

National Learning Management System (NLMS) Pilot sites confirmed

The National Learning Management System (NLMS) project, which will make national elearning content available to all NHS employees in England with a staff record on ESR, is on schedule to commence piloting in June of this year, as confirmed in earlier issues of ESR News.

The joint initiative between the Department of Health, NHS Connecting for Health and the Electronic Staff Record (ESR) project, the NHS Core Learning Unit and e-Learning for Healthcare will involve extending the Oracle Learning Management module currently available through ESR to include access to the national elearning course catalogue.

After a period of consultation and review, eighteen pilot sites have been selected from a wide range of NHS organisation types, to ensure a representative sample. Work commenced from the end of April to agree the scope of each pilot site, verify project plans, undertake prerequisite work and start the general preparation for the pilot phase activity in June.

At a national level, the objectives of the pilots are as follows:

- to demonstrate that the new elearning functionality works
- to test that content from a range of local and national providers can be played and learner progress tracked

successfully through the application ● to confirm that the method to implement the elearning functionality, as described in the OLM Implementation Guide, is robust.

We look forward to working with the pilot organisations with a view to offering full access to national elearning content for all NHS organisations in England from September this year.

The OLM Implementation Guide is accessible on Kbase at <http://esr.knowledgebasesolutions.com/>. Further support documents will be added when available.

SHA	Trust Pilot sites
East Midlands	Nottinghamshire Healthcare NHS Trust
East of England	Addenbrooke's Hospital, Cambridge University Hospitals NHS Foundation Trust
	Norfolk & Norwich University Hospital NHS Trust
London	Guy's and St Thomas' NHS Foundation Trust
	King's College Hospital NHS Foundation Trust
North West	Manchester Mental Health & Social Care Trust
	Liverpool PCT
South Central	Berkshire Healthcare NHS Foundation Trust
	Oxford Radcliffe Hospitals NHS Trust
South East	East Kent Hospitals NHS Trust
South West	Royal Cornwall Hospitals NHS Trust
	Royal Devon & Exeter NHS Foundation Trust
	The Royal Bournemouth & Christchurch Hospitals NHS Foundation Trust
North West	Clatterbridge Centre for Oncology NHS Foundation Trust
West Midlands	Heart of Birmingham Teaching Primary Care Trust
	University Hospitals Coventry & Warwickshire NHS Trust
Yorkshire & Humberside	Humber Mental Health Teaching NHS Trust
	Sheffield Teaching Hospitals NHS Foundation Trust

May Update from Programme Director Simon Willcock



Welcome to the May edition of ESR News. In this edition we focus on the response to the User Satisfaction Survey that was conducted last December (thanks to all who

contributed to this), the forthcoming introduction of the interface to the Deanery systems, the improvements we are making to Kbase, our Knowledge Management System, following user feedback, and the progress we are making towards the delivery of the National Learning Management System. I hope you find it both interesting and useful. If you do have comments or suggestions about how we can improve this publication, then please contact us at esrcommunications@mckesson.co.uk

Action to Improve User Satisfaction

The User Satisfaction Survey undertaken by McKesson in December 2007 has provided a clear steer on those areas of the service where Users felt improvements were needed.

The main areas identified were:

- the release process
- the knowledge and empathy of support
- the speed of Service Request (SR) response
- more personal interaction
- speed of answering queries
- improvements in the local handling of queries
- more highly skilled super users locally.

The Release Process

Action to address most of the areas listed has already begun. Improvements in the release process are already in place. New quality checks in the release and testing process have been introduced together with an impact assessment review involving a panel of Trusts. A reorganisation of internal teams will be completed in June.

Knowledge and Empathy of Support

A programme of cross-training of all McKesson support staff began in December and is continuing. This, together with customer service training, is aimed at improving knowledge and empathy of the support function. Further reorganisation of the support teams, including alignment with Service Delivery Managers, is planned for completion in June this year.

Speed of Response and More Personal Interaction

Improvements have been made in the speed of SR response with the implementation of a measurement and reporting regime which analyses the SRs within the Application Support team. Further improvements will result from extending this to other teams and by providing extra resource to address design and development SRs. Measures to improve and increase the frequency of phone call interaction from the support team were introduced in March.

Local Handling of Queries and More Highly Skilled Local Super Users

Currently, a large number of the SRs raised are queries about how ESR functions, rather than faults with the system, and McKesson has recognised that major improvements in service and customer experience could be achieved by helping NHS organisations become more expert in using the ESR system. To address this, a pilot programme is being developed for a two month trial in June which will provide specialist support and training to super users in a number of organisations so that they are better equipped to resolve functionality queries locally.

Two further initiatives have already begun which will improve user experience in the areas identified in the survey:

- A detailed review of the end-to-end payroll business process is underway, together with a review of the reports required in the payroll process. Outcomes of this review will result in revised guidance to promote best practice and allow users to experience optimum system performance.
- A new McKesson Customer Support Page for ESR is being piloted in May which will provide an improved communication channel to active users, better access to the User Manual and other essential documentation, together with urgent messaging where necessary.

Progress against this action plan will be reviewed at the ESR Project Board and future satisfaction surveys are proposed to measure the resulting improvement in service experience.

Latest RA5 Update

The third RA5 meeting held on 24th April, has seen a further 8 organisations achieve the RA5 standard at green and a further 5 have reached green, with some recovery items. Many congratulations to all the organisations involved!

GREEN RA5 pass

- Blackpool, Fylde and Wyre PCT
- Bury PCT
- Heywood, Middleton and Rochdale PCT
- Knowsley PCT
- Papworth Hospital NHS Foundation Trust
- Pennine Acute Hospitals NHS Trust
- Pennine Care NHS Trust
- Stockport PCT

GREEN RA5 pass with some recovery items

- Bassetlaw PCT
- Devon Partnership NHS Trust
- Plymouth Teaching PCT
- Queen Mary's Sidcup NHS Trust
- Worthing and Southlands Hospitals NHS Trust

Finance Post Go-live Workshops – a New Programme

For 3 months, starting in June 2008, the ESR Interface team will be delivering Finance workshops in all Strategic Health Authority areas in England and Wales. These sessions will provide an overview of all the processes and functions connected to the finance within ESR, including the NHS interface hub. All finance staff involved with financial code mapping, reporting, reconciliation and the technical functions of retrieving the General Ledger file should attend.

The session will cover lessons learnt and best practice advice, as well as providing an opportunity to ask questions as a group or individually after the presentation.

Dates are currently being agreed with the ESR Lead Account Managers, who will be managing the attendance list and the booking of venues. Where possible the sessions will be arranged in conjunction with the local Finance Special Interests Groups (SIGs).

Achieving Data Quality

The Data Quality workshops led by the Information Centre are due to take place again this month, as featured in the last issue of ESR News. At the workshops held last year a number of organisations discovered that they had inadvertently set up their Positions incorrectly. In particular, they had allocated an incorrect Staff Group/ Job Role and Workforce Reporting had been distorted at a local level as a result. When organisations have attempted to correct this problem, they find that Staff Group and Job Role are core features of the underlying Oracle application on which the ESR solution is based, and therefore cannot be amended.

Guidance on setting up new positions can be found under the End to End Processes section in Kbase under Useful Documents Associated with the ESR Project > Generic > ESR End to End Process. Further information on appropriate Staff Groups and Job Roles can be obtained in Useful Documents Associated with the ESR Project > Implementation > Data Management > Data Migration > A Guide to Job Roles, Staff Group and Area of Work.

The current 'workaround' to correct this issue is lengthy. A new Position has to be created and the old incorrectly defined details replaced. Staff then have to be reassigned to the Position with the correct details. If many positions have been set up incorrectly, this process can take some time to put right. To correct this, the Central team and McKesson are currently scoping the requirement for an automated workaround which will allow a simple 'find and replace' mass update. Further details will follow once available.

It is important to understand the impact of poor data quality on reporting beyond local level. The SHAs and National Reporting bodies, such as the DH and Information Centre, all use the information in the Data Warehouse. Poor quality data can have a significant impact on management decisions and planning so it is vital that the Data Warehouse reports accurate information.

Pre-requisites for Using the Deanery Recruitment Interface



The Deanery Recruitment interface is due to be released at the end of May 2008. This interface will enable the transfer of personal data to ESR directly from the Deanery system.

To be ready to use the interface in time for the August start date for many Doctors in Training, there are a number of preliminary steps which NHS organisations should undertake in advance. A User Guide will be available shortly to inform ESR users about the use of the interface, but it will be helpful to begin to plan the project by gathering information and considering the following questions:

1. Is your partner Deanery ready to use the interface?
2. Do the Medical Staffing Officers (or individuals responsible for recruitment of Doctors in Training) have access to the Recruitment Administration URP? Have they been trained to use ESR?
3. Have you set up your Positions with Deanery Post Numbers?
4. Have you altered all of your training posts which were previously set up as 'Bucket Posts' to single posts?
5. Have you allocated the new 'Medical Staff Officer' Notification role to someone within your Trust?
6. Have you confirmed your approach on rotating Doctors in Training internally through ESR Functionality?
7. Have you set up the workplace organisation code for training posts that you host on behalf of another NHS Trust?
8. Have you agreed the use of Inter Authority Transfer (IAT) for rotating Doctors in Training externally during their training programme?
9. Have you received notification from your partner Deanery/Deaneries of the posts you will be hosting on their behalf?
10. Are you aware which Deanery manages each of your training posts? For example, sometimes training posts are managed by a 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 Deanery must be managed carefully.
11. Are you ready/able to set up vacancies for those posts once the Deanery notify you of selection outcomes?

Post Go-live Kbase Review

Kbase is the Knowledge Management System which provides information about:

- the functionality and benefits realisation of ESR
- the other systems that ESR interfaces with, such as e-Learning, Pensions and the Data Warehouse.

Now that the ESR System has been fully rolled out, the information on Kbase has been rationalised to ensure it is up to date and relevant. Some changes have taken place in the layout and design of the system which will hopefully enable users to find information more quickly and with greater ease. The main changes to note are:

Frequently Asked Questions (FAQs)

The NHS Central team have undertaken a review of all the Frequently Asked Questions. All FAQs have been fully reviewed for accuracy and relevance and have now been relocated to the appropriate functionality, initiative or hot topic section to ensure users can find this information more easily. The 'Ask a Question' functionality has been removed from Kbase in order to ensure that users are logging system functionality issues through the correct system - Remedy. All users should be referring to the User Manual for answers to their queries in the first instance and if this does not address them then they should be logged onto the Remedy system. This will ensure a full response from the McKesson or the NHS Central team. For more details on raising a Service Request (SR) through the Remedy system please refer to the document S-2350 ESR Help Desk User Guide for Live Customers v2.0 which can be found on Kbase under Useful Documents associated with the ESR Project > Implementation > Help Desk - Remedy.

The Search Engine

Following user feedback collated from the Benefits Realisation team, the search engine on Kbase has been modified in order to increase usability and ensure that more items of relevance are returned in any searches made. Users can reduce the amount of articles which are returned in a search if required. The document

'Basic and Advanced Search' under 'Getting to know your way around Kbase' provides details on how to use the search engine to its maximum potential.

Additions Made to Kbase to Increase Usability

Other changes we have made to the system to aid usability include:

User Notice Library – this is one of the most popular areas of Kbase and access to this section is now available direct from the front page. All User Notices which have been issued are stored on Kbase for reference purposes only. Please note Kbase is not the primary distribution route for User Notices and if you need to receive these as they are issued then you should contact the person within the Employing Authority who controls the membership of the group email address which the User Notices are sent to.

Placing Contents Lists in Alphabetical Order – where appropriate we have placed the contents lists in alphabetical order to ensure users can navigate through Kbase in a more straightforward and simple way.

Modification Dates on Articles – we have enabled a 'date modified' function on the articles so users can see when a section was last updated or added to.

Contact Details for the Kbase Administrator – at the bottom of every page on Kbase there is an email address which can be used to contact the Kbase administrator with any queries or issues relating to the use of Kbase. This address should not be used for ESR system issues. The contact email is kbaseadmin@mckesson.co.uk

Navigation Path - a navigation path has been designed to enable users to see exactly which area of Kbase they are in at any one time and allow them to move backwards and forwards within the sections.

User Notices

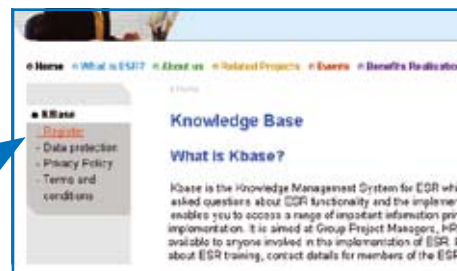
The NHS Central team would like to reiterate that Kbase only provides a reference library for users who wish to look for previous User Notices. These are generally loaded onto Kbase within 24 hours; except if they are received after 5pm on Fridays, in which case they are loaded the following Monday morning (or Tuesday in the event of a Bank Holiday). Kbase should not be used as a primary source for User Notice updates.

Documentation

Due to the IT security settings on PCs within some organisations, some documentation available on Kbase may not open up immediately. This is not a Kbase system issue, it is related to the security settings determined by an organisation's IT department for internet sites. Kbase documentation is still accessible to these users but requires them to complete an additional step of saving the document to their PC locally before they can then open it.

How to Register on Kbase

To register as a user on Kbase go to <http://www.esrsolution.co.uk/kbase> Click on the 'register' link on the left hand side and it will take you to the registration page. You will need to fill in your details and you will be sent an automated email with your login and password details so you can access Kbase. Please be aware that due to some security settings on PCs, you may not receive the automated registration email. If you have not received your user registration details within 3 days, please contact kbaseadmin@mckesson.co.uk or call **01926 478808**.



ESR at the Heart of Intelligent Management in South Central Ambulance Service NHS Trust



(from left):

Will Hancock
Chief Executive
Fizz Thompson
Director of Clinical Services
Vince Weldon
Director of IM & T
Sharon Walters
Director of Human Resources & OD
Ian Ferguson
Director of Operations
Charles Porter
Director of Finance
Natalie Edwards
Director of MAD Associates – Programme Manager for IMP/ESR

The implementation of ESR presented South Central Ambulance Service NHS Trust (SCAS) with a real opportunity to drive the organisational change needed to create the new Trust, following the merging of four ambulance services in July 2006. Driven by the Trust Board, this extremely complex implementation was led by Programme Manager Natalie Edwards of MAD (Make a Difference) Associates.

South Central Ambulance Service NHS Trust provides a service across Hampshire, Berkshire, Oxfordshire and Buckinghamshire. The Hampshire division of the Trust has been live on ESR since September 2005, with the three remaining payroll groups going live as part of Wave 10, in early October 2007.

The Intelligent Management Programme was designed for SCAS by Natalie in the lead up to the full ESR go-live. It is made up of six inter-related projects, which places ESR at the heart of corporate activities within SCAS, interfacing any systems involving workforce, related costs and activities. SCAS's vision is to increase corporate effectiveness from partnership working across Finance, HR, IT, Training and Operations, to support frontline service delivery. Vince Weldon, Director of Information Management and Technology defines ESR as; "the single source of truth for workforce management information across the organisation".

Much has been achieved already. The initial implementation of ESR is complete.

A review of processes and procedures across the divisions has resulted in a new set of standards, procedures and controls based around ESR functionality. NHS Jobs, with its interface to ESR, is in use across the organisation. Further plans are in place to fully implement ESR functionality, once the four Virtual Private Databases (VPDs) are merged this May.

Following merger of the VPDs, the Trust will be collating all training records into OLM/Talent Management and setting up the catalogue to support its annual training programme. Work with the IM&T team will ensure that ESR will then be interfaced with other systems requiring staff information, as well as a new single

corporate e-rostering system. Close working with Finance has ensured plans are in place to manage the Trust's funded establishment on ESR, with an agreed control procedure for signing off changes to work structures and budgeted establishment.

Sharon Walters, Director of Human Resources said; "We have just transferred from four external payroll providers into one and the next major milestone is the merger of our four VPDs in May. Only then can we really make progress in unifying workforce management practice and reporting, implementing OLM, interfacing with a single e-rostering system and open up self service functionality to maximise ESR benefits."

Oracle learning Management (OLM) 2008 Launch Events - Reminder

As reported in last month's ESR News, following growing interest in the ESR Oracle Learning Management functionality, the NHS Central team and Oracle UK are delivering a series of OLM Executive launch events across the ten Strategic Health Authorities (SHAs) during May and June 2008. The first of ten events (one per SHA) will provide NHS HR and Workforce Directors with an insight into the strategic and operational benefits of

OLM and NLMS. These events will be followed up by a further ten events, two to three weeks later, for training and workforce leads, providing greater detail about the OLM and NLMS functionality. Invitations for these events have been distributed by the ESR Central team. To ensure your place please respond to your invite or contact your local ESR Account Manager Lead. Further details can be found at: <http://www.esrsolution.co.uk/projects/nlms/>