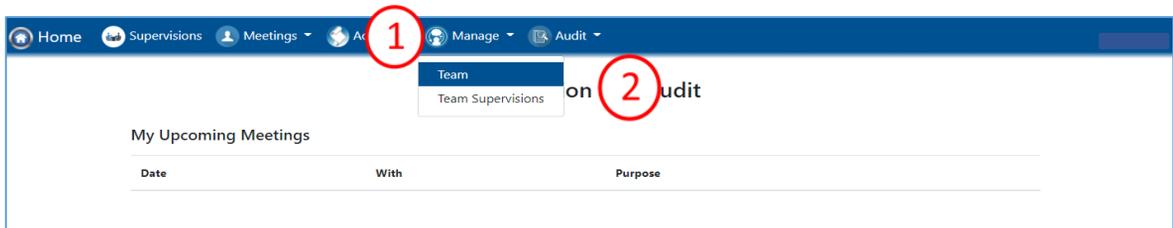


A supervisor's guide to the database

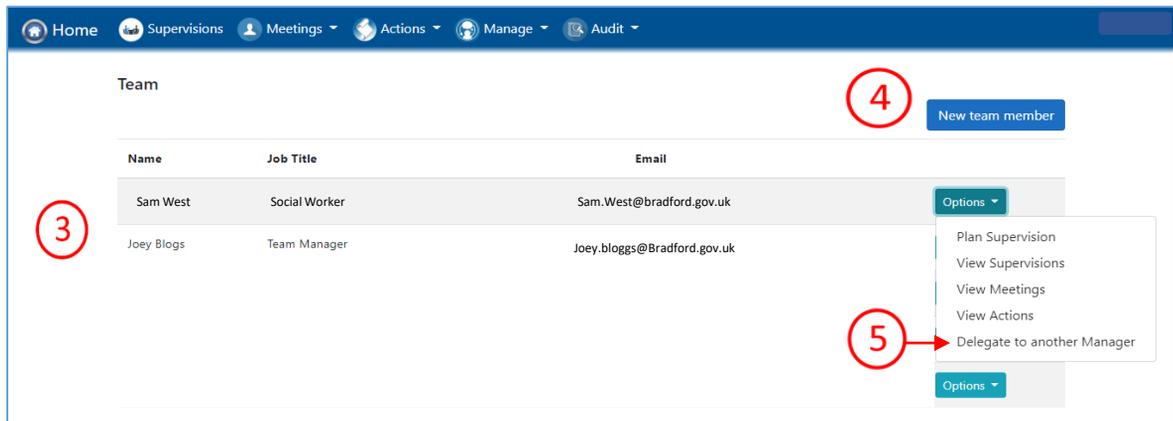
Identifying your team

Open browser and enter link <http://supervision.bradford.gov.uk/>

1. Select **Manage** on the tool bar
2. Select **Team** from the drop down list

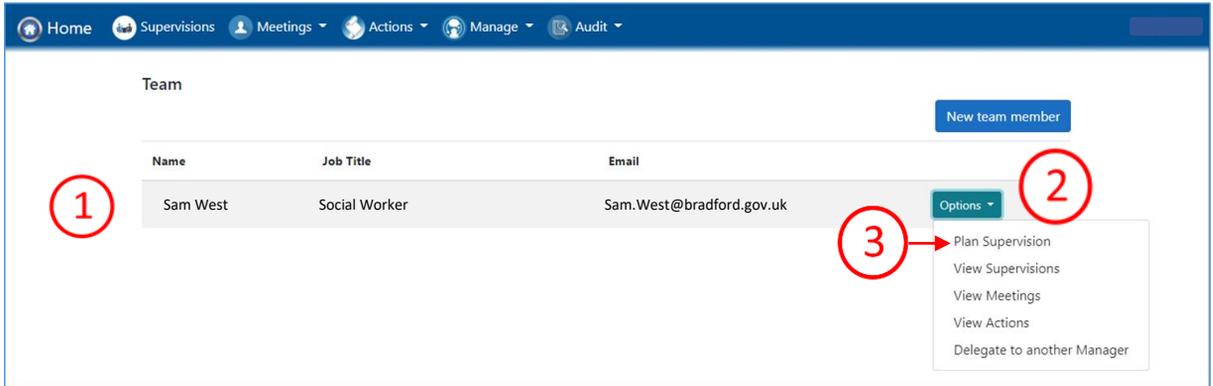


3. You will see a list of the people you supervise. Council staff are pulled through from SAP
4. If your supervisee is an agency member of staff (and so not on SAP) and they are not currently on the list, you can add them using the **New team member** button.
See **S & A Database Managing agency workers**
5. Any team member who has moved teams can be **delegated to another manager**. If someone needs to be moved to your team, their existing manager needs to do this.

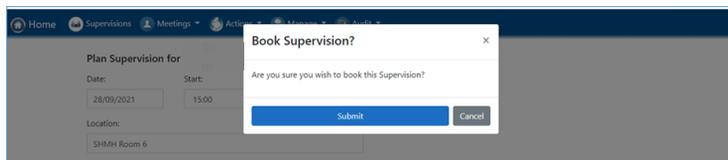
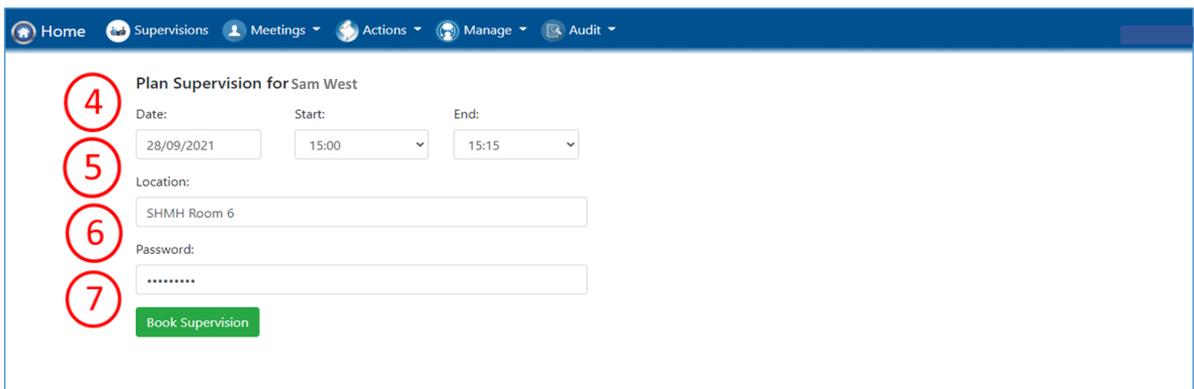


Arranging a supervision

1. Select Team Member
2. Select **Options**
3. Select **Plan Supervision**



4. Select **Date**, **Start** and **End** times from the drop down lists
5. **Location** is a free text box. If you want to conduct the supervision using Microsoft Teams you will need to send a separate calendar update that includes an MST link.
6. Your **password** is your usual Council log in password
7. Select **Book Supervision**

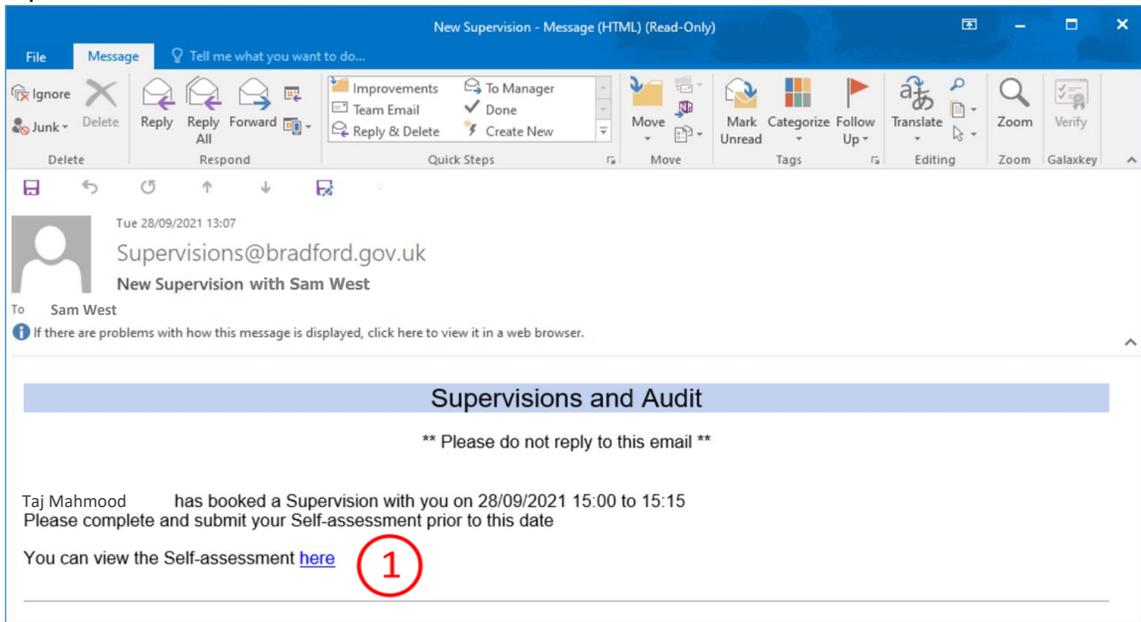


You will need to confirm by selecting **Submit**

Supervisee response and completion of the self-assessment

The supervisee will automatically receive an email and an Outlook calendar invite stating “Name of supervisor has booked a supervision with you”

When the supervisee accepts the calendar invite, an email confirmation will be received by the supervisor.



1. The supervisee should complete the self-assessment by selecting the link in the email

Or by going to the Supervision and Audit database:

2. Select **Supervisions** from the tool bar
3. Select **Awaiting Self-assessment**

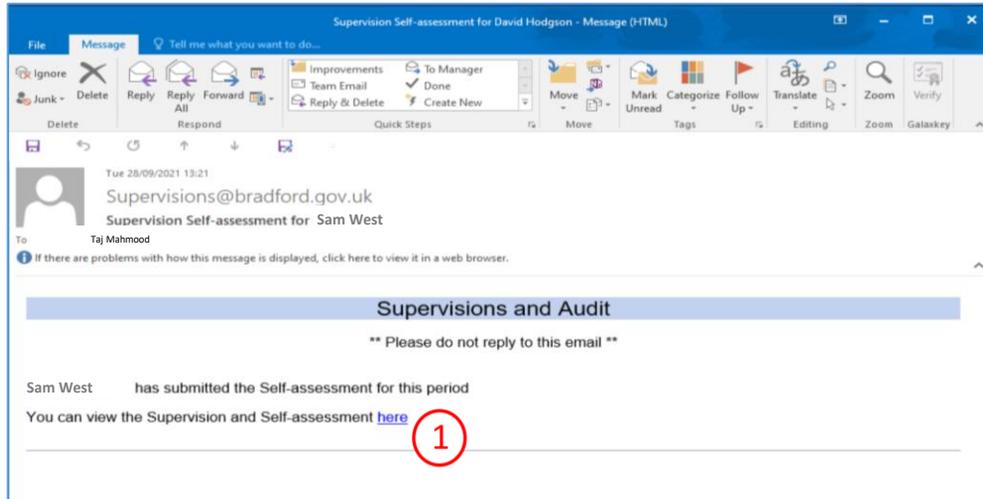


4. When the supervisee has submitted the self-assessment, their status is:

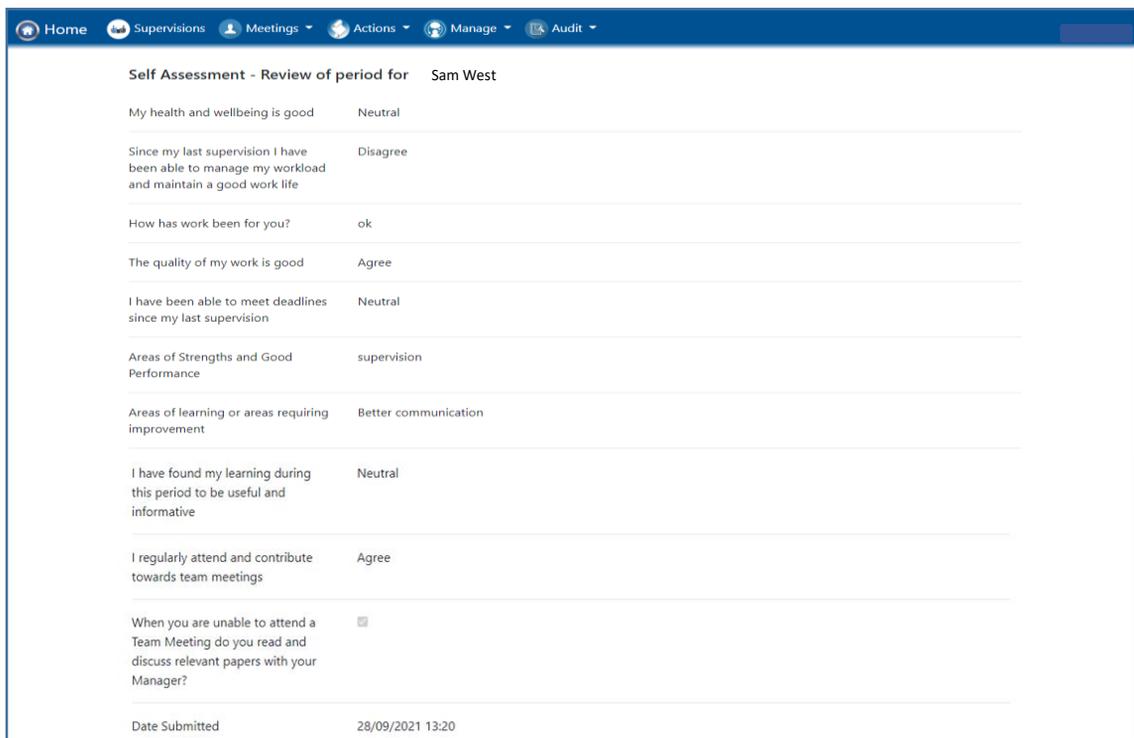
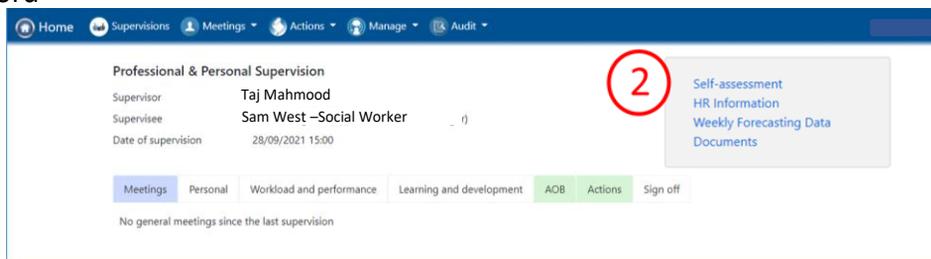


Viewing the self-assessment

The supervisor will receive an email advising that the self-assessment has been completed.

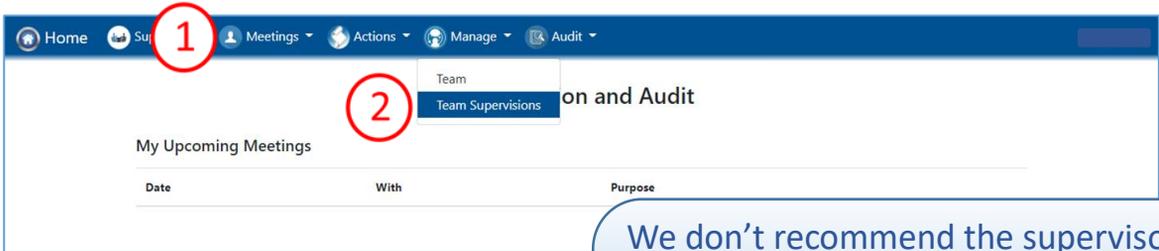


1. The supervisor can view the self assessment by clicking the link in the email
2. Alternatively the supervisor can select **self-assessment** from the menu in the supervision record



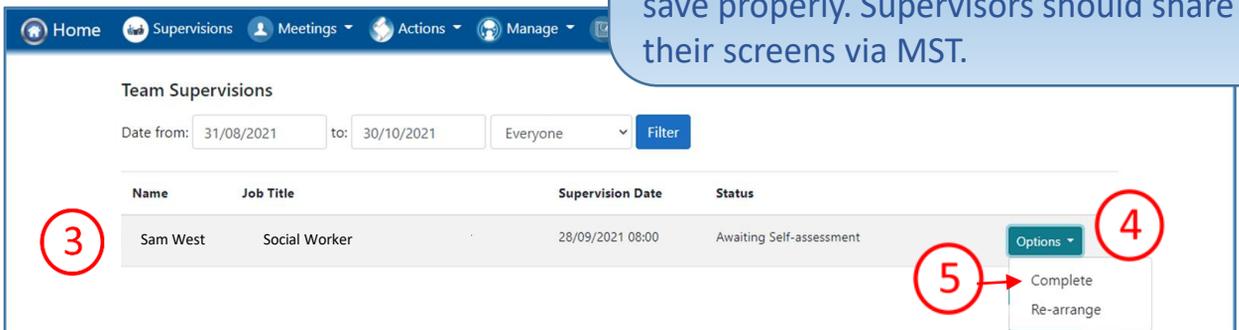
Completing a supervision

1. Select **Manage** from the tool bar
2. Select **Team Supervisions** from the menu



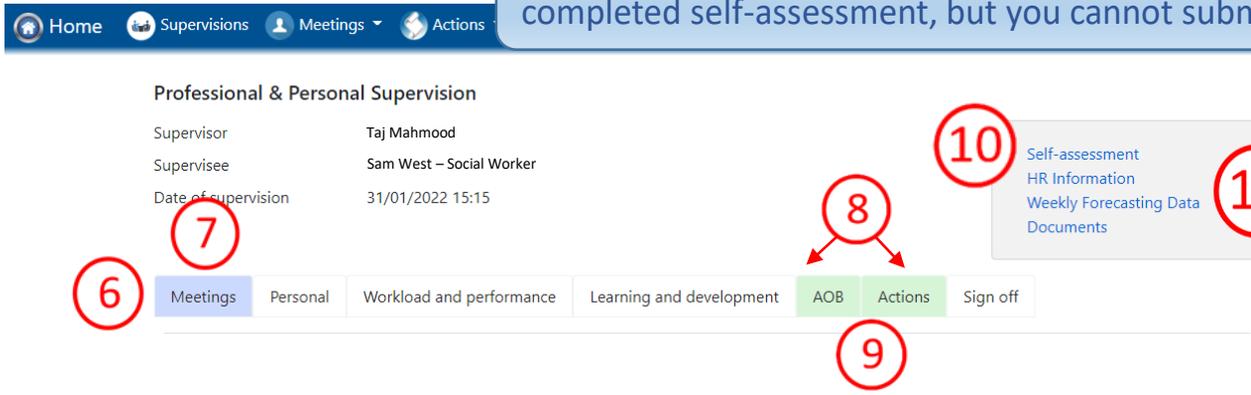
We don't recommend the supervisor and supervisee attempt to view the supervision record at the same time on different devices as records may not save properly. Supervisors should share their screens via MST.

3. Find the team member
4. Select **Options**
5. Select **Complete**



6. Access the 6 pages of the supervision (Meetings, Personal, Workload & Performance, Learning & Development, AOB, Actions) by clicking on the button in the menu bar.
7. A blue button tells you which page you are on.
8. Buttons go green when the page is fully completed.
9. Only AOB and Actions are optional. You need to fully complete all other pages before you can submit the supervision.
10. The self-assessment can be accessed via this route too.
11. The supervisee's HR and performance records can be accessed here. Documents can also be uploaded.

You can complete and save a supervision without a completed self-assessment, but you cannot submit it.



Reviewing meetings

The meetings tab records any general meetings that have been held since the last supervision

1. You can view the details of the meeting by selecting [view](#).
2. Add comments/updates in the Discussion points box
3. Add additional actions if required using the **actions** tab (see page 10)

The screenshot shows the 'Professional & Personal Supervision' interface. At the top, there is a navigation bar with icons for Home, Supervisions, Meetings, Actions, Manage, and Audit. Below this, a green notification bar states 'The record has been saved'. The main content area displays supervision details: Supervisor (Taj Mahmood), Supervisee (Sam West- Social Worker), and Date of supervision (31/01/2022 15:15). To the right, there are links for Self-assessment, HR Information, Weekly Forecasting Data, and Documents. Below the details is a tabbed interface with 'Meetings', 'Personal', 'Workload and performance', 'Learning and development', 'Actions', and 'Sign off'. The 'Meetings' tab is active, showing a table with columns 'Meeting Type' and 'Date'. A row is visible for 'Return to work' on '19/01/2022' with a 'View' link. Below the table is a 'Discussion points' section with a text area containing 'Meeting outcome agreed'. Red circles with numbers 1, 2, and 3 highlight the 'View' link, the 'Discussion points' text area, and the 'Actions' tab respectively.

Professional & Personal Supervision

The record has been saved

Supervisor Taj Mahmood
Supervisee Sam West- Social Worker
Date of supervision 31/01/2022 15:15

Self-assessment
HR Information
Weekly Forecasting Data
Documents

Meetings Personal Workload and performance Learning and development Actions Sign off

Meeting Type	Date	
Return to work	19/01/2022	View

Discussion points:
Meeting outcome agreed

For details about how to set up meetings see **S&A Database Setting up Meetings** guide

Personal

1. The Personal information page is free text but you must complete all the boxes.
2. Add actions for supervisor or supervisee if required using the **Actions** tab (see page 10 for further details)
3. **Save** when completed

Professional & Personal Supervision

Supervisor Taj Mahmood
Supervisee Sam West - Social Worker
Date of supervision 28/09/2021 15:00

Self-assessment
HR Information
Weekly Forecasting Data
Documents

Meetings Personal Workload and performance Learning and development **2** Actions Sign off

1 Health and Wellbeing:
How is work? Are there any personal issues the supervisee wants to discuss? Do you think this is impacting on work performance? What is the impact on work and how will the individual be supported? Does this information need sharing with anyone else? Work life balance discussion

free text

Sickness since the last supervision session:
If on sickness monitoring process is this working; are there any issues impacting on this to be aware of? Is additional support required and if so what?

free text

Leave remaining:
Has leave been taken regularly to support health and wellbeing?

free text

TOIL accrued / taken:
Is this evidenced in electronic diaries and is toil agreed in advance

free text

3 Save

Workload and performance

1. Complete the free text boxes

The record of audits since the last supervision will populate automatically

2. The audits can be viewed by selecting [View](#).
3. Audit actions can be viewed in the **Actions** tab. Further actions for supervisor or supervisee can be added if required (see page 10 for details)
4. [Save](#)

The screenshot shows the 'Professional & Personal Supervision' interface. At the top, there is a navigation bar with 'Home', 'Supervisions', 'Meetings', 'Actions', 'Manage', and 'Audit'. Below this, the supervisor and supervisee information is displayed: Supervisor: Taj Mahmood, Supervisee: Sam West - Social Worker, Date of supervision: 28/09/2021 15:00. A sidebar on the right contains links for 'Self-assessment', 'HR Information', 'Weekly Forecasting Data', and 'Documents'. The main content area has a tabbed interface with 'Meetings', 'Personal', 'Workload and performance', 'Learning and development', 'AOB', and 'Actions'. The 'Workload and performance' tab is active. Below the tabs, there are three main sections: 1. 'Review of workload:' with a free text box for input. 2. 'Audits since last Supervision:' with a table showing one audit record. 3. 'Performance Review:' with a free text box for input. A 'Save' button is located at the bottom left of the interface.

Professional & Personal Supervision

Supervisor: Taj Mahmood
Supervisee: Sam West - Social Worker
Date of supervision: 28/09/2021 15:00

Self-assessment
HR Information
Weekly Forecasting Data
Documents

Meetings Personal **Workload and performance** Learning and development AOB Actions

Review of workload:
How many cases? Do they think this is manageable? Does any action need to be taken to reduce case loads? Any closures? Capacity?

Free text

Audits since last Supervision:

Type	Case ID	Overall Grade	Date Completed	
Audit Moderation	223344	0	15/09/2021	View

Performance Review:
What are their strengths? Discussion regarding audits and any feedback from others regarding good practice. What does your data tell you about their performance? Practice Observations. Identified learning and development needs?

Free text

[Save](#)

Learning and Development

1. Complete the free text boxes
2. Add actions for supervisor or supervisee if required using the **Actions** tab (see page 10 for further details)
3. **Save**

Professional & Personal Supervision

The record has been saved

Supervisor: Taj Mahmood
Supervisee: Sam West - Social Worker
Date of supervision: 28/09/2021 15:00

Self-assessment
HR Information
Weekly Forecasting Data
Documents

Meetings Personal Workload and performance **Learning and development** Actions Sign off

1 **Continued professional development:**
What support is needed for learning identified from performance review or from worker's perspective? Has previous learning identified been completed – outcome and impact? What are their professional aspirations? Are they using the 3.5 hours per month CPD time?

Free text

3 **Personal Reflections:**
What impact do they think they are making? What achievements do they feel they have made this month? Is there anything they would do differently?

Free text

2 Save

AOB

This section can be left blank if desired. Actions can be added in the usual way. If you use it, don't forget to **Save**

Professional & Personal Supervision

The record has been saved

Supervisor: Taj Mahmood
Supervisee: Sam West - Social Worker
Date of supervision: 28/09/2021 15:00

Self-assessment
HR Information
Weekly Forecasting Data
Documents

Meetings Personal Workload and performance Learning and development **AOB** Actions Sign off

3 **Any other business:**

Free text

Save

Actions

The actions page lists all actions from supervisions, meetings and audits identified or completed since the last supervision.

1. You can also add actions from this supervision on this page using the **+ Add SMART Recommendation** button. See next page for details
2. Completed actions can be reviewed. Select **View**
3. Actions not yet completed can be edited and signed off during the supervision session. Select **Edit**. Actions open in a new tab on your browser.

Professional & Personal Supervision

Supervisor: Taj Mahmood
Supervisee: Sam West - Social Worker
Date of supervision: 31/01/2022 13:15

Self-assessment
HR Information
Weekly Forecasting Data
Documents

Meetings Personal Workload and performance Learning and development AOB **Actions** Sign off

1 Add SMART Recommendation

What outcome to be achieved	How SMART actions required to achieve the outcome	Due by	Assigned to	Completed
Free text	Free text	31/01/2022	Sam West	31/01/2022 2 View
Free text	Free text	01/02/2022	Sam West	3 Edit

4. To complete an action, select date completed and use the drop down calendar
5. You can also allocate the action to a different worker.
6. Add comments if required
7. **Save**.

Close browser tab. To return to the supervision, click on the Supervision tab already open in your browser. You may need to refresh  your page to see your amendments.

Edit Action

What needs to happen? Free text

Desired outcome Free text

When does it need to happen by 26/07/2021

Who for Sam West - Social Worker **5**

4 Date completed

6 Comments

7 Save

Add SMART recommendation

When you select Add SMART recommendation the recommendations page will pop up

1. Complete **What** and **How**
2. **Who**: You must use a name. Complete by typing in the first four characters and then select the correct name from the pick list.
3. **When**: Choose from drop down calendar
4. **Save**. The recommendation is recorded and can be edited in the **Actions** tab

SMART Recommendations - Specific, Measurable, Achievable, Relevant, Timely

What outcome to be achieved

Free text...

How SMART actions require to achieve the outcome

Free text...

Who is to carry out the action? - **This must be the name of the worker selected from the search results**

When - Deadline for completion

Save Cancel

1 (points to 'What' and 'How' text boxes)

2 (points to 'Who' label)

3 (points to 'When' dropdown)

4 (points to 'Save' button)

You MUST use the pick list: if you try to input a name the database does not recognise, YOUR RECOMMENDATION WILL NOT SAVE.

Sign off

1. Sign off the audit by selecting **Save** and then **Submit**

The screenshot shows the 'Professional & Personal Supervision' form. At the top, a navigation bar includes Home, Supervisions, Meetings, Actions, Manage, and Audit. Below the navigation bar, a green message box states 'The record has been saved'. The form fields show: Supervisor: Taj Mahmood, Supervisee: Sam West - Social Worker, Date of supervision: 28/09/2021 15:00. A sidebar on the right contains links for Self-assessment, HR Information, Weekly Forecasting Data, and Documents. A horizontal menu below the fields includes Meetings, Personal, Workload and performance, Learning and development, AOB, Actions, and Sign off. A blue message box indicates 'Self-assessment received'. At the bottom, a red circle with the number '1' highlights the 'Save' and 'Submit' buttons. The 'Last updated by' field shows '28/09/2021 13:07:20'.

This screenshot shows a confirmation dialog box titled 'Submit Supervision?'. The dialog asks 'Are you sure you wish to submit this Supervision?' and has 'Submit' and 'Cancel' buttons. A white callout box with a blue 'Submit' button is overlaid on the dialog, with the text 'You will need to confirm by selecting Submit'.

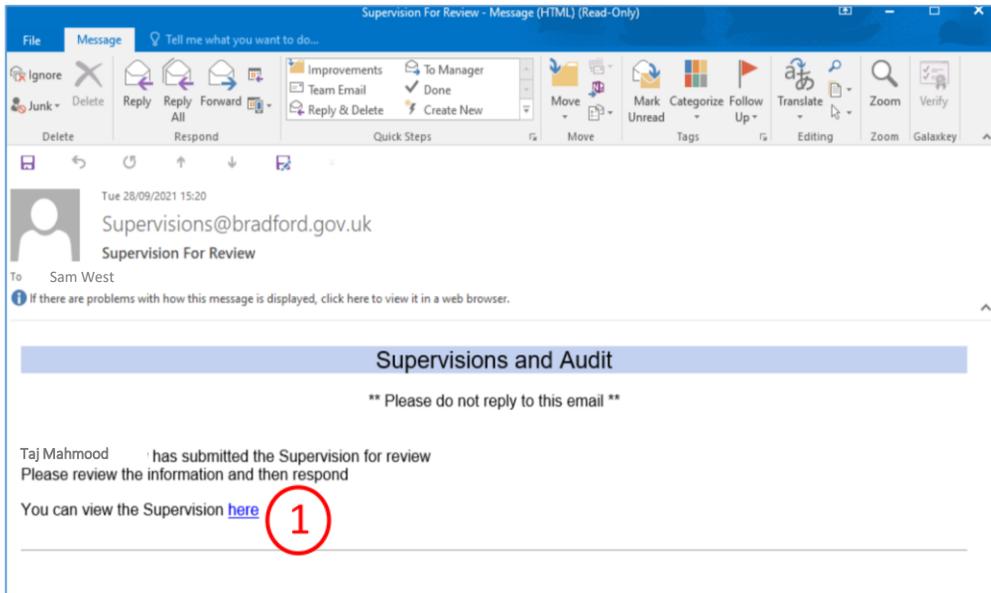
Your Team Supervision record will look like this:

The screenshot shows the 'Team Supervisions' table. At the top, there are filters for 'Date from: 29/08/2021 to: 28/10/2021' and 'Everyone' with a 'Filter' button. The table has columns for Name, Job Title, Supervision Date, and Status. One record is shown for Sam West - Social Worker, with a Supervision Date of 28/09/2021 15:00 and a Status of 'Awaiting agreement from Supervisee'. An 'Options' button is visible at the end of the row.

Name	Job Title	Supervision Date	Status
Sam West - Social Worker		28/09/2021 15:00	Awaiting agreement from Supervisee

Supervisee response

The supervisee will receive an email as follows:



1. The supervisee should review the notes by selecting the link in the email. The supervisee's supervision record will look like this:

Home Supervisions Meetings Actions Manage Audit

My Supervisions

Supervision Date	With	Status
28/09/2021 03:00	Taj Mahmood	Awaiting agreement from Supervisee

The supervisee cannot directly amend the record and should contact the supervisor to discuss any proposed changes.
The supervisor can make amendments if appropriate and re-submit the supervision.

2. When the record is agreed, the supervisee should check the box
3. Then **Save** and **Submit**

Home Supervisions Meetings Actions Manage Audit

Professional & Personal Supervision

Supervisor Taj Mahmood
Supervisee Sam West
Date of supervision 28/09/2021 15:00

Self-assessment
HR Information
Weekly Forecasting Data
Documents

Meetings Personal Workload and performance Learning and development AOB Actions Sign off

Awaiting sign off from to Supervisor

Agreed by Supervisee

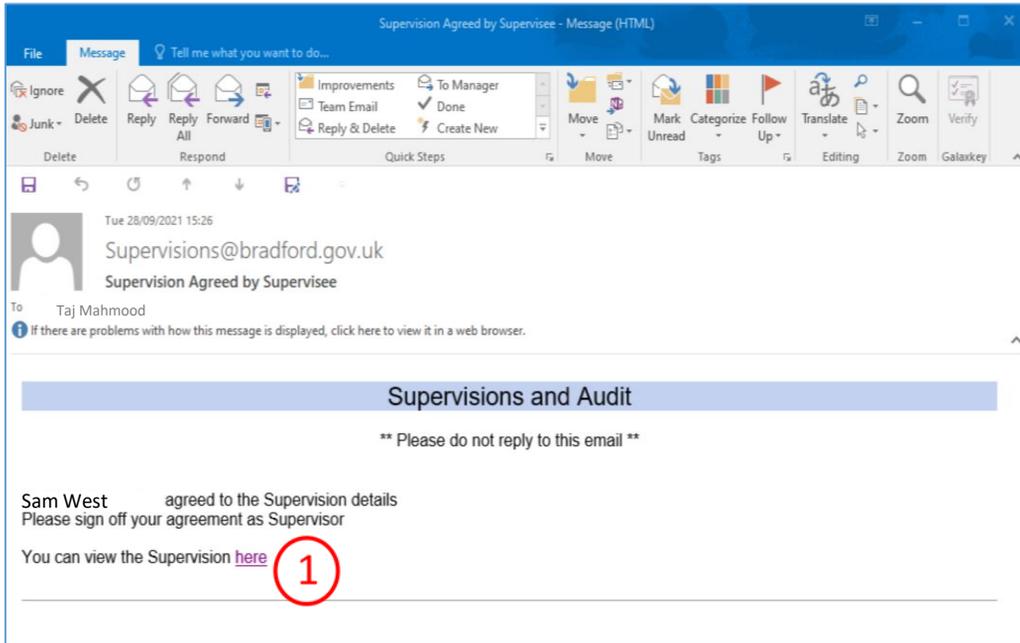
Last updated by

2 **3** Save Submit

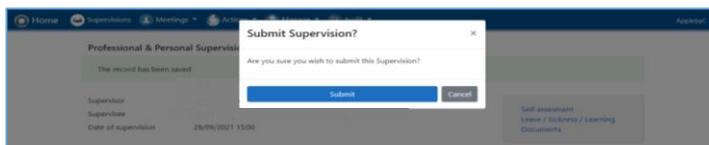
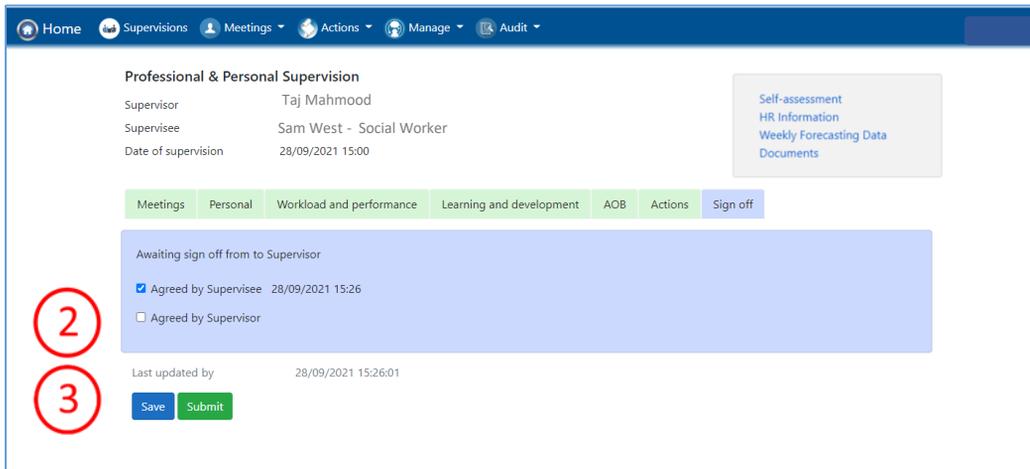
Final submission

You will receive an email from the supervisee to advise they have agreed the supervision

1. You can view the supervision record by selecting the link



2. Check the box Agreed by Supervisor
3. Sign off the audit by selecting **Save** and then **Submit**

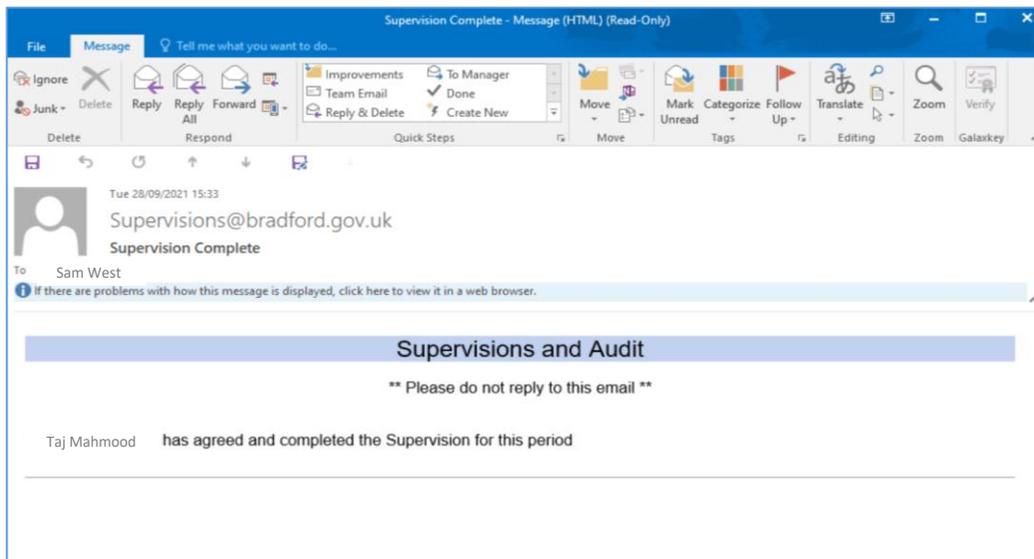


You will need to confirm by selecting **Submit**



Viewing completed supervisions

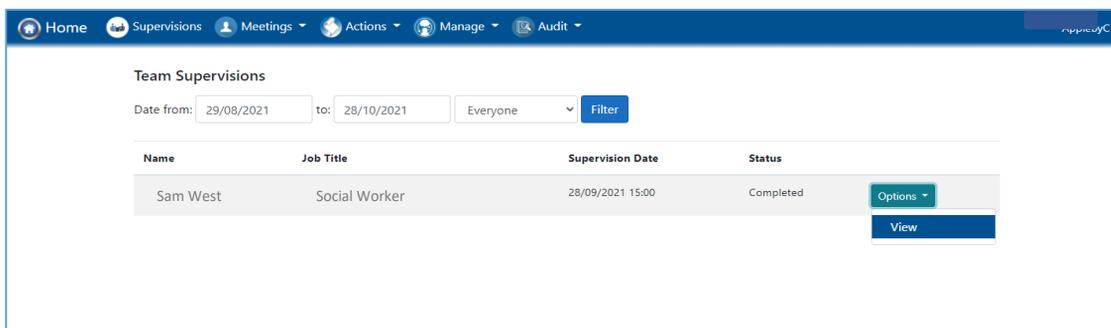
Supervisees will receive an email confirming the supervision has been completed.



Supervisees can view supervisions in the **My Supervisions** tab. They should select **Completed** to read the supervision details



Supervisors can read completed supervisions in the Team Supervisions tab. Select **Options** then **View**



Sam West - Social Worker

Self-assessment
HR Information
Weekly Forecasting Data
Documents

Sam West

Sam West

1