

Multi-Year Operational Planning Workforce eCollection Guidance

Health Education England
eCollection Guidance Pack
v1.0

Contents

Introduction.....	3
Multi-Year Workforce Collection Overview & Guidance.....	3
eCollection	4
Where to find the Multi-Year Operational Planning Tool.....	5
Timeline	5
Templates	5
Using the Multi-Year Operational Planning Tool	6
As an existing user	6
Logging in.....	6
Invitations to use the Multi-Year Operational Planning Tool.....	7
Invitation to new users	7
Joining the website as an unknown user	8
Registering to use Multi-Year Operational Planning Tool for the first time.....	9
Forgotten password.....	10
Multi-Year Operational Planning Tool home page.....	12
Navigation buttons.....	12
Change User details	13
Dashboard Navigation Features (Organisational Admin view).....	14
Dashboard Navigation Features (ICB view)	16
Dashboard Navigation Features (Regional view)	17
eCollection general commands	18
My Organisation	19
Assign Contributors	20
Adding a user note.....	21
Deleting a user	22
Data Sharing Agreement.....	23
Multi-Year Operational Planning Workforce Plan	23
Completing The Mental Health Template.....	27
ICB Workforce Plan	29
Manage Providers	29
Triangulation Report.....	32
Downloading and Uploading data.....	33
Editing Uploaded Data	35
File Versions.....	36
Sign-off.....	36
Technical Support.....	38
All other Multi-Year Planning enquiries.....	38

Introduction

This pack contains guidance for the use of the Operational Multi-Year Workforce Planning 2023/24 Tool, developed by Health Education England (HEE) in collaboration with NHSE.

The guidance provided includes:

- Instructions on how to log-in and use the Tool
- Contact information for any queries

Multi-Year Workforce Collection Overview & Guidance

This guidance document outlines the technical guidance for system workforce plan submissions in the 2023/24 operational planning process.

The purpose of this document is to update systems on the process for producing and submitting operational plans and to provide guidance on the operational plan templates being used this year.

Workforce planning templates are to be submitted via the Health Education England (HEE) eCollection portal and comprises of the following sections:

- Whole Time Equivalent (WTE) - to include Acute, Ambulance, Community, Mental and Specialist Health providers
- Supply Bridge
- Hosted
- Key Performance Indicators (KPIs)
- Primary Care
- Mental Health

This document covers the guidance and process for all collections associated with workforce for operational planning 2023/24.

Every system will need to develop whole-system workforce plans, building on the launch of the 2023/24 priorities and operational planning guidance published in December 2022, and the three tasks; recover our core services and productivity, make progress in delivering key ambitions in the NHS Long Term Plan, and continue transforming the NHS for the future.

The 2023/24 workforce planning collection has been developed to include further granularity of roles for Acute, Ambulance, Community, Mental and Specialist Health providers alongside Primary Care. A supply bridge has been included for year 1 at an aggregate level to describe and explain the anticipated workforce change. The Mental Health collection has also been incorporated into this planning round.

Plans must demonstrate an integrated approach to activity, finance, and workforce planning for year 1 and provide realistic workforce plans for years 2-5; this is vital for education commissioning and ensuring we are able to scope supply against demand into the mid-term.

Information governance requirements relating to workforce planning data collection, intended data use and data sharing are included in the HEE eCollection portal.

eCollection

HEE has developed 'eCollection', a suite of data collection tools, one of which is the Operational Multi-Year Workforce Planning Tool.

The benefits of eCollection include:

- Easy access for users with the tools available through the HEE website/HEE 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'
- 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 an appropriate login for each tool can access the data submitted at the level they require

Where to find the Multi-Year Operational Planning Tool

The Multi-Year Operational Planning Tool can be accessed via the eCollection web portal.

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

Timeline

Date	Activity
9 th January 2023	Technical Guidance published
16 th January 2023	Submission portal opens
23 rd February 2023	Interim submission and portal closes
10 th March 2023	Submission portal re-opens
30 th March 2023	Final submission and portal closes

Templates

ICBs will lead this workforce planning process and agree a workforce plan at system level to cover all the below tabs:

- WTE
- Supply Bridge
- Hosted
- Primary Care
- KPIs
- Mental Health provider
- Mental Health for NHS Non-Mental Health providers
- Mental Health for Non-NHS

Data can be entered either straight into the template within the eCollection portal, or downloaded as an excel file, completed, and then uploaded back to the portal.

Please note that eCollection will only accept uploads of the official template downloaded from the eCollection portal¹.

Pasting data from other data sources into the template can be problematic if the source column data is not in the same order. If possible, try to rearrange the source data to fit the template format.

In some cases, this might not be possible. For instance, if there is a calculation field within the area being pasted into.

Taking these steps will enable a successful upload of the data. Once uploaded the data will be validated and if the system reports any errors it will provide an opportunity to correct them.

Password protected workbooks or sheets are not required due to the secure functionality of eCollection; passwords may prohibit the functionality of the data upload and its contents.

¹ The template is subject to minor changes and updates to reflect system feedback but the overall structure will remain consistent

Using the Multi-Year Operational Planning Tool

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

If you have been registered as a user of the eCollection tool you will receive an electronic invitation to access the system. This section provides guidance on how to log in and what to do if you have not received the required information.

As an existing user

Existing users of the eCollection tool can login using their current login credentials.

Logging in

The login page will be the first page you see when you browse to the Multi-Year Operational Planning tool on the eCollection website.

Multi-Year Operational Planning Tool Login page

The screenshot shows a web browser window with the URL <https://ecollection.hee.nhs.uk/OPS2023>. The page is titled "2023/24 - Multi-Year Operational Planning Workforce Collection".

Login Form:

- Email address:
- Password:
- Buttons: [Log in](#) (green), [Forgotten your password?](#) (blue)

Main Content:

- 2023/24 - Multi-Year Operational Planning Workforce Collection**
- Every ICB will need to develop whole system workforce plans, building on the progress towards a pre-covid level of return in the 2022/23 operational plans and People Plan delivery.
- Developments made to this collection include an increase in the granularity of roles for Acute, Ambulance, Community, Mental and Specialist Health Organisations as well as for Primary Care. A supply bridge for year 1 to help better explain the workforce change and a detailed Mental Health collection have also been included in this planning round.
- Plans must demonstrate an integrated approach to activity, finance and workforce planning for year 1 and look at a realistic workforce change for years 2-5.
- The workforce plan will be collected through the Health Education England (HEE) eCollection portal.
- ICBs will lead this workforce planning process and agree a workforce plan across their providers and at a system level, to cover all the below tabs:
 - WTE (Acute, Ambulance, Community, Mental and Specialist Health)
 - Supply Bridge
 - Hosted
 - Primary Care
 - Key Performance Indicators (KPIs)
 - Mental Health NHS Trusts
 - Mental Health for NHS Non-Mental Health Trusts
 - Mental Health for Non-NHS providers
- Timing**
 - 9th January 2023 - E-Collection and Technical Guidance published
 - 16th January 2023 - Submission portal opens
 - 23rd February 2023 - Interim submission and portal closes
 - 10th March 2023 - Submission portal re-opens
 - 30th March 2023 - Final submission and portal closes
- Technical Support**
 - For support to access the HEE e-collection portal or any other technical enquiries please contact: DataService@hee.nhs.uk
 - For all general queries relating to the workforce planning collection, including queries about definitions, guidance and content, please contact: england.nhs-planning@nhs.net
- The following guidance documents can be found on the NHS Planning FutureNHS Collaboration Platform:
 - 2023/24 priorities and operational planning guidance
 - Joint forward plan
 - Templates
 - Tools
 - Technical guidance
 - Supporting materials
- In order to access these materials, please ensure you request to 'join' the associated workspace: [NHS Planning - FutureNHS Collaboration Platform](#)

Bottom Action Buttons:

- HAVE AN INVITE CODE?** If you have an invite code, click here to complete your registration to use 2023/24 - Multi-Year Operational Planning Workforce Collection.
- REGISTER TO USE 2023/24 - MULTI-YEAR OPERATIONAL PLANNING WORKFORCE COLLECTION** If you would like to sign up to use 2023/24 - Multi-Year Operational Planning Workforce Collection, click here and follow the instructions.
- APPLICATION GUIDANCE** Click here to download the current guidance documentation.

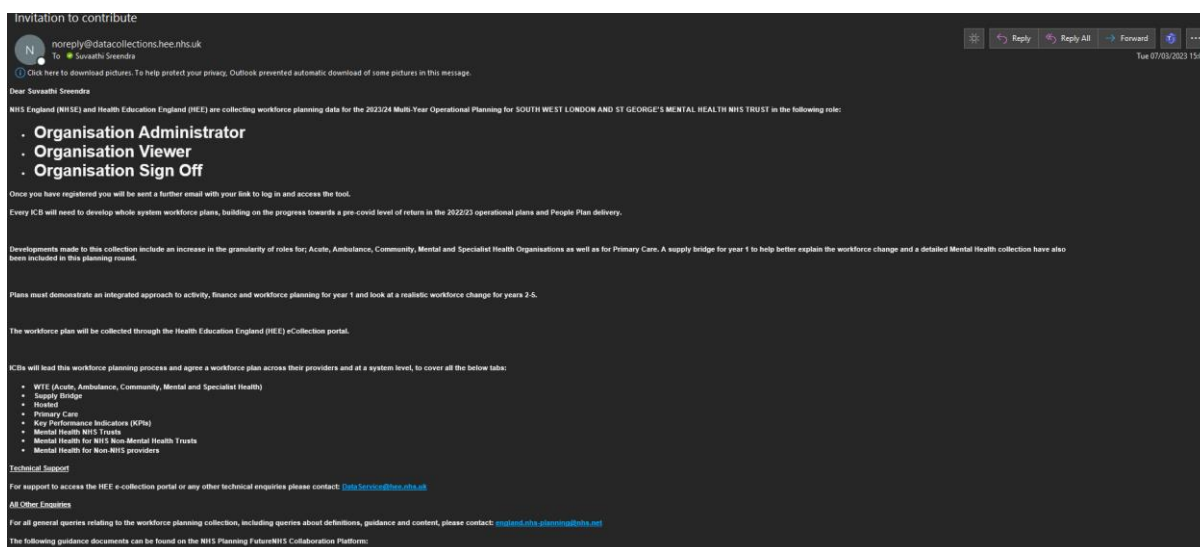
Populate the email address and password fields appearing on the left side of the login page and click the *Log In* button.

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

Invitations to use the Multi-Year Operational Planning Tool

An invitation to contribute will be sent to all registered contributors to the Multi-Year Operational Planning Tool as below:

Invitation to Contribute



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

It also includes the following links:

- eCollection Tool site link
- Forgotten password link (for existing users)
- Complete registration link (for new users).

Invitation to new users

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 the screenshot below.

- 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 Multi-Year Operational Planning Tool.
- Your password must contain between 8 and 16 letters, with a mix of uppercase and lowercase letters, with one or more symbols and numbers.

Click the “create user account” button. Create Account Page

Account set up – Workforce Planner

As the Workforce Planner for CENTRAL ENGLAND MENTAL HEALTH TRUST please set up an account to use the eCollection Tool. This will allow you to organise the collection and submission of workforce information to Health Education England.

Your contact details

Email address

keith.riviera@heavyenergy.com

Name

Keith Riviera

Telephone

Job title

Workforce Lead

Your password

New password

Confirm new password

Create user account

[Return to login](#)

An account will be created for you which you can use to access the tool in the future. After you have created your account, you will be taken through to the home page.

Joining the website as an unknown user

If you have been given an invite code (the invite code is 4 groups of letters separated by a dash - something like ABCD-EFGH-IJKL-MNOP), you can click the “HAVE AN INVITE CODE” link on the Login Screen. You will be presented with the following screen:

Accept an invitation

If you have been provided with an **Invite Code** please enter it below and click 'Next'.

Enter your invitation code

Next

[Return to login](#)

Enter your invite code. When you press the Next button, you will be taken through to a page where you will be asked to enter your email address. On pressing Next, you will be able to create an account as detailed above.


Registering to use Multi-Year Operational Planning Tool for the first time

If you have not received an invitation but believe you should have access to the application, you can use this section to request access from HEE.

- Go to the Multi-Year Operational Planning Tool login page
- Click the panel titled *REGISTER TO USE 2023/24 Ops Planning*

REGISTER TO USE 2023/24 - MULTI-YEAR OPERATIONAL PLANNING WORKFORCE COLLECTION

If you would like to sign up to use 2023/24 - Multi-Year Operational Planning Workforce Collection, click here and follow the instructions.



- You will then be forwarded to the registration page. Enter your email address and click Next.

Registration email address *2023/24 - Multi-Year Operational Planning Workforce Collection*

Email address

Enter a valid email address

Please provide an email address

Next

- Once you have entered a valid email address and clicked Next, you will be taken to a page where you can enter your organisation code. The corresponding organisation name should auto-populate once you entered your ODS code. If you do not know your ODS code, you can click on the text "*I don't have an ODS code*" and this will take you through to another page where you can select your organisation from a drop-down list, to retrieve the ODS code.

Please enter the details of the organisation to which you wish to contribute.

ODS Code

Org Name

Org Code

Org Code

[I don't have an ODS code](#)

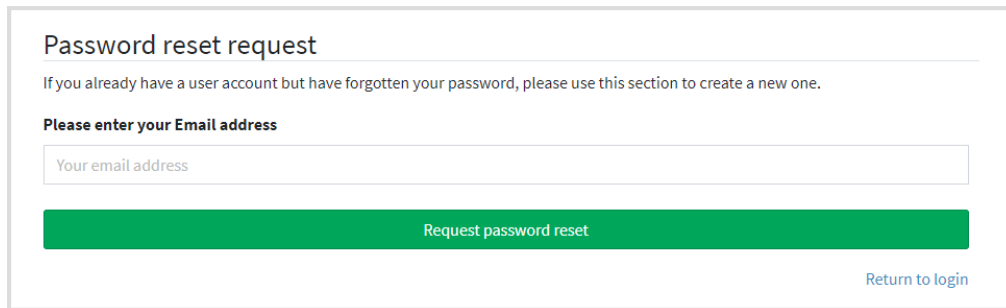
Next

- Once you have entered your ODS Code, click on the Next button and you will be taken through to a confirmation page. Please check the information on this page is correct and click the green button Submit Registration Request.
- Once submitted, your registration request will be reviewed by an administrator.
- If your request is accepted, you will be sent an invitation email inviting you to contribute.

Forgotten password

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

- Click “*Forgotten your password?*” on the login page. This will display the Password Reset page.



The screenshot shows a web form titled "Password reset request". Below the title is a horizontal line. Underneath, there is a line of text: "If you already have a user account but have forgotten your password, please use this section to create a new one." Below this is the instruction "Please enter your Email address". There is a text input field with the placeholder text "Your email address". Below the input field is a green button labeled "Request password reset". In the bottom right corner of the form, there is a blue link that says "Return to login".

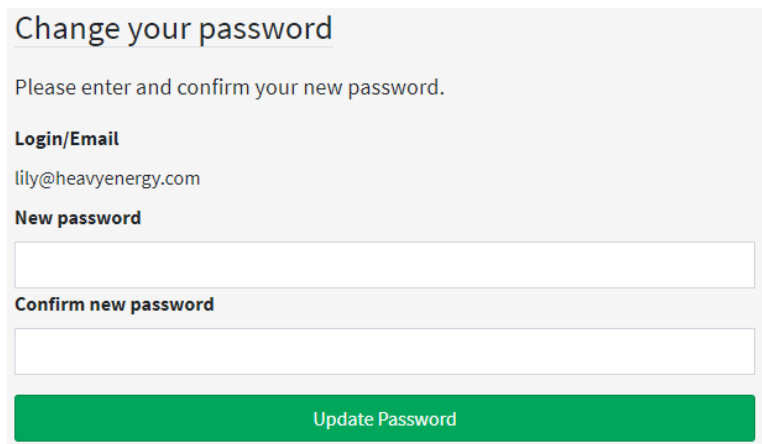
- Enter your email address and click the “*Request password reset*” button. If successful, the following message will be displayed.

Password reset request

A password reset has been sent to your email address

Return to login

- A *password reset email* will be sent to your email address.



The screenshot shows a web form titled "Change your password". Below the title is a line of text: "Please enter and confirm your new password." Below this is the instruction "Login/Email". There is a text input field with the value "lily@heavyenergy.com". Below this is the instruction "New password". There is a text input field. Below this is the instruction "Confirm new password". There is a text input field. Below the input fields is a green button labeled "Update Password".

Dear Lily Crosswell.

You have requested a password reset for your eCollection account

If you have remembered your password, then no further action is necessary - please proceed to the [login page](#)

To proceed, [Reset Password now](#) and follow the instructions.

Click the *Reset Password Now* link and your browser will display the change your password page.

- 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.

If your email address is not registered, the application will display the following message.

Password reset request

If you already have a user account but have forgotten your password, please use this section to request a password reset.

Please enter your Email address

joe@noaccount.com

We could not find a user account associated with this email address.

Request password reset

[Return to login](#)

Possible causes for this might include:

- The email you provided was incomplete or mistyped.
- You had previously received an invitation email to access Multi-Year Operational Planning Tool but did not click the *Complete Registration* link. This may result in your email address not being recognised.

If either of these are the case, please contact DataService@hee.nhs.uk

Multi-Year Operational Planning Tool home page

Upon successful login, you will be forwarded to the Multi-Year Operational Planning Tool 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.
- **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 Multi-Year Operational Planning Tool documentation and downloads.

Multi-Year Operational Planning Tool home page

2023/24 - Multi-Year Operational Planning Workforce Collection 16 Jan - 30 Mar 2023

Every ICB will need to develop whole system workforce plans, building on the progress made towards a pre-covid level of return in the 2022/23 operational plans and People Plan delivery. Developments made to this collection include an increase in the granularity of roles for the Acute, Ambulance, Community, Mental and Specialist Health Organisations as well as for Primary Care. A supply bridge for year 1 to help better explain the workforce change and a detailed Mental Health collection have also been included in this planning round.

Plans must demonstrate an integrated approach to activity, finance and workforce planning for year 1 and look at a realistic workforce change for years 2-5. The workforce plan will be collected through the Health Education England (HEE) eCollection portal.

Baseline numbers for Trainees by Specialty and Foundation Trainees have been pre-populated in the template and eCollection using current data from the Trainee Information System (TIS). The current figures have been copied across future years but are subject to change to reflect work underway on USGAD numbers and redistribution & known growth.

ICBs will lead this workforce planning process and agree a workforce plan across their providers and at a system level, to cover all the below tabs:

- WTE (Acute, Ambulance, Community, Mental and Specialist Health)
- Supply Bridge
- Hosted
- Primary Care
- Key Performance Indicators (KPIs)
- Mental Health NHS Trusts
- Mental Health for NHS Non-Mental Health Trusts
- Mental Health for Non-NHS providers

Timeline

- 8th January 2023 - E-Collection and Technical Guidance published
- 15th January 2023 - Submission portal opens
- 23rd February 2023 - Interim submission and portal closes
- 10th March 2023 - Submission portal re-opens
- 30th March 2023 - Final submission and portal closes

Technical Support

For support to access the HEE e-collection portal or any other technical enquiries please contact: DataService@hee.nhs.uk

All Other Enquiries

For all general queries relating to the workforce planning collection, including queries about definitions, guidance and content, please contact: eng@ndi.info-planning@hee.nhs.uk

The following guidance documents can be found on the NHS Planning FutureNHS Collaboration Platform:

- 2023/24 priorities and operational planning guidance
- Joint forward plan
- Templates
- Tools
- Technical guidance
- Supporting materials

In order to access these materials, please ensure you request to 'join' the associated workspace: NHS Planning - FutureNHS Collaboration Platform

Navigation buttons

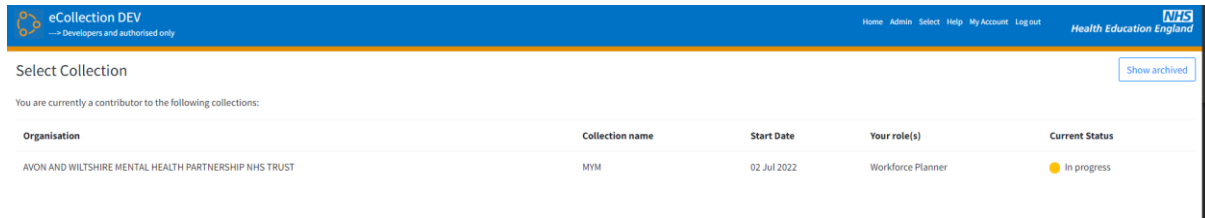


The navigation buttons above, which are displayed at the top of the screen, have the following functions from left to right:

- Home – returns you to the home page
- Select – switching between different data collections or plans (if assigned to more than one)
- Help – Provides help and support on the system
- My Account – Manage your account and account details - see [Change User details](#)

- Log out – log out of the system and be sent back to the login screen - See [Login page link](#)

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



Simply click on the relevant row you would like to view.

Change User details

Your user account

Your details

Full name

Phone number

Job title

[Update](#)

Change your password

Current password

New password

Confirm new password

[Change password](#)

You will find the following navigational features listed down the left-hand side of the dashboard.

Dashboard Navigation Features (Organisational Admin view)

An Organisational Admin (Non-MH) will see the following navigation features:


The screenshot shows a navigation menu for an Organisational Admin. At the top, it displays the user's name 'Suvaathi Sreendra' and the organization 'Airedale NHS Foundation Trust'. A notification bell icon shows 0 notifications. The menu is organized into several sections: 'My Trust' with 'My Organisation' and 'Assign Contributors' (100%); 'Data Sharing Agreement' with 'Consent' (0%); 'Upload' with 'Upload File' and 'Uploads'; 'Workforce Plan' with 'WTE' (0%), 'Supply Bridge' (0%), 'Hosted' (0%), 'KPIs' (0%), and 'Download Template'; and 'Sign Off' with 'Organisation Sign Off' (0%) and 'Submit Return' (0%). The 'Organisation Sign Off' item is highlighted with a blue background.


Section	Item	Progress
My Trust	My Organisation	
	Assign Contributors	100%
Data Sharing Agreement	Consent	0%
Upload	Upload File	
	Uploads	
Workforce Plan	WTE	0%
	Supply Bridge	0%
	Hosted	0%
	KPIs	0%
	Download Template	
Sign Off	Organisation Sign Off	0%
	Submit Return	0%

An Organisational Admin (MH) will see the following navigation features:

 AVON AND WILTSHIRE MENTAL
HEALTH PARTNERSHIP NHS TRUST
 Suvaathi Sreendra

My Trust


 My Organisation


 Assign Contributors 0%

Data Sharing Agreement

 Consent 0%


Upload

 Upload File

 Uploads


Workforce Plan

 WTE 0%

 Supply Bridge 0%


 Hosted 0%

 KPIs 0%

 Download Template

Mental Health Plan

 Mental Health Trust 0%

 Download Template

Dashboard Navigation Features (ICB view)

An ICB/system provider will see the following navigation features:

The screenshot displays a vertical navigation menu for the NHS South West London Integrated Care Board. The menu is organized into several sections, each with a header and a list of items. Each item is accompanied by a status indicator, either a green circle with a checkmark or a red circle with a percentage.

- NHS SOUTH WEST LONDON**
INTEGRATED CARE BOARD
Suzantha Sreendra
- My Organisation**
 - My Organisation
 - Assign Contributors 0%
- Your Providers**
 - Manage Providers
- Data Sharing Agreement**
 - Consent 0%
- Upload**
 - Upload File
 - Uploads
- Provider Workforce Plans**
 - WTE 0%
 - Supply Bridge 0%
 - Hosted 0%
 - KPIs 0%
 - Mental Health 0%
 - Download Template
- ICS Workforce Plan**
 - Primary Care 0%
 - Non-NHS Mental Health 0%
 - Non-Mental Health Trust 0%
 - Download Template
- Provider Workforce Plan Review**
 - WTE
 - Supply Bridge
 - Hosted
 - KPIs
 - Mental Health
 - Download Template
- ICS Workforce Plan Review**
 - Primary Care
 - Non-NHS Mental Health
 - Non-Mental Health Trust
 - Download Template
- Assurance Reports**
 - Triangulation Report
- Sign Off**
 - ICB Sign Off 0%
 - Submit Return 0%





Dashboard Navigation Features (Regional view)

A regional viewer will see the following navigation features:

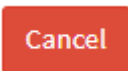
The screenshot shows a vertical navigation menu on the left side of a dashboard. At the top, it displays the organization name 'NHSI/E - London' and the user name 'Suvaathi Sreendra'. Below this, the menu is organized into several sections:

- My Organisation**
 - My Organisation (with an information icon)
 - Assign Contributors (with a yellow progress indicator and a red '0%' badge)
- Provider Workforce Plans**
 - WTE (with a yellow progress indicator and a red '0%' badge)
 - Supply Bridge (with a yellow progress indicator and a red '0%' badge)
 - Hosted (with a yellow progress indicator and a red '0%' badge)
 - KPIs (with a yellow progress indicator and a red '0%' badge)
 - Mental Health (with a yellow progress indicator and a red '0%' badge)
 - Download Template (with an information icon)
- ICS Workforce Plans**
 - Primary Care (with a yellow progress indicator and a red '0%' badge)
 - Non-NHS Mental Health (with a yellow progress indicator and a red '0%' badge)
 - Non-Mental Health Trust (with a yellow progress indicator and a red '0%' badge)
 - Download Template (with an information icon)


The tasks in the navigation features list will have small icons to left of the text:


Icon	Meaning
	This indicates there is an incomplete task that is assigned to you. You can edit the demands in this task
	Indicates that the task is incomplete, and the task is not assigned to you. You can only view the tasks in this demand
	This button allows you to download all templates categorised under a particular section
	Indicates that the task is complete

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

My Organisation

The first section on the dashboard navigation contains information about your organisation and the people who will work on your submission. It is divided into two sub-sections - organisation details and contributors.

When you first log in, check that your organisation or institution's details are correct. Click 'My Organisation' and check your details.

My Organisation Page

My Organisation [Redacted]

ODS Code	Org Name
<input type="text" value="QHL"/>	<input type="text" value="Birmingham and Solihull"/>

Location	About
Address	Organisation Type
<input type="text"/>	<input type="text" value="STP"/>
Postcode	HEE
<input type="text"/>	<input type="text" value="Health Education England"/>
	HEE - Local Office
	<input type="text" value="West Midlands"/>
	HEE - Regional teams
	<input type="text" value="Midlands & East"/>
	STP in NHSEI
	<input type="text" value="Birmingham and Solihull"/>
	Region in HEE
	<input type="text" value="03_MIDLANDS"/>
	NHS7 Regions 18
	<input type="text" value="Midlands"/>
	HEE Region 17
	<input type="text" value="M&E"/>
	HEE - Regional Team
	<input type="text" value="M&E"/>
	HEE - Region
	<input type="text" value="Midlands"/>

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.

Assign Contributors

Multiple users may be assigned to the data collection allowing the tasks to be shared with designated colleagues. Please note this is an ICB-led collection, and ICBs will decide who should be a contributor for a specific organisation. It is though possible for contributors, once assigned, to then assign additional contributors.

The Assign Contributors 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.

Assign Users

Users *Setup and modify your organisation's users* Cancel Save

Email	Name	Job Title	
University Administrator			Add another
<input type="text" value="lily@heavyenergy.com"/>	<input type="text" value="Lily Piper"/>	<input type="text" value="Administrator"/>	🗨️ ✉️ ✖️

Adding a user

Please note that adding a user to your organisation will also give them access to the data.

- Click “Assign Contributors” in the side menu
- Click the “Add another” link which will result in a new row being displayed

Barts Health NHS Trust
Sovaathi Sreedra

My Trust

My Organisation

Assign Contributors 0%

Users *Setup and modify your organisation's users* Cancel Save

Email	Name	Job Title	
Organisation Administrator			Add another
<input type="text" value="Add email address"/>	<input type="text" value="Add contact name"/>	<input type="text" value="Add job title"/>	n/a
Organisation Viewer			Add another
<input type="text" value="Add email address"/>	<input type="text" value="Add contact name"/>	<input type="text" value="Add job title"/>	n/a
Organisation Sign Off			Add another
<input type="text" value="Add email address"/>	<input type="text" value="Add contact name"/>	<input type="text" value="Add job title"/>	n/a

- Add the details of the new user into these fields, taking particular care to add the email address correctly.

<input type="text" value="billy@heavyenergy.com"/>	<input type="text" value="Billy Williamson"/>	<input type="text" value="Administrator"/>	🗨️ ✖️
--	---	--	---------------------------------

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

Users *Setup and modify your organisation's users* Cancel Save

Email	Name	Job Title	
Organisation Administrator Add another			
[Redacted]	Clement Davey	HEE	
Organisation Viewer Add another			
[Redacted]	Nora Saad	Project Support Officer	
Organisation Sign Off Add another			
[Redacted]	Suvaathi Sreendra	Senior Project Manager	

- An invitation will then be sent to the new users giving further instructions for how to complete their registration.
- Please note you will need to enter details for each role, to complete this section. If necessary, you can have the same person for more than one role.

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

Add note for Billy Williamson x



Billy, please could you lead on the placement provider returns?

Cancel OK

- 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.
🔴 Billy Williamson will be deleted when you click save. 
- If you are sure you want to delete this user, click the “Save” button.
- The page will reload, and the user has been removed.

There are three ways which you can use to navigate between cells. You can :

- Use your mouse to click cells
- Use the TAB or ENTER key on your keyboard or
- Use the arrows on your keyboard.

In order to enter information/data you need to click on the cells and enter your value. **You must enter some data in all cells (even if zero) to complete the section.**

To make it easier to bulk fill empty cells with zero data, each row has a bulk editing option that is shown when you click on the row header under “Area/Role”.

Clicking on a row header for an editable row (white background) will give the following options:

1. Fill Zeros
2. Clear
3. Undo

Substantive		874.00	881.00	885.00	885.00	885.00	885.00	885.00	885.00	885.00	885.00	885.00	885.00	885.00	885.00	885.00	885.00
Registered Nursing, Midwifery an...	NQA, N0C, N0H, N0J, N0L, N6A, N6C, ...	39.00	36.00	39.00	39.00	39.00	39.00	39.00	39.00	39.00	39.00	39.00	39.00	39.00	39.00	39.00	39.00
Adult nursing	NQA, N6A, N7A, NAA, NCA, N0C, N6C,...	9.00	6.00	9.00	9.00	9.00	9.00	9.00	9.00	9.00	9.00	9.00	9.00	9.00	9.00	9.00	9.00
Hospital based	NQA, N6A, N7A, NAA, NCA	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00

When you click on the blue ‘Fill Zeros’ link, all the empty cells within that section fill with zeros.

When you click on the black ‘Clear link’, all the cells are emptied.

When you click on the red ‘Undo’ link, all your changes are reverted to what they were when they were last saved.

You may save the template at any time and return to it later if you wish. If you press cancel, all your unsaved updates will be lost.

Entering Comments

To enter comments, click on the comment box of the row you would like to enter comments for. The row will be highlighted allowing you to edit perhaps to detail any assumptions, actions, risks or mitigations, relating to the row in question.

31/03/2024	31/03/2024	31/03/2024
Year ending	Year ending	Year ending
WTE Change	Change %	Comments
0	0	0
0	0	0
0	-	test

Once completed, click out of the row and the text will be saved with the box turning green

31/03/2024
Year ending
Comments
0 0
0 0
- test

The comment can be edited as necessary by clicking on the comment box again.

The comments will also show as an additional column in the template when downloaded to excel (*except in the Total tab*) and can be entered or edited as necessary in excel and uploaded to eCollection, where they can be further reviewed or amended if required.

The screenshot shows an Excel spreadsheet titled 'Download Template_2022Dec20_1631_A20'. The spreadsheet contains a table for '2023/24 - OPS Planning (Oct 2022 to Oct 2023)'. The table has columns for months from 30/11/2023 to 31/03/2024, and a 'Comments' column. The data is as follows:

	30/11/2023	31/12/2023	31/01/2024	28/02/2024	31/03/2024	31/03/2024	31/03/2024	31/03/2024
	Month 8	Month 9	Month 10	Month 11	Month 12	Year ending	Year ending	Year ending
	WTE	WTE	WTE	WTE	WTE	WTE Change	WTE Change	WTE Change %
Total WTE Hosted Staff	27.00	27.00	88.00	27.00	27.00	-18.00	-22.7%	
Total Non Medical - Clinical Staff	21.00	21.00	82.00	21.00	21.00	0.00	0%	
Registered Nursing, Midwifery and Health visiting staff	1.00	1.00	1.00	1.00	1.00	0.00	0%	test
Allied Health Professionals	2.00	2.00	2.00	2.00	2.00	0.00	0%	
Other Scientific, Therapeutic and Technical Staff	3.00	3.00	3.00	3.00	3.00	0.00	0%	
Health Care Scientists	4.00	4.00	65.00	4.00	4.00	0.00	0%	
Support to clinical staff	5.00	5.00	5.00	5.00	5.00	0.00	0%	
Total Non Medical - Non-Clinical Staff	6.00	6.00	6.00	6.00	6.00	0.00	0%	

Completing The Mental Health Template

Organisations classified as “Mental Health Provider Trusts” will be responsible for completing the Mental Health template, which will feature as an additional stage in the left-hand menu.

Workforce Plan

- ✔ WTE 100%
- ✔ Supply Bridge 100%
- ✔ Hosted 100%
- ✔ KPIs 100%
- i Download Template

Mental Health Plan

- ✔ Mental Health Trust 100%
- i Download Template

[Sign Off](#)

The organisation administrator (or ICB administrator depending on what is agreed) for the Mental Health provider Trust should first select the ICB for whom they provide workforce and services, by clicking on the orange + button and choosing the ICB from the list. A blank template will be displayed in a tab adjacent to the total, which will display the name of the ICB.

Mental Health Trust Review & edit data (0 rows) Search data

Total	+	ICB	Establishment	Baseline			Plan			Commentary
				Staff in Post	How many of these roles are ARNs?	Establishment	Staff in Post	How many of these roles are ARNs?	Establishment	
				Year End (31st Mar 2023)	Year End (31st Mar 2023)	Year End (31st Mar 2023)	Year End (31st Mar 2024)	Year End (31st Mar 2024)	Year End (31st Mar 2024)	
WTE	WTE	Whole Number	WTE	WTE	Whole Number	WTE	Free Text - Optional			
Children		Cheshire & Merseyside	0.00	0.00	0	0.00	0.00	0	0.00	
Psychiatrist - non consultant										
Nursing										
Pharmacist										
Psychologist										
Psychotherapists and psychological professionals										
of which are Educational Mental Health Practitioners										
of which are Children's Wellbeing Practitioners										
of which are Senior Educational Mental Health Practitioners										
of which are Senior Children's Wellbeing Practitioners										
Occupational Therapists										
Other therapists \ other Scientific, Therapeutic & Technical										
of which are Youth Intensive Psychological Practitioners										
of which are Family Ambassadors										
Paramedics										
Support to clinical staff										
of which are Nursing Associates										
of which are Trainee Nursing Associates										
of which are Trainee Educational Mental Health Practitioners										
of which are Trainee Children's Wellbeing Practitioners										
Physicians Associates										
Admin										

The Mental Health template can be completed in the same way as the Workforce Plan, either by downloading to excel, completing, and then uploading back to eCollection, or by editing directly on the eCollection screen itself.

Every cell will require either a positive number or a zero to complete the plan and for the Mental Health Trust section on the left-hand menu to show as 100%.

Adding a template for an additional ICB:

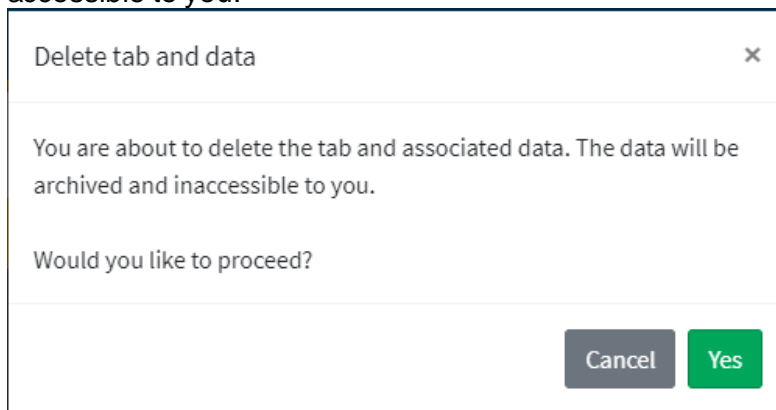
For those NHS Trusts who provide mental health services to more than one ICB and would like to complete a mental health workforce plan to reflect this, there is the facility to add further tabs for additional ICB's. Click on the orange '+' button and select the ICBs from the list displayed.

If you click on an ICB in this list, it will be added as another tab alongside your lead ICB. This can be repeated as many times as necessary. Any ICB's which have been added as tabs will then be displayed in bold when looking at this menu again.

Deleting an ICB tab:

If you would like to remove an ICB and delete the tab, there is an orange X button (✖) which appears next to the name of the ICB in the tab. Clicking on this button will lead to a pop-up window appearing (highlighted in red)

If you click on the green 'Yes' option, the tab will be deleted, and the data will no longer be accessible to you.



Total:

The Total tab displays a view of the aggregated total of the mental health workforce plans (tabs) submitted by a mental health provider trust for ICBs for whom they provide services. (Available for organisation administrators)

ICB Workforce Plan

The ICB provider has two parts:

1. Validating the plans of their providers:

The 'Provider Workforce Plans' view in the ICB screen is a **read only** view which enables the ICB to view and validate both the individual plans for each organisation within their ICB and also see the aggregate of all providers' plans. The ICB can monitor and review the plans, **but** they do not contribute to the plans in this screen.

Provider Workforce Plans

✖ WTE	11%
✖ Supply Bridge	3%
✖ Hosted	50%
✖ KPIs	0%
✖ Mental Health	33%
📄 Download Template	

Manage Providers

The Manage providers option allows ICBs to assign contributors including themselves if it is agreed with the respective organisation that the ICB will complete the workforce plan.

If an ICB wants to complete or edit workforce plans for a provider or providers, they should add themselves to the provider's collection by selecting 'Manage Providers' (as seen in the below screenshot) and assigning themselves as a contributor for the relevant organisation.

The screenshot shows the 'eCollection DEV' interface for 'NHS WEST YORKSHIRE INTEGRATED CARE BOARD'. The main heading is 'Manage Providers'. Below the heading is a search bar and three buttons: 'Show Active', 'Lock all', and 'Unlock all'. The table below has the following data:

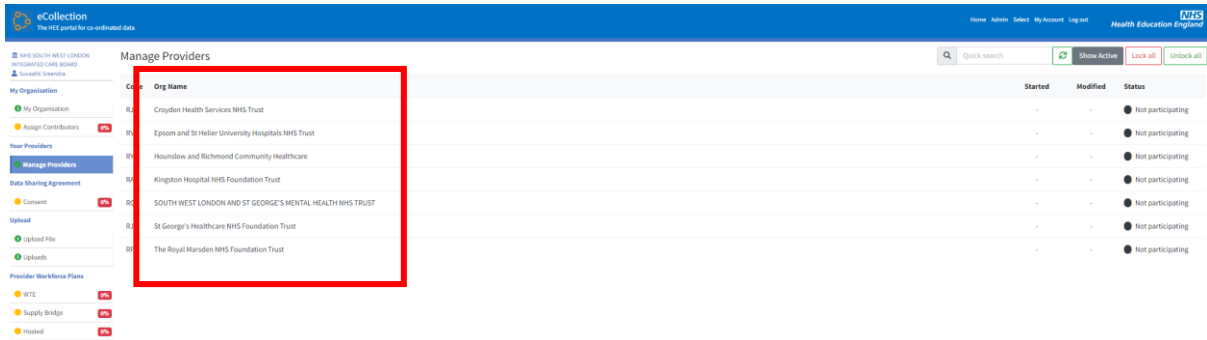
Code	Org Name	Status
RCF	Airedale NHS Foundation Trust	Unused invite code
TAD	BRADFORD DISTRICT CARE NHS FOUNDATION TRUST	In progress
RGD	LEEDS AND YORK PARTNERSHIP NHS FOUNDATION TRUST	In progress
RXG	SOUTH WEST YORKSHIRE PARTNERSHIP NHS FOUNDATION TRUST	Unused invite code

When data is added for a plan in an organisation, the ICB administrator (or viewer) can expect to see the values change in the ICB section of the collection.

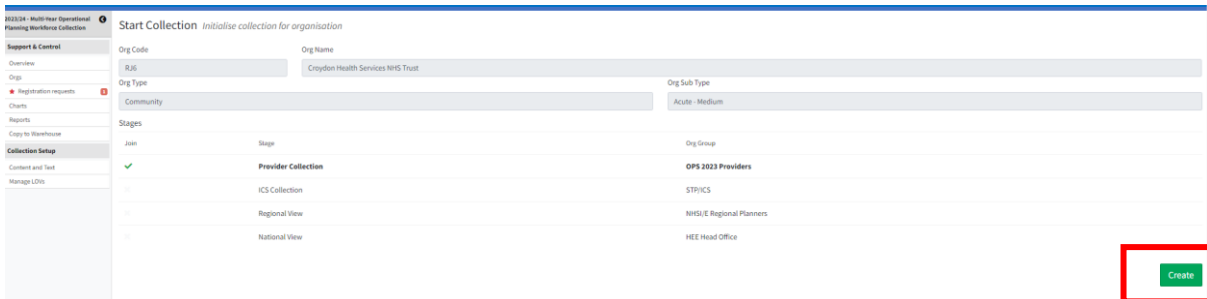
Initiate Provider Collections

For the collections showing as "Not participating" the ICB administrator needs to initiate the collection ("Create") and assign contributors (administrators, viewers, sign-off). The process outlined below should be followed.

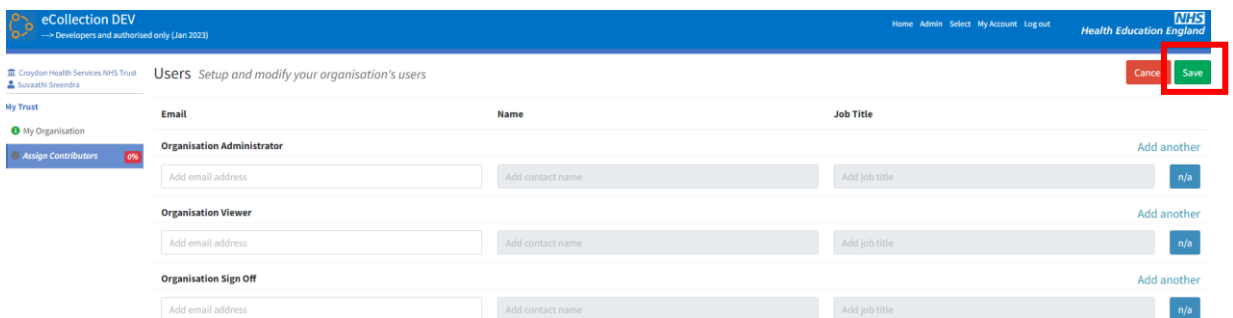
- Select 'manage providers' in the left-hand menu, then click on the provider in question. For example, in the screenshot below the ICB administrator will need to click on any of the 'org name' that have the status as not participating



- Select 'Create'



- The provider collection will be initiated & the ICB administrator will then be within the collection for that provider. Following this the ICB administrator needs to select "Assign contributors". Complete the user details for all relevant organisation administrator, viewer and sign-off roles (NB this might be the ICB administrator themselves if it is agreed that they will be the one actually completing the collection for the provider)



Press 'Save' (top right) and invitation emails will be generated to each of the respective users

2. Plans to be completed by the ICB for the collection:

An ICB is expected to complete and submit the following 3 plans:

- Primary Care
- Non-NHS Mental Health
- Non-Mental Health Trust

Primary Care *Review & edit data*

Search data Save

Workforce	Baseline		Plan				Year ending	Comments
	Staff in post autumn		Q1	Q2	Q3	Q4		
	Year end (31-Mar-23)	30/06/2023	30/09/2023	31/12/2023	31/03/2024	As at the end of		
Total WTE	Total WTE	Total WTE	Total WTE	Total WTE	Total WTE	Total WTE		
Total Workforce	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Total GPs	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
GP Partners								
GP Regular Locums								
GP Retainers								
GPs in Training Grade								
Subsided GPs								
Medical Clinical Director (GP)								
Total Nurses	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Advanced Nurse Practitioners								
Extended Role Practice Nurses								
Nurse Dispensers								
Nurse Specialists								
Nursing Partners								
Other Nurses								
Practice Nurses								
Trainee Nurses								
Clinical Director (Nurse)								
Direct Patient Care roles (ARRS funded)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Adult Mental Health Practitioners								
Advanced Dietician Practitioners								
Advanced Occupational Therapist Practitioners								
Advanced Paramedic Practitioners								
Advanced Pharmacist Practitioners								
Advanced Physiotherapist Practitioners								
Advanced Podiatrist Practitioners								

Non-NHS Mental Health *Review & edit data (0 rows)*

Search data Save

Staffing Category	2023/24 planned position		Baseline		Plan				Commentary
	Establishment	Staff in Post	How many of these roles are ARRS?	Establishment	Staff in Post	How many of these roles are ARRS?	Establishment		
	Year End (31-Mar-2024)	Year End (31-Mar-2023)	Year End (31-Mar-2023)	Year End (31-Mar-2023)	Year End (31-Mar-2024)	Year End (31-Mar-2024)	Year End (31-Mar-2024)		
	WTE	WTE	WTE Number	WTE	WTE	WTE Number	WTE	Flow Text - Optional	
Children and Young People	0.00	0.00	0	0.00	0.00	0	0.00		
Psychiatrist - consultant									
Psychiatrist - non-consultant									
Nursing									
Pharmacist									
Psychologist									
Psychotherapists and psychological professionals									
of which are Educational Mental Health Practitioners									
of which are Children's Wellbeing Practitioners									
of which are Senior Educational Mental Health Practitioners									
of which are Senior Children's Wellbeing Practitioners									
Occupational Therapists									
Other therapists (other Scientific, Therapeutic & Technical)									
of which are Youth Intensive Psychological Practitioners									
of which are Family Ambassadors									
Paramedics									
Support to Clinical Staff									
of which are Nursing Associates									
of which are Trainee Nursing Associates									
of which are Trainee Educational Mental Health Practitioners									
of which are Trainee Children's Wellbeing Practitioners									
Physicians Associates									
Admin									
Peer support worker									
Social worker									
Physical Mental Health	0.00	0.00	0	0.00	0.00	0	0.00		
Psychiatrist - consultant									
Psychiatrist - non-consultant									
Nursing									
Pharmacist									

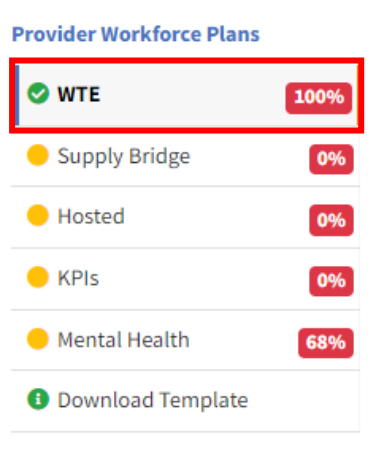
Staffing Categories	2023/24 planned position		Baseline				Plan				Commentary
	Establishment	Staff in Post	New entry of these roles are		Establishment	Staff in Post	New entry of these roles are				
			Year End (2024 Mar 2024)	Year End (2024 Mar 2024)			Year End (2024 Mar 2024)	Year End (2024 Mar 2024)	Year End (2024 Mar 2024)	Year End (2024 Mar 2024)	
	WTE	WTE	Whole Number	WTE	WTE	WTE	WTE	WTE	WTE	WTE	Free Post - Optional
Children and Young People	0.00	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00	
Psychiatrist - consultant											
Psychiatrist - non consultant											
Nursing											
Pharmacist											
Psychologist											
Psychotherapists and psychological professionals											
of which are Educational Mental Health Practitioners											
of which are Children's Wellbeing Practitioners											
of which are Senior Educational Mental Health Practitioners											
of which are Senior Children's Wellbeing Practitioners											
Occupational Therapists											
Other therapists (other Scientific, Therapeutic & Technical											
of which are Health Inequality Psychological Practitioners											
of which are Family Embassadors											
Paramedics											
Support to clinical staff											
of which are Nursing Associates											
of which are Senior Nursing Associates											
of which are Senior Educational Mental Health Practitioners											
of which are Trainee Children's Wellbeing Practitioners											
Physicians Associates											
Admin											
Peer support worker											
Social worker											
Mental Health	0.00	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00	
Psychiatrist - consultant											
Psychiatrist - non consultant											
Nursing											
Pharmacist											

Triangulation Report

As an ICB administrator, you will be able to download and view the triangulation report before you sign off on the submission. This can be located by clicking on 'Triangulation Report' on the left-hand side menu under the 'Assurance Reports' section



It is essential that 'WTE' tab under 'Provider Workforce Plans' is 100% completed by your organisations before you download the report



Click on the downloaded excel file, and you will be able to view the report for all your providers within your ICB.

The report can then be used with the triangulation tool.

Please note this report can be downloaded multiple times as part of the assurance process ahead of signoff, following any changes made to the 'WTE submission.

Assurance Reports

Triangulation Report

Sign Off

ICB Sign Off

0%

Submit Return

0%

<https://hee-ecollection-uat-app.azurewebsites.net/Coll>

ICS Triangulation...xlsx

SystemCode	SystemName	Provider	ProviderName	LineDescription	Subjectivity	MeasureCode	WTE
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Registered Nursing, Midwifery and Health visiting staff	STCL1707	30/04/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Registered Nursing, Midwifery and Health visiting staff	STCL1707	30/06/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Registered Nursing, Midwifery and Health visiting staff	STCL1707	30/07/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Registered Nursing, Midwifery and Health visiting staff	STCL1707	31/08/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Registered Nursing, Midwifery and Health visiting staff	STCL1707	30/09/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Registered Nursing, Midwifery and Health visiting staff	STCL1707	31/10/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Registered Nursing, Midwifery and Health visiting staff	STCL1707	30/11/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Registered Nursing, Midwifery and Health visiting staff	STCL1707	31/12/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Registered Nursing, Midwifery and Health visiting staff	STCL1707	31/01/2024	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Registered Nursing, Midwifery and Health visiting staff	STCL1707	29/02/2024	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Registered/ Qualified Scientific, Therapeutic and Technical Staff	STCL185T	31/03/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Registered/ Qualified Scientific, Therapeutic and Technical Staff	STCL185T	30/04/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Registered/ Qualified Scientific, Therapeutic and Technical Staff	STCL185T	31/05/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Registered/ Qualified Scientific, Therapeutic and Technical Staff	STCL185T	31/06/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Registered/ Qualified Scientific, Therapeutic and Technical Staff	STCL185T	31/07/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Registered/ Qualified Scientific, Therapeutic and Technical Staff	STCL185T	31/08/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Registered/ Qualified Scientific, Therapeutic and Technical Staff	STCL185T	30/09/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Registered/ Qualified Scientific, Therapeutic and Technical Staff	STCL185T	31/10/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Registered/ Qualified Scientific, Therapeutic and Technical Staff	STCL185T	29/02/2024	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Registered/ Qualified Scientific, Therapeutic and Technical Staff	STCL185T	31/03/2024	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Support to Clinical staff	STCL230T	31/03/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Support to Clinical staff	STCL230T	30/04/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Support to Clinical staff	STCL230T	31/05/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Support to Clinical staff	STCL230T	30/06/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Support to Clinical staff	STCL230T	31/07/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Support to Clinical staff	STCL230T	31/08/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Support to Clinical staff	STCL230T	30/09/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Support to Clinical staff	STCL230T	31/10/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Support to Clinical staff	STCL230T	30/11/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Support to Clinical staff	STCL230T	31/12/2023	Substantive 0
Q16	NHS CORNWALL AND THE ISLES OF SCILLY INTEGRATED CARE BOARD	RJB	CORNWALL PARTNERSHIP NHS FOUNDATION TRUST	Support to Clinical staff	STCL230T	31/01/2024	Substantive 0

Downloading and Uploading data

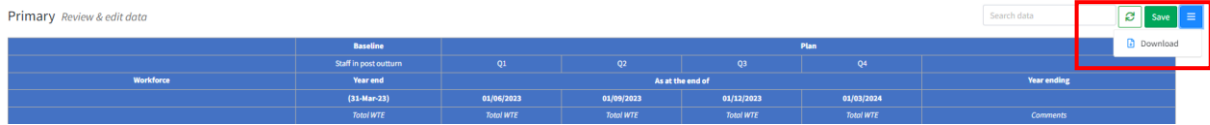
If you find it easier, you can download the demand data and do the editing in Microsoft® Excel*.

Users can download the complete the workforce data template which includes all the tabs by clicking the 'Download Template' option in the navigation bar on the left:

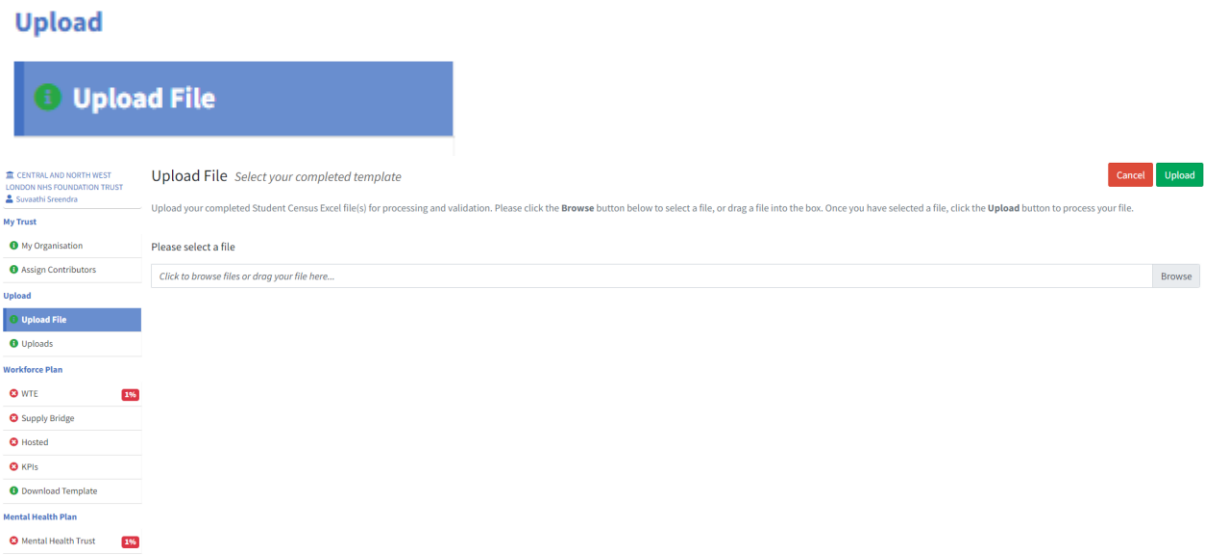
Download Template

Users can download a specific tab via clicking on the button top right of the screen, as seen on the screenshot below.

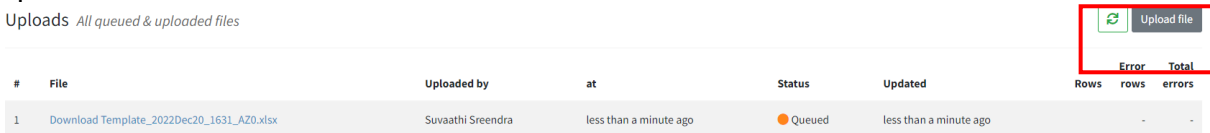
***Please note, to enable a download of the Mental Health template, an ICB will have to be added first**



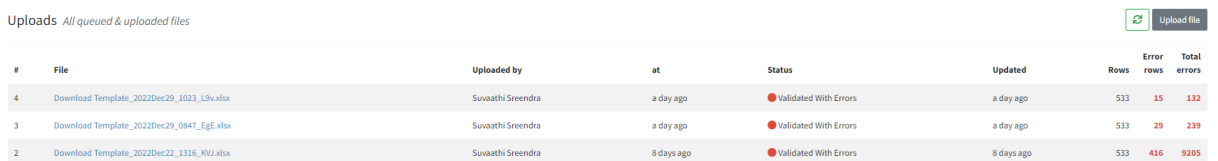
Once you have downloaded and filled out a template using Microsoft® Excel, you can reupload it to the eCollection Tool. You can upload a template by clicking on the 'Upload File' button underneath the 'Upload' section in the navigation bar on the left, at which point you will receive the option to select a file to import:



Once you have chosen the file and clicked on the green "Upload" button, you will be taken through to the 'Uploads' tab (as seen on a test below). At this point, you can review your uploads.



You will need to press the refresh button at the top right corner to see the progress status of your upload



Navigate back to the workforce data screen to check that the data has successfully updated

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.

If your upload has been validated with errors, you can click on your upload status, and you will be directed to the staging area where you will be able to see where the validation errors are

Uploads *Upload progress*

Restage Revalidate Back

File Upload

Status	Uploaded file	Created	Last updated
Validated	Download Template_2022Dec28_1327_KBb.xlsx	28/12/2022 13:32:38	28/12/2022 13:32:50

Timestamp	Status	Content	Audit Text	Rows	Rows with errors	Total errors
28/12/2022 13:32:49	Validated		Success			
28/12/2022 13:32:49	Content Validated	OPS2023MentalHealthProvider		282	0	0
28/12/2022 13:32:48	Content Validating	OPS2023MentalHealthProvider				
28/12/2022 13:32:48	Content Validated	OPS2023KPIs		0	0	0

There are 2 options to amend the errors:

- Re-download the template, edit and re-upload. Only the data that has been amended will be amended in the portal. You can re-download and edit as many times as necessary.
- You can navigate to the tab which has errors and if you click on 'view errors' located at the top right corner it will filter out the data to just show you the errors.

Supply Bridge *Review & edit data*

Search data View errors Save

Baseline	Plan	Outturn to	Indicative Supply	Stabilising Factor	Change	Newly	International	Domestic	Return to	Apprenticeships	Other	Change Allocated	Change Unallocated	In the event that you have recorded against other, please provide brief detail on how this will be delivered:
Staff in post outturn	Year End	Outturn to	Indicative Supply		Change	Newly	International	Domestic	Return to	Apprenticeships	Other	Change Allocated	Change Unallocated	In the event that you have recorded against other, please provide brief detail on how this will be delivered:

Supply Bridge *Review & edit data*

Search data View all data Save

Substantive Workforce	Baseline		Plan		Indicative Supply Growth	Stabilising Factor		WTE change delivered by:								Change Allocated	Change Unallocated	In the event that you have recorded against other, please provide brief detail on how this will be delivered:
	Staff in post outturn Year End (31-Mar-23)	Year End (31-Mar-24)	Outturn to M12 Change	Retirements		Other	Change Required	Newly Qualified	International Recruitment	Domestic recruitment	Return to Practice	Apprenticeships	Other					
Support to clinical staff	188.00	196.00	4	0.0408163265306122	4.00	4.00	16	4.00	4.00	4.00	4.00	4.00	4.00	24	8			
Medical & Dental	552.00	559.00	1	0.0125223613595707	0.00	0.00	7	0.00	0.00	0.00	0.00	0.00	0.00	0	7			
All Consultant	158.00	168.00	6	0.0595238095238095	0.00	0.00	10	0.00	0.00	0.00	0.00	0.00	0.00	0	10			
All Non Consultant Career Grades	184.00	189.00	3	0.0264550264550265	0.00	0.00	5	0.00	0.00	0.00	0.00	0.00	0.00	0	5			
Total	1449.00	1475.00			9.00	10.00	45.00	9.00	9.00	9.00	9.00	9.00	9.00	54.00	7.00			

Please note: Any cells highlighted in red demonstrate a validation error and must be corrected before 100% completion can be achieved and the data collection can be submitted – this is demonstrated by a green tick.

Validation errors include non-numerical values (i.e. negative values and letters) and empty cells. Ensure only positive numbers are entered and blank cells are filled with a zero.

File Versions

The upload template may be updated between subsequent data collections. Please ensure you are using the current version of the file when completing your return.

Sign-off

Once the template has been completed, the hierarchical menu on the left will have all ticks, apart from “Sign-Off” and “Submit Return”*. **The collection will need to be signed off by your respective trust’s accountable officer** and once this has been confirmed, the officer will have to add their name to the input box as seen below. The officer can then tick the “Yes” box to acknowledge that the submission has been signed off and click on the green “Save” button to mark this section as complete.

**Please note: Sign-off will not be available unless all your tasks are 100% complete.*

Organisation Sign Off

Tony Curtis

By submitting your return, the organisation confirms:

- that the plans reflect the intentions of the organisation for the next five years
- that the WTE year one plan triangulates with finance and activity
- that you have read and accepted the Data Sharing Statement
- that the plans have been reviewed and agreed by an accountable officer

Accountable Officer Name:

Accountable Officer Job Title:

To complete the collection, click on the “Submit” menu item. Click on the green submit button at the top right of the screen.

Submit Return

Collection Complete Submit

Task	Contributor(s)	Progress	Completed
Data Sharing Agreement			
Consent	Tony Curtis	100%	-
My Trust			
Assign Contributors	Tony Curtis	100%	15/01/2023
Workforce Plan			
WTE	Tony Curtis	100%	-
Supply Bridge	Tony Curtis	100%	-
Hosted	Tony Curtis	100%	-
KPIs	Tony Curtis	100%	-
Mental Health Plan			
Mental Health Trust	Tony Curtis	100%	-
Mental Health Plan Review			
Mental Health Trust	Not applicable	-	-
Sign Off			
Organisation Sign Off	Tony Curtis	100%	-
Submit Return	Tony Curtis	0%	-

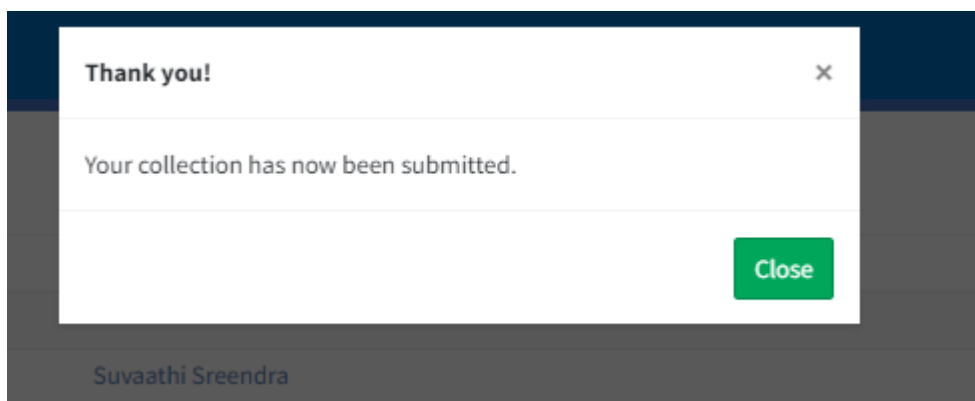
A confirmation box will appear:

Submit collection?

You are about to submit your collection. Please ensure you are happy with the data provided before you proceed.

Cancel Proceed

Click “Proceed” to submit your return. Once submitted a message will be displayed saying that the collection has now been submitted.



Click the green “Close” button.

The return has now been submitted and this will be reflected in the home screen, showing a green tick next to the “Submit Return” stage in the left-hand menu, as below.

Task	Contributor(s)	Progress	Completed
Data Sharing Agreement			
Consent	Tony Curtis	100%	-
My Trust			
Assign Contributors	Tony Curtis	100%	15/04/2023
Workforce Plan			
WTE	Tony Curtis	100%	-
Supply Bridge	Tony Curtis	100%	-
Hosted	Tony Curtis	100%	-
KPIs	Tony Curtis	100%	-
Mental Health Plan			
Mental Health Trust	Tony Curtis	100%	-
Mental Health Plan Review			
Mental Health Trust	Not applicable	-	-
Sign Off			
Organisation Sign Off	Tony Curtis	100%	-
Submit Return	Tony Curtis	100%	-

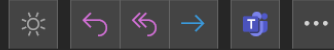
If you need to make any changes to your submission, you can press the red ‘unsubmit’ button as seen above

You will also receive an email acknowledging your submission

Collection submitted for CENTRAL AND NORTH WEST LONDON NHS FOUNDATI...



noreply@datacollections.hee.nhs.uk
To Suvaathi Sreendra



13:48

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Multi-Year Operational Planning Workforce

Data Collection 2023/24



Thank you.

The detail you have provided has been submitted and recorded by Health Education England.

This email was sent from eCollection on the behalf of the Health Education England data collection.

The information contained in this communication from the sender is confidential. It is intended solely for use by the recipient and others authorised to receive it. If you are not the recipient, you are hereby notified that any disclosure, copying, distribution or taking action in relation of the contents of this information is strictly prohibited and may be unlawful.

Technical Support

For support to access the HEE eCollection portal, to amend user details, to set up additional users or any other technical enquiries please contact DataService@hee.nhs.uk
If you have a technical issue, please include URL for the affected user, steps to recreate the issue, and if appropriate a template and/or screenshots.

All other Multi-Year Planning enquiries

For all general queries relating to the health workforce planning collection, including queries about definitions, guidance, and content, please contact england.nhs-planning@nhs.net

The following guidance documents can be found on the NHS Planning FutureNHS

Collaboration Platform:

- 2023/24 priorities and operational planning guidance
- Joint forward plan
- Templates
- Tools
- Technical guidance
- Supporting materials

To access these materials, please ensure you request to 'join' the associated workspace: [NHS Planning - FutureNHS Collaboration Platform](#)