"Quick Start" Guide for Coachees
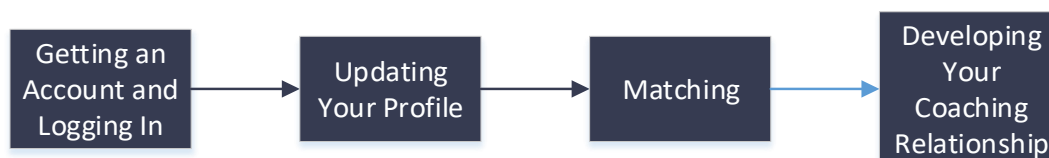
Contents

1.   **Introduction**

Welcome to the Coaching programme at Health Education England Yorkshire and the Humber. This guide is intended to give you the basic information you need to get started using the Coaching system.

There are four main phases which are described in this document:

2.   **Getting an Account and Logging In**

2.1.   **Getting an Account**

1. **You will be asked to 'self-register' as a Coachee**
    Please follow the following URL and follow the self-registration process:

    https://hee.sfgmentornet.com/User/Register?program=1&role=Coachee

    You will be asked to read and sign the Privacy Notice and Consent Agreement before you can access the system. These notices tell you what your rights are under data protection legislation; they explain how your personal data will be used and who you can contact if you want to correct any mistakes or withdraw your consent. Nobody can access any of your personal data, and you cannot access the system, until you have accepted the Privacy Notice and given your consent.

    Once you have submitted your self-registration, you will be sent a confirmation email with your account details and you then need to wait for an administrator to authorise your account. This normally takes 2-3 days and you will be sent another automated email once your account has been authorised. You can then login and access your account. Note you will not be able to access your account until the administrator has authorised your account and you have received the email to confirm.

2.2.   **Logging In**

Once you have your login details (see above), you can log in as follows:

1. Open your web browser using any of the common browsers (e.g. Microsoft Internet Explorer, Google Chrome or Firefox).

2. Go to https://hee.sfgmentornet.com You will see the following login page:
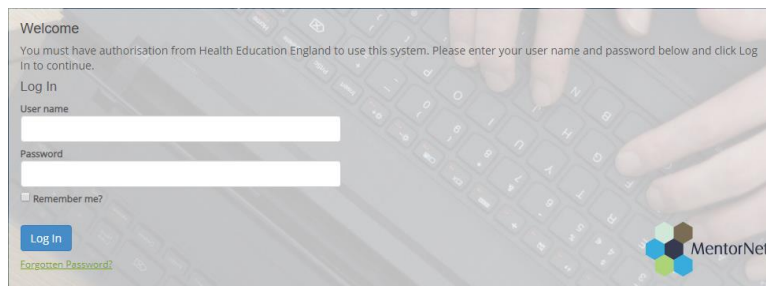
3. Enter the username and password that you chose during the self-registration process, or which you were sent in the automated email.

4. Once you have logged in, you will see a screen similar to the one below:
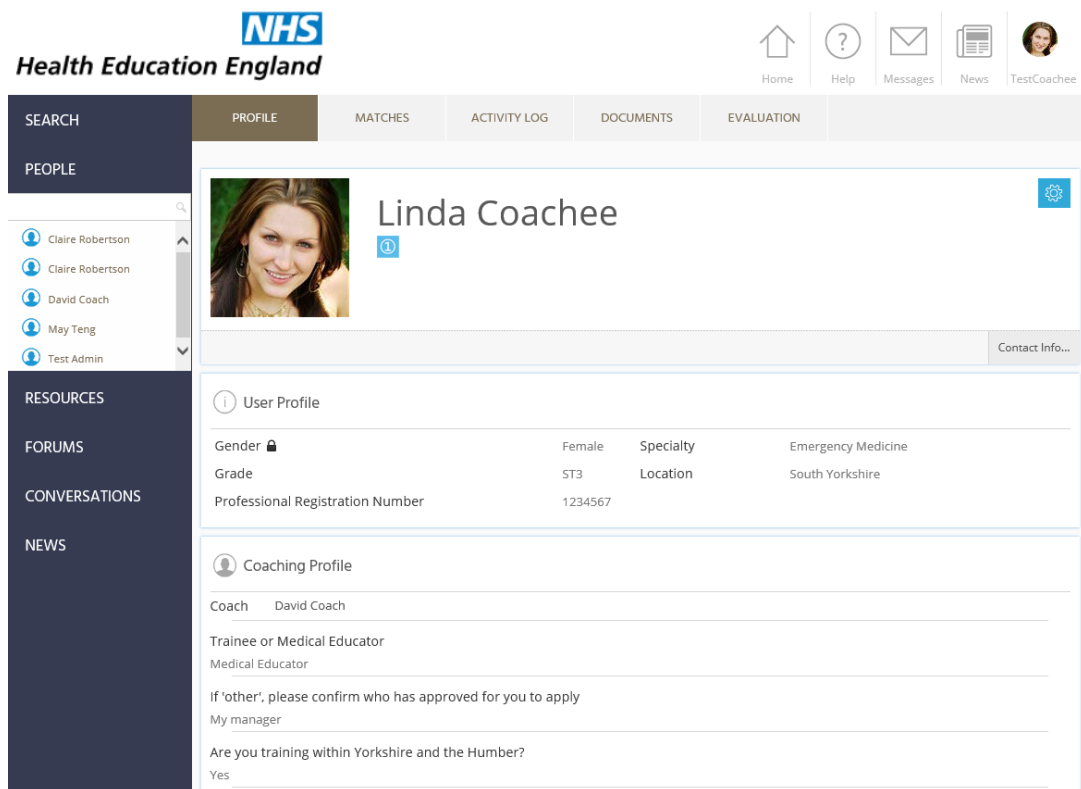
Any fields which have the padlock symbol (🔒) against them are 'private' fields – this data can be seen only by you and by administrators. Your mentor and other users cannot see this information.

5. Once you have logged in you should update your profile, as per the following section.

2.3. Smartphone Users

You can also access the system through a smartphone. Just go to your standard smartphone browser and use the same URL and user details as above (i.e https://hee.sfgmentornet.com You may find it helpful to add a shortcut on your home page; if you're unsure how to do this then you'll find instructions for various types of smartphone under the Resources Section of ('Training Documents') on the left-hand side of the screen. Look for the document titled: "Setting up on a Smartphone".

3. Updating Your Profile

Once you have logged in you should update your profile. Most functions to edit your profile are available by clicking on the ⚙ icon on the top-right of your user profile screen – clicking on this icon will bring up the following drop-down list of options.
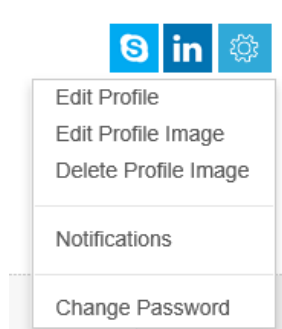
3.1. Changing Your Password

In order to keep your personal data secure, you should change your password to a secure password that only you know. Do this by selecting the "Change Password" option above. Passwords are required to be a minimum of 8 characters in length containing at least 1 uppercase character and 1 number.

3.2. Adding a Profile Photo

You should add a profile photo to make your profile more personal and to help others to identify you. Click on the "Edit Profile Image" and choose an image file to use. You can preview the image and crop/zoom the image to fit. Click "Upload Image" when you are happy with the image.

3.3. Editing your User Profile

If the administrator has created your account for you then you will probably need to add more information to fill out your profile. Or you may just want to edit information you have already added.

Choose the "Edit Profile" option from the drop-down list above. This gives you the following headings:

You can expand each heading and edit the detail within.

4. Matching

4.1. Coachee-led Matching

You are able to search for and request a Coach. Your Coach choice is then approved (or rejected) by either the Coach or the administrator.

It is possible to view the user profile of any Coach by clicking on a name under the "People" menu, but it is normally more effective to use the search function to search for a Coach based on keywords. To use the search:

1. Click on the "Request a Coach" button under the "Coaching Profile" heading:

2. If this system match does not provide a good quality list, then it is also possible to type keywords into the Search box. Using the keyword search will search the entire user profile of all available Coaches and will find all Coaches who have these keywords anywhere within their user profile.

3. Once you have chosen your preferred Coach, click the "Request Match" button. A new screen will pop up, allowing you to enter additional information:


Your request will be sent to the Coach who will then either accept or reject the match request. This process can take a few days.

Once your match request has been accepted, you will receive an automated email confirming your match has been accepted. If your match is rejected, then you will also receive an email informing you of this.

Alternative Way of Requesting a Match
If you are viewing the profile of a Coach with whom you'd like to request a match (e.g. because you have found the mentor under the "People" heading), you can request a match directly from the Coach's user profile screen. Simply click the "Send Coaching request" icon at the top-right of the Coach's user profile – see below:

PROFILE

David Coach
①

Contact Info...
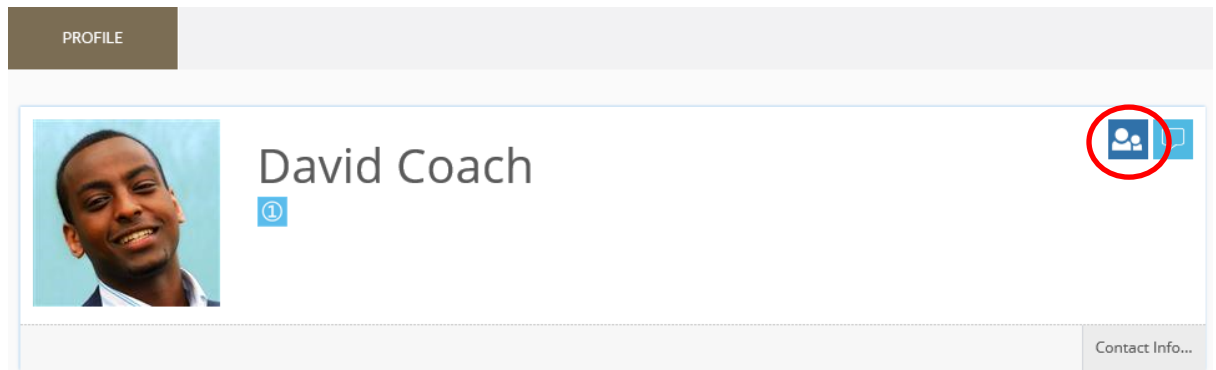
5.   Developing your Coaching Relationship

Once you have been matched, you will want to use the system to develop your relationship with your Coach. The system should be fairly intuitive to use, but you may find the following features useful as you build and develop your Coaching relationship:

5.1.   Home Page

If you ever get 'lost' in the system, clicking the Home Page icon, at the top right of the screen, will take you back to your user profile page.

5.2.   Messaging

Messaging on the system works in much the same way as messaging in most social media apps. The key difference is that you are assured of confidentiality and security within the system.

To access your messages:

1. Click on the ⎵Messages⎵ icon at the top right of the screen. The number highlighted in a blue background indicates if you have unread messages.

2. You will see a list of all the *conversations* you are having with other users. A 'conversation' is a list of all the messages with that user – you have one conversation per user.
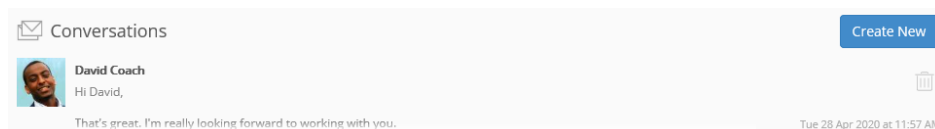
3. If you click on the conversation, you will see a list of all the messages with that user, and you are able to reply:
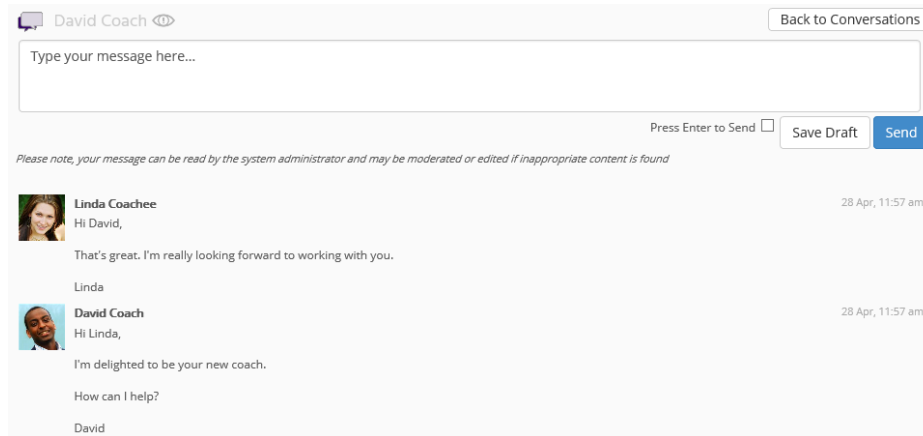
Notes:

- You can type a draft message, save the draft, and return to it at a later date without sending it.
- Remember you can send/receive messages on your mobile device (see above for instructions on how to setup the system on your phone).
- You will receive email notifications when you receive a new message. Email notifications can be configured so that you can change the frequency of the notifications.
- If you use inappropriate language in your messages, your message may be moderated and edited by the administrator.

5.3. Activity Logs

Your Coaching programme administrator may expect you to keep records of meetings/conversations you have with your Coach. You can do this in system by creating an 'Activity Log'. Sometimes you, the Coachee, will complete the activity log and sometimes your Coach will.

To view an existing Activity Log:

1. Go to your profile and click on the **Activity Log** tab:
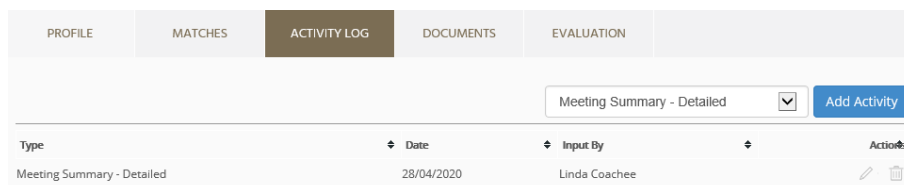
2. You will see a list of any activity logs that have already been created and you have the option to add a new activity.

3. You can view/edit an existing activity log by clicking on the pencil ( ) icon at the far right of the activity log entry.

To create a new Activity Log:

1. An example of a simple Activity Log template is as follows:

5.4. Sharing Documents

You may want to share documents with your Coach, perhaps so that he/she can review the document and you can discuss at your next meeting.

To upload and share documents:

1. Go to your profile and click on the **Documents** tab:

2. You will see a list of any documents (and photos) that you have already uploaded. You can add new documents by clicking "Upload File".

Note: Documents uploaded here can be viewed only by you, your Coach, and administrators.

5.5. Resources

The system has a 'Resources' section where you can find documents that your administrator has made available to you. These might be training materials, templates, best practice documents, policies, etc.

You can access these by clicking on the "Resources" heading on the left-hand side under the list of People.

6. Common Problems

6.1. General

If you have any problems or questions about the Coaching programme or use of the system, you should contact your administrator on coaching.yh@hee.nhs.uk

6.2. Unable to Log In

If you cannot login to your account, the most likely reason is that your username or password is incorrect, or your account has been locked. For example, if you enter your password incorrectly 5 times then your account will be locked, you will need to ask the Administrator to unlock your account.

If you cannot log in then check you are using the right username and double-check your password is correct (check caps lock is off and check any upper/lower case characters – sometimes a lower case "L" can look like the number "1" or the letter "I"). If you still cannot 'log in' then contact your administrator (details above).

6.3. Forgotten Password

If you forget your password, click on the "**Forgotten Password**?" link on the Login page. You will be asked to enter your username and to confirm the email address held within the system. A new password will then be sent to the email address registered. If this is the incorrect email address, then you will need to ask an administrator to reset your password.

6.4. Not Receiving Automated Emails

If you are not receiving any of the automated emails, the most likely reason is that they are going into your spam/junk folder. Check the following:
1. Check the email address on your user profile is correct
2. Check your spam/junk folders
3. Check your Notification settings

You should also add the email address (noreply@sfgmentornet.com) to your 'safe senders' list in your email system to ensure future messages are not put into your junk/spam folders.