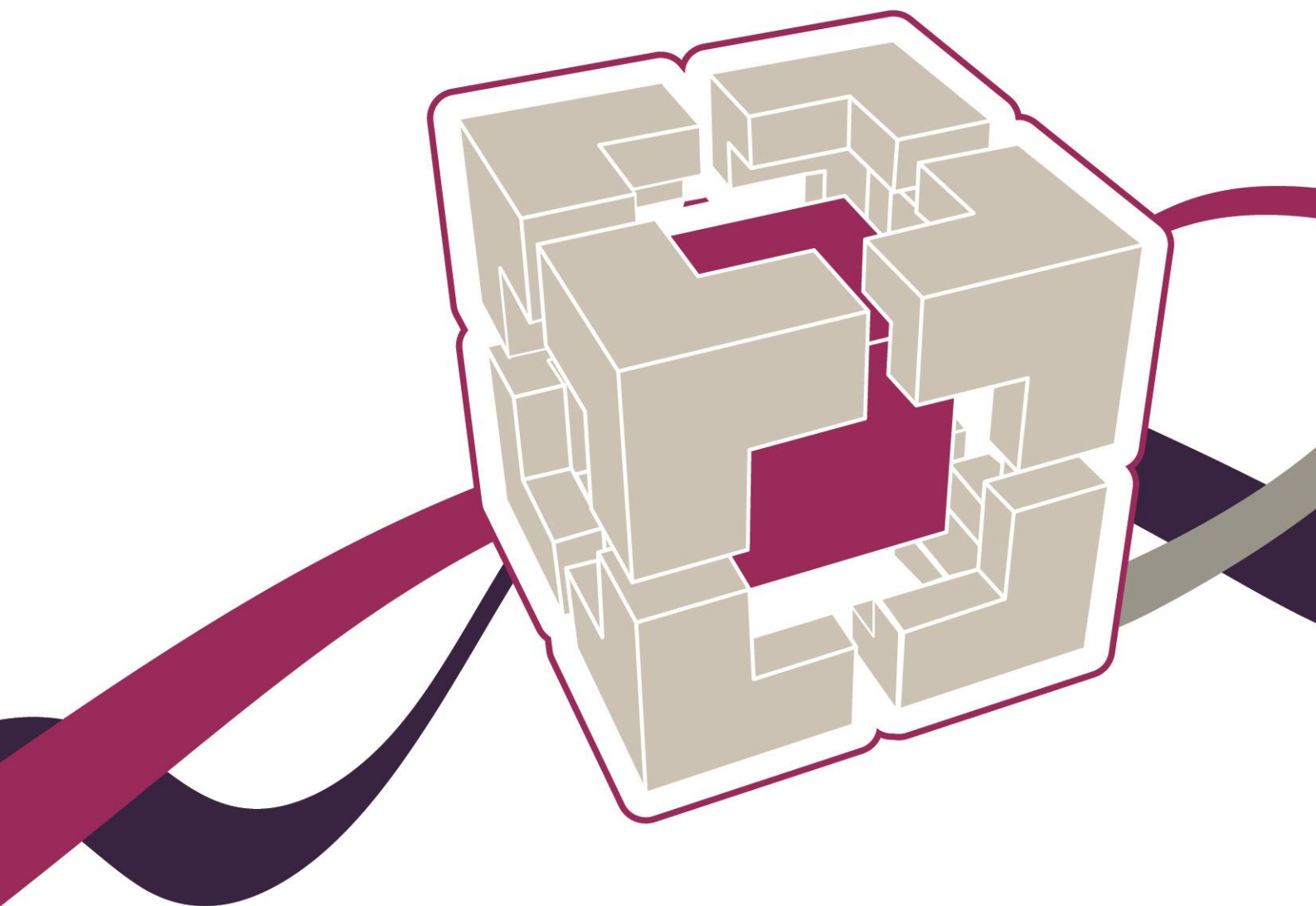


The Healthcare Leadership Model Appraisal Hub


Multiple 360° Questionnaires (Batches) User Guide



Multiple 360° Questionnaires (Batches) User Guide

Contents

- 05** Introduction
- 06** What is a Batch?
- 07** Accessing the Healthcare Leadership Model Appraisal Hub
- 11** Creating a Batch
- 17** Inviting Batch Participants
- 19** Managing a Batch
- 22** Managing Completed 360° Questionnaires
- 23** Help and Support



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 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). *Please note that group reports are not currently available for the new version of the questionnaire.*
- 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://modelappraisalhub.leadershipacademy.nhs.uk/Account/Login>
- The link will take you to the **home page** of the Healthcare Leadership Model Appraisal Hub 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 the following link: <https://nhsx.uk/register>
- Create an account using the **form** pictured below:

Register with NHSx

First name

Last name

Email

Password

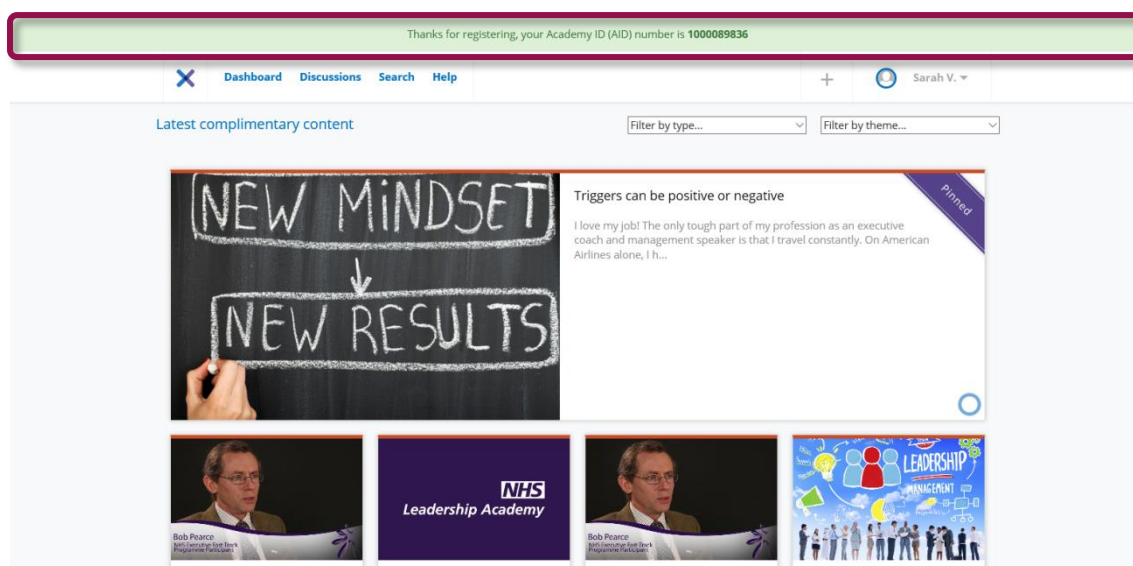
☐ Do you want to keep in touch? Check this box so we can send you the latest news, content and offers.

CREATE ACCOUNT

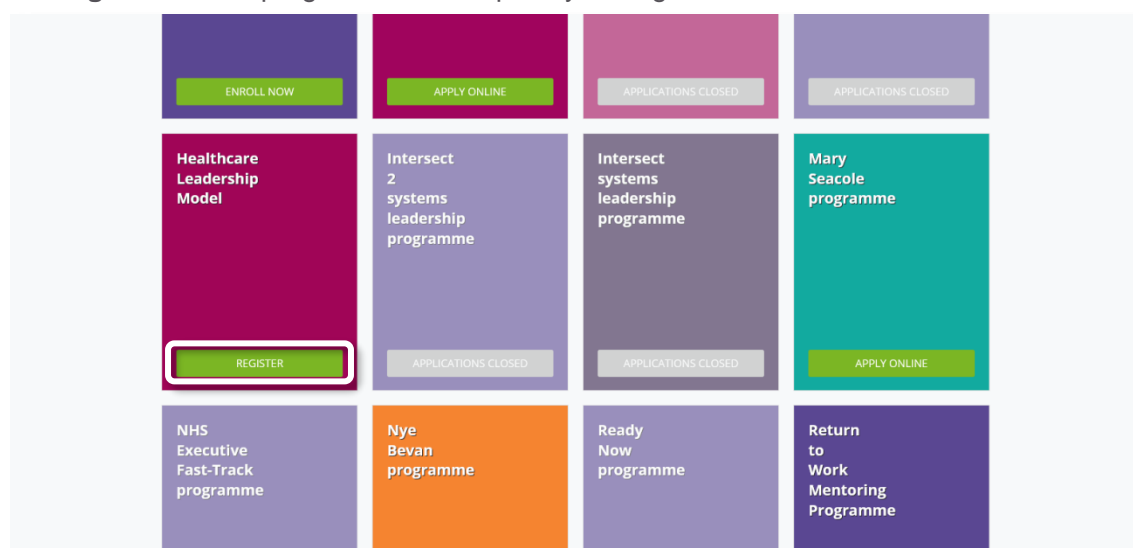
© NHS Leadership Academy, 2016. All rights reserved.
[Help](#) [Changelog](#) [Feedback](#)

- ✓ Note: if this page **does not** appear then you may **already** be logged into an NHSx account, in which case carry on from the instructions on page 5.

- You will receive an **email** to the address you specified when you created an account, containing your **10-digit username**.
- Your **10-digit username** is also specified at the top of the page once you have clicked **Create Account** (see below)
 - ✓ *Note: The screen shown below **may not** have the same ‘Complimentary content’ as this is updated regularly.*



- If you were already registered and logged in, click **Dashboard** at the top of the page and you will be taken to the screen shown above. If you have just created an account, you will already be at this page.
- Whilst you are on this page, scroll until you reach the **Programmes** section.
- You will see **Healthcare Leadership Model** under **All Programmes**. Click **Register** on this programme to complete your registration.



→ Press **Register** again to confirm that you would like to access the Healthcare Leadership Model

→ Fill out the **form** that will appear on screen

→ At the bottom of this form, you will see the **Register and continue to Healthcare Leadership Model Appraisal Hub** button. Please read and accept the Terms of Service, and then select button.

- Once you submit the form, you will automatically be taken to the Appraisal hub, (pictured below), where you can then log in with the username and password you received a moment ago.

The screenshot shows the login interface for the Healthcare Leadership Model Appraisal Hub. At the top, there is a dark blue header with the text 'Healthcare Leadership Model Appraisal Hub' on the left and the 'NHS Leadership Academy' logo on the right. Below the header is a large red banner with the text 'Welcome to the Healthcare Leadership Model Questionnaire'. The main content area is white and contains a login form. The form has two input fields: 'User name' and 'Password'. Below the 'User name' field, there is a reminder: 'Remember: Your user name is a 10-digit number'. Below the 'Password' field, there is a red 'Log in' button. At the bottom of the form, there are several links: 'Need an account? click here', 'To change or reset your password, click here', 'Search the Facilitator database here', 'View our Privacy Policy in a new window', 'View our Accessibility Statement in a new window', and 'For any queries, contact JCA at 360support@jcaglobal.com'.

Healthcare Leadership Model Appraisal Hub

NHS Leadership Academy

Welcome to the
Healthcare Leadership Model Questionnaire

User name

Remember: Your user name is a 10-digit number

Password

Log in

Need an account? [click here](#)

To change or reset your password, [click here](#)

Search the Facilitator database [here](#)

View our [Privacy Policy](#) in a new window

View our [Accessibility Statement](#) in a new window

For any queries, contact JCA at 360support@jcaglobal.com

- ✓ *Note: Throughout this process, please read **all** the provided information and follow **all** instructions carefully.*

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

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

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

NHS Leadership Academy

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

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

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

NHS Leadership Academy

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**. *Please note that Group Reports are not currently available for the new version of the questionnaire.*
- 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

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.



Cancel payment

Paying by Purchase Order

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

Pay by purchase order

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

Amount (£)

40

+ VAT

Your purchase order number

ⓘ Please note - In order to access your 360 report you must enter a valid P.O. Number.

Search for the trust or organisation linked to the Purchase Order number

Search

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	<div>Select</div>	
137 LODGE HILL	ABBAY WOOD		LONDON	GREATER LONDON	<div>Select</div>	
139 LODGE HILL	ABBAY WOOD		LONDON	GREATER LONDON	<div>Select</div>	
15 HOMERTON ROW	HOMERTON		LONDON	GREATER LONDON	<div>Select</div>	
15 THORNE CLOSE	THORNE HOUSE		LONDON	GREATER LONDON	<div>Select</div>	
181 LODGE HILL	GOLDIE LEIGH	LODGE HILL	ABBAY WOOD	LONDON	GREATER LONDON	<div>Select</div>
1A BEATRICE PLACE	MARLOES ROAD		LONDON	GREATER LONDON	<div>Select</div>	
2 WOLVERTON GARDENS	WEST LONDON MENTAL HEALTH TRUST		LONDON	GREATER LONDON	<div>Select</div>	

- 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.



Back Set up a participant

- 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
maria.clease@jcaglobal.com

First Name
Maria

Surname
Clease

Cancel Save

- ✓ *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.

Back

Set up a participant

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	<div>Send Email</div> <div>Manage</div> <div>Remove</div>
Example	One	example1@nhs.net	Not sent	awaiting self	<div>Send Email</div> <div>Manage</div> <div>Remove</div>
Example	Two	example2@nhs.net	Not sent	awaiting self	<div>Send Email</div> <div>Manage</div> <div>Remove</div>

- 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.

Welcome to the Healthcare Leadership Model Appraisal Hub

Dear [REDACTED]

You have been invited by [REDACTED] undertake a pre-paid 360 degree assessment.

You will now be able to set up your Healthcare Leadership Model 360 degree assessment. The purpose of the 360 degree process is to help you identify what you do well, and not so well so as to support your professional development.

To ensure that you access your assessment correctly and are not asked for payment, please follow the instructions in this user guide carefully: [user guide](#)

[To start your 360 degree questionnaire please click here.](#)

If you do not have an Appraisal Hub account please create one [here](#)

Please note: your ratings may form part of a group report, which will combine the ratings of everyone in your group to give an overall picture of how the group has been rated. Your individual results will not be identifiable in the group report.

For help please read the [FAQ](#), or contact your helpdesk at 360support@jcaglobal.com

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**. *Please note that a Group Report is not currently available for the new version of the questionnaire.*
 - ✓ *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.

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 360°support@jcaglobal.com.

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