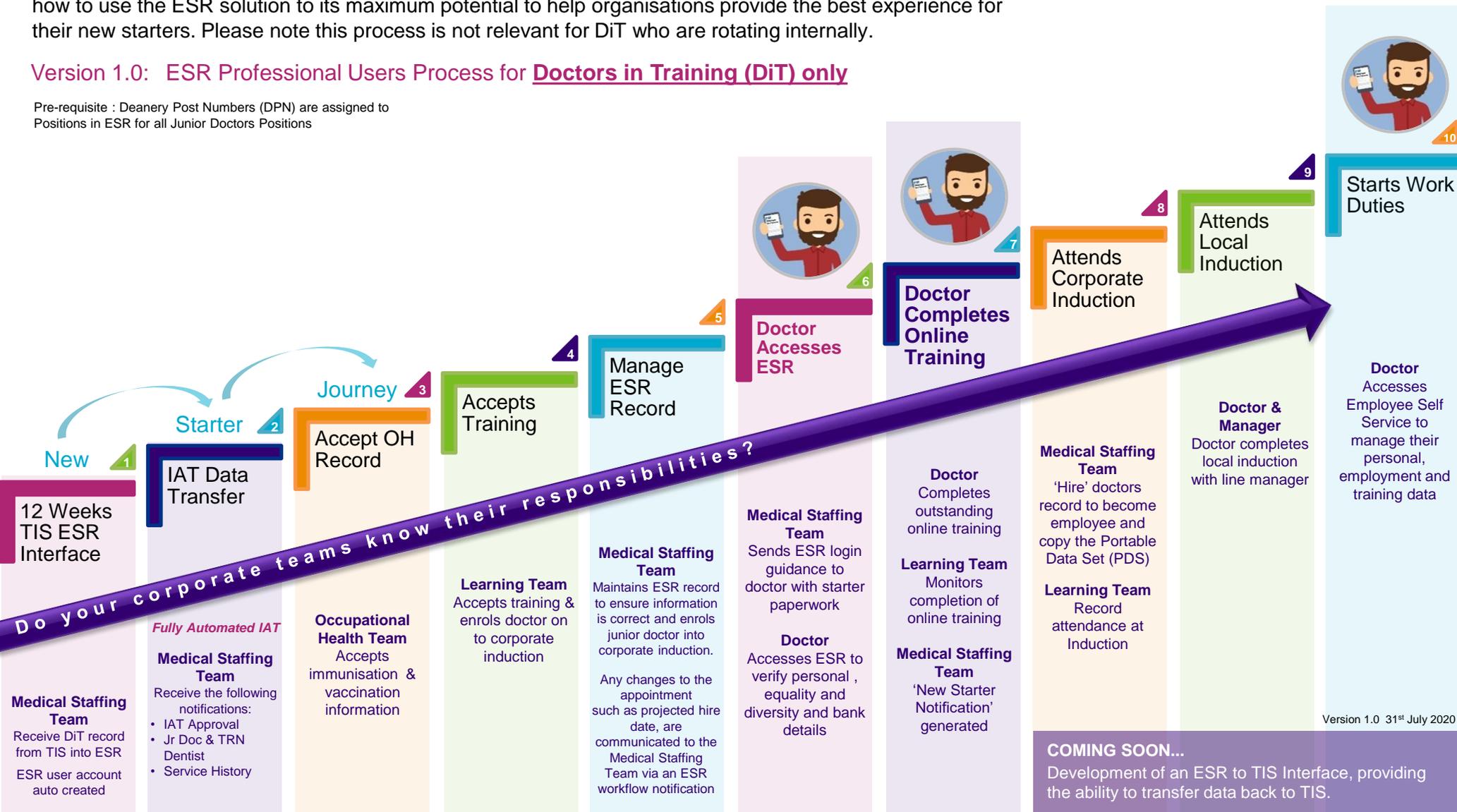# New Starter Journey - Doctor in Training (DiT)

The New Starter Journey is designed to outline the simple 10 step process for all new starters, describing how to use the ESR solution to its maximum potential to help organisations provide the best experience for their new starters. Please note this process is not relevant for DiT who are rotating internally.

Version 1.0: ESR Professional Users Process for **Doctors in Training (DiT) only**

Pre-requisite : Deanery Post Numbers (DPN) are assigned to Positions in ESR for all Junior Doctors Positions

Do your corporate teams know their responsibilities?

New 1

12 Weeks TIS ESR Interface

Medical Staffing Team
Receive DiT record from TIS into ESR

ESR user account auto created

Starter 2

IAT Data Transfer

Fully Automated IAT

Medical Staffing Team
Receive the following notifications:
• IAT Approval
• Jr Doc & TRN Dentist
• Service History

Journey 3

Accept OH Record

Occupational Health Team
Accepts immunisation & vaccination information

4

Accepts Training

Learning Team
Accepts training & enrols doctor on to corporate induction

Manage ESR Record

Medical Staffing Team
Maintains ESR record to ensure information is correct and enrols junior doctor into corporate induction.

Any changes to the appointment such as projected hire date, are communicated to the Medical Staffing Team via an ESR workflow notification

5

Doctor Accesses ESR 6

Medical Staffing Team
Sends ESR login guidance to doctor with starter paperwork

Doctor
Accesses ESR to verify personal , equality and diversity and bank details

Doctor Completes Online Training 7

Doctor
Completes outstanding online training

Learning Team
Monitors completion of online training

Medical Staffing Team
'New Starter Notification' generated

Attends Corporate Induction 8

Medical Staffing Team
'Hire' doctors record to become employee and copy the Portable Data Set (PDS)

Learning Team
Record attendance at Induction

Attends Local Induction 9

Doctor & Manager
Doctor completes local induction with line manager

Starts Work Duties 10

Doctor
Accesses Employee Self Service to manage their personal, employment and training data

Version 1.0 31st July 2020

COMING SOON...
Development of an ESR to TIS Interface, providing the ability to transfer data back to TIS.

New Starter Journey – <u>Doctors in Training (DiT) only</u>

This document sits alongside the New Starter Journey diagram for Doctors in Training (DiT) by outlining the details of each of the steps. It describes the processes, tasks and the team responsible for each step to ensure the journey is followed to deliver the best outcome for the doctors.

1 | 12 Weeks TIS ESR Interface

The Streamlined Doctors in Training Interface transfers information from the Trainee Information System (TIS) to ESR, up to 12 weeks before the doctor's hire date. As it's transferred it creates an applicant record in ESR with the appropriate position, which has been previously associated with the correct Deanery Post Number (DPN). This is the applicant record which will be 'hired' by the Medical Staffing Team in Step 8, thereby converting the record from applicant to employee. Once transferred, ESR automatically generates an ESR user account for the doctor.

2 | IAT Data Transfer

The ESR Inter Authority Transfer (IAT) process is the mechanism in which data is transferred between NHS organisations. For Doctors in Training the IAT process is run <u>automatically</u> when the ESR record is created. The process sends a range of data via workflow notifications to nominated role holders in Medical Staffing, Occupational Health (see Step 3), Learning Team (see Step 4). It is recommended there are nominated role holders within Medical Staffing to enable them to receive:
- IAT Initiator & PDS Notification role holders will receive a 'IAT Approval' notification (please note Local PDS Notification roles can be set up)
- Medical Staffing Officer role holder will receive a 'FYI Junior Doctor & Trainee Dentist Pre-Employment' notification
- IAT Service History role holder will receive 'IAT NHS Service History' notification

3 | Accept OH Record

As a result of the IAT process, the 'Pre-IAT FYI Notification for XXX' is sent to the nominated 'Occupational Health Admin' role holder outlining any known Immunisation and vaccinations data held on the doctors. The NHS Occupational Health Assessment details can be copied into the doctors record by clicking on the 'Copy OH Assessment Data' button. Transferring these records in a timely manner will eliminate the need for duplicate checks and repeat immunisations, therefore can speed up the Occupational Health Clearance process.

4 | Accepts Training

As a result of the IAT process, the 'NHS IAT Stat and Mand Competence Approval' notification is sent to the nominated 'Stat & Mand Competencies Ntf' role holder outlining all valid national competencies (including CSTF). The role holder needs to review the competencies and choose to accept, edit or decline the competencies into the doctor's ESR record. These competencies will be automatically measured against competency requirements set for the doctor, thereby providing a clear and accurate compliance matrix available in the 'My Competency' portlet in the ESR Portal. It will also trigger the auto-enrolment process and enrol the doctors where possible into the relevant training.

5 | Manage ESR Record

It is essential the doctor's ESR record is checked and effectively maintained due to the dependency of this data on other area of the system. The Medical Staffing Team must check the doctors record to ensure the correct position has been allocated (DPN association), email address is in office details tab, Date of Birth and National Insurance number are recorded. This will ensure the correct competency requirements are applied, auto enrolment can run effectively, the compliance matrix is accurate, enable the doctor to request their username and reset their password and will facilitate ESR workflow notifications to be sent directly to their email account. In addition, the Medical Staffing Team must enrol the doctor into corporate induction and also manage any changes to the appointment through the workflow notifications sent to the nominate 'Medical Staffing Officer' role holder.

New Starter Journey – Doctors in Training (DiT) only

Continued... Step 6 – 10 below.

6 — Doctor Accesses ESR

Medical Staffing Team can either send the doctor their ESR login and password as provided in the workflow notification sent to nominated 'Auto User Account Details' role holder or they can simply provide the ESR URL www.my.esr.nhs.uk, with guidance on how the doctor can click on 'Forgotten | Request Username/Password | Unlock Account' link on the ESR login page and follow the instructions to receive their username and reset their password. *Please note this is reliant on the email address being entered into the office details tab as outlined in Step 5.*
Once logged in, the doctor can update / confirm personal, equality & diversity and bank account details using the various portlet in the ESR Portal.

7 — Doctor Completes Online Training

Using the 'My Compliance' portlet in the ESR Portal the doctor can clearly view and complete outstanding online statutory and mandatory training as per the competency requirements set by the Trust. This is because the Trust has followed the New Starter Journey, fully utilised ESR functionality including competency requirements and the relevant teams have completed the IAT process outlined in Step 2-4. Where online training is not suitable, the doctor can book themselves on suitable classroom based training (dependant on local ESR configuration). If the Learning Team has undertaken this task, the date, time and location of the training will be available alongside the corporate induction details on the Learner Homepage.

8 — Attends Corporate Induction

The doctor attends the Trusts corporate induction on their first day, which includes guidance on how to user Employee Self Service. The Learning Team monitor their compliance for all Stat and Mand training and record their attendance for corporate induction.
In ESR, the Medical Staffing Team date track to the doctors start date and 'Hire' the doctors applicant record in ESR, thereby ensuring all historical personal, employment, training and data is retained. The doctor is now classed as an 'Employee' and therefore the Medical Staffing Team are also required to copy the Portable Data Set (PDS) by clicking on the 'Perform Portable Data Set Copy' in the IAT notification, which concludes the IAT process.

9 — Attends Local Induction

The doctor attends local induction with the line manager and completes any local orientation required.

10 — Starts Work Duties

The doctor can now use Employee Self Service to access their personal, employment and training data, thereby providing them access to their online payslips, P60's and to maintain statutory and mandatory training compliance.

If your Trust has implemented Manager Self Service, the doctor will be able to perform more activities which require manager approval or interaction.