

# Mesma User Guide

## Self-Evaluation and Quality Action Plan

2024-25

Making skills work for Scotland

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## **1.0 Introduction**

#### **1.1 Introduction to Self-Evaluation**

Your Self-Evaluation (SE) is an opportunity to discuss each topic within the <u>Self Evaluation and</u> <u>Quality Action Plan (SEQAP) Guidance</u>

and record this on mesma. Self-evaluation is a recognised tool for driving improvement and gives teams an opportunity to reflect on how services are being delivered, and where refinement is required to improve the experience of stakeholders. Setting aside adequate time for this is very valuable, you should plan to bring together relevant people across your organisation to contribute to the SE process.

Through collaboration with your team you will come to a consensus judgement to **describe what** you do, evaluate what you do, what you could enhance.

Your SE is a **live** document that reflects your current practices and should be updated to mirror process changes. It is best practice to do update your SE as changes occur.

#### **1.2 Introduction to Quality Action Planning**

A Quality Action Plan is used is to store and track progress toward addressing Areas for Improvement (AFI). Ownership of the Quality Action Plan sits with Learning Providers whose responsibility is to ensure it remains up to date.

When used well, a Quality Action Plan (QAP) will help your organisation focus on priority areas for improvement which should help deliver the changes you want to your modern apprenticeship provision. It can demonstrate a culture of continuous improvement within your organisation and support internal and external audit, review, or inspection.



It is the responsibility of the provider to ensure their SE and QAP reflects current delivery and improvement priorities of Modern Apprenticeship Delivery. Where approaches to delivery change or improvements have been made, the self-evaluation should be updated.

## 2.0 Completing your Self-Evaluation

#### 2.1 How to Access your Self-Evaluation

1. Log onto mesma <u>here</u> using your username and password. Open the drawer (=) at the top left of screen and select Self-Evaluation or the icon showing two parallel lines (...).



2. To access, select the title of your self-evaluation. The title of your SE will be your organisations name followed by 'SE'. Please note the due date, which will be set at 2027, is *not* the deadline for updating your SE.

Self Evaluation	inquire All							
Active Planne	ed Activity Archived							
Create N	ew Self Evaluation Actor y Export	Save Grid L	ayout Reset Grid Layout					
Title	Due Date	Ŧ	Completion Progress	Ŧ	Status	Ŧ	Participants	Role
SDS-Self-Evalu	ation 24/25 31/03/2027			0%	Not_Started		0	O, P,

#### 2.2 Understanding your Self-Evaluation

For each topic there are sections to: **describe what you do**; **evaluate what you do**; detail **what you want to enhance**; provide a **RAG** status; and mark the topic as **complete**.

You will be required to complete these sections for all topics, bar **what you want to enhance**, which you should use when relevant.

To understand what we mean by topic, refer to page 5 of the SEQAP guidance.

Торіс	Question	Describe what you do	Evaluate what you do	What do you want to enhance	Help	RAG Status
Initial Assessment & Recruitment	How effective is your approach and methodology to appropriately match individuals to Modern Apprenticeship pathways, ensuring that prior learning and tailored support needs are met?		Check Text	Check Text	•	



Within the '**Describe what you do'**, detail your current practices related to this topic, using the *points of consideration* within the <u>SEQAP Guidance</u> as a prompt.



For **'Evaluate what you do'**, articulate your team's judgement of how well you think you are doing in relation to the topic. This should inform the next section titled **'What do you want to enhance'** which is an opportunity to identify and record areas that could be improved. For examples of evaluative words please click <u>here</u> and please refer to the <u>SE exemplar</u> for further guidance



Provide a **RAG** status for each topic using the definitions shown in the <u>SEQAP</u> <u>Guidance</u>, giving a clear visual on your perception of the effectiveness of your processes.



By selecting the information icon (<sup>(1)</sup>) under help, a hyperlink to the self-evaluation guidance will appear.

#### 2.3 Editing your Self-Evaluation

 Once in your Self-Evaluation, you will see the page below with the two quality standards, 'Service Delivery' and 'Leadership and Quality Culture'. Select the downward arrow (
 ) to expand and view the content within the standard.



To edit the content, select the pencil icon ( $\checkmark$ ) highlighted below. Once you save each section you will need to repeat this step for each **Topic**. To **save** your changes, select the floppy-disk icon ( $\square$ ) or to **discard** changes, select the cancel icon ( $\square$ ).

When editing your SE it may be useful to expand the column for ease of use. To do this, hover your mouse over the line beside the area you wish to expand, these lines are shown below. Click the line and this will allow you to expand the area, making the text more visible. You will need to repeat this step for all topics and ensure you select save each time.

Please refer to section 2.2 to understand the self-evaluation template.



2. While editing content within 'Evaluate what you do' and 'What do you want to enhance' you will see a 'Check Text' icon. Selecting this icon will highlight all evaluative language throughout your response.

	Topic	Question	Describe what you do	Evaluate what you do	What do you want to enhance	Help	RAG Status
0	Initial Assessment & Recruitment	How effective is your approach and methodology to appropriately match individuals to Modern Apprenticeship pathways, ensuring that prior learning and tailored support needs are met?	tailored ad campaigns	pulls up a lot of ineligible learners	market opps	6	Amber

3. Once you feel this topic is fully updated, you should use the toggle ( ) to mark as complete. Follow this step for all topics to show SDS you have fully updated your SEQAP.

		v i 2 3	,						
	Торіс	Question	Describe what you do	Evaluate what you do	What do you want to enhance	Help	RAG Status	Tags	Complete
0	Initial Assessment & Recruitment	How effective is your approach and methodology to appropriately match individuals to Modern Apprenticeship pathways, ensuring that prior learning and tailored support needs are met?	ß	Check Text	Check Text	•	Amber		

4. Please note, there is no expectation that you use the Tags function shown below.

Grade breakd	own for section	0 1 2 3	Save Grid Layout R	eset Grid Layout					
	Торіс	Question	Describe what you do	Evaluate what you do	What do you want to enhance	Help	RAG Status	Tags	Complete
/	Initial Assessment & Recruitment	How effective is your approach and methodology to appropriately match individuals to Modern Apprenticeship pathways, ensuring that prior learning and tailored support needs are met?				•			

## 3.0 Developing and Maintaining Your Quality Action Plan

Following the completion of your self-evaluation, prioritise areas for improvement identified to focus on over the duration of your SDS contract. In addition, you **MUST** include area(s) for improvement related to topics graded as **RED** in your self-evaluation.

#### 3.1 How to Access your Quality Action Plan

1. Open the drawer (=) at the top left of screen and select Quality Action Plan.



2. To access, select the title of your Quality Action Plan. The title of your SE will be your organisations name followed by 'QAP'.

Active Planned Activity	Archived						
Create New Quality Action	n Plan	set Grid Layout					
Title	Progress against completion of objectives	Progress against completion of tasks	Current Impact	Participants	Group	Provider	T
SDS QAP exemplar 24-25			·				

#### 3.2 Understanding your Quality Action Plan



An **Area for Improvement** is something identified that needs "fixed" or "enhanced" to improve what and how things are done to deliver better results e.g. our achievement rate for MA Framework is below SDS target.



The **Expected Impact** articulates the change and/or improvement expected as a result of implementing the **tasks**. There must be a direct relationship between the **Area for Improvement**, the **Tasks** and the **Expected Impact**. The Expected Impact should be <u>measurable</u>.



**Tasks** are action(s) that will be taken to address **Area for Improvement**. When delivered, the task will result in a change in what you deliver or how things are delivered e.g. service offer, processes, approaches, resources available which in turn results in improved performance.



Who to Action is the named user on mesma, within your organisation, with responsibility for coordinating taking the action forward. This is ideally an individual who will be responsible for ensuring that the action is progressed to conclusion and will liaise with any necessary stakeholders involved in the execution of the action, ensuring that progress is tracked, and updates are recorded.



The **Due Date** is when the **Expected Impact** is <u>likely</u> to be achieved.



The **Status** shows the position of progress towards achievement of the Expected Impact. The Status will show as '**Not Started**' until an Impact Note or Comment has been added. This will change the Status to '**In Progress**'. '**Overdue**' will show when the current date is past the Due Date, and the Completion Date has not been added. The status will show as '**Complete**' once a Completion Date has been added. The mesma system will issue reminder emails for any overdue Tasks or AFIs.



The **Completion Date** is when the **Expected Impact** is <u>actually</u> achieved.



The **Actual Impact** indicates the extent to which the Expected Impact has been achieved as a result of addressing the **area for improvement** and implementing the associated **Tasks**. The options are: 'Met', 'Not Met', 'Partial', or 'Exceeded'.

$\equiv$
—

**Impact Notes** and **Comments** provide additional information that enables the Action Owner to articulate progress towards achievement of the **Expected Impact** and delivery of **Tasks** associated with the **Area for Improvement.** By leaving an Impact Note or Comment, the Status will be updated to 'In Progress'.

#### 3.3 How to Create an Area for Improvement

1. Select 'Create an Improvement'.

līs	Quality Action Plan		
I	View Plan Create Improvement	Move/Copy/Link	Manage Improvement Plan
\$	view Plan	move, copy, zink	Manage improvement i ian
E	✿ View Users Invite Users	Remove Users E	xport Grid Settings

 Under 'Objective Title', articulate the Area for Improvement identified. Please refer to section 3.2 and 3.7 for guidance. Select the title of your Self-Evaluation under 'Select Evaluate Area' to link the Area for Improvement.

100	Quality Action	Plan			
I	View Plan	Create Imprement	Move/Copy/Link	Manage Improvement Plan	
\$	VIEW FIAIT	Create initial zment	wove,copy,Link	Manage improvement Flan	
Ē	Objective Employe	Title ers are not adequately in	volved in apprentice	progress reviews to ensure apprenti	Select Evaluate Areas

3. Select 'Create Objective' to confirm. You then must add Expected Impact, Tasks, Due Date, and the action owner. **Please refer to section 3.4** 



#### 3.4 How to Edit your Quality Action Plan

1. Once you have accessed your Quality Action Plan, select the pencil icon (<sup>2</sup>) to edit content related to the Area for Improvement.

Active	Archived										
Expand Tasks Say tid Layout Reset Grid Layout											
	s) for improvement	Expected Impact	Who to action <b>T</b>	Due date	Status	Completion date	Actual Impact	Impact Notes			
- C	Employers are not adequately involved in apprentice progress reviews to ensure apprentices are fully supported in progressing through their qualification.	Increased employer involvement in apprentice progress reviews and updates, removing barriers to learning more effectively, which overall leads to quicker completion of work-based tasks related to their qualification. This will be measured as part of the APR review process.	Callum Rae	20 Dec 24 🛱	In Progress	Date not set		ß			

2. You will now be able to edit all aspects of your Quality Action Plan. To understand your Quality Action Plan better, **please refer to section 3.6 and 3.7**. To **save** your changes, select the floppydisk icon (<sup>(D)</sup>) or to **discard** changes, select the cancel icon (<sup>(S)</sup>). To **delete** the Area for Improvement, select the trash can icon (<sup>(1)</sup>).

Activ	e Arc	chived								
E	pand Tas	sks Save Grid Layout Reset Gri	id Layo	ut						
		Area(s) for improvement	T	Expected Impact	Who to action 🔻	Due date	Status	Completion date	Actual Impact	Impact Notes
•		Employers are not adequately involved in apprentice progress		Increased employer involvement in apprentice progress reviews and updates,	Callu × ×	20 Dec 24 🛱 Reset Date	In Progress		Null	ľ

#### 3.5 How to Add Tasks to your Quality Action Plan

Adding Tasks to your Area for Improvement is good practice, demonstrating the action that will be taken to drive change and achieve its Expected Impact.

1. Expand the Area for Improvement by select the downward arrow icon (

Active	Archived							
Expand	Taske Grid Lavout Peset Grid Lav	out						
Expand	Area(s) for improvement	Expected Impact	Who to action	Due date	Status	Completion date	Actual Impact	Impact Notes
Archive	Employers are not adequately involved in apprentice progress reviews to ensure apprentices are fully supported in progressing through their qualification.	Increased employer involvement in apprentice progress reviews and updates, removing barriers to learning more effectively, which overall leads to quicker completion of work-based tasks related to their qualification. This will be measured as part of the APR review process.	Callum Rae	20 Dec 24	In Progress	Date not set		ľ
2. Se	elect Add New Task	ζ.						
Expand	Tasks Save Grid Layout Reset Grid Lay	out						
	Area(s) for improvement	Expected Impact	Who to action <b>Y</b>	Due date	Status	Completion date	Actual Impact	Impact Notes
Archive	Employers are not adequately involved in apprentice progress reviews to ensure apprentices are fully supported in progressing in using their qualification	Increased employer involvement in apprentice progress reviews and updates, removing barriers to learning more effectively, which overall leads to quicker completion of work-based tasks related to their qualification. This will be measured as part of the APR review process.	Callum Rae	20 Dec 24 🛱	In Progress	Date not set		ď
Add N	ew Task							
	Task		Who to action	Due date	Status	Completion date	Comments	
			No records available					

3. You will now be able to create your Tasks related to the Area for Improvement. To understand your Quality Action Plan better, **please refer to section 3.2 and 3.9**. To **save** your changes, select the floppy-disk icon (<sup>(D)</sup>) or to **discard** changes, select the cancel icon (<sup>(S)</sup>). To **delete** the Task, select the trash can icon (<sup>(III)</sup>).

Active A	rchived	out						
	Area(s) for improvement	Expected Impact	Who to action <b>Y</b>	Due date	Status	Completion date	Actual Impact	Impact Notes
Archive	Employers are not adequately involved in apprentice progress reviews to ensure apprentices are fully supported in progressing through their qualification.	Increased employer involvement in apprentice progress reviews and updates, removing barriers to learning more effectively, which overall leads to quicker completion of work-based tasks related to their qualification. This will be measured as part of the APR review process.	Callum Rae	20 Dec 24 🛱	In Progress	Date not set		ď
Add New	r Task Task		Who to action	Due date	Status	Completion date	Comments	
	Increase communication with employ progress updates.	er on apprentice progress through monthly	Callum Rae	20 Dec 24 É	3		₽	

#### 3.6 How to Edit Tasks to your Quality Action Plan

 Once a Task has been created, select the pencil icon (
 to edit content related to the Task. Multiple Tasks can be created for each Area for Improvement, and each task can be allocated to different users on mesma, which do not need to be the same user allocated to its Area for Improvement.

tive Ar	sks Save Grid Layout Reset Grid Lay	out						
	Area(s) for improvement	Expected Impact	Who to action <b>T</b>	Due date	Status	Completion date	Actual Impact	Impact Notes
Archive	Employers are not adequately involved in apprentice progress reviews to ensure apprentices are fully supported in progressing through their qualification.	Increased employer involvement in apprentice progress reviews and updates, removing barriers to learning more effectively, which overall leads to quicker completion of work-based tasks related to their qualification. This will be measured as part of the APR review process.	Callum Rae	20 Dec 24 🛱	In Progress	Date not set		
Add New	Task		Who to action	Due date	Status	Completion date	Comments	
/	Increase communication with employer of updates.	n apprentice progress through monthly progress	Callum Rae	20 Dec 24	a)	Date not set	₽	

 To change the status of the Task to complete, edit the Task and input the Completion Date. <u>Note:</u> Tasks must be completed before the Area for Improvement should be marked as complete.

#### 3.7 How to Add Impact Notes

It is important, as part of your quarterly QAP update, to add details of progress made toward achieving the Area for Improvement. You can do this by leaving an Impact Note.

1. Under Impact Notes, select the notepad icon (<sup>III</sup>) and a pop-up box will appear, prompting to add details of progress made towards addressing the Area for Improvement. Insert an update and select the current impact (not met, partially met, met or exceeded). To save Impact Note, select 'Post'.

dd details of progress made towards achievin hould improve over time if the actions you tal esired impact.	ng the objective. This ke are having the
Meetings with employers have now taken place to intro approach to report progress. Making progress as plan communication.	oduce our new ned with improved
Partially Met	
	Post

#### 3.8 Completing Your Tasks and Area for Improvement

Once you have achieved your tasks, you can mark them as complete by selecting the pencil icon (
 to edit, selecting the toggle (
 and recording the completion date. To save these changes, select the floppy-disk icon (

Task	Who to action	Due date	Status	Completion date	Comments
Increase communication with employer on apprentice progress through monthly progress updates.	Callum Rae	20 Dec 24 🛱		13 Dec 24	₽

Areas for Improvement should only be marked as complete once its Expected Impact and associated Tasks have been achieved. You can also mark Areas for Improvement as complete by selecting the pencil icon (
 to edit, selecting the toggle (
 and recording the completion date. Select the Actual Impact ('Met', 'Not Met', 'Partial', or 'Exceeded'). To save

these changes, select the floppy-disk icon (<sup>1</sup>).

Active /	rchived									
Expand T	asks Save Grid Layout Reset Grid Layout									
	Area(s) for improvement	Ŧ	Expected Impact	Who to action	Due date	Status	Completion date		Actual Imp	Impact Notes
▲   ■	Employers are not adequately involved in apprentice progress reviews to ensure	1	Increased employer involvement in apprentice progress reviews and updates, removing barriers	Callum × ×	20 Dec 24 🛱 Reset Date	Not Started	13 Dec 24	8	Null	

<u>Note</u>: a system warning message will appear when completing an Area for Improvement if associated tasks have not been completed.

#### 3.9 How to Archive an Area for Improvement

You may wish to archive an Area for Improvement once the Expected Impact has been achieved or in the circumstance where it is no longer a priority.

1. Select 'Archive', as shown below, which will move the Area for Improvement from the 'Active' section to the 'Archived' section.

Activ	ve Arc	chived								
E	xpand Tas	sks Save Grid Layout Reset Grid L	ayo	ut						
		Area(s) for improvement		Expected Impact	Who to action <b>Y</b>	Due date	Status	Completion date	Actual Impact	Impact Notes
	Archive	Employments not adequately involved in a securice progress reviews to our apprentices are fully supported wprogressing through their qualification.	1	Increased employer involvement in apprentice progress reviews and updates, removing barriers to learning more effectively, which overall leads to quicker completion of work-based tasks related to their qualification. This will be measured as part of the APR review process.	Callum Rae	20 Dec 24 📋	In Progress	Date not set		ß

2. To move the Area for Improvement back to the 'Active' section, select 'Restore'.

Active	Arc	hived							
Expa	and Task	s Save Grid Layout Reset Grid Lay	yout T	Expected Impact	Who to action	Ţ	Due date	Status	Completion
Res	tore	Encoursers are not adequately involved operatice progress reviews to ensure apprentices are fully supported in progressing through their qualification.	in	Increased employer involvement in apprentice progress reviews and updates, removing barriers to learning more effectively, which overall leads to quicker completion of work-based tasks related to their qualification. This will be measured as part of the APR review process.	Callum Rae		20 Dec 24	Not Started	Date not set

#### 3.10 SMART Action Planning

Quality Action Plans need to be **SMART** and it is important that you consider the following when you are defining your **Areas for Improvement** and **Tasks**.



Specific



addressing the Area for Improvement. Achievement of the Expected Impact can be evidenced e.g. improvement in an already published result or a result is available or feedback from customers is showing improvement. When using increase as part of the Expected Impact, you must quantify the expected increase – e.g. from X%

Tasks detail exactly what you are going to do and relate to the Area for improvement and Expected Impact. The Area for Improvement clearly articulate what the problem is. It should also be clear who is responsible for

Measurable



Achievable







Time-bound

There is a timescale which is achievable and realistic

required support and resources in place.

Expected Impact.

Having created your Quality Action Plan, review the content and ask yourselves if a third party had to pick up and implement, would they understand the activities/steps they would need to take to achieve the expected impact.

to X% in the Expected Impact. This will enable you to visualise how improvement will be delivered, stay motivated and track progress. Expected Imapct and Tasks are something that can be achieved, ensuring plans (AFI/Tasks/Expected Impact) are agreed and attainable with the

There is a reasonable expectation Tasks and the Expected Impact can be achieved. This means what you are setting out matters, aligns with organisational priorities and is within your influence This also relates to the

## 4.0 Your Documents

Unless asked, SDS *do not* require you to upload documents. This is your area to store and upload documents should you wish.

It is important to compare against previous year performance and benchmarks to understand your Continuous Improvement in Delivery & Performance. In the documents section, if you have completed a contracting year with SDS, you will find documents outlining your results in relation to SDS Key Performance Indictors.

#### 4.1 How to Access your Documents

1. Open the drawer (=) at the top left of screen and select 'Documents'.



2. To access, select your organisations name underneath 'Title'.

Documents			
Active			
Create Portfolio	Y Access Type	▼ Participants	Provider
SDS exemplar 24-25	Private		

#### 4.2 How to Create a Folder

If you haven't already done so you will need to create a folder before adding documents. To do this, please complete the following instructions. You can create multiple folders and SDS may create folders for specific documents.

1. Once accessed the documents area, select 'Add Folder'.

Change	owner			
	udd Folder			
	Title	File	Move Folder	
≡ •	Trial folder	trial.docx	Move	/

2. Name the folder and select the save icon ( ).

#### 4.3 How to Delete a Folder

1. To delete a folder, select the trash icon (<sup>1</sup>) beside the file and select OK on the following popup. Once deleted this is **not** recoverable on mesma.

•	Add Folder			
	Title	File	Move Folder	
= .	Trial	trial.docx	Move	

#### 4.4 How to Rename a Folder

Select the pencil icon (2), type in the new 'Title' for the folder and select the floppy disk icon (2) to save.

<b>♠</b> A	dd Folder			
	Title	File	Move Folder	
= •	Trial	trial.docx	Move	

#### 4.5 How to Add Documents to a Folder

1. Once you have created a folder, you will need to select the downwards facing arrow () and select 'Upload File'. This will take you to your documents within your device which you can upload. Please note some file types and sizes cannot be uploaded, for more information please click here.

	Title		File			Move Folder			
=	Trial					Move			
	Upload File								
		File Name	Uploaded Date	Uploaded By	Tags	Comments	Reviewers	Review Date	Review
						No records available.			

#### 4.6 How to Access a Document

1. Once you have accessed your folder, select the downwards facing arrow () to open the folder.

Add Folder			
Title	File	Move Folder	
	trial.docx	Move	

2. This will display all documents within this folder. Select the download(<sup>▲</sup>) icon next to the document you wish to access.

Upload File											
	File Name	Uploaded Date	Uploaded By	Tags	Comments	Reviewers	Review Date	Review	Move File	Link Evidence	
	test 1.docx	03/06/2024	Connor Mc				N / A		Move	Link Evidence	
	test 2.docx	03/06/2024	Connor Mc		₽		N / A		Move	Link Evidence	٣

#### 4.7 How to Delete a Document

3. To delete a document, select the trash icon (<sup>11</sup>) beside the file and select Confirm Delete. Once deleted this is **not** recoverable on mesma.

Uplo	Upload File								
		File Name	Uploaded Date	Uploaded By	Tags	Comments	Reviewers	Review Date	
=		trial .docx	25/04/2024	Connor McCracken				N/A	

#### 4.8 How to Amend a Document

1. To amend, select the pencil icon( $\square$ ) and then select the save icon ( $\square$ ) once complete.

U	oload File							
		File Name	Uploaded Date	Uploaded By	Tags	Comments	Reviewers	Review Date
=		trial .docx	25/04/2024	Connor McCracken				N/A
	*							

## 5.0 User Roles Explained

#### 5.1 User roles

#### <u>Owner</u>

Users undertaking the role of the Owner will have the functionality of the Participant and Lead role and will also be able to archive areas for improvement in their quality action plan.

#### <u>Lead</u>

As a Lead you will be invited into the software by SDS or by your organisation's existing lead when roles are being transferred. In addition to the functionality of the participant role, you can also invite other users to contribute to your activity and determine the role others will have. Please refer to section 6.0 for more information.

#### Participant

As a Participant, you will be invited into the software by your Lead. You will be able to participate by being able to input your contributions. For example, if you have been invited to a self-evaluation or a quality action plan, you will be able to add, edit and delete content.

#### <u>Reader</u>

As a Reader, you have access to be able to read the contributions of others. You will not be able to make changes to any of the input.

## 6.0 Guidance for Lead Role - Managing your SEQAP

#### 6.1 How to View Users

Users can have access to the SE and/or QAP and can have different levels of access. Therefore, you will have to repeat these steps for both areas<sup>1</sup>.

1. To view users within your SE and QAP, follow section 2.1 to access your SE and 3.1 for your QAP. From here select view users. This will take you to a page with a list of those with access and their role within this.

Self Evaluation				
Home				
View data	Create Improvement	Copy/Move/Link Data	Manage Area	Evidence
♠ Viev	w users Invite Users	Remove Users Brow	se Enquire Intro	o/Scope Export

#### 6.2 How to Add New Users

You will need to repeat these steps within your QAP.

1. From the main page select invite users.

Self	f Evaluation					
Hon	ne					
	View data	Create Improvement	Copy/Move/Link Data	Manage Area	Evidence	
	<b>♠</b> Vie	ew users Invite Users	Remove Users Brow	se Enquire	o/Scope Export	

<sup>&</sup>lt;sup>1</sup> While the instructions show how to view, add, edit and remove users to the self-evaluation, please follow the same steps for the quality action plan.

2. Select invite new user and enter their name and email address and select their role within the document.



#### 3. Select Add User to Area



#### 6.3 How to Add Existing Users

It is possible an existing user may only have access to one of the SE or QAP. If this is the case and you want to give them access to both, please follow the instructions below.

- 1. Access your SE or QAP. See section 2.1 and 3.1 on how to do this.
- 2. Select Invite users.

Self	Self Evaluation						
Hom	ne						
	View data	Create Improvement	Copy/Move/Link Data	Manage Area	Evidence		
	_						
	A Vie	w users Invite Users	Remove Users Brow	se Enquire	o/Scope Export		

3. Select Invite system user.

- 4. Select the downwards facing arrow ( ) next to Select User to Add to Area and select the individual you wish to add from the existing users.
- 5. Click on the Select Roles to Assign to User box and choose the role you wish to provide this individual.



6. Select Add User to Area

#### 6.4 How to Remove Users

You will need to repeat these steps for both the SE and QAP area.

1. From the main page select remove users.

Self Evaluation				
ome				
View data	Create Improvement	Copy/Move/Link Data	Manage Area	Evidence
♠ Vie	w users Invite Users	Remove Users Brow	se Enquire	o/Scope Export
2 Select re	Remove (	) next to the releva	ant user and s	elect Confirm Remo

#### 6.5 How to Export your SE

You will need to repeat these steps for both the SE and QAP.

- 1. Access your self-evaluation.
- 2. From the main page select export.

Self I	Evaluation				
Home	e				
	View data	Create Improvement	Conv/Move/Link Data	Manage Area	Evidence
	view data	Create improvement	Copy/Move/Link Data	Manage Area	Evidence
	♠ View	vusers Invite Users	Remove Users Brow	se Enquire Intr	o/Scope Export

- 3. Use the toggle ( ) button to select the fields on the SE/QAP you want to export.
- 4. You'll then be given options of which software to export too, select which application you'd prefer the document to export on. Generally, for the SE you'll be best using MS Word.

Export As Word	Export As Excel	Export Report	

#### 6.6 How to Export your QAP

- 1. Access your Quality Action Plan
- 2. From the main page select export.

uality Action Plan
View Plan Manage Improvement Plan
★ View Users Invite Users Remove Users Export Crid Settings

- 3. All areas with show as selected for export, if you wish to remove this select the toggle( ) button.
- 4. You'll then be given options of which software to export too, select which application you'd prefer the document to export on. Generally, for the QAP you'll be best using MS Excel.

## 7.0 Accessing Mesma Support

There is a range of support, in addition to this guide, within the mesma platform.

You can access the mesma helpdesk by clicking <u>here</u> or selecting 'Helpdesk' at the top right of your screen. This will provide access to frequently read articles and a search bar to look for other materials.

In addition to this guide we have created bitesize videos to support you on the platform and these can be accessed <u>here</u> or alternatively by selecting Helpdesk, scrolling down to 'Browse All Categories' and clicking the SDS logo as seen below.

Skills	Skills Development Scotland
Development Scotland	How to use SDS self assessment and quality action plan

You can access the live chat function ( ) which you will see at the bottom right of your screen. This will connect you to a mesma representative who can support you in your query.