



“Quick Start” Guide for Coaches

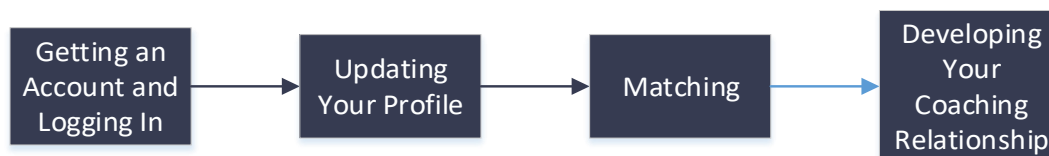
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1. Introduction

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'

If you have been asked to self-register then you should go to the following URL and follow the self-registration process:

<https://hee.sfgmentornet.com/User/Register?program=1&role=Coach>

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.

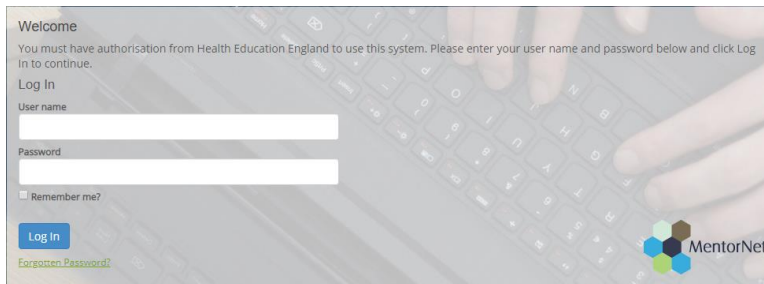
Once you have submitted your self-registration, you will be sent a confirmation email with your account details and you then need to wait for an administrator to authorise your account. This normally takes 2-3 days and you will be sent another automated email once your account has been authorised. You 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

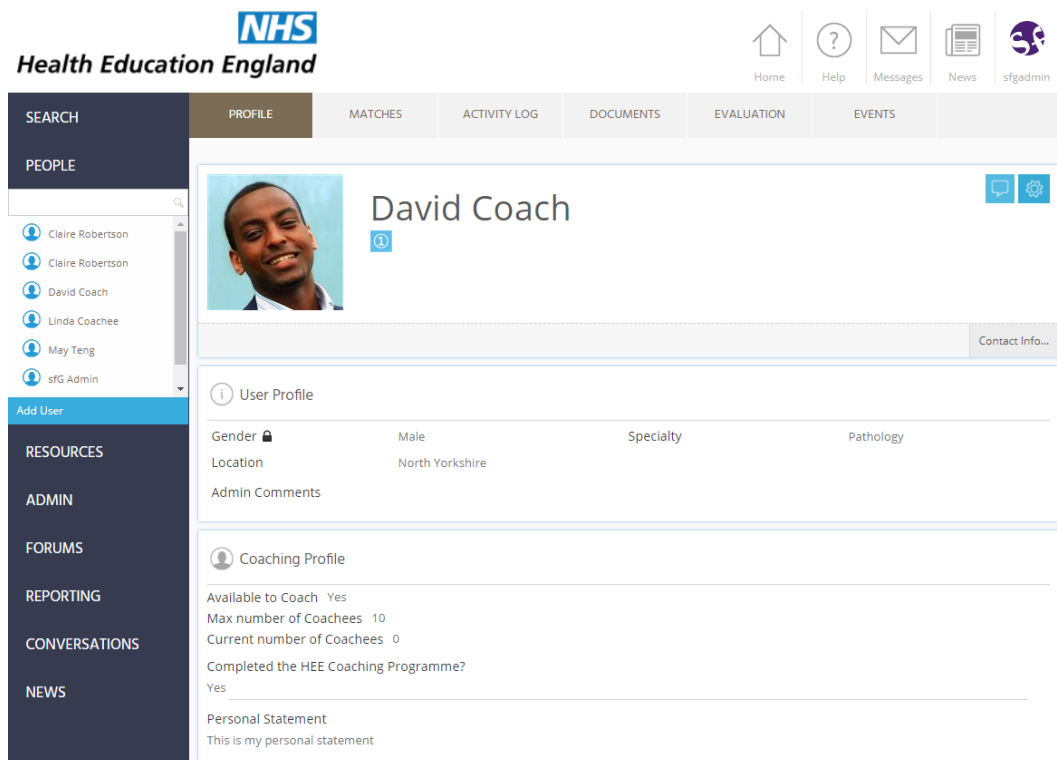
Once you have your login details (see above), you can log in as follows:

1. Open your web browser using any of the common browsers (e.g. Microsoft Internet Explorer, Google Chrome, 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.
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 Coachee and other users cannot see this information.

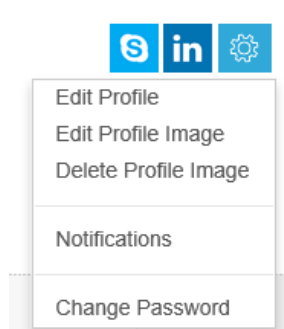
5. Once you have logged in you should update your profile, as per the following section.

2.3. Smartphone Users

You can also access the site through a smartphone. Just go to your standard smartphone browser and use the same URL and user details as above (ie <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 on the system ('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" top right  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.

Right click on this symbol  choose the “Edit Profile” option from the drop-down list above. This gives you the following headings:



- General
- Contact
- User Profile
- Coaching Profile
- Settings

Save Cancel

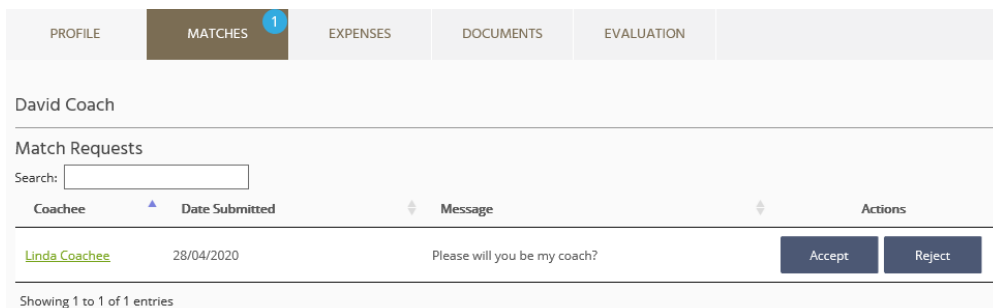
You can expand each heading and edit the detail within.

4. Matching

4.1. Coachee-led Matching

A coachee is able to search for and request a Coach. This request is then approved (or rejected) by you, the Coach.

When a Coachee requests you to be their Coach, you will receive an email alerting you to this. When you log on, you will see a highlight against the Matches tab, indicating how many Coaching requests you have received (see below). When you click on the Matches tab, you will see the detail of the request, including any message the Coachee may have added to the request.



Coachee	Date Submitted	Message	Actions
Linda Coachee	28/04/2020	Please will you be my coach?	Accept Reject

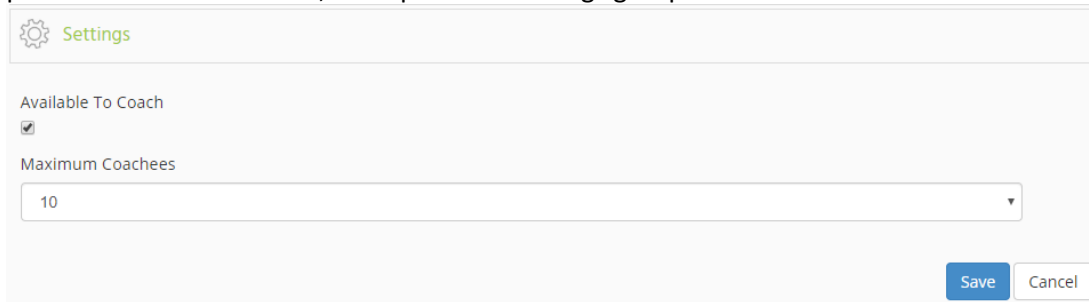
Showing 1 to 1 of 1 entries

You can now accept or reject the request by clicking on the buttons to the right of the match request. A default ‘accept/reject’ message is provided, and you can change this if you want, to make a more personal response to the Coachee. This message will be sent back to the Coachee. **We recommend within this message you give/request availability to set up your first session – ‘please action within 48hrs’ where possible.**

Once you have accepted a match, the Coachee and yourself will both receive automated emails confirming the match and inviting you to make contact, with each other. You can see the Coachee’s profile details the next time you log in to the system by clicking on the Matches tab. Clicking on your Coachee’s name will take you to his/her user profile.

4.2. Defining Maximum Number of Coachees

The system allows you to define a maximum number of Coachees you are, able to accept at any time, so that you can ensure you are not overloaded. To change this setting, edit your profile as described above, and open the “Setting” group:



The screenshot shows a settings interface with a gear icon and the word 'Settings' in green. Below this, there is a section titled 'Available To Coach' with a checked checkbox. Underneath, there is a section titled 'Maximum Coachees' with a dropdown menu currently displaying the number '10'. At the bottom right of the settings area, there are two buttons: 'Save' (in blue) and 'Cancel' (in grey).

You can choose your maximum number of Coachees and you can also make yourself unavailable for Coaching, if your limit has been reached, or if you are ‘unavailable’ to Coach. *You will not appear in any search results during the matching process.*

5. Developing your Coaching Relationship

Once you have been matched, please use the system to develop your relationship with your Coachee. Most of the system should be fairly intuitive to use, but you may find the following features useful as you build and develop your Coaching relationship below:

5.1. Home Page



Home

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.

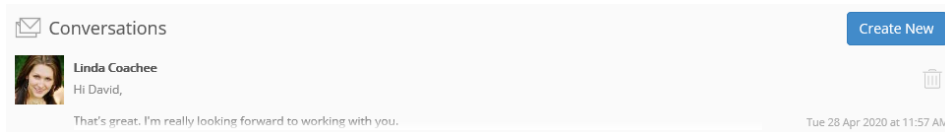
5.2. Messaging

Messaging in 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 this system.

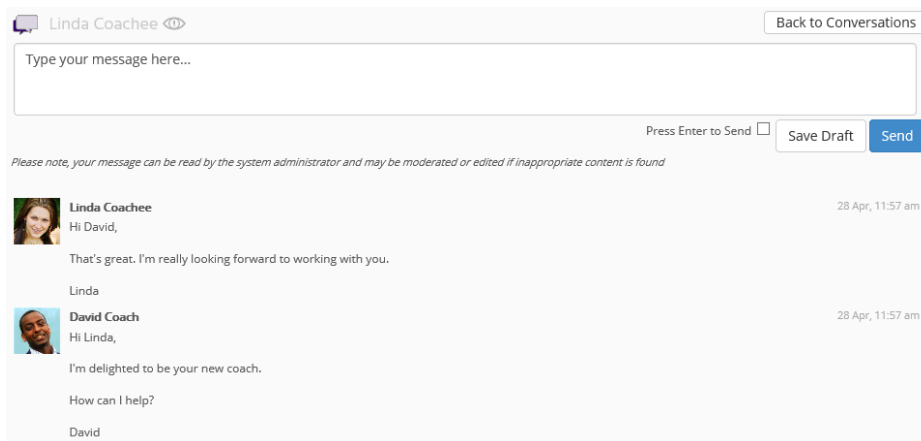
To access your messages:



1. Click on the icon at the top right of the screen. The number highlighted in a blue background indicates 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 – please note, *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 are, able to type a draft message, save the draft, and can return to it, at, a later date (without sending).
- Remember you can send/receive messages on your mobile device (see above for instructions on how to setup 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 any 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 Coachee. You can do this in the system by creating an 'Activity Log'. Sometimes you, the Coach, will complete the activity log and sometimes your Coachee will.

To view an existing Activity Log:

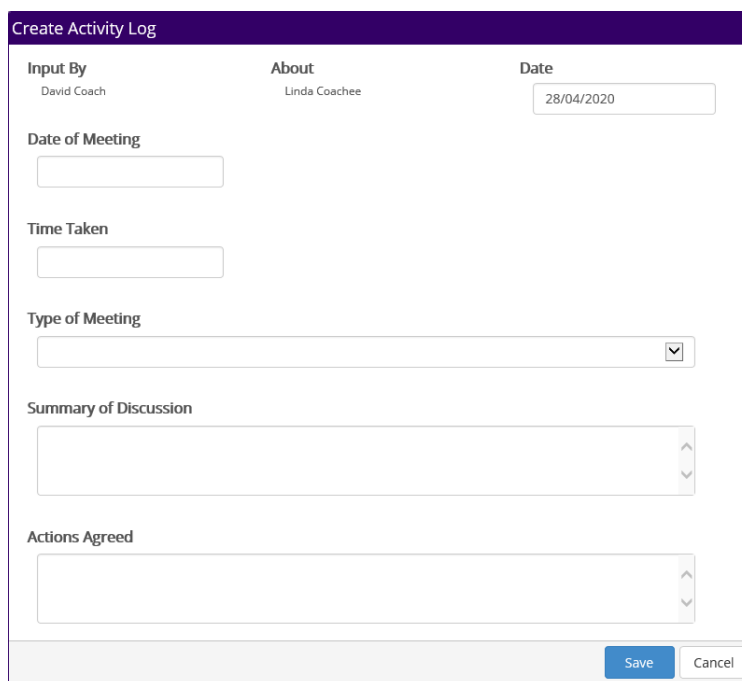
1. Firstly, make sure you are looking at your Coachee's profile (not your own). If you are on your own profile then any activity logs created will be about you, not about your Coachee. To create an activity log about a specific Coachee, you must start from that Coachee's profile.
2. Go to your Coachee's profile and click on the **Activity Log** tab:



3. You will see a list of any activity logs that have already been created and you have the option to add a new activity.
4. 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:

A screenshot of a 'Create Activity Log' form. The form has a purple header. It contains several fields: 'Input By' (David Coach), 'About' (Linda Coachee), and 'Date' (28/04/2020). Below these are 'Date of Meeting', 'Time Taken', and 'Type of Meeting' (a dropdown menu). There are two text areas for 'Summary of Discussion' and 'Actions Agreed'. At the bottom right, there are 'Save' and 'Cancel' buttons.

5.4. Sharing Documents

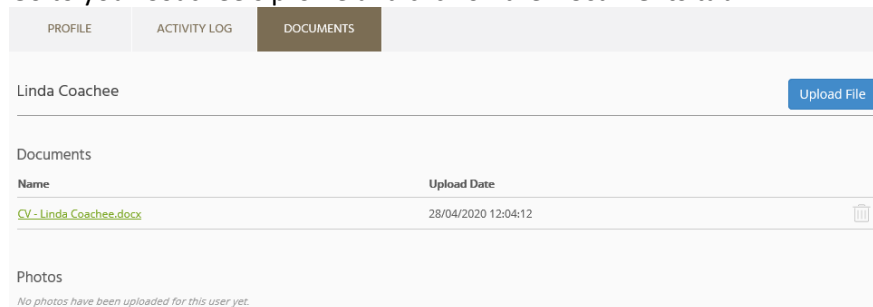
You may want to share documents with your Coachee perhaps, so that he/she can review the document and you can discuss it at your next meeting.

To upload and share documents:

1. Firstly, make sure you are looking at your Coachee's profile (not your own). If you are on your own profile then any documents uploaded will be for you, not for your Coachee, *your Coachee will not be able to see them.*

To upload a document to be shared with a specific Coachee, you must start from that Coachee's profile:

2. Go to your Coachee's profile and click on the **Documents** tab:



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

Note: Documents uploaded here can be viewed only by you, your Coachee, 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:



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 have entered your password incorrectly 5 times then your account will be locked, you will need to ask the Administrator (email above) to unlock your account.

If you cannot log in, 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.

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 within the system. 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 aren't put into your junk/spam folders.