

**NHS England Education Training  
Activity Plan 2026/27**

**Data Collection Guidance  
Documentation**

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## Education Training Activity Plan 2026/27

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### Introduction to the eCollection Platform

Delivering health and care services for patients is only possible with a high-quality workforce, with the right education, training, experience, and behaviours.

Following publication of Fit for the Future the 10-year Health Plan, our role within Education and Training continues to be pivotal in developing a workforce that can and will deliver the ambitions set out within it.

NHS England (NHSE)'s duty to patients, taxpayers and staff is to ensure education and training funds are used effectively and focused on key priorities.

This essential long-term investment in education must be maintained whatever the short-term pressures. This ensures NHSE staff will be available long into the future.

To achieve this, we must work with colleagues in NHS England and the wider NHS community and education partners. Part of the NHSE strategy is to host all data collection activity in one place. To support the long-term workforce planning process, NHSE has developed 'eCollection', an in-house data collection platform supporting a suite of data collection tools.

### Benefits of eCollection

The benefits of eCollection include:

- Easy access for users with the tools available through the NHSE website/NHSE online portal
- A clear data collection approach with user requirements at the centre
- All participating organisations can view the data once submitted and those with access to the tools are able to view these submissions within the live environment.
- Technical support is provided as well as support for 'system users', available from NHSE teams.
- User guides have been developed for each tool.
- Each tool follows a similar format to maximise ease for providers and recipients of the data to move between the tools and understand the operating system.
- Tools include some simple online validation checks, reducing errors and maximising data quality.
- All data is submitted and stored securely in line with GDPR (General Data Protection Regulations)
- Intelligent access: those with required login for each tool can access the data submitted at the level they require.

### eCollection Guidance

This guidance provided includes:

- An outline of the process
- Instructions for use of the templates
- Details of the definitions of the fields
- Instructions on how to log-in and use the tool as intended.
- Contact Information for any queries.

### Introduction to the Education Training Activity Plan

This is the Education Training Activity Plan (ETAP) data collection for recording information related to the planned ETAP activity for Year 1 starters of Clinical programmes for 2026/27 annually and by month. Through the ETAP collection, NHSE is collecting essential clinical data related to:

- Qualification and qualification code
- Course Length
- Delivery mode, type of training and unit of training activity
- Forecasted activity for 2026/27
- New starters by month for 2026/27

This data will be used to inform the ETAP plan for 2026/27, calculate the financial cost of the activity and review relative to budget. NHSE has developed the ETAP to strengthen the process for planning education and training activity and the associated investment plan for the NHS Workforce in England currently under the stewardship of NHSE. This collection method will ensure consistency in collecting data across NHSE.

### Timeline

The key dates for the collection are listed in table 1. Please note the eCollection portal will not reopen after 6/10/2025 for changes to be made.

With previous collections administration for updates had been devolved to regions. We are striving to improve efficiency and as such our aim is to only adjust the data once. Therefore, if anything has been inputted in error, please confirm using [england.educationdelivery@nhs.net](mailto:england.educationdelivery@nhs.net) subject title **e-collection 26/27**, we can then action the change on your behalf.

**Table 1 Education Training Activity Plan Timeline**

Timeline	Activities	Owner
8 <sup>th</sup> September 2025	Invitation emails sent to Regional Commissioning Leads, Regional and National Programme Leads, and Regional Directors to provide access	NHSE WTE Data and Analytics

	to eCollection portal & inform them that METP Returns collection is open for submissions	
<b>6<sup>th</sup> October</b>	Submission of signed-off ETAP Returns. Signed off by NHSE Regional Directors	NHSE Regional Directors
<b>December 2025</b>	Submission to NHS England Board for 20256/27 activity and approvals processes for DHSC/Treasury	ETAP team

### Completing the data return

#### Prepopulated template

The following fields are pre-populated within the template reflecting the signed-off ETAP menu:

- Region/National
- National Programme Family
- Programme Name
- ETAP Programme Code
- Qualification
- Qualification Code
- Course Length (MM)

#### Look-up Values

The template fields listed below utilise lookup values whereby the user can select from a drop-down list. The prepopulated fields align to the lookup value data and the system will only accept the data contained within that column. If a different combination is entered, the data will not be valid at the point of submission and will show as an error. If you are unsure of the 'common' name for a course, please refer to the official fully mapped ETAP List of Programmes Menu which includes Course Length and Qualifications for cross-reference for further information.

- Region/National
- ICS
- Education Provider
- National Programme Family
- Programme Name
- ETAP Programme Code
- Qualification
- Qualification Code
- Course Length (MM)
- Delivery Mode
- Unit of Training Activity

The lookup data provided in the template is the product of a national project to standardise the naming conventions for these areas and reflects the signed-off ETAP menu.

## Data Specification

The data specification in table 2 defines what data should be input into each field. All fields are 'required' (i.e., mandatory) except where noted.

Please note for prepopulated fields, where regional teams add new rows of data, please ensure that all applicable fields are completed.

Table 2 Education Training Activity Plan Data Specification

Region/National	Required	Prepopulated value (can be amended using LOVs) Region submitting plan.
ICS	Optional	Please select the ICS if known / relevant
Education Provider	Optional	Please select the Education Provider if known / relevant
National Programme Family	Required	Prepopulated value (can be amended using LOVs).
Programme Name (E.g. Adult Nurse)	Required	Prepopulated value (can be amended using LOVs). Please select the programme name e.g., Adult Nurse
ETAP programme code	Required	Prepopulated value (can be amended using LOV's)
Qualification	Required	Prepopulated value (can be amended using LOVs). Please add the qualification type, e.g., BSc.
Qualification code	Required	Prepopulated value (can be amended using LOV's)
Course Length (MM)	Required	Prepopulated value (can be amended using LOVs). <u>For this return the data is prepopulated based on whole years represented in months, colleagues are advised if course years are between years they are to round up e.g. if 18 months round up to 24 months.</u>
Delivery mode	Required	This cell allows the differentiation of pricing between different models of delivering the same programme. In the majority of cases there is only

		<p>one funding model, which will be ‘standard’ delivery mode. LOVs include</p> <ol style="list-style-type: none"> <li>1. Standard – where only funding model exists, or where this is the most common pricing structure.</li> <li>2. Apprenticeship – a small number of programmes have an apprenticeship route delivering the same qualification as a standard pricing route, e.g. Adult nursing BSc.</li> <li>3. Salary supported – this is where there is a secondary pricing structure which adds salary support to the standard offer. This is primarily designating where there is 100% salary support for HIT/PWP trainees</li> <li>4. Recruit to Train- identifies where a different pricing structure is used for Recruit to Train learners.</li> </ol>
<b>Unit of training activity</b>	Required	<p>LOVs shows options for the supporting funding model</p> <ol style="list-style-type: none"> <li>1. Block payment</li> <li>2. Single unit per trainee</li> <li>3. Module</li> <li>4. Credit</li> <li>5. Post</li> <li>6. By cohort</li> </ol>
<b>Regionally triangulated numbers*</b>	Required	<p><b>Assessment of Need Number</b></p> <ul style="list-style-type: none"> <li>• Built from a range of data sources and local knowledge – will likely reference demand scoping completed with external stakeholders.</li> <li>• Informed by Scoping Round 2 meetings and the National Programme Position Statement (so any strategic plan or 10YP shifts).</li> <li>• This number should be <i>reasonable</i> and should be the number the determiner (e.g. the region) thinks is the ‘right’ number factoring in all the available evidence. Do not or apply non take up or attrition to this number.</li> <li>• This would be the figure we would aim to deliver, <b>assuming we could utilise every training place within the year.</b></li> </ul>

<b>Forecasted activity numbers</b>	Calculated	<p><b>Activity Forecast Number</b></p> <ul style="list-style-type: none"> <li>• Further assessment, using all the national and regional intelligence available to assess the ‘Need Number’.</li> <li>• Submitters evaluate the ‘Need Number’ and forecast how many they think CAN be delivered knowing all the regional nuances, variables and limitations.</li> <li>• This number should be, to the best of the submitter’s knowledge, the actual delivery which will occur – and therefore need funding for.</li> </ul>
<b>Apr-26*</b>	Required	Please insert any forecasted number of starters (headcount) in April
<b>May-26*</b>	Required	Please insert any forecasted number of starters (headcount) in May
<b>Jun-26*</b>	Required	Please insert any forecasted number of starters (headcount) in June
<b>Jul-26*</b>	Required	Please insert any forecasted number of starters (headcount) in July
<b>Aug-26*</b>	Required	Please insert any forecasted number of starters (headcount) in August
<b>Sep-26*</b>	Required	Please insert any forecasted number of starters (headcount) in September
<b>Oct-26*</b>	Required	Please insert any forecasted number of starters (headcount) in October
<b>Nov-26*</b>	Required	Please insert any forecasted number of starters (headcount) in November
<b>Dec-26*</b>	Required	Please insert any forecasted number of starters (headcount) in December
<b>Jan-27*</b>	Required	Please insert any forecasted number of starters (headcount) in January
<b>Feb-27*</b>	Required	Please insert any forecasted number of starters (headcount) in February
<b>Mar-27*</b>	Required	Please insert any forecasted number of starters (headcount) in March
<b>Additional Comments</b>	Optional	The additional comments box should be used by exception only. All relevant information about the programme should have been captured in the corresponding relevant fields. Do not use it to input important information as there is no guarantee that it will be utilised.

\* Please note although the template allows decimals to be added, please only insert whole numbers.

### **Further guidance**

The system has been configured so that users can overwrite the list of value choices, as locking the template down would prevent users being able to copy and paste rows of data which users may occasionally need to be to perform.

If there is a combination you require that is not on the prepopulated template, please use the drop-down menus to create the combination you need. If you have any questions while you are submitting, please reach out to the Education delivery team [england.educationdelivery@nhs.net](mailto:england.educationdelivery@nhs.net) . All added lines will be reviewed post submission and queried through the QA process to ensure we collect the information accurately.

**Please do not attempt to add or remove columns in the template. Any such action will disable NHSE's ability to collate all the data and will cause loss of your data.**

### **Logging into the eCollection tool**

You will need a user account to access the data collection application.

The ETAP Returns Collection can be accessed via the eCollection web portal:

Link to the eCollection web portal: <https://ecollection.hee.nhs.uk/>

If your NHSE Regional Team has registered you as a user, you will have received an electronic invitation to access the system. This section of the Guidance provides guidance on how to log in, and what to do if you have not received the required information.

### **Logging in as an existing user**

If you already have a user account, you can login using your login credentials. The login page shown in figure 1, will be the first page you see when you browse to the collection you are looking for,

Figure 1 Education Training Activity Plan Login Page

Populate the email address and password fields appearing on the left side of the login page and click the Log In button.

If the credentials you have provided are valid, you will be forwarded to the main page of your collection.

## Invitation to use the eCollection Tool

An invitation to contribute will have been sent to all those registered to contribute to the collection. An example of an Invitation to contribute email is shown in figure 2.

Figure 2 Invitation to contribute email

**eCollection**  
**Education Training Activity Plan (ETAP) Data Collection Tool**

Dear

NHSE has opened the Education Training Activity Plan (ETAP) 2026/27 Data Collection Tool. This data collection is now available on the eCollection site.

Through this collection, NHSE is collecting planned ETAP activity data for Year 1 starters of Clinical programmes for 2026/27 annually and by month.

Regional Heads of Commissioning, nominated regional leads and some national contacts will have access to the template via the eCollection tool.

Please review and update information regarding your planned ETAP activity for 2026/27, submissions will require sign-off by both the Regional Head of Commissioning and the Regional Director by the return date of COBon 06 October 2025.

A copy of the guidance can be [downloaded here](#).

Please direct any queries to the Service Desk: [england.da-wfeservicesdesk@nhs.net](mailto:england.da-wfeservicesdesk@nhs.net)

You already have a user account to access the Tool.

[Click here to log in to eCollection](#)

If you have forgotten your password, please [click here](#) to reset.

This email will give you some high-level information about the collection, your role in the process and details for your regional support contacts.

It also includes the following links:

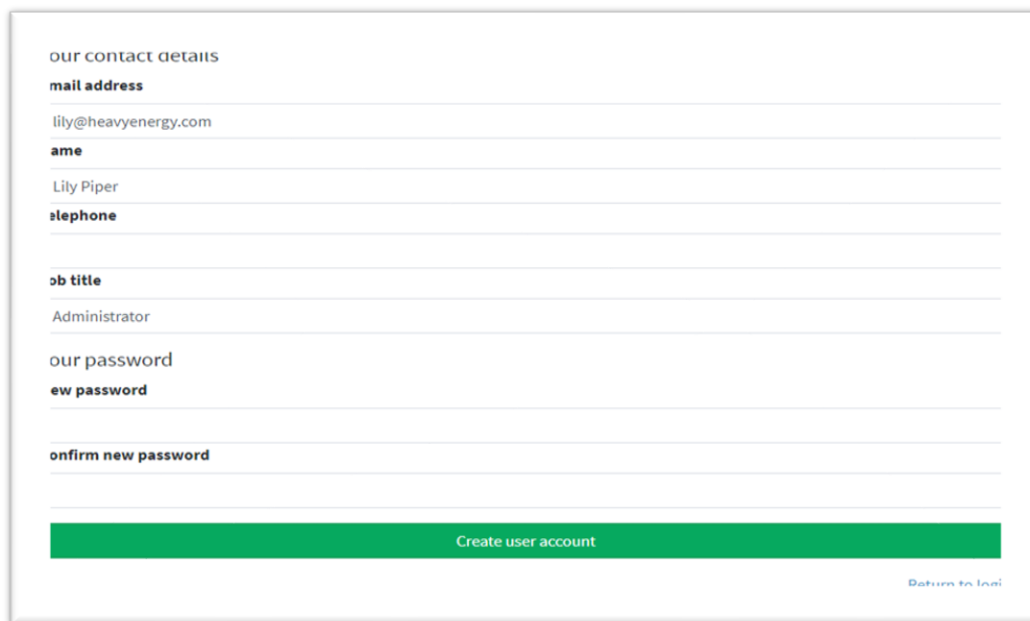
- Education Training Activity Plan (ETAP) 2026/27 Data Collection site link.
- Forgotten password link (for existing users)

- Complete registration link (for new users).

### Complete the setup of your user

If the email address used in your invitation is not known to the application, your invitation will include a link that will enable you to complete the setup of your user account page shown in figure 3.

Figure 3 new user account setup



The screenshot shows a web form for creating a new user account. The form is titled "our contact details" and contains several input fields with prepopulated text. The fields are: "mail address" with "lily@heavyenergy.com", "name" with "Lily Piper", "telephone", "job title" with "Administrator", "your password", "new password", and "confirm new password". A prominent green button labeled "Create user account" is at the bottom center. A small link "Return to login" is visible in the bottom right corner.

Please take a moment to review the prepopulated sections and update this content as required. You will also be asked to provide and confirm your password to access the collection. Your password must have between 8 and 16 letters, with a mix of uppercase and lowercase letters, and one or more symbols and numbers. **Click the “create user account” button. Create Account Page.** An account will be created for you which you can use to access the Education Training Activity Plan (ETAP) 2026/27 Data Collection in the future.

## Unregistered email addresses

If your email address is not registered, the application will display the password reset request screen shown in figure 4.

Figure 4 Password Reset Request

The screenshot shows the 'Password reset request' form in the eCollection portal. The header includes the eCollection logo and the NHS logo. The form title is 'Password reset request' with a subtitle: 'If you already have a user account but have forgotten your password, please use this section to request a password reset.' Below this, there is a section titled 'Please enter your Email address' with a text input field labeled 'Your email address'. A green button labeled 'Request password reset' is positioned below the input field. To the right of the button is a smaller grey button labeled 'Return to login'.

Potential causes for this might include:

- The email you provided was incomplete or mistyped.
- You had previously received an invitation email to access Education Training Activity Plan (ETAP) 2026/27 Data Collection but did not click the Complete Registration link. This may result in your email address not being recognised.

If neither of these are the case, please contact [England.da-wteservicesdesk@nhs.net](mailto:England.da-wteservicesdesk@nhs.net)

## Forgotten Password

If you have forgotten your password, you can reset your password by following this simple process:

1. Click “Forgotten your password?” on the Education Training Activity Plan (ETAP) 2026/27 Data Collection login page. This will display the Password Reset page.
2. Enter your email address and click the “*Request password reset*” button. If successful, you will see confirmation on the screen, figure 5.

Figure 5. Confirmation password reset link emailed to you

The screenshot shows a confirmation message box titled 'Password reset request'. Inside the box, there is a green text message: 'A password reset has been sent to your email address'. Below the message is a blue button labeled 'Return to login'.

3. A password reset email will be sent to your email address.

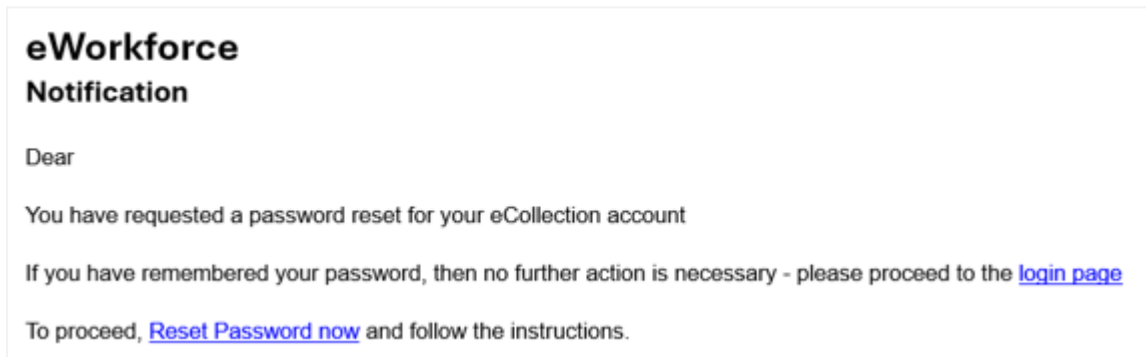


Figure 6 Reset your password

4. Click the Reset Password Now link and your browser will display figure 7.

Figure 7 change your password

The image shows a web form titled "Change your password". Below the title is the instruction "Please enter and confirm your new password." There are three input fields: "Login/Email" with the value "lily@heavyenergy.com", "New password", and "Confirm new password". At the bottom of the form is a green button labeled "Update Password".

5. Set and confirm your new password, then click Update Password. Your password has now been changed and you will be forwarded to the login page.

## Education Training Activity Plan 2026/27 - Home Page

Upon successful login, you will be forwarded to the Education Training Activity Plan (ETAP) 2026/27 Data Collection home page.

The page is split into three parts:

- **Page header**

This is visible in all application pages and provides access to application-level tasks such as logout and my account. Clicking the home button or eCollection icon in this area will always bring you back to this page.

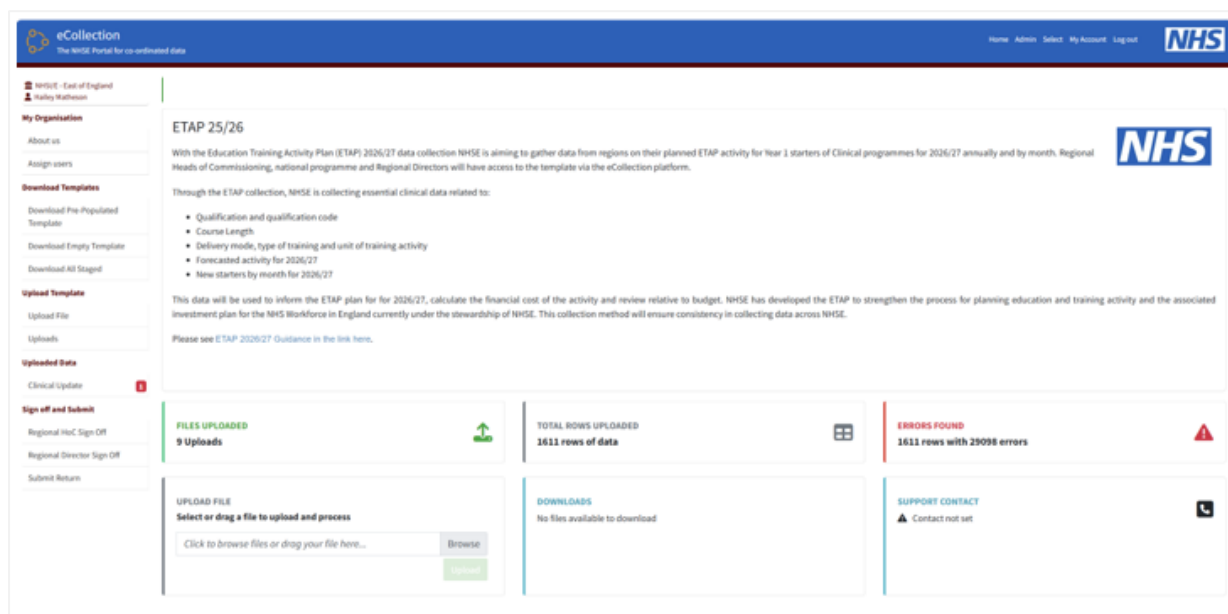
- **Side bar navigation**

Also available in all pages, these are the tasks or application features to be completed, such as information about My Organisation, Downloading and Uploading templates, option to review Uploaded data, Sign-off and Submission.

- **Dashboard**

The main area of the page displays introductory text to provide a high-level overview of the collection. There are also panels providing status information, support contact details and Education Training Activity Plan (ETAP) 2026/27 Data Collection documentation and downloads.

Figure 8 Education Training Activity Plan Data Collection home page



## Navigation buttons

The navigation buttons displayed at the top of the screen, have the following functions from left to right:

- Home – returns you to the home page.
- Select – switching between different data collections.
- Help - Provides help and support on the system.
- My Account - Manage your account and account details.
- Log out – log out of the system and be sent back to the login screen.

Figure 9 Navigation buttons



The **“Select”** button will only appear for those users who are working across simultaneous collections on the Collection platform. Clicking through this button will allow you to select which collection you would like to view.

Figure 10 User assigned to multiple collections

Collection name	Organisation	Start Date	Your role(s)	Current Status
2023/24 - Multi-Year Operational Planning Workforce Collection	NHSE Head Office	16 Jan 2023	eCollection National Administrator	In progress
Education Training Activity Plan - ETAP	NHS/E - East of England	27 Sep 2024	Regional Heads of Commissioning	Root contributor signed off
Student Data Combined Collection	NHSE HCS Validation	01 Jun 2025	National PIVQ Administrator	In progress
Student Data Combined Collection	NHSE Head Office	01 Jun 2025	Superuser System Administrator	In progress
Student Data Combined Collection	Ramsay Healthcare	01 Jun 2025	Parent PIVQ Validation Administrator	In progress
Student Data Combined Collection	University of Heavyshire	01 Jun 2025	None	In progress

Simply click on the relevant row you would like to view. You will find the following navigational features listed down the left-hand side of the dashboard.

Figure 11 Navigational features

The screenshot shows the eCollection dashboard for ETAP 25/26. On the left, there is a navigation menu with sections: 'My Organisation' (containing 'About us', 'Sign users', 'Download Templates', and 'Upload Data'), 'Regional Templates', and 'Regional Data'. The main content area includes a header for 'ETAP 25/26', a description of the data collection, a list of data points (Qualification and qualification cycle, Course Length, Delivery mode, etc.), and a summary of 'FILES UPLOADED' (9 Uploads) and 'TOTAL ROWS UPLOADED' (1811 rows of data). There is also a section for 'UPLOADED FILE' and 'DOWNLOADS'.

## My Organisation

The first section on the dashboard navigation contains information about your organisation (for ETAP organisation refers to your regional view) and the people who will work on your submission. It is divided into two subsections: organisation details and contributors.

When you first log in, check that your organisation or institution’s details are correct. Click ‘About us’ in the ‘My Organisation’ section shown in figure x and check the details.

You can change your organisation’s address here and review other details. Click the green save button once any necessary changes, if any, have been made.

Figure 12 About us

The screenshot shows the 'About us' page in the eCollection DEV system. The page is titled 'About us' and has a 'Cancel' button and a 'Save' button in the top right corner. The page is divided into several sections:

- My Organisation:** Includes 'About us' (selected), 'Assign users', 'Download Templates' (Download Pre-Populated Template, Download Empty Template, Download All Staged), 'Upload Template' (Upload File, Uploads), 'Uploaded Data' (Clinical Update with 2037 items), and 'Sign off and Submit' (Regional HOC Sign Off, Regional Director Sign Off, Submit Return).
- About us:** Contains the following fields:
  - ODS Code: NHST-7
  - Org Name: NHSE - London
  - Location: Address (text area), Postcode (text field)
  - About: Organisation Type (NHST, HEE, Health Education England), NHST, London

## Assign Users

The Assign Users function can be used at any time to view, remove, or add users to your organisation. When the page is loaded you will be presented with a list of the users currently assigned to the application.

Multiple users may be assigned to the data collection allowing the tasks to be shared with designated colleagues.

Figure 13 Assign Users

The screenshot shows the 'Users' page in the eCollection DEV system. The page is titled 'Users Setup and modify your organisation's users' and has a 'Cancel' button and a 'Save' button in the top right corner. The page is divided into several sections:

- My Organisation:** Includes 'About us', 'Assign users' (selected), 'Download Templates' (Download Pre-Populated Template, Download Empty Template, Download All Staged), 'Upload Template' (Upload File, Uploads), 'Uploaded Data' (Clinical Update with 5596 items), and 'Sign off and Submit' (Regional HOC Sign Off, Regional Director Sign Off, Submit Return).
- Users:** A table listing users assigned to the organisation. The table has columns for Email, Name, and Job Title. There are also action buttons (Add, Edit, Delete) for each user.

Email	Name	Job Title	Action
<b>Regional Heads of Commissioning</b>			
John.Tidmarsh@hee.nhs.uk	John Tidmarsh	Head of Data Systems and Development	[Add] [Edit] [Delete]
Leanne.Clews@hee.nhs.uk	Leanne Clews	Senior Quality Lead	[Add] [Edit] [Delete]
aqib.afzal@hee.nhs.uk	Aqib Afzal	Contract Manager	[Add] [Edit] [Delete]
Matt.Thomas@hee.nhs.uk	Matt Thomas	Lead Developer	[Add] [Edit] [Delete]
maxine.kwofie@hee.nhs.uk	Maxine Kwofie	Senior Commissioning Manager	[Add] [Edit] [Delete]
liam.soane@hee.nhs.uk	Liam Soane	Analyst	[Add] [Edit] [Delete]
<b>Regional Director</b>			
Tom.Kirkbride@hee.nhs.uk	Tom Kirkbride	Regional Directors	[Add] [Edit] [Delete]

## Adding a user

Please note that adding a user to your organisation will enable them to enter and amend the data being collected.

- Click “Assign Users” in the side menu.
- Click the “Add another” link above the relevant role (e.g. Regional Heads of Commissioning) which will result in a new row being displayed

Figure 14 Adding a new user

The screenshot shows a web interface titled "Users" with the subtitle "Setup and modify your organisation's users". At the top right are "Cancel" (red) and "Save" (green) buttons. Below is a table with columns "Email", "Name", and "Job Title". The table has a section header "Regional Heads of Commissioning" and an "Add another" link. Two rows are shown:

Email	Name	Job Title	
arthur.person@hee.nhs.uk	Arthur Person	Regional Head of Commissioning	
Colin.human@hee.nhs.uk	Colin Human	Regional Lead	

Add the details of the new user into these fields, taking particular care to add the email address correctly. If the user already has an eCollection account, their details will prepopulate when you enter the email address.

Figure 15 Prepopulate user information

This close-up shows the input fields for a user:

Colin.human@hee.nhs.uk	Colin Human	Regional Lead	
------------------------	-------------	---------------	--

Once you have completed the detail, click the Save button, and the new user(s) will be created.

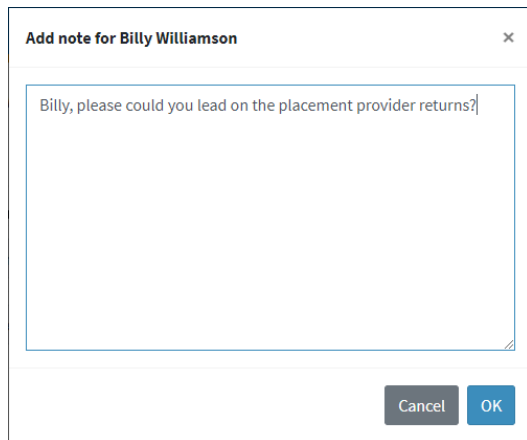
## Adding a user note

When adding a colleague as a user, it may be useful to provide a note or personal message to provide them with some context.

To add a note:

- Locate the user for whom you would like to add a note.
- Click the blue comment button
- The add note popup is displayed.

Figure 16 Add a note



- Add your note or message and click OK.
- Finally, click the save button and an invitation will be sent which includes the new message.

### Deleting a user

- If an individual has left your organisation, you can remove their user account to revoke their access to the application.
- Click the red cross button by the user you wish to remove.

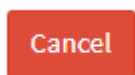


- Once clicked, the user details will change to highlight the item as tagged for deletion.



- If you are sure you want to delete this user, click the “Save” button.
- The page will reload, and the user has been removed.

### eCollection general commands:



- Red buttons cancel an action and lose all changes



- Green buttons perform an action which accepts changes



- Blue buttons perform actions – like download/upload data



- Amber buttons perform special actions.

### Downloading a Template

Users can download from three options in the 'Download Templates' panel located on the lefthand side of your screen.

#### 1. Pre-populated template

This option contains prepopulated data representing the signed-off ETAP menu for 2026/27, which is reflected in the final List of values for:

- Region/National
- National Programme Family
- Programme Name
- ETAP Programme Code
- Qualification
- Qualification Code
- Course Length (MM)

This is because there is more than one option for Course Length for a particular programme name and qualification combination. In this circumstance the user should select as appropriate from the List of Values. You will be able to amend and insert a new row using the LOVs data fields in the table, for example if you have more than course start month for a programme name and qualification combination.

Click [here](#) to access the ETAP List of Programmes Menu.

#### 2. Download Empty Template

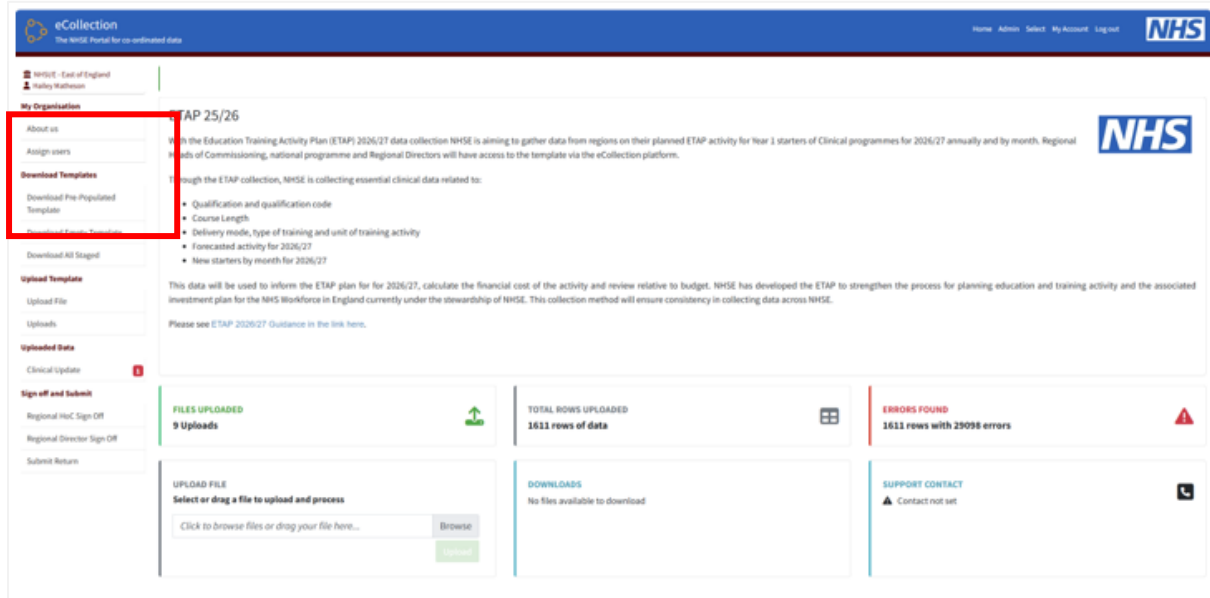
A blank template mapped to the ETAP menu (LOV). You can input data from scratch with the options of the drop-down menu. This can useful if you need to complete and upload additional lines of data.

**Please note National users will only have the option to download an empty template, as they are only due to complete and upload a few rows of data.**

#### 3. Download all Staged

You can download a copy of all data entered via the eCollection portal to keep for your record.

Figure 17 download data



**How to display the column filters in the template**

- To display the column filters in the template, the user will need to unhide row 6.
- Highlight rows 5 & 7 on the left of the template.
- Right click on your mouse and select unhide.
- Row 6 will be displayed (see screenshot below) which will enable the user to filter on the columns

Figure 18. How to display the column filters in the template

	A	B
1	<b>METIP Regional Update (Sep 2024)</b>	
2	<b>NHS7-5 - NHSI/E - North West</b>	
3	<b>Clinical and Workforce Development update</b>	
4	<b>Region/National</b>	<b>ICS</b>
5	<b>Required</b>	<b>Optional</b>
7	North West	
8		
9		
10		

**DO NOT** make any changes to **row 6** (shown below), do not edit any formatting or delete any columns in this row. This would ordinarily be locked or hidden, and any changes made here will impact your upload and data.

Region/National	ICS	Education Provider	Profession (E.g. Health Visitor)	Programme Name (E.g. Adult Nurse)	Qualification
Required	Optional	Optional	Optional	Required	Required
Region/National	ICS	Education Provider	Profession (E.g. Health Visitor)	Programme Name (E.g. Adult Nurse)	Qualification

## Uploading a Template

The current upload template for the ETAP Returns Data Collection can be found in the homepage in the 'Upload Template' panel. This template utilises rules and validation checks to ensure the quality of the uploaded data.

Figure 19 Uploading a template

To upload a file into ETAP Returns Data Collection:

- Click "Upload File" in the side menu.
- The page will load as can be seen in Figure 20
- Click the Browse button to select your file or drag a file into the box.
- Click the Upload button to process your file.
- Once your file has uploaded you will be forwarded to the uploads page to view the monitor status of your upload

Figure 20 uploading a file

The screenshot shows the 'Uploads' page in the eCollection DEV system. The page title is 'Uploads Upload progress'. On the left, there is a sidebar with 'My Organisation' (NHSE - London, Deborah Jagun) and various actions like 'About us', 'Assign users', 'Download Templates', and 'Upload Template'. The main content area shows a 'File Upload' section with a table of uploaded files. The table has columns for Status, Uploaded file, Created, and Last updated. One file is listed: 'Download Pre-Populated Template\_NHS7\_7\_NHSE\_London\_\_2023Aug08\_1045\_6mj-test.xlsx' with a status of 'Validated With Errors', created on 08/08/2023 10:53:13, and last updated on 08/08/2023 10:53:20. Below this, there is a detailed table with columns: Timestamp, Status, Content, Audit Text, Rows, Rows with errors, and Total errors. The first row shows a timestamp of 08/08/2023 10:53:19, status 'Validated With Errors', content 'Validated but error found', and 505 rows with 505 errors, totaling 3805 errors. The second row shows a timestamp of 08/08/2023 10:53:19, status 'Content Validated With Errors', content 'METIPRegionalReturn', 505 rows with 505 errors, totaling 3805 errors.

The details of all files uploaded into ETAP Returns Data Collection for a submission are listed in this page.

Figure 21. Uploads

The screenshot shows the 'Uploads' page in the eCollection DEV system, titled 'Uploads All queued & uploaded files'. The page includes a sidebar with 'My Organisation' and various actions. The main content area features a table with columns: #, File, Uploaded by, at, Status, Updated, Rows, Error rows, and Total errors. The table lists three files: 17 'Download Pre-Populated Template\_NHS7\_7\_NHSE\_London\_\_2023Aug08\_1220\_Ogu\_WITHOUT\_FORMULAEa (1).xlsx' (Validated With Errors, 504 rows, 504 error rows, 1009 total errors), 15 'File rejected' (Upload Failed, 0 rows, 0 error rows, 0 total errors), and 12 'File rejected' (Upload Failed, 0 rows, 0 error rows, 0 total errors). The page also includes buttons for 'Finalised by Carol Chikwaya', 'Show Dropped', and 'Upload file'.

To ensure the best performance at busy times, uploaded files are not processed immediately. Instead, they are queued to be processed within a separate background task. Typically, your file will be processed promptly but at times of high demand it may take a little longer to complete.

### Status

While your file is being processed, it will go through several stages to ensure the data is stored and validated.

The status colours can be used as a guide:

<b>Red</b>	The file has encountered an error while processing. In most cases these will be validation errors. You will need to review the status error for more information.
<b>Amber</b>	The file is currently being processed. No action necessary.
<b>Green</b>	Processing of the file has completed without any errors. No action is necessary.

## Deleting an uploaded file

If you have uploaded a file in error or wish to re-import a file after amendments, the **drop** feature will enable you to remove the file and all the associated content from the Education Training Activity Plan (ETAP) 2026/27 Data Collection.

To delete a file:

- Select Uploads on the left menu.
- Click the file you wish to remove.
- You will then be taken to the file page.
- Click the Drop file button in red at the top right and a confirmation dialog will pop up.
- Click proceed to continue and the file will be dropped.

Figure 22. Deleting a file

The screenshot shows the 'eCollection' portal interface. At the top, there is a navigation bar with 'Home', 'Admin', 'Select', 'Help', 'My Account', and 'Log out'. The main header includes 'eCollection - The HEE portal for co-ordinated data' and the NHS logo. On the left, a sidebar menu lists 'My Organisation', 'Download Templates', 'Upload Template', 'Uploaded Student Data', and 'Sign off and Submit'. The main content area is titled 'Uploads Upload progress' and features a 'Drop file...' button in red. Below this is a 'File Upload' section with a table showing upload details.

Status	Uploaded file	Created	Last updated
Validated With Errors	Upload Me METIP.xlsx	14/07/2021 17:15:10	14/07/2021 17:15:22

Timestamp	Status	Content	Audit Text	Rows	Rows with errors	Total errors
14/07/2021 17:15:21	Validated With Errors		Validated but error found			
14/07/2021 17:15:21	Content Validated With Errors	METIPRegionalReturn		2	1	1
14/07/2021 17:15:21	Content Validating	METIPRegionalReturn				
14/07/2021 17:15:18	Validating					
14/07/2021 17:15:18	File Staged		Success - file has been staged			
14/07/2021 17:15:18	File Content Staged	METIPRegionalReturn	2 rows staged			
14/07/2021 17:15:17	File Content Staging	METIPRegionalReturn				
14/07/2021 17:15:14	File Staging					
14/07/2021 17:15:10	Queued					
14/07/2021 17:15:10	File Stored					
14/07/2021 17:15:09	None					

## Clinical Update

This section displays all the data which has been uploaded and allows you to review errors (which are highlighted in red), edit, correct, and delete rows. Also, you can download a template without using the left menu option.

Data uploaded will be aggregated in the order you upload it. For example, if you upload a completed pre-populated template, and then upload a completed blank template it will show in this order.

Please note: The system will not allow you to add data via the online portal, however, if you would like to add additional data, you have two options:

1. You will need to go back to the current template to add it. You will need to re-upload the file back to the e-portal. However, you will need to drop the previous file, so you don't have a duplicate.
2. You download an empty template insert the data and upload it (See instructions above)

Figure 23. Clinical Update

#	Region/National	ICS	Education Provider	National Programme Family	Programme Name (E.g. Adult Nurse)	ETAP program
1	London			Nursing & Midwifery	SCPHN - School Nursing	1189
1	London			Nursing & Midwifery	SCPHN - School Nursing	1189
1	London			Nursing & Midwifery	SPQ - General Practice Nursing	1155
1	London			Nursing & Midwifery	Registered Nurse - NA/AP Conversion - ...	1180
1	London			Nursing & Midwifery	SPQ - General Practice Nursing	1155
1	London			Nursing & Midwifery	Adult Nurse	1212
1	London			Nursing & Midwifery	Dual Professional Qualification Nursing	1231
1	London			Nursing & Midwifery	SCPHN - Health Visiting	1089
1	London			Nursing & Midwifery	Learning Disabilities Nurse	1217
1	London			Nursing & Midwifery	SPQ - Community Children's Nursing	1051
1	London			Nursing & Midwifery	SPQ - Community Mental Health Nursing	1204
1	London			Nursing & Midwifery	Children's Nurse	1213
1	London			Nursing & Midwifery	Mental Health Nurse	1218
1	London			Nursing & Midwifery	SPQ - Community Learning Disabilitie...	1052
1	London			Nursing & Midwifery	Children's Nurse	1213
1	London			Nursing & Midwifery	Registered Nurse - NA/AP Conversion	1179
1	London			Nursing & Midwifery	Children's Nurse	1213
1	London			Nursing & Midwifery	Mental Health Nurse	1218
1	London			Nursing & Midwifery	Midwifery	1219
1	London			Nursing & Midwifery	Children's Nurse	1213

## Errors

Errors are highlighted in red within the Clinical Update screen. The number of errors within all templates uploaded (& not dropped) is displayed in the top right corner of the page. You have the option to click the View Errors button to filter through the errors found in the template and correct them (see screenshot below).

Examples of errors would be any field within a “Required” column (such as Programme Name) which has not been completed, any entries which do not correspond to the list of value options, alphabetic or special characters or negative numbers or very large numbers within the columns for Proposed Activity for 2026/27.

The screenshot shows the 'eCollection DEV' interface for 'Clinical Update'. The top navigation bar includes 'Home Admin Select My Account Log out' and the NHS logo. The main header shows 'Clinical Update Review & edit data (6012 rows)' with a search bar and buttons for 'Download', 'Select...', 'View errors 28252', and 'Save'. A sidebar on the left contains navigation options like 'My Organisation', 'Download Templates', and 'Upload Template'. The main table has the following columns: ICS, Education Provider, Profession (E.g. Health Visitor), Programme Name (E.g. Adult Nurse), Qualification, and Course Length (MM). The table contains several rows of data, with one row highlighted in red.

## Editing Uploaded Data

Changing data is an easy task to do in the application. Simply locate and click on the field you wish to update and make your amendments. The drop-down list of values is available for each column where appropriate, to allow the user to choose from.

Figure 24 LoV

The screenshot shows the 'eCollection' interface for 'METIP Review & edit data (7 rows)'. The top navigation bar includes 'Home Admin Select Help My Account Log out' and the NHS logo. The main header shows 'METIP Review & edit data (7 rows)' with a search bar and buttons for 'Finalised by Tony Curtis', 'Download', 'Select...', and 'Save'. A sidebar on the left contains navigation options like 'My Organisation', 'Download Templates', and 'Upload Template'. The main table has columns: #, Region, ICS/STP, Education Provider, Profession (E.g. Health Visitor), Programme Name (E.g. Adult Nurse), Qualification, Course Length (MM), Course Start (MM/YY), Proposed Activity for 2022/23 (Headcount - Starters), Target Number (Headcount - Starters), Proposed Activity for 2022/23 (Training posts for PC Medical & Dental), and Proposed Activity for 2022/23 (Training posts for PC Medical & Dental). A dropdown menu is open over the 'Education Provider' column, listing various NHS regions and health partnerships.

When you have completed your changes, click the Save button and the data will be saved and revalidated.

### Sign-off and submit

For the ETAP regional returns, sign-off will be sequential as follows:

- Collection data input by Regional Commissioning Lead
- This can be delegated to a regional lead through 'assigning an additional user'.
- Sign-off must be by the Regional Commissioning Lead
- The Regional Commissioning Lead should inform the Regional Director that the collection is ready to be reviewed and signed off.
- Sign-off by Regional Director
- Submission should be either by Regional Director or Regional Commissioning Lead, as appropriate.

For the ETAP national returns, sign-off will be sequential as follows:

- Collection data input by Programme Lead
- This can be delegated to additional programme leads through 'assigning an additional user'.
- Sign-off must be by the National Programme Lead
- The programme lead should inform the National Programme Lead that the collection is ready to be reviewed and signed off.
- Submission should be either by programme lead or National Programme Lead, as appropriate.
- Sign off by Director of National Programmes

### Regional Commissioning Lead Sign-off

Once the collection data has been entered and reviewed as accurate, the Regional Commissioning Lead should then sign it off by selecting the Regional HoC sign Off option in the menu on the left of the screen. The Regional Commissioning Lead should enter their name, select "Yes" to confirm that the submission is complete, then 'Save' in the top right of the screen.

Once the Regional Commissioning Lead has uploaded the data, the Regional Director of Workforce should be informed that the collection is ready to be reviewed and signed off.

Figure 25 Regional Commissioning Lead Sign-off

## Regional Director Sign-off

The Regional Director can review the data in the “Clinical update” menu option (see *above clinical update section*) and download a complete copy of the submitted data in that screen or using “Download All Staged” from the left-hand menu. This should then be approved via regional WTE Governance as agreed by each region. Regional Directors of Workforce should always share the proposed plan with their Regional Director for approval.

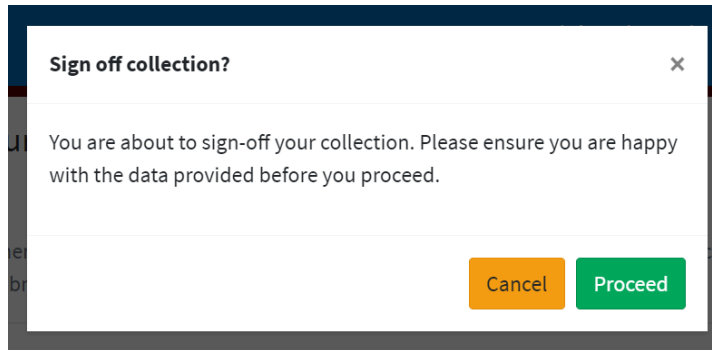
Once sign-off is ready, select the ‘Regional Director’ sign Off option in the menu on the left of the screen. The Regional Director should enter their name, select “Yes” to confirm that the submission is complete, then ‘Save’ in the top right of the screen.

Figure 26 Regional Director Sign Off

Once the Regional Director has signed off the collection there is the facility for either the Regional Director or the Regional Commissioning Lead to then submit the return (as practical or appropriate).

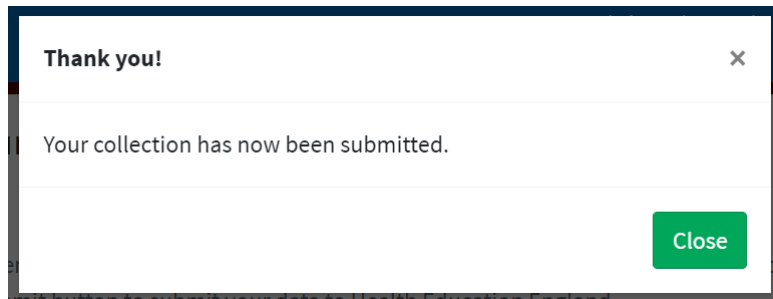
Select the Submit Return option in the menu on the left of the screen, then “Submit” in the top right hand of the screen and a confirmation box will appear.

Please note the collection can be submitted even with errors unresolved and so caution should be taken to review your data prior to submission.



Click “Proceed” to submit your return.

A message will be displayed confirming that the collection has been submitted.



The Submit Return screen will be updated to reflect that the collection has been submitted.

It is still possible to ‘unsubmit’ the return by selecting the red ‘unsubmit’ button, make further amends, and repeat the sign-off and submission process.

### Support

For support to access the NHSE eCollection portal, to amend user details, to set up additional users or any other technical enquiries please contact [england.dawteservicesdesk@nhs.net](mailto:england.dawteservicesdesk@nhs.net) and all other enquiries should be directed to [england.delivery@nhs.net](mailto:england.delivery@nhs.net)