Report**

Set up a Group Report

Please select the participants you would like to include by ticking the 'Add' box alongside their name.

GROUP NAME

You can add or remove participants from this group. There is no limit to the number of amendments you can make and there will not be any additional charges.

Back Create group report

Select your participants

First Name	Surname	Email	Status	Add all
Sam	Sample		8/9 raters	<input checked="" type="checkbox"/> Add
Alex	Sampler		7/7 raters	<input checked="" type="checkbox"/> Add
Jo	Example		10/10 raters	<input checked="" type="checkbox"/> Add
Jamie	Examples		8/8 raters	<input checked="" type="checkbox"/> Add
Jordan	Samples		7/7 raters	<input checked="" type="checkbox"/> Add

Step 6.

Choosing a Group Facilitator

- You will now need to request a **facilitator** for the group report. Once you have clicked **Create Group Report**, you will see your Report in a table (as below), and an option in the table to **Choose Facilitator**.

Group Reports for Sample Group Report

Number of pre-paid reports: 3
 Number of reports created: 2
 Number of reports archived: 1
 If you require further reports you will need to select the button below.

Back Set up a Group Report

View Archive

The following group reports have been created

Description	Details	Facilitator	Report
Sample Group Report	View	Choose Facilitator	Archive

- Click this, and then search for a facilitator by **name**, **city** or **region**. Choose them by clicking **Select this facilitator**, as shown below. You can choose someone you know already, or simply find a facilitator nearby.
- By selecting **Show only group accredited facilitators**, you will only be presented with a list of facilitators that are registered to give the group feedback that you need.

Surname starts with

City starts with

Region

Only show group accredited facilitators

Search

First Name	Surname	Email	City	Region	Job title	Organisation	Costs	Options
PoppyTest	Boothroyd		do not use	England - North East	do not use	do not use	JCA Global Test Account - Please do not use	Select this facilitator

- After you have chosen your facilitator, click the **Send Request** button in the table on the group reports page to **submit** your report to them.

Group Reports for Sample Group Report

Number of pre-paid reports: 3
 Number of reports created: 2
 Number of reports archived: 1
 If you require further reports you will need to select the button below.

Back Set up a Group Report

View Archive

The following group reports have been created

Description	Details	Facilitator	Report
Sample Group Report	View	Poppy Boothroyd	Change Facilitator Send request Archive

- The facilitator will receive an **email** with an option to **accept** or **decline** the request.
- In the **Report** column, the **Send Request** button will change to **Re-send request** and the note in green will appear at the top of the page, notifying you that the report has been submitted to your selected facilitator.
- If your facilitator does **not** receive the request, you can click **Re-send request** to notify them again.
- The facilitator can now **access and download** the report.
- ✓ *Note: At this point **no further amendments** (adding or removing participants) can be made to the group report. If any raters complete after the facilitator has processed the report, the facilitator has the option in their account to 'Resubmit', which will update these changes. If the facilitator marks the report as 'Complete', the resubmit button will no longer be available, and the report will be closed.*
- Your report is **only accessible** by your facilitator. It is **your** responsibility to contact the facilitator **directly** to arrange a **mutually convenient time** and date for your facilitation session.
- An option to **Archive** any finished reports is available to enable ease of use and **organisation** within the hub. When a report has been finished with, clicking the **Archive** button will safely **store** it in your Archive list, should you ever need to access it again in the future.
- If you wish to purchase more group reports for this batch, click the **Purchase more group reports** button on this page, which will take you to the payment screen as shown previously.

Overview of Report Structure

- ✓ *Note: This overview will outline the structure of a **Group Report**. For information on the **Individual 360° Report** for batch participants not being assessed as a Group, please see the **360° Assessment User Guide**.*

The 360° Group Report is divided into the following sections:

Contents

- 05** Group 360° overview
- 06** Group ratings
- 07** Group Performance and Importance ratings
- 08** Group Performance versus Importance summary
- 09** Group hidden strengths and blind spots
- 10** Group Performance and Importance analysis
- 12** Group Impact ratings
- 16 Appendix 1**
Reflections and learning
- 17 Appendix 2**
List of respondents
- 18 Appendix 3**
The nine dimensions of leadership behaviour

Understanding the Group Report

1. The Healthcare Leadership Model

- This section of the report **describes** the Healthcare Leadership Model upon which the 360° assessment is based and explains **why** and **how** it is useful to leaders.
- This section also covers **personal qualities** and how being **aware** of our **strengths** and **limitations** will have a **direct effect** on how we behave and interact with others.

2. About this report

- Here you will gain an **overview** of the report itself, how to use it and your next steps.

3. Group 360° overview

- Here the group is presented with a **diagram** that displays its **average rating** on the nine leadership dimensions of the Healthcare Leadership Model.
- The group's average **personal** ratings are presented **separately** to the averages of its **raters** to enable them to **compare** and **contrast**.

4. Group Ratings

- This table displays the **average** ratings given on each of the 360° dimensions by the **different rater groups**. This table enables the group to see any **gaps in perception** between **themselves** and their **rater groups**.

5. Group Performance and Importance Ratings

- This section of the report displays in a **visual format** the group's performance and importance ratings for each of the **nine dimensions** of the Healthcare Leadership Model.
- The group's average **personal** ratings are presented separately to the averages of their **raters** to enable them to **compare** and **contrast**.

6. Group Performance versus Importance Summary

- In this section the group is presented with a **diagram** that displays a **summary** of its collated ratings by comparing low to high **performance** against low to high **importance**. This can demonstrate and in turn improve how the group **prioritise** its development focus
- Ratings that align with **low performance** on dimensions that are of **high importance** will be shown in the **risk** area (marked in **red**). The group may want to prioritise its development actions **here**.
- Ratings that align in **similar** positions against performance and importance will be shown in the **balanced** area (marked in **amber**).
- Ratings that align with **high performance** on dimensions that are of **low importance** will be shown in the **opportunity** area (marked in **green**).

7. Group hidden strengths and blind spots

- The table shows the spread of scores given by all raters and self raters for each dimension. Each coloured circle indicates the **percentage** of raters who gave that particular rating. The **higher the percentage** of raters who gave the same rating, the **larger the coloured circle** will be in that section.
- The **blue** circle shows the percentage of raters who gave the same rating as the average self rating. If no raters gave the same rating, you will instead see a blue S to show what the average self rating was.
- The **red** circle(s) show the percentage of raters who gave a **lower** rating than the average self rating. Dimensions that have **larger red circles**, particularly if they are further from the average self rating, may be potential '**blind spots**' and areas for development.
- The **green** circle(s) show the percentage of raters who gave a **higher** rating than the average self ratings. Dimensions that have **larger green circles**, particularly if they are further from the average self rating, may be potential '**hidden strengths**' that the group could make greater use of.

8. Group Performance and Importance Analysis

- This section of the report shows the **spread of scores** given by the group itself and all rater groups, **against each of the nine dimensions**.

9. Group Impact ratings

- This section of the report examines the level of engagement by **Direct Reports** in relation to the nine Healthcare Leadership Model dimensions.
- The table in this section displays the average score given by the individuals and their Direct Reports on each of the nine leadership dimensions plus seven additional items.
- Please note that this section will only appear if the individuals within the Group Report have answered 'yes' to having Direct Reports.

10. Appendix 1: Reflections and learning

- Here the group is presented with the opportunity to begin **mapping out a group development plan** based upon **reflections** of what has been learnt as a team from reading the report.

11. Appendix 2: List of respondents

- A list of the individuals included in the Group report.

12. Appendix 3: The nine dimensions of leadership behaviour

- Here you are presented with the nine dimensions of leadership behaviour and the behaviours required for each of the rating scales.

Help and support

If you'd like further help and support with your 360° assessment, please don't hesitate to contact the helpdesk on +44 (0)1242 282 979 or by emailing 360support@jcaglobal.com.

Alternatively, you can view **Frequently Asked Questions** by following this link:
<http://modelfaq.jcaglobal.com/>