Job Planning API Interface - FAQ

1. Introduction

The Electronic Staff Record is part of the Workforce Services Directorate within the NHS Business Services Authority. ESR is managed by the NHS ESR Central Team and offers the provision of an integrated hire to retire workforce management solution for the NHS in England and Wales.

With increasing pressure on NHS budgets, the ESR solution is supporting organisations to reduce costs, improve workforce planning and management and empower NHS managers and employees to take ownership of their data.

NHS England (NHSE) research suggests that there is an average consultant pay misalignment in the region of 5-15%, equating to over/under payments at a single NHS Organisation being over £100k for Medical Consultants. NHS Organisations currently also struggle to perform the necessary reporting on Job Planning, due to the data not being recorded within ESR.

Following a period of research and consultation, involving a supplier reference group and a national provider job planning forum, NHSE advised this was due to two main factors: the ESR job planning forms requiring updates to previously agreed data items, and there not being a mechanism to transfer job plan information from third-party systems into ESR.

As a result of this, NHSE has engaged with the NHS BSA ESR team and asked for a solution to be developed.

2. Document Purpose

This FAQ document has been developed to assist existing and prospective users with some common questions, and to provide a brief overview of the Job Planning API Interface which has been developed to support NHS strategic ambitions.

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Contents

Frequently Asked Questions

1. About the interface

What is the purpose of the interface?

NHS Organisations may use third-party job planning systems to record job planning information. This information must then be manually entered into ESR.

Through collaboration with NHSE and third-party suppliers, a new ESR interface has been developed to facilitate the transfer of Job Planning data, from third-party Job Planning systems, into ESR. This will remove the need for manual entry of job-planning data into ESR and will ensure that the data within ESR accurately reflects that which is captured within the third-party system.

How does the data transfer work?

The relevant data will be taken from the third-party Job Planning system and transferred across into the new Job Planning form in ESR, where it will be available for reporting in ESR BI. An image of the form, including the relevant data items, has been presented below.

Field	Value
Effective Date	
Total Contracted Activities / Sessions	
Additional Programmed Activities / Sessions (APA / EPS)	
Total Contracted Direct Clinical Care (DCC)	
Total Contracted Supporting Professional Activities (SPA)	
Total Contracted Additional Responsibilities (ANR / AR)	
Total Contracted External / Other Duties (ED)	
Total Medical School Activities (MS)	
Total Additional to Contract (ATC) Across All Categories	
On-Call Frequency	
On-Call Category	
On-Call Supplement (% England and SAS / Band Wales)	
Total Operating Theatre Work	
Elective Operating Theatre Work	
Non-Elective Operating Theatre Work	
Total Outpatient Activities	
Ward Rounds and Inpatient Work	
Multidisciplinary Care	
Clinical Diagnostic Work	
Procedures	
Public Health Duties	
Research	
Teaching and Education	
Continuing Professional Development	
DCC Travel	
Non-DCC Travel	
DCC Administration	
Non-DCC Administration	
Private Professional Services	
Fee Paying Services	

What is the direction of transfer of the data?

The supplier-side API will only allow data to flow in one direction - inbound into ESR. No information will be sent back from ESR to the Job Planning systems.

When will a Job Plan be sent to ESR?

The point of transfer is expected to be once a job plan has received final organisational approval. The interface uses APIs which allow data to be received in real-time. As such, it is expected that these requests will be received and processed 24 hours a day, seven days a week, unless there is planned or unplanned NHS Interface Hub or ESR downtime.

When will the Job Planning API Interface be available?

The ESR technical delivery of the Job Planning API solution is complete. Implementations will be carried out in line with the development schedules of Third-Party Job Planning suppliers.

Currently, the interface has been developed and deployed with SARD and Allocate (RLDatix), however integration is welcomed from other suppliers.

Please contact your individual supplier for further information in this area.

2. Business Processes

What are the recommended business processes for an NHS Organisation to fully utilise the new functionality?
In order to fully utilise the new ESR functionality, it is recommended that an NHS Organisation implements the Job Planning API to then send all current active Job Plans into ESR from their third-party Job Planning System. Thereafter, any new signed off Job Plans are also sent to ESR, so ESR will always hold a copy of the new current active Job Plan.

ESR Reporting is available to run to compare the current Job Plans, sent in via the API, to the one entered in ESR against payroll.

What ESR reporting will be available?
The ESR team have developed a Reconciliation Report which will be available through ESR BI. The report is restricted to employees with a Staff Group of Medical and Dental.

The data will represent the latest Job Plan available for a user alongside payroll information. This will allow for comparisons against total contracted activities and oncall availability allowances to identify areas of over and under payment.

The analysis is available on the NHS Workforce Profile Dashboard and is available to the following URPs:
XXX BI Administration
XXX HR Administration
XXX HR Administration (With RA)
XXX HR Management
XXX Payroll Administration
XXX Payroll Super Administration

Further guidance can be found on the Dashboard page.

Do I need to cleanse my data before implementing the interface?
The interface has been designed to transfer the data as it exists in your third-party system, so there is no additional data cleansing needed ahead of implementation. However, implementation itself is expected to identify data errors that require correction, such as incorrect employee names or assignment numbers.

3. Troubleshooting and Support

How do I request the Job Planning APIs?

Once the implementation has been agreed with the third-party Job Planning supplier, NHS Organisations wishing to implement the Job Planning API Interface will need to raise a Service Request on the ESR Service Desk, under 'other systems interface'. For help on how to raise a Service Request on the ESR Service Desk, please refer to the guide available on the ESR Hub.

Is there a cost to this product?

This is a chargeable interface and will be subject to the standard charging model, including the one-off implementation fee and the ongoing annual support costs. NHSE have secured funding to cover these costs for the 25/26 financial year. This funding will be available on a 'first come, first served basis'.

For charges beyond the end of the 25/26 financial year, NHS Organisations will be advised on the specific cost to their Organisation as part of the standard invoicing process.

Who should I contact for support?

Depending on the specific case, issues may need to be resolved by your Third-party supplier, the ESR Support Teams or internal colleagues. Some examples of commonly faced issues are presented below to help signpost you to the correct support:

Issue	Support Source
Issues with the data to/from the Job Planning System e.g. appears to be incomplete, incorrect or isn't transferring properly	Please raise an SR on the ESR Service Desk and a member of the team will investigate for you
ESR login issues e.g. forgotten password, credentials not working	Please contact the ESR Service Desk
Requesting a new interface	Please raise an SR on the ESR Service Desk and fill in the mandatory details
Job Planning information is appearing multiple times	Please contact your Supplier to ensure they are not sending the same data in repeatedly
The incorrect data for an individual has been received into ESR or data is missing	Please contact your Supplier in the first instance to ensure they have sent the data correctly

4. Appendix

Contact Details for the ESR Functional Account Management Team

These are available on the ESR Hub using the following link:
https://my.esr.nhs.uk/dashboard/web/esrweb/about-communications-team

Document Library on the ESR Hub

A wealth of resources is available in the Document Library section of the ESR Hub which can be found here: ESRHUB_ROOT - Browse Content - ESR Hub - NHS Electronic Staff Record.

Additional resources and locations are available if you sign in to the ESR Hub using your ESR login details.