

Streamlined Doctors in Training Interface

Implementation Checklist

The answer to each of the questions below should be 'yes' in order to proceed with the implementation of the interface process.

- Have you received notification from your partner HEE Local Office/Deanery of the posts you will be hosting on their behalf?
- Is your partner HEE Local Office/Deanery ready to use the Streamlined Doctors In Training Interface and have you informed the local HEE Local Office/Deanery System supplier?

Please remember to obtain your Business Manager authorisation letter from your local HEE Office to attach to your Go Live Service Request.

- Are you aware which HEE Local Office/Deanery manages your training posts?

For example, some training posts are managed by a HEE Local Office/Deanery which sits outside of your Geographical Area, but the post has a local Deanery Post Number. **All Deanery Posts which are managed in this manner, i.e. a local training post managed by a non-local HEE Local Office/Deanery must ensure that the ESR Position form holds the correct managing HEE Local Office/Deanery details.** This will ensure the interface file is sent to the correct HEE Local Office/Deanery in order to update trainee information.

- Have you set up all positions relating to the Deanery Training Post?

Posts should be set up in your ESR hierarchy as soon as application is obtained from the HEE Local Office/Deanery. The ESR Service desk offers a Mass Update Service which can automatically add positions with DPNs into ESR for over 100 posts. This requires the Trust to complete a template. This service can be requested by raising an SR.

- Have you ensured that any training posts previously setup as 'Bucket Posts' have been amended to individual posts? One to one mapping should exist between the position number and the DPN i.e. only one position number in ESR should be

assigned to one DPN.

- Have you ensured that Deanery Post Numbers are entered on all your trainee doctor positions and that the posts are 'Active'?
- Do appropriate individuals have access to the Recruitment Administration URP and do they know how to use it?
- Have you allocated the 'Medical Staffing Officer' Notification role to someone within your Trust?
- Have you raised an SR with the NHS ESR Systems Integration Team to notify them of your wish to go live with the Streamlined Doctors In Training Interface?
- Have you raised an SR with the ESR service desk to request access to the Medical Rotations Notification?

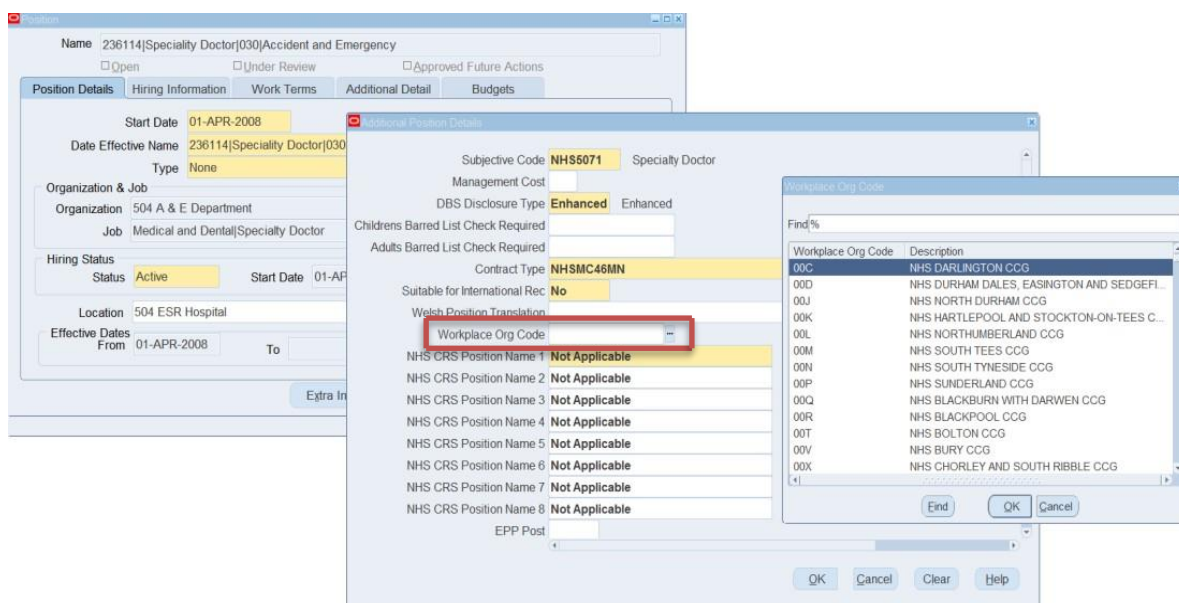
Notifications about changes to the placement will be automatically generated to the MSO role holder as a feature of the interface. The Medical Rotations Grid will also be made available via the notifications. This grid is a snapshot of all the current and next placements at the NHS organisation. However, as this contains personal information of doctors in current and next placements at the Trust, the access is via a user name and password.

- Have you added the Workplace Organisation Code onto your ESR Positions where applicable?

The Workplace Org Code field can be used to record when employees are based in a workplace that is different from their employing organisation. This satisfies the Data Warehouse requirement to report on a person's actual Workplace Organisation as distinct from their Employing Organisation and also NHS Digital reporting requirements, NHS Improvement Model Hospital activity unit costs and for calculating NHS Litigation Authority premiums.

This field should be populated if the employee is working in a location that is different to that of their employer. For example, they are employed by a Lead Employer, but are working offsite at a Host Employer. *Note: the Workplace Organisation Code should capture the location of where the employee is working,*

not who their employer is. If the employee is working at the same location as their employer, this does not need to be filled in.



Have you agreed the use of the Pre-employment IAT for rotating Doctors externally during their training programme?

Has an agreement been reached on management of training posts which require training outside of the organisation?

For example, a programme run and hosted within your trust, but part of that training involves a placement off site, or, only part of the programme is run within your organisation, but the remainder of the placement and pay arrangements are managed by an external Trust.

Local awareness of date tracking in ESR / update and correct / insert & replace.

Are you aware of the considerations around using TRAC with the TIS/ESR Interface if applicable to your organisation?

Note: more information can be found in the *Streamlined Doctors in Training Interface with TIS – FAQs* which can be found on the My ESR Hub.



Electronic Staff Record

