

ESR Super User Support Pilot

Following feedback from Trusts in the Customer Satisfaction Survey at the end of 2007, McKesson and the NHS Central team have been keen to develop an approach to improve the user experience.

Work was immediately undertaken to consider how the support teams could improve their service while assisting local organisations to become more empowered in their use of the system. This led to the ESR Super User Support Pilot, which began in July 2008. The pilot project, consisting of 10 sites, was aimed at training and equipping ESR Payroll Super Users to enable them to resolve potential issues. A training course was held at McKesson's Warwick office which included advanced payroll topics and the use of new support tools, alongside visiting the facilities and teams that support the whole ESR service. The support tools include an ESR Information Screen with Alert Notices,

User Notices, an ESR Wiki (an information repository for ESR) with links to a User Guide search engine, the Remedy Helpdesk system and ESR itself.

One of the measures for a successful pilot was a reduction in the number of simple queries raised as Service Requests (SRs) with McKesson by the pilot sites. The results were very positive, with an overall reduction of 28% and a reduction of 54% for the high volume Trusts. Also, customer satisfaction questionnaires were sent out to the pilot sites pre and post pilot and improvements were shown across the board.

Plans are now being formulated for a rollout of the Customer Portal to Remedy users by the end of the year and discussions are underway on the best approach to roll out the Super User training by McKesson and the NHS Central team.



The tools used to support the pilot staff have recently been shown at the payroll SIGs alongside the rollout of the Payroll Best Practice.

We would like to offer our thanks to all the pilot sites and to the individuals involved for all the time and effort they have invested over the past few months.

October RA5 Successes

At the RA5 Board meeting held on 21st October, 13 organisations achieved their RA5 standard, with a further 24 organisations achieving their RA5 with some recovery items.

Many congratulations to all concerned!

GREEN RA5 Pass:

- Airedale NHS Trust
- Cambridgeshire PCT
- Gloucestershire PCT
- Guy's & St Thomas' NHS Foundation Trust
- Hampshire Partnership NHS Trust
- Hillingdon Hospital NHS Trust
- Leicester City Teaching PCT
- Bath & North East Somerset PCT
- South Central SHA
- South West SHA
- St Georges NHS Trust

- Walsall Hospital NHS Trust
- Queen Elizabeth Hospital Kings Lynn.

GREEN RA5 with some recovery items:

- Bedford Hospital NHS Trust
- Berkshire West PCT
- Calderdale & Huddersfield NHS Foundation Trust
- Calderdale PCT
- City & Hackney Teaching PCT
- Derby City PCT
- Dudley PCT
- Haringey Teaching PCT
- Kirklees PCT
- Luton PCT
- Mid Yorkshire Hospitals NHS Trust
- Milton Keynes PCT
- North Middlesex University Hospital NHS Trust

- Northamptonshire Teaching PCT
- Nuffield Orthopaedic Centre NHS Trust
- Royal Berkshire NHS Foundation Trust
- Royal Bournemouth & Christchurch Hospitals NHS Foundation Trust
- Southampton City PCT
- Southport & Ormskirk Hospital NHS Trust
- Stoke on Trent PCT
- Tavistock & Portman NHS Foundation Trust
- The Royal National Hospital for Rheumatic Diseases
- Wandsworth PCT
- Yeovil District Hospital NHS Foundation Trust.

NB: Rotherham PCT passed with GREEN status with some recovery actions in September.

Leeds Teaching Hospitals NHS Trust – Managing the Consultant Contract with ESR

The largest acute Trust in Western Europe, employing 14,500 staff and around 590 Consultants, Leeds Teaching Hospitals NHS Trust has long been a 'champion' of ESR, both as a key member of the Implementation pilot and as an advocate of the Benefits Realisation approach. It was also one of forty-four Trusts involved in NHS Employers' Large Scale Workforce Change (LSWC) Team's consultant contract programme.

This was a 10 month programme to support employers in using the contract to enable them to work more effectively and deliver real service improvement for the NHS. Carol Robinson, Assistant Director of HR and Bryan Gill, Deputy Medical Director at Leeds Teaching Hospitals demonstrated their use of ESR to manage the contract, the Job Planning process and co-ordinate the planning of annual leave at the recent LSWC conference to showcase the outcome of the programme; 'Consultants' contract: sharing the benefits'.

The Leeds approach to ESR has consistently been to expand use of all ESR functionality to manage workforce processes, to streamline and minimise data entry and to use the data for accurate and critical reporting across the organisation. The vision for developing their use of ESR is to encourage local input for central reporting and monitoring, and a programme for wider use of the system is underway. This approach has had considerable initial success in supporting management of the consultant contract.

Following the 2004 implementation of the new contract, there was a high level of take-up (92%) which was supported by good, centrally held information and guidance on the application of the national standards for job planning. In 2005 Job Planning was devolved

operationally and following a review in 2006, a centrally held information base was re-established which enabled the tracking of improvements following the 2006 Task Force Review.

ESR is now the central source of Job Plan information in the Trust. Job Plan information is entered in ESR and appraisal and pay progression is recorded and managed. Annual leave recording, to support better co-ordination within and between specialties, will be managed at Directorate level by Clinical Managers using ESR Manager Self Service and the Administrator URP.

'We must promote ESR for medical workforce use, engage in the user network and ensure that improvements we identify become part of the development pipeline.'

Clinical Managers find the system intuitive and easy to use and the link to payroll means no paperwork and therefore no delays. The main benefits of using ESR are:

- Accessible information in departments and at Trust level;
- Reduced duplication and a whole system approach;
- Links between pay progression and Clinical Excellence Awards (CEA);
- Job plan history used in productivity measures feeding annual service performance review;
- Potential for aligning Job Planning to activity and commissioning;
- National benchmarking via the Data Warehouse



Brian Gill



Carol Robinson

The experience of the Leeds team has identified potential improvements to the ESR functionality for managing Consultant Contract requirements and they are working on potential improvements with the NHS ESR Development Team.

Overall, their recommendations for introducing the use of ESR to record and monitor consultant contract requirements are:

- Identify clinical champions and leads for medical workforce and ESR;
- Start with service requirements and then investigate how ESR can deliver;
- Develop a process for recording and managing annual leave;
- Potentially standardise the annual leave year;
- Use and promote ESR - engage with the user network to develop functionality.

Carol Robinson commented: 'ESR is our national workforce system. It is available to all NHS organisations and at Leeds we have demonstrated that it can be used successfully for all medical staffing requirements. We must promote ESR for medical workforce use, engage in the user network and ensure that improvements we identify become part of the development pipeline. ESR has huge potential, which we have not had in the past, for enabling local and national benchmarking and reporting on medical workforce activity.'

Launch of ESR Payroll Best Practice Guidance

The ESR Central Team with the help of the Regional Payroll Special Interest Groups (SIG) has recently held a series of workshops to introduce a number of new initiatives and to explain the reasons behind the recent performance issues.

The workshops were run jointly between McKesson Senior Management and the NHS ESR Development Team. The areas covered were as follows:

- Recent System Incidents (as reported in the October edition of ESR News)
- Customer Satisfaction Survey Findings
- Payroll Best Practice Launch
- Super User Pilot
- ESR Information Page Rollout

This article centres upon the Payroll Best Practice.

Background

Running Payroll within ESR requires that a number of processes are completed in a certain order to ensure that payrolls are processed accurately and in a timely manner. The payroll best practice documentation currently in use by the Programme was written prior to the completion of rollout. There have been suggestions from local organisations that the process does not fully meet their needs and that it is difficult to run payrolls in ESR within core hours using standard reports.

The Payroll Best Practice Guide (M-3025) was commissioned to review the current approach and provide updated best practice guidance based on the experience gained over the rollout period and with large numbers of organisations live on the ESR system.

The findings of the review were shared and agreed with the ESR National Payroll SIG.

Purpose

The purpose of the Payroll Best Practice Guide is to detail the best practice approach to running successful payrolls within the ESR system. It covers:

- The processes and reports required



- to run a successful payroll;
- The purpose of each process and report;
- The likely timings for each process and report, based on payroll sizes of 2000 and 6000;
- Potential enhancements to existing reports to reduce the overall number of steps in the process;
- Recommendations as to whether processes or reports should be run in core hours or not;
- A sample payroll schedule illustrating an approach to running a successful payroll detailing each task and demonstrating how this can be achieved in a typical month.

The document is not intended as a full user guide to running payrolls. Full instructions on how to run each of the reports and processes listed in the report can be found in the ESR User Guide which can be accessed via Kbase.

The Best Practice guide is seen as a method of spreading the workload, allowing reports to be generated without impacting other users.

The Guide is designed specifically around the Monthly Payroll Cycle, as this is the main payroll cycle for organisations. The steps for weekly, fortnightly and lunar monthly payrolls are the same but in a more condensed timeline.

Recommended Developments

The National Payroll SIG is particularly keen to develop a suite of checking

reports that can be run within ESR, removing the need for Discoverer reports in the payroll checking process. These are currently being specified and will be introduced in due course. Further recommendations have been made around the NHS Element Batch Details Report to show the amounts payable in addition to the keyed element entry and to include date tracked input data.

Reports and Processes not included in the Critical Path

Any reports not included in the Critical Path will, of course, continue to be available unless otherwise stated in a future user notice. However, they may have to be moved to non priority queues which do not interfere with the Critical path of payroll processing in ESR.

Evolving Document

The Payroll Best Practice Document is seen as a living document that will be developed as revised reports come on stream. The main driver for this will be via the National Payroll SIG. The Payroll End-to-End Process held in Kbase will shortly be amended to reflect the requirements of the new guide.

Conclusion

There is now an agreed best practice that Trusts can share and by adopting best practice they can assist in improving the running of payrolls for both themselves and their colleagues.

Case study

Piloting eLearning Delivery through the National Learning Management System (National LMS) at University Hospitals Coventry and Warwickshire NHS Trust

Background

University Hospitals Coventry and Warwickshire NHS Trust boasts one of Europe's top hospitals and one of the UK's largest teaching Trusts. Responsible for the management of two major hospitals in Coventry and Warwickshire, that between them service a population of over 1 million people, the Trust now offers a state of the art £400m investment 'super' hospital based on the old Walsgrave hospital site in Coventry. The new University hospital currently employs approximately 5,000 staff and has a training and development team of 15 which is responsible for the management and monitoring of a large proportion of staff learning.

Learning and development at University Hospitals Coventry & Warwickshire NHS Trust

Although the Trust admits to having used very little elearning as part of its training and development offering, it is very much a part of the Trust's vision and, for this reason, the training team was keen to be part of the National LMS pilot. Until recently the Trust has been using only a small amount of the NHS Core Learning Unit national content and local content, specifically for its mandatory training. However, an elearning steering group was set up approximately 18 months ago in an effort to encourage wider availability with better regulated control over the use of elearning content among departments.

Ward managers in particular are conscious of the benefits of elearning for their staff. Rather than taking time out to attend day-long classroom training, having access to elearning allows clinical staff the flexibility to learn within the constraints of their work, making more efficient use of their valuable time. Furthermore, with the absence of any link between existing elearning systems and ESR, elearning can only be recorded and reported on

following manual input into ESR. With the National LMS system, all elearning will be tracked and recorded automatically within ESR, into an individual's portable learning and competence record without any manual data entry required. Ultimately, the plan is to make it the only means of accessing national elearning content.

'The National LMS system is going to bring many financial and time-related benefits as a result of the greater efficiencies it offers. It's a great system with huge potential, particularly in terms of meeting NHSLA* requirements. It will allow us to monitor and report on mandatory training much more effectively, comprehensively and accurately', says Zoë Whittaker, National LMS Project Lead at University Hospitals Coventry and Warwickshire NHS Trust

The piloting process



Zoë Whittaker,
National LMS
Project Lead

After a period of consultation and review, University Hospitals Coventry and Warwickshire NHS Trust was chosen as one of the 18 NHS sites to pilot the National LMS system. Preliminary work involved identifying which national and local elearning content the Trust wished to test in the pilot and allocating this task to a range of clinical and non-clinical users within the organisation. Users were nominated from HR and Recruitment, Medical Staffing, Training and Development and one of the hospital wards. Project plans and relevant user documentation were shared throughout the piloting process and a dedicated National LMS Account Manager was allocated to the Trust by the ESR Central team to provide ongoing advice and support. They also joined forces with a 'buddy' pilot site, to



University Hospital, Coventry

encourage the sharing of information, issues and experiences. These were supplemented with monthly update meetings where progress could be further shared with the other pilot organisations.

Lessons learnt for future implementation

Overall, the pilot achieved exactly what it set out to do in terms of testing that the elearning functionality within ESR works, that learner progress could be tracked successfully and that the implementation guide is fit for purpose. All feedback, issues and lessons learnt have been fully documented and will be used to improve the system and implementation approach as more NHS organisations deploy the functionality. Internal resourcing and technical IT issues were the main local challenges encountered during the testing period but the system itself was well received by the Trust. Zoë identified a number of key points to be addressed by NHS organisations looking to implement the system, to help ensure a smooth and successful process:

- Ensure full early engagement with both the HR and IT departments;
- Plan thoroughly – allowing adequate time and resources as required;

* The NHS Litigation Authority (NHSLA) is a Special Health Authority responsible for auditing NHS organisations with a view to providing an active risk management programme to help raise standards of care in the NHS.

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Case study

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- Tackle any technical issues as early as possible;
- Ensure the availability of ongoing training and documentation for users of the system, including the provision of user-friendly guides

Quality, Flexibility and Trackability are Top of the Agenda

Flexibility and efficiency are key components in the delivery of training and development at University Hospitals Coventry and Warwickshire NHS Trust and it is this which the National LMS system addresses. All nationally approved elearning course content will be made available in one central source, with the option to access remotely as required. All elearning completed is automatically recorded on ESR, eliminating the need for manual data entry and eradicating the possibility of human error. From the data recorded, standard reports can be produced that outline for instance an organisation's compliance with statutory and mandatory training requirements. The pilot project did highlight some early problems with the running of reports; however these have now been fixed. 'The National LMS system ensures that we

have a single, up-to-date and much more comprehensive record of the training and competencies of staff in all disciplines. It will significantly streamline our processes, increase opportunities for learning for our staff and ensure a wider, more accurate and timely record is maintained,' says Zoë.

Moving forward with the National LMS

Providing online access to elearning content will extend flexible training opportunities to all staff members by enabling them to study at a time and place that suits shift-based working patterns. Since completion of the pilots, the National LMS will be available to all NHS organisations in England in November and Coventry and Warwickshire is one of those planning the next step of rolling the system out across the whole of the organisation. Zoë concludes, 'Having the ability for staff to access all learning from one central platform, to offer our staff flexible ways of learning and developing and to be able to record and track training is fundamental. We, as a Trust, are supportive of the system and look forward to realising the many benefits it offers. We are considering how we roll this out across the organisation in due course.'

ESR Reporting

Good progress has been made in the Reports area and a number of the key initiatives will be published in the Reports Newsletter which is distributed in December

This will include:

- A progress report on the ESR Standard Reports Review which has been underway since last autumn. Over 200 worksheets were identified for review and, at the end of November, there are 26 remaining;
- Details of the changes to Absence reporting which are available within release 5.4 on 30 November;
- Results of the recent reports performance testing undertaken by the National Management Reporting SIG members;
- Information about educational tools which have been made available to assist with reporting.

The newsletter will be distributed to the current ESR News distribution list and to the National SIG members. It will also be available on Kbase.

Leading Workforce Thinking Annual NHS Employers Conference

Acknowledged as the key workforce event in the NHS, this year's annual NHS Employers conference was held at the ICC in Birmingham between 4th-6th November. The event attracted over 1800 delegates, speakers and exhibitors making this conference the largest attended to date.

Following another period of significant change across the NHS, the event focused on 'staff engagement' and 'patient experience', reinforcing workforce at the centre of the NHS agenda.

Integral to the event was the exhibition, which complemented the themes for the conference and provided an ideal opportunity to network, share knowledge and discuss current issues.

The ESR team were represented at three stands this year, staffed by members of the Operations and Benefits team. Once again, considerable interest was shown in ESR and specifically, the demonstration and literature regarding the new eLearning functionality within the ESR solution.

Overall, the three-day event was received very well. Regular speaker sessions hosted by eminent health sector representatives including Rt Hon Alan Johnson MP, Secretary of State for Health, Clare Chapman, Director General of Workforce (DH) and David Nicholson, Chief Executive of the NHS in England, set the priorities for workforce for the coming year.

Next year's conference will be held between 3rd-5th November 2009 at the ICC in Birmingham.

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