NHS England

Undergraduate Medical & Dental (UGM&D) Education

Data Collection Guidance Documentation

We welcome your feedback about this document so we can improve it for future collections.

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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.

The Long-Term Plan describes how NHS organisations and services should be integrated around patients and communities to meet their needs and expectations over the next decade. The NHS People Plan outlines how NHS staff will be supported to deliver the Long-Term Plan.

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

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

To support the long-term workforce planning process, NHS England utilises 'eCollection', an in-house data collection platform supporting a suite of data collection tools.

The benefits of eCollection include:

- Easy access for users with the tools available through the NHS England website/ NHS England 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 NHS England 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 UK GDPR (General Data Protection Regulations)
- Intelligent access: those with a required login for each tool can access the data submitted at the level they require

This guidance 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

Where to find the Undergraduate Medical and Dental Education Data Collection Tool

The undergraduate Medical and Dental Education Data Collection tool can be accessed via the e-Collection web portal.

Link to the e-Collection web portal: https://ecollection.hee.nhs.uk/

Undergraduate Medical and Dental Education Data Collection Overview and Guidance

The collection of this data enables NHS England to answer its following key business questions:

- **What is the future workforce supply over the short, medium and long term**
  - *What is the potential supply to PG medical and dental foundation training*
  - *How many students are studying, what are they studying and where*
- **How much income does NHS England need to receive for medical and dental student clinical placements and bursaries in the short and medium term**
- **What budget does NHS England need to set in the short and medium term for the planned delivery of clinical placements for students at each medical and dental school**
  - *How many students will be in education in the current and following academic year by course and by course year*
  - *In the current and following academic year for how much of each course year will students be on clinical placement*
- **Which providers are/will be delivering the clinical placements in the short and medium term to inform the funding to transfer via NHS England's education contracts**
  - *What placement sessions are agreed/in process of being agreed with each provider for the current and following academic year*
  - *In which healthcare settings will students be placed and for how much of each course year*

The purpose of this guidance is to explain how data provided by Medical and Dental Schools through NHS England's data collection process is used to determine clinical placement funding each NHS financial year and to provide Medical and Dental Schools with guidance to support providing the data being collected.

The Undergraduate Medical and Dental Data Collection template has been designed to collect two areas of Student Activity:

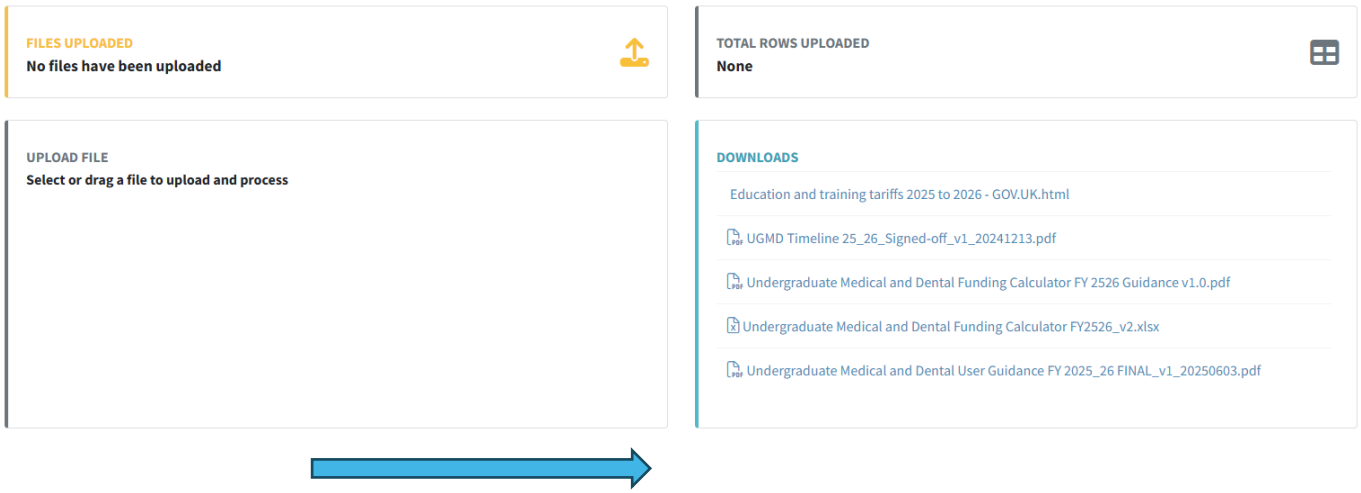
- Cohort level activity for Undergraduate Medical and Dental Courses
- Placement activity for those placements that attract tariff payments

Timeline

This data will be collected three times per year. The schedule for the 2026/27 financial year is as follows:

Medical & Dental school data submission	Validation period
5th June – 10th July 2026	13th July – 7th August 2026
25th September – 30th October 2026	2nd – 27th November 2026
8th January – 19th February 2027	22nd February – 17th March 2027

The full schedule for the collection can be found in the 'Downloads' section of the portal.



Template

The Undergraduate Medical and Dental Education Template consists of the following four tabs for completion by the schools.

- Student Activity Current
- Placement Activity Current
- Student Activity Planned
- Placement Activity Planned

The template now includes the following validation tabs to support Schools with checking their data submission:

- Validation – Summary
- Validation – Placement Sessions
- Validation – Student Flow
- Validation – Medical Placement

Student Activity Current and Student Activity Planned

Medical and Dental Schools are asked to provide the expected number of students for each of the academic years relevant to the NHS financial year NHS England is producing contracts and financial plans for.

Schools are asked to provide the expected student numbers for each course they run and for each year of those courses.

Schools are to provide actual or expected student numbers based on the information available:

- Include all expansion place students (including during the COVID period)
- Include students having to repeat a year and record in the year being repeated
- Show separately all students GOING OUT on intercalation in the year they would have moved into
- Include all students RETURNING from intercalation in the year they're coming back to
- Exclude any students that have permanently left their course.
- Include all students returning from any other leave of absence in the year they're coming back to
- Exclude all students expected to be on a leave of absence for most of the academic year and not requiring a clinical placement in that year
- Include eligible EU students under the 'planned number to start cohort for OfS intake target number for 'Home' students '
- Include eligible international students under 'planned number of international students to start cohort' i.e. OfS intake'
- Show separately any international/overseas student numbers ABOVE the OfS target cap if numbers of home and overseas students across all years exceed the cumulative OfS target

The above is not an exhaustive list but hopefully covers the most likely situations affecting student numbers.

Working with the DHSC, the government is reviewing the international student eligibility criteria for NHS funded clinical placements and this may be subject to change in the future.

Why does NHS England need data for multiple academic years?

NHS England budgets are set for the NHS financial year running from 1 April to 31 March and this period falls across two academic years. School data on when each course/year starts is key to identifying the relevant 'proportion' of each academic year falling into the NHS financial year period. If start dates vary across the course years then knowing this will enable NHS England to use the correct academic year 'proportions' for each year of the course.

For example, setting the NHS England budget for the NHS financial year 2026/27 or producing a provider education contract finance schedule requires 2025/26 and 2026/27 academic year data

- if the degree course starts in September, then the 5-month period April 2026 to August 2026 (5/12ths) of the 2025/26 academic year and the 7-month period September 2026 to March 2027 (7/12ths) of the 2026/27 academic year will fall into the NHS 2026/27 financial year.

- Setting the NHS England budget for the following financial year 2027/28 requires academic years 2026/27 and 2027/28, the latter being collected in the October and February data returns.

Why does NHS England need data for each degree course?

Students on different courses are eligible for different financial support from the National Bursary Scheme so data about each course enables NHS England to more accurately forecast the cost of student bursary claims it is responsible for funding

For example,

- students on a 6-year degree receive support to fund the full year tuition fee cost for the final two years of the course,
- students on a 5-year degree receive support to fund the full year tuition fee of the final year of the course
- students on a 4-year graduate entry accelerated degree receive support to part fund tuition fees in all 4 years of the course

The time students spend on clinical placement, or the healthcare setting students do clinical placements may also vary by course (and year of course).

Why does NHS England need data for each year of the degree course?

The number of students will vary in each year of the course. This may be due to the medical student expansion programme, the increases in student numbers during the COVID period, students needing to repeat a year, students intercalating out of or back on to a medicine or dental degree.

The time students spend on clinical placement also varies each year generating a different clinical placement funding need for each year of the course.

Why does NHS England need data about home and international student numbers?

NHS England receives an allocation from the Department of Health and Social Care (DHSC) to fund the clinical placement cost related to students within the Office for Students (OfS) intake control target of medical and dental school places.
The OfS intake targets include anticipated home and international student targets.
The clinical placement cost related to international students in excess of the OfS intake target is to be covered by a ‘self-paying’ arrangement. There is some NHS placement funding flexibility for ‘excess’ international students if across all course years the number of international students is within the OfS intake target number overall or if home student numbers are below the OfS target.

Should NHS England fund the clinical placement cost of students repeating a part/year of a course?

Currently NHS England does fund the cost of students needing to repeat clinical placements. However, it has been queried whether it is correct for the NHS/taxpayer to cover these costs and so this may lead to funding changes in the future.

Placement Activity Current and Planned

A student will spend time on both clinical placement and academic activities throughout the degree programme. This will be driven by each school's curriculum. It will vary by year of the course and it may be, for some schools, that students in the same year of a degree go on different placements particularly in the student selected component years.

Below is an example of a 22/23 academic year medical school plan for a 5-year medical degree providing the data to complete this section.

	Academic Year 22/23				
	Year 1	Year 2	Year 3	Year 4	Year 5
Total Curriculum Sessions	**300**	**300**	**440**	**440**	**370**
Clinical			1 week induction		1 week induction
			10 sessions		10 sessions
	2 weeks very early clinical experience GP Placement	9.5 days very early clinical experience GP Placement	3*12 week clinical apprenticeship placements in Surgery, Medicine and Primary care	6*7 week specialty rotations in Child Health, Integrated Care, Reproductive Health, Mental Health, Cancer , Neurology/Dermatology	4*5 week foundation assistantship placements in Acute Care, Hospital (Surgery and Medicine inc. End of Life Care) and Primary Care
	20 sessions	19 sessions	360 sessions	420 sessions	200 sessions
	1 week very early experience in HCHS Trust	3.25 days very early experience in HCHS Trust	4 week Student Selected Component		3 week Student Selected Component
	10 sessions	6.5 sessions	40 sessions		30 sessions
			2 weeks OSCE clinical examinations	2 weeks OSCE clinical examinations	4 weeks OSCE clinical examinations
			20 sessions	20 sessions	40 sessionsl
Academic (including other non OSCE exams)	27 weeks	27.45 weeks	0 weeks	0 weeks	7 weeks
	270 sessions	274.45 sessions			
			1 week OSCE Exam Revision		2 weeks OSCE Exam Revision
			10 sessions		20 sessions
Electives					6 week elective plus 2 weeks travel
					80 sessions
Holidays	5 weeks Easter	5 weeks Easter	1 week Easter	1 week Easter	1 week Easter
	3 weeks Christmas	3 weeks Christmas	2 weeks Christmas	2 weeks Christmas	2 weeks Christmas
	14 weeks Summer	14 weeks Summer	5 weeks Summer	5 weeks Summer	5 weeks Summer
	220 sessions	220 sessions	80 sessions	80 sessions	80 sessions
Clinical	30	25.5	430	440	270
Academic	270	274.5	10	0	100
Electives					
Total Sessions	**300**	**300**	**440**	**440**	**370**
Total Weeks	**52**	**52**	**52**	**52**	**52**
Clinical Placement Sessions by Setting Example					
Primary Care	20	19	120		50
HCHS	10	6.5	310	430	210
PVI Healthcare				10	10
	30	**25.5**	**430**	**440**	**270**

What placement activity is in scope of this collection

The activity in scope of this collection is determined by the Department of Health and Social Care Education and training tariffs 2026 to 2027 published 30/09/2026 (see link below). NB These are the same as the interim tariffs used in the UGMD June 2026 data collection.

Education and training tariffs 2026 to 2027 - GOV.UK

For medical students, the key sections of this guidance are Annex B and D.
For dental students, the key section is Annex E

As conveyed by the guidance it is the type of activity, rather than the location of training or who is delivering it, that is relevant in deciding the most appropriate funding source.

For medical students, if an activity is meeting the clinical learning elements of the curriculum as mapped by the school to the GMC requirements, then this activity is deemed in scope of the national tariff and this collection.
In Table 5 of the DHSC guidance it states the responsibility for funding the delivery of **medical** student clinical examinations (OSLERs, OSCEs or similar) is subject to locally negotiated arrangements. For the purposes of this collection the time a **medical** student spends doing clinical examinations is considered in scope of the clinical placement national tariff and is to be included as clinical placement sessions.

Why does NHS England need to know how many sessions each year of the degree runs for?

This provides the 'denominator' figure when calculating the % of time a student spends on clinical placement each academic year.

Where a school is not currently running all years of a medical or dental course, we do require the planned sessions data for all years of their course(s) including the years the school does not yet have any students on.

Education Providers are expected to work in partnership with placement providers to agree and verify placement session delivery for the period covered by the collection, in line with NHS England's Education Contract Tripartite Agreement (Undergraduate Medical Education and Undergraduate Dental Education) as the data submitted feeds NHS England's education contract finance schedules with placement providers. The validation of the activity between the individual School and placement provider is an important stage of the process.

Example 1: if year 1 of a 5-year degree course runs for 300 sessions in total (excluding breaks eg Christmas and Easter) and each student spends 20 sessions (10 full days) on placement in general practice and 10 sessions (5 full days) on placement in a HCHS NHS Trusts during that year, then each student spends 6.67% of time in a GP placement and 3.33% of time in a HCHS Trust placement.

This % is then used to calculate the total placement WTE in general practice and HCHS Trusts for all students in that year.

If there are 100 students in year 1 of a 5-year degree course then the total GP placement WTE for that year would be 6.67 and the total HCHS placement WTE would be 3.33.

Example 2: if year 3 of the same 5-year degree course runs for 440 sessions in total and each student spends 120 sessions (60 full days) on placement in general practice and 240 sessions (120 full days) on placement in a HCHS NHS Trusts during that year, then each student spends 27.27% of time in a GP placement and 54.54% of time in a HCHS Trust placement.

If there are 95 students in year 2 of the 5-year degree course then the total GP placement WTE for that year would be 25.90 and the total HCHS placement WTE would be 51.81

Why does NHS England need to know how many sessions a student is on placement in different healthcare settings?

Prior to September 2022, there was a national tariff rate only for medical students in the HCHS setting with locally agreed non-tariff arrangements for medical GP & PIVO placements and, dental students. Therefore, the activity for each setting was required to be able to calculate the non-tariff funding amount for that setting. Since then, a national tariff has been introduced harmonising all medical student placement settings as well as a tariff for Dental students. Whilst the funding rates have been harmonised for medical students, continuing to report the activity in each setting assists with the monitoring, reviewing and future planning of the medical student's placement setting at each school.

How can a school take account of students doing different placements in the same year on the return?

This will require the school to work out a weighted average placement time per student to populate the placement details section of the collection.

Example:
There are 200 students in year 3 of a 5-year degree course.

Group A: 140 (70%) of the students do a 60 session placement in general practice, 60 sessions in a community healthcare service NHS Trust and 240 sessions in a secondary care NHS Trust and 20 sessions of clinical exams in a secondary care NHS Trust - 380 sessions in total

Group B: 60 (30%) of the students do a 120 session placement in general practice, 200 sessions in a secondary care NHS Trust and 40 sessions in a charity funded hospice – and 20 sessions of clinical exams in a secondary care NHS Trust - 380 sessions in total.

Course Year	Total Curriculum Sessions	Academic Activity Sessions	Clinical Placement Weeks per Student per Academic Year			
			GP	HCHS NHS Trusts	Other/PVI Organisations	Total Weeks
1	300					
2	300					

3 Gp A			60	320	0	380
3 Gp B			120	220	40	380
3 Average	440	60	78	290	12	380
4	440					
5	370					

The Year 3 weighted average weeks per student are:

in GP: (60 sessions*70%) + (120 sessions*30%) = 78 sessions average
in HCHS NHS Trusts: (320 sessions*70%) + (220 sessions*30%) = 290 sessions average
in PIVO org'ns: (0 sessions*70%) + (40 sessions*30%) = 12 sessions average

How much placement time does NHS England fund?

For medical students, NHS England funds up to a maximum of 3 full years (WTE) of clinical placement time per student per course (300%) in the years of the course the school reports the clinical placements take place.

If a medical school return reports the student clinical placement time is less than 3 full years (WTE) for a course then NHS England will uplift to 3 full years (300%) when setting its budget.

If a medical school return states student clinical placement time is greater than 3 full years (WTE) for a course then NHS England will reduce to 3 full years (300%) when setting its budget.

For dental students, NHS England funds up to a maximum of 4 full years (WTE) of clinical placemen time per student per course (400%)

Currently NHS England funds this for students in the final 4 years of the education programme.

How does NHS England set the Undergraduate Medical Clinical Placement Budget

NHS England uses a financial modelling tool to forecast future NHS financial year costs using the data provided by schools in their data collection returns. The modelling tool is carried out at school level but NOT placement provider level.

The financial modelling follows NHS England's financial planning guidance and assumptions agreed by NHS England each financial year.

For example, the agreed planning assumption could be that no change is expected to the DHSC national tariffs in the next financial year and so forecasts for medical student placements in HCHS trusts are based on the currently published DHSC national tariffs.

HCHS trusts receive an uplift to the DHSC national tariff to reflect costs in different parts of the country. This is known as the Market Force Factor (MFF). NHS England uses a weighted average MFF for each medical school in its financial modelling.

NHS England will take academic year student numbers provided by schools and use course start dates provided to convert to the financial year student numbers by year of each course (A).

By each year of each course NHS England takes the clinical placement time %s which are either uplifted or reduced to 3 full years (300%) of placement time overall.

Each year of each course will have a clinical placement time % for different locations eg. primary care (GP) and secondary care (HCHS NHS Trust) (B).

By each year of each course NHS England's financial modelling multiplies (A) by (B) to calculate the financial year placement WTEs by course by year giving a total number of placement WTE for both secondary care and primary care.

The total placement WTEs are then multiplied by the annual tariffs for secondary care plus the medical school average MFF.

Example:
A medical school runs a 5-year medicine degree course.
Year 1 starts in September and runs for 32 weeks.

- In Academic year 26/27 there are 100 students and in AY 27/28 there are expected to be 105 students in year 1
- The financial year student number conversion for year 1 is 103 students (A)
  (5/12ths*100) + (7/12ths*105) = 103
- Each student spends the following time on clinical placement in year 1 (B)
  2.8 weeks in a GP placement (2.8/32) = 8.75% of their time and
  1 week in a HCHS Trust placement (1/32) = 3.12% of their time
- Multiplying (A)*(B) gives the total placement WTEs per NHS financial year in each of the healthcare settings:

103 students*8.75% = 9.01 GP placement WTE (C)
103 students *3.12% = 3.22 HCHS/PIVO placement WTE (D)

- The DHSC national tariff is £32,552 per year for a HCHS/PIVO/GP clinical placement WTE and the medical school average MFF is 1.05 (E)
- The NHS financial year GP clinical placement funding will be (C)*(E) = £307,958
- The NHS financial year HCHS/PIVO clinical placement funding will be (D)*(E) = £ £110,058
- The total NHS financial year placement funding for all students in year 1 would be £418,016.

For medicine students, the same calculation would be applied to each year of each course delivered by a school to give the total clinical placement funding required for that school. All calculations would be based on the data provided by schools in their returns and converted to financial year information, adjusted where required to reflect NHS England planning guidance as described above.

How does NHS England determine the level of budget required for each placement provider

The placement activity tabs give the clinical placement delivery to the schools as planned in partnership with its placement providers down to individual provider level.

Placement sessions are assumed to be the delivery measure used by schools when agreeing the placement delivery plan with individual providers and the most appropriate measure to apply to distribute NHS England's clinical placement funding.

For medicine students, based on the data provided by Medical Schools in the Placement Activity tabs, the total budgeted placement WTE for a school can then be distributed across placement providers.

Completing the data return

Education Providers are expected to work in partnership with placement providers to agree and verify placement session delivery for the period covered by the collection, in line with NHS England's Education Contract Tripartite Agreement (Undergraduate Medical Education and Undergraduate Dental Education) as the data submitted feeds NHS England's education contract finance schedules with placement providers.

The validation of the activity between the individual School and placement provider is an important stage of the process.

The following guidance defines what data should be inputted into each field.

All fields are mandatory except where noted.

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Data Fields for Undergraduate Medical and Dental Data Collection:

Student Activity Current and Planned

Please note that the Current and Planned tabs are the same except for columns R – X in Planned which asks for estimated number of students not actual number of students.

A – Your Course title / code identifiers	Optional	This is a free text field required for reporting. Education Providers to include a cohort unique identifier, to allow NHS England to link the data collections in a more robust way.
B – Course Title Medical/Dental	Required	Select Dental or Medical as appropriate from the drop-down list
C- Course Type	Required	Select Postgraduate Degree or Undergraduate Degree from the drop-down list
D – Length of course	Required	Select length of course from the drop-down menu or enter as a number (4, 5, 6)
E- Qualification	Required	Select qualification from the drop-down menu as appropriate
F – Year of course	Required	Select year of course from the drop-down menu or enter as a number (0 – 6) ***Year of course 0, see page 17, bullet point 2 of FAQ's**
G – Academic year start month	Required	Select start month from drop-down menu. Frequently used months are at the top (July, August, September, October etc..)
H – Placement Year	Required	Select the Placement Year from the drop-down menu to which Year of Course (column F) best aligns to. ***Placement year 0, see page 17, bullet point 3 of FAQ's**
I – What is the total number of sessions for that course,	Required	Add total sessions that the course for that cohort runs that year', i.e. excluding holiday weeks (X)

cohort and year' i.e. excluding holiday in weeks?		***Definition of a session, see page 17, bullet point 1 of FAQ's**
J – On average how many sessions will each student spend on clinical placement in Hospital and Community Healthcare NHS Trusts	Required	Add average sessions each student will spend on clinical placement in Hospital and Community Healthcare NHS Trusts ***Dental only see page 17, bullet point 4 of FAQ's section *Definition of a session see page 16, bullet point 1 of FAQ's**
K – On average how many sessions will each student spend in clinical placement in General Practice	Required	Add average sessions each student will spend on clinical placement in General Practice. ***For definition of a session see page 17, bullet point 1 of FAQ's**
L – On average how many sessions will each student spend on clinical placement in Private Independent and Voluntary Organisations	Required	Add average sessions each student will spend on clinical placement in Private Independent and Voluntary Organisations including University if delivering clinical placements. ***If a university/school is delivering clinical placements please include this in column K, see page 17, bullet point 6 of FAQ's** ***For definition of a session see page 17, bullet point 1 under the Please note! Section**
M - On average how many sessions will each student spend on clinical placement in Community Dental Services	Required	Add average sessions each student will spend on clinical placement in Community Dental Services if not already counted in column I Please complete column L if a Community Dental Service is **NOT** under the management of a hospital or community healthcare NHS trust. ***For definition of a session see bullet point 1 on page 17 of FAQ's**
N - Average sessions students spend in academic activities	Calculation – Auto-populate	This is a calculated field that will auto populate average sessions spent in academic activities.
O - Memorandum – Within the total number of average academic activity sessions (column M), how many are clinical skill sessions?	Optional	Add how many clinical skill sessions there are **within** the total number of average academic activity sessions (column M).
P - Planned Number to start cohort for OfS intake target number for 'Home' students	Auto-populate	OfS intake target number for 'Home' students to start cohort will auto-populate
Q - Planned number of international students to start cohort' i.e., OfS intake	Auto-populate	OfS intake target number for 'International' students to start cohort will auto populate
R -Total planned OfS intake target	Calculation	This is a calculated field that will be total OfS home and international intake target figures.
S - Actual total number of 'Home' students in course year	Required	Add the actual total number of 'Home' Students in course year.
T - If actual total number of 'Home' students in course year is different from planned OfS intake 'Home' target please provide reason	Required – Free text	Provide reason if your actual total number of 'Home' students differ from the planned OfS figures. **Examples of reason can be found in bullet point 6 on page 16 of FAQ's** A difference in the numbers will be flagged in amber in the downloaded version of the template and in red in the uploaded version of the template

U - Actual total number of international students in course year with NHS funded clinical placement	Required	Add the total number of international students starting each cohort in each year of course, who are funded.
V - If actual total number of 'International' students in course year is different from planned OfS intake 'International' target please provide reason	Required – Free text	Provide reason if you your actual total number of 'International' students differ from the planned OfS figures. **Examples of reason can be found in bullet point 7 on page 18 of FAQ's** A difference in the numbers will be flagged in **amber** in the downloaded version of the template and in red in the uploaded version of the template
W - Actual Total (Home + International)	Calculated Field	Actual total number of 'Home' students starting in each cohort + Total number of international students starting each cohort in each year of course' who are funded
X - Actual total number of international students above OfS intake target international cap	Required	Add the total number of international students above OfS intake target international cap
Y - Number of students on intercalation excluded from column W	Required	Add the number of students on intercalation excluded from column W
Z - Total Funded Placement Sessions in Hospital and Community Healthcare NHS Trust	Calculation	On average how many sessions will each student spend on clinical placement in Hospital and Community Healthcare NHS Trusts * Actual total (Home + International)
AA – Total Funded Placement Sessions in General Practice	Calculation	On average how many sessions will each student spend on clinical placement in General Practice * Actual total (Home + International)
AB – Total Funded Placement Sessions in Private, Independent and Voluntary Organisations	Calculation	On average how many sessions will each student spend on clinical placement in Private, Independent and Voluntary Organisations * Actual total (Home + International)
AC – Total Funded Placement Sessions in Community Dental Services	Calculation	On average how many sessions will each student spend on clinical placement in Community Dental Services * Actual total (Home + International)

Placement Activity Current and Planned

A - Medical Student or Dental Student	Required	Select Medical or Dental from the drop-down list
B - Placement Provider Name	Required	Select Placement Provider Name from the drop-down list. If the option is not listed please free text the Placement Provider Name. The list is ordered – A - Z by Trust, A - Z by Education Provider, single option of GP Practices and then Other For GP please select General Practices from the dropdown list which you will find towards the end of the list.
C - Placement Provider Code	Read-only	Placement Provider Code will auto-populate in line with the selection in column B
D - Placement Provider Type	Auto-populate	Placement Type will auto-populate depending on which Placement Provider is selected in Column B. If you are certain that the Placement Provider Type that is auto populated is incorrect you can change this by selecting from the drop-down menu. If the selection is not what is expected it will highlight in **amber** as a warning.

E – Placement Provider Site	Optional	If you know the Placement Provider Site please add this here.
Year 1 Sessions	Required	Please add the total curriculum sessions per year *(assume 10 per week)*
Year 2 Sessions	Required	Please add the total curriculum sessions per year *(assume 10 per week)*
Year 3 Sessions	Required	Please add the total curriculum sessions per year *(assume 10 per week)*
Year 4 Sessions	Required	Please add the total curriculum sessions per year *(assume 10 per week*
Year 5 Sessions	Required	Please add the total curriculum sessions per year *(assume 10 per week)*
***Year 6 Sessions**	Required	Please add the total curriculum sessions per year *(assume 10 per week)*
Calculated Total Hours/Sessions	Calculated Field	Auto-calculated field (Year 1 Sessions) + (Year 2 Sessions) + (Year 3 Sessions) + (Year 4 Sessions) + (Year 5 Sessions) + *(Year 6 Sessions)

FAQ'S

Student Activity (Current and Planned) tabs

1. **What is the definition of a session**?
   A session **=** 2 sessions per day – assume 10 sessions per week.
   If converting weeks into sessions the calculation is placement weeks multiplied by 10.

2. **Why is there a Year 0 in Column F, Year of course?**
   0 should be selected for those schools who offer a 6-year undergraduate programme including a widening participation year where no clinical placement activity takes place.

3. **Why does** NHS England **need 27/28 academic year data for the October collection for medical schools?**

   NHS England uses the 26/27 and 27/28 AY data to set its budget for next NHS financial year (27/28). NHS England doesn't set budgets down to provider level at this point in time so we can work with high level school assumptions e.g., for HCHS trusts if the placements plan at individual provider level isn't yet know just include under Other HCHS trusts on the placement activity tab.

4. **How do I enter data for year 4 of a 5-year programme where one group of students is on a different placement plan to the rest of the students in that year, can I add 2 rows for year 4?** Please see page 11 of the UGM&D Data Collection Guidance *How can a school take account of students doing different placements in the same year on the return?*

5. **The OFS intake target is incorrectly split across the different programmes delivered by my medical school can we amend?** Yes – please provide NHS England with the correct splits and we will amend. It may mean downloading the template again to activate the change.

6. **What student numbers dataset should we use the OFS return or our university data systems particularly to capture returners, leavers etc?** Please use the student number data available that best represents the clinical placements that have been or will be delivered for students at your school. eg. if a student leaves right at the end of a year and has completed the clinical placement before leaving include that student. If a student starts the year but transfers out a few weeks into the course before doing any clinical placement exclude that student.

7. **How do I record Placement Year?**
   If the placement year best aligns with a different year to that of year of course, please select the year in the Placement Year in column H.
   For example a Graduate Entry course may better align with Placement Years 2- 5

A	B	C	D	E	F	G	H
Undergraduate Medical & Dental (2022/23)							
Z0000001 - University of Heavyshire							
Student Activity Current							
Optional	Required	Required	Required	Required	Required	Required	Required
Your Course Title/Code Identifiers	Course Title Medical/Dental	Course Type	Length of course	Qualification	Year of Course	Academic year start month	Placement Year
	Medical	Graduate Entry	4	MBBS (Medical)	1	September	2
	Medical	Graduate Entry	4	MBBS (Medical)	2	September	3
	Medical	Graduate Entry	4	MBBS (Medical)	3	September	4
	Medical	Graduate Entry	4	MBBS (Medical)	4	September	5

Why is there a Placement Year 0 in column H?

8. **Dental only - What is the difference between column I 'On average how many sessions will each student spend on clinical placement in Hospital and Community Healthcare NHS Trusts' AND column L 'On average how many sessions will each student spend on clinical placement in Community Dental Services', Column I & L?** Please complete column L if a Community Dental Service is NOT under the management of a hospital or community healthcare NHS trust.

9. **How do I record if a university/school is delivering clinical placements?**
   If you university/school is delivering clinical placements please include this in column K, On average how many sessions will each student spend on clinical placement in Private, Independent and Voluntary Organisations?

10. **What are the examples of reasons for why there are differences in numbers between planned OfS targets and actuals, column T & V?**

- Students are repeating a year of the course
- Students transfer onto a course from another university
- Students leaving the course
- Students intercalating out or returning from intercalation

11. Columns in Grey, M, O, P, Q, V are calculation or auto – populated and must not be manually inputted into.

12. **Do I need to record both Student and Placement Activity for all of the Programme if I am a new Medical or Dental School?**
Yes! Please record all activity plans even if you do not have a programme full of students. This will ensure that you receive the full funding envelope available to you.

Placement Activity Current and Planned tabs

13. **How should I record General Practices - Column B?**
Select "Other – GP" from the drop-down list. Aggregate the placement activity for general practice per cohort (year) and enter into the appropriate column for the year of programme. It is possible to list individual practices if you would like to provide this detail or it is agreed as required for your organisation or region, but at this stage individual general practices are not included in the dropdown list for placement provider name.

Validation Tabs:

- Validation – Summary
- Validation – Placement Sessions
- Validation – Student Flow
- Validation – Medical Placement

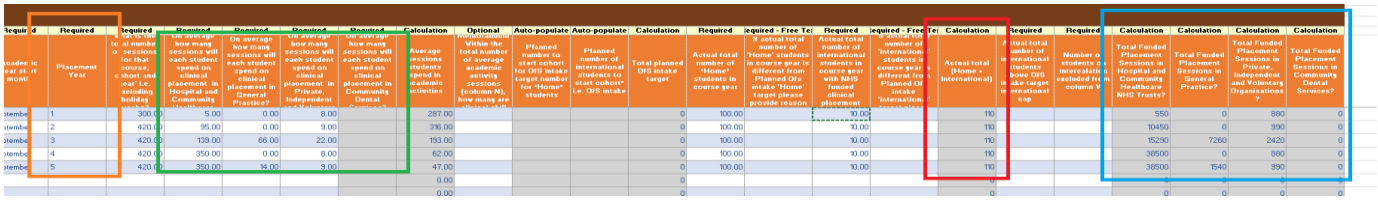
The template includes some simple tools, which will highlight some of the most common data issues as the data at the point of entry, in order that they can be resolved prior to the data being submitted.

There are 3 checks:

- **Placement Sessions** – Does the sessions data in the Student Activity and Placement Activity roughly align?
- **Student Flow** – For cohorts that appear in both academic years, are student numbers consistent?
- **Medical Placement** - For medical degrees, has placement data been added for all years of the course?
- These data checks are summarised in the "Validation – Summary" sheet, with further sheets providing the detail.

Placement Sessions

- Placement session information is included in both the Student Activity and Placement Activity data sets, here the two sets of information are compared to each other.
- The total placement sessions in the Student Activity sheets are calculated by multiplying the average student placement session (in green below) by the number of students (red below) to give total sessions for each setting (blue below), this information is then captured in the "Validation – Placement Sessions" sheet using the "Placement year" column



The above data would appear as below

Placement Sessions Validation

		Student Activity Placement year	Student Placemer	HCHS Student Activity	HCHS Student Placement	HCHS Variance	General Practice Student Activity	General Practice Student Placement	General Practice Variance	PIVO Student Activity	PIVO Student Placement	PIVO Variance	Community Dental Services Student Activity	Community Dental Services Student Placement	Community Dental Services Variance	TOTAL Student Activity	TOTAL Student Placement	TOTAL Variance	TOTAL Variance %
Current Year	Medical	1	1	550	-	- 550	-	-	-	880	-	- 880	-	-	-	1,430	-	- 1,430	-100%
		2	2	10,450	-	- 10,450	-	-	-	990	-	- 990	-	-	-	11,440	-	- 11,440	-100%
		3	3	15,290	-	- 15,290	7,260	-	- 7,260	2,420	-	- 2,420	-	-	-	24,970	-	- 24,970	-100%
		4	4	38,500	-	- 38,500	-	-	-	880	-	- 880	-	-	-	39,380	-	- 39,380	-100%
		5	5	38,500	-	- 38,500	1,540	-	- 1,540	990	-	- 990	-	-	-	41,030	-	- 41,030	-100%
		6	6	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		TOTAL		103,290	-	- 103,290	8,800	-	- 8,800	6,160	-	- 6,160	-	-	-	118,250	-	- 118,250	-100%
	Dental	1	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		2	2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		3	3	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		4	4	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		5	5	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		6	6	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		TOTAL		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		GRAND TOTAL		103,290	-	- 103,290	8,800	-	- 8,800	6,160	-	- 6,160	-	-	-	118,250	-	- 118,250	-100%
Planned Year	Medical	1	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		2	2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		3	3	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		4	4	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		5	5	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		6	6	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		TOTAL		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	Dental	1	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		2	2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		3	3	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		4	4	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		5	5	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		6	6	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		TOTAL		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		GRAND TOTAL		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	

The placement data included in the placement activity sheets will pull through, based on the "Placement Provider Type" and the "Year Sessions" as below, for easy comparison.

Placement Sessions Validation

		Student Activity Placement year	Student Placemer	HCHS Student Activity	HCHS Student Placement	HCHS Variance	General Practice Student Activity	General Practice Student Placement	General Practice Variance	PIVO Student Activity	PIVO Student Placement	PIVO Variance	Community Dental Services Student Activity	Community Dental Services Student Placement	Community Dental Services Variance	TOTAL Student Activity	TOTAL Student Placement	TOTAL Variance	TOTAL Variance %
Current Year	Medical	1	1	550	500	- 50	-	-	-	880	880	-	-	-	-	1,430	1,380	- 50	-3%
		2	2	10,450	1,045	- 9,405	-	-	-	990	990	-	-	-	-	11,440	2,035	- 9,405	-82%
		3	3	15,290	15,000	- 290	7,260	7,300	40	2,420	2,400	- 20	-	-	-	24,970	24,700	- 270	-1%
		4	4	38,500	39,000	500	-	-	-	880	880	-	-	-	-	39,380	39,880	500	1%
		5	5	38,500	18,000	- 20,500	1,540	1,500	- 40	990	20,900	19,910	-	-	-	41,030	40,400	- 630	-2%
		6	6	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		TOTAL		103,290	73,545	- 29,745	8,800	8,800	-	6,160	26,050	19,890	-	-	-	118,250	108,395	- 9,855	-8%
	Dental	1	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		2	2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		3	3	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		4	4	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		5	5	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		6	6	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		TOTAL		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
		GRAND TOTAL		103,290	73,545	- 29,745	8,800	8,800	-	6,160	26,050	19,890	-	-	-	118,250	108,395	- 9,855	-8%

Whilst it's not expected that the sets of data will be exactly the same, the above table highlights where there are differences, larger differences may need to be reviewed as errors will result in incorrect funding distribution.

In this example, there are a couple of significant difference to investigate.
In year 2 HCHS, there looks to be a typo (in red), on the student placement data "1,045" has been added rather than "10,450", resolved by amending the data in the "student placement" sheet.
In the year 5, whilst the total session (in purple) doesn't appear to be significantly different, when looking by sector, the HCSH setting in -20,500 and the PICO sector is +19,890. However, a placement has been included under "HCHS" in the "Student Activity" sheet but under "PIVO" in the "Student Placement" sheet, it's important for the distribution calculation that placement sessions are classed consistently across the "Student Activity" and "Student Placement" sheets. In this case either moving the "Student Activity" sessions to "PIVO" or moving the "Student Placement" session to "HCHS" would resolve this issue.

Student Flow

This tool is designed to be a quick check of the cohorts that appear in both academic years, to identify if the numbers are relatively similar. Whilst it's appreciated that student movements are complex and there are many reasons why students don't progress in a uniformed way including

attrition, repeats, returns and interrupts, the table highlights where there are differences, larger differences may need to be reviewed.
All the data is collected from the “Student Activity” sheets. In the below example, in year 1 of the 5-year course of the “Student Activity Current” sheet there are 105 students, however, in year 2 of the “Student Activity Planned” sheet there are only 25 students, a difference of 80 (highlighted in red), this may require additional investigation. In year 4 of the 5-year course of the “Student Activity Current” sheet there are 105 with an additional 25 intercalating, in year 5 of the “Student Activity Planned” sheet there are 125 students, a difference of 5 (highlighted in green), this may be a reasonable level of attrition.

Student Flow Validation

		Student Activity Current					Student Activity Planned					Movement
		Length of course	Year of Course	Total of funded students	Number of students on intercalation	TOTAL	Length of course	Year of Course	Total of funded students	Number of students on intercalation	TOTAL	
	Medical	4	1	0	0	0	4	2	0	0	0	0
	Medical	4	2	0	0	0	4	3	0	0	0	0
	Medical	4	3	0	0	0	4	4	0	0	0	0
	Medical	TOTAL				0	TOTAL				0	0
	Medical	5	1	105	0	105	5	2	25	0	25	-80
	Medical	5	2	105	0	105	5	3	105	0	105	0
	Medical	5	3	105	0	105	5	4	85	20	105	0
Medical	Medical	5	4	105	25	130	5	5	125	0	125	-5
	Medical	TOTAL				445	TOTAL				360	-85
	Medical	6	1	0	0	0	6	2	0	0	0	0
	Medical	6	2	0	0	0	6	3	0	0	0	0
	Medical	6	3	0	0	0	6	4	0	0	0	0
	Medical	6	4	0	0	0	6	5	0	0	0	0
	Medical	6	5	0	0	0	6	6	0	0	0	0
	Medical	TOTAL				0	TOTAL				0	0

The above would be summarised as follows on the “Validation – Summary” sheet

Student Flow Validation

Course	Course Length	Current year	Planned Year	Net movement of cohorts included in both academic years
Medical	4 Year	Y1-3	Y2-4	0
	5 Year	Y1-4	Y2-5	-85
	6 Year	Y1-5	Y2-6	0
				-85
Dental	4 Year	Y1-3	Y2-4	0
	5 Year	Y1-4	Y2-5	0
	6 Year	Y1-5	Y2-6	0
				0

Medical Clinical Placement

Unlike the other tools, this tool is designed for medical courses only, as placement time is a key element of the medical funding calculation. To correctly calculate the medical funding, it’s important that placement time for every year of a course is provided in the “Student Activity” sheets, where a new course has been started and not all years are not filled by students, estimated placement data should be included in the “Student Activity”. This tool’s main aim is to highlight where placement data has been added for some years but not all years of a medical degree.
In the below example, data for 4 years of a 5-year degree have been added, as it’s a relatively new course and there are only students in years 1-4.

Optional	Required	Required	Required	Required	Required	Required	Required	Required	Required	Required	Required	Required	Calculation	Optional	Auto-populate	Auto-populate	Calculation	Required	
Your Course Title/Code Identifiers	Course Title Medical/Dental	Course Type	Length of course	Qualification	Year of Course	Academic year start month	Placement Year	Total the total number of sessions for that course, cohort and year' i.e. excluding holiday	On average how many sessions will each student spend on clinical placement in Hospital and Community	On average how many sessions will each student spend on clinical placement in General Practice?	On average how many sessions will each student spend on clinical placement in Private, Independent	On average how many sessions will each student spend on clinical placement in Community Dental	Average sessions students spend in academic activities	Within the total number of average academic activity sessions (column N), how many are	Planned number to start cohort for OfS intake target number for 'Home' students	Planned number of international students to start cohort' i.e. OfS intake	Total planned OfS intake target	Actual total number of 'Home' students in course year	
	Medical	Undergraduate Degree	5	BDS (Dental)	1	September	1	300.00	5.00	0.00	8.00		287.00				0	100.00	
	Medical	Undergraduate Degree	5	BDS (Dental)	2	September	2	420.00	95.00	0.00	9.00		316.00				0	100.00	
	Medical	Undergraduate Degree	5	BDS (Dental)	3	September	3	420.00	139.00	66.00	22.00		193.00				0	100.00	
	Medical	Undergraduate Degree	5	BDS (Dental)	4	September	4	420.00	350.00	0.00	8.00		62.00				0	100.00	
													0.00				0		

A red will appear as follows on the “Validation – Summary”

Medical Clinical Placement Time Report

Course	Year	Course Length	Unadjusted amount of time in Clinical Placement Settings
Medical	Current Year	4 Year	0%
		5 Year	All years require placement data to correctly adjust to 300%
		6 Year	0%

This will be resolved by adding estimated placement time of the 5th year as below, note the student numbers should be left blank, see below.

Student Activity Current

Optional	Required	Required	Required	Required	Required	Required	Required	Required	Required	Required	Required	Required	Calculation	Optional	Auto-populate	Auto-populate	Calculation	Required
Your Course Title/Code Identifiers	Course Title Medical/Dental	Course Type	Length of course	Qualification	Year of Course	Academic year start month	Placement Year	Indicate total number of sessions for that course, cohort and year i.e. excluding holiday	On average how many sessions will each student spend on clinical placement in Hospital and Community	On average how many sessions will each student spend on clinical placement in General Practice?	On average how many sessions will each student spend on clinical placement in Private, Independent	On average how many sessions will each student spend on clinical placement in Community Dental	Average sessions students spend in academic activities	Within the total number of average academic activity sessions (column N), how many are	Planned number to start cohort for OfS intake target number for "Home" students	Planned number of international students to start cohort* i.e. OfS intake	Total planned OfS intake target	Actual total number of "Home" students in course year
	Medical	Undergraduate Degree	5	BDS (Dental)	1	September	1	300.00	5.00	0.00	8.00		287.00				0	100.00
	Medical	Undergraduate Degree	5	BDS (Dental)	2	September	2	420.00	95.00	0.00	9.00		316.00				0	100.00
	Medical	Undergraduate Degree	5	BDS (Dental)	3	September	3	420.00	139.00	66.00	22.00		193.00				0	100.00
	Medical	Undergraduate Degree	5	BDS (Dental)	4	September	4	420.00	350.00	0.00	8.00		62.00				0	100.00
	Medical	Undergraduate Degree	5	BDS (Dental)	5	September	5	420.00	350.00	14.00	9.00		47.00				0	

The "Validation – Summary" sheet will then show the unadjusted amount of time in clinical placement settings.

Medical Clinical Placement Time Report

Course	Year	Course Length	Unadjusted amount of time in Clinical Placement Settings
Medical	Current Year	4 Year	0%
		5 Year	257%
		6 Year	0%

If there are no red sections on the medical clinical placement section of the "Validation – Summary", no more action is required.
However, it may of interest to look at the "Validation – Medical Placement" sheet to show how the data is extracted from the "Student Activity" sheets, red section, converted to percentages, blue section, and then adjust to 300% (NHS England's funding commitment,3 lots of tariff), green section.

Validation

- Validation occurs in both the downloaded version as well as the uploaded version of the template.
- Cells will highlight in red if free text is entered into cells where a drop-down list is available, and the text does not match any item from the drop-down menu.
- Blank required cells will only be validated once uploaded to eCollection. They will highlight in red and be shown amongst the error count.
- If actual numbers (Student Activity column R & U) differ from planned numbers, Student Activity tab columns T & V will highlight in amber to show that a reason is required.
- Please note that blank cells are not part of the validation in the downloaded version of the template which avoids a template that is all red to start with.
- If you change Placement Provider Type (Placement Activity Current and Planned, Column D) from the auto-populate selection it will highlight in amber to demonstrate this has changed and act as a warning. However, this is not an error and the eCollection portal will accept the selection.
- No required cells should be left blank, and all figures entered must be numeric or text in relevant fields.
- Please aim to get your error count 0/lowest number possible to ensure quality data and accurate reporting.

Acceptable Errors

Due to the way eCollection Organisations are set up there are some listed in the drop-down menu that will flag as error.

Placement Activity Current and Planned tabs - Placement Provider Name

- GP Practices
- Other – Dental community
- Other – GP
- Other – PIVO
- Other – HCHS

Selecting any of the above options from the drop-down menu will highlight as an error in the eCollection portal however this error can be ignored and the data will be accepted.

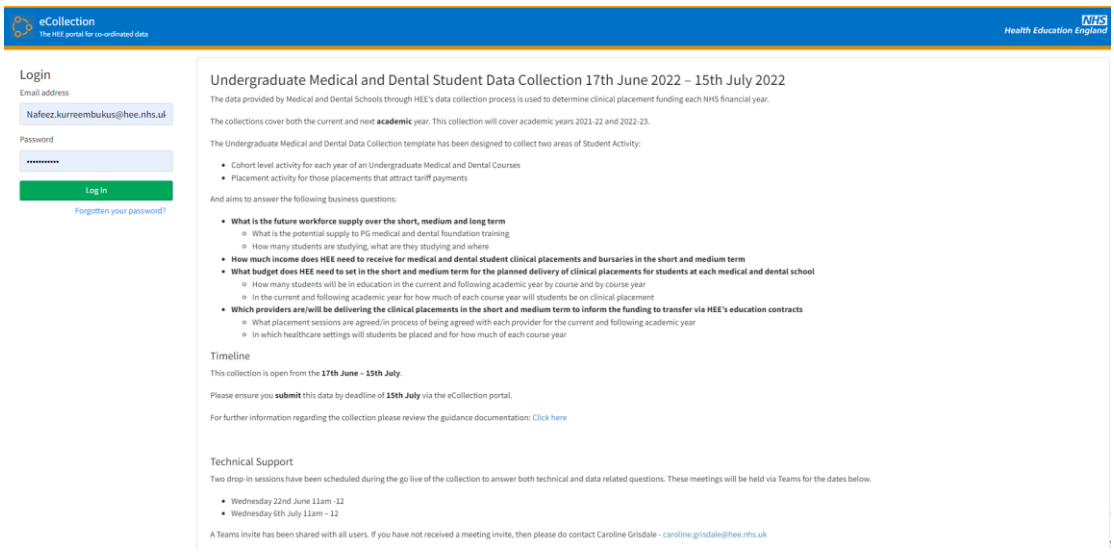
Logging into the e-Collections tool:

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

If your NHS England 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 will be the first page you see when you browse to the collection you are looking for, for example the login page for the Undergraduate Medical and Dental Data Collection is shown Figure 1 below.



Populate the email address and password fields appearing on the left side of the UGM&D 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 e-Collection 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 for the Undergraduate Medical and Dental Data Collection is shown in Figure 2 below


Invitation to contribute

N noreply@datacollections.hee.nhs.uk
To [redacted] (NHS ENGLAND)

Reply | Reply All | Forward
Fri 12/09/2025 09:50

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

This message originated from outside of NHSmail. Please do not click links or open attachments unless you recognise the sender and know the content is safe.

eCollection

Undergraduate Medical and Dental Student Data Collection 6 June - 11 July 2025

CollectionOverview

The data provided by Medical and Dental Schools through NHS England's data collection process determines clinical placement funding each NHS financial year.

Timeline

This collection is open from **6th June - 11th July 2025**. Please ensure you submit this data by the deadline of **11th July 2025** via the eCollection portal.

The next collections will go live:

- 26 September 2025. The deadline for submission is 5:00 pm on 31st October 2025
- 09 January 2026. The deadline for submission is 5:00 pm on 20th February 2026

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

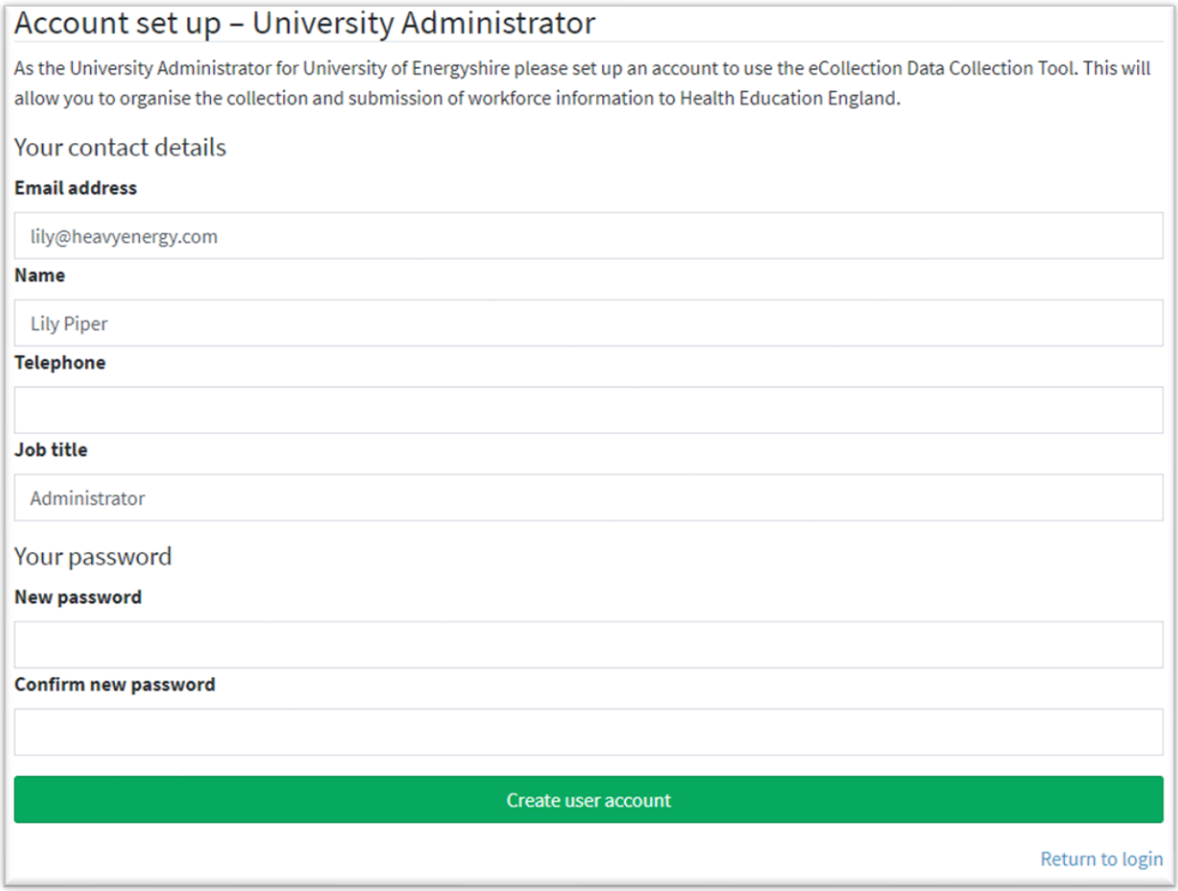
It also includes the following links:

- Undergraduate Medical and Dental Data Collection 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 Figure 3.

- 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 UGM&D.
- Your password must have between 8 and 16 letters, with a mix of uppercase and lowercase letters, and one or more symbols and numbers.



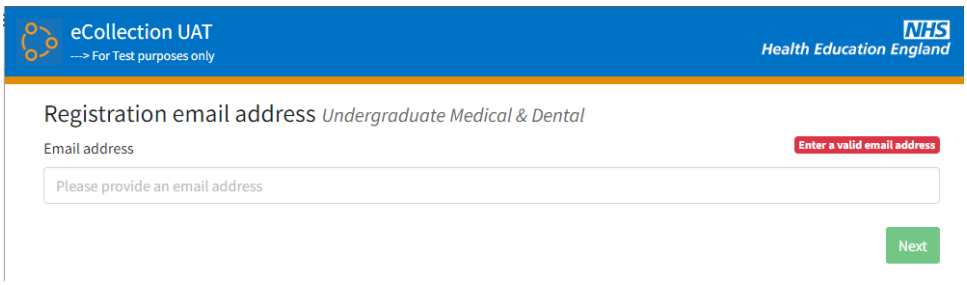
- An account will be created for you which you can use to access the UGM&D in the future.

Registering to use the Undergraduate Medical and Dental Data Collection Tool for the first time

If you have not received an invitation but believe you should have access to the application, you can request access from HEE by following the steps below:

- Go to the UGM&D login page
- Click the panel titled Register to use UGM&D
- You will then be forwarded to the registration page.

Enter your email address and click Next.



Registration review process

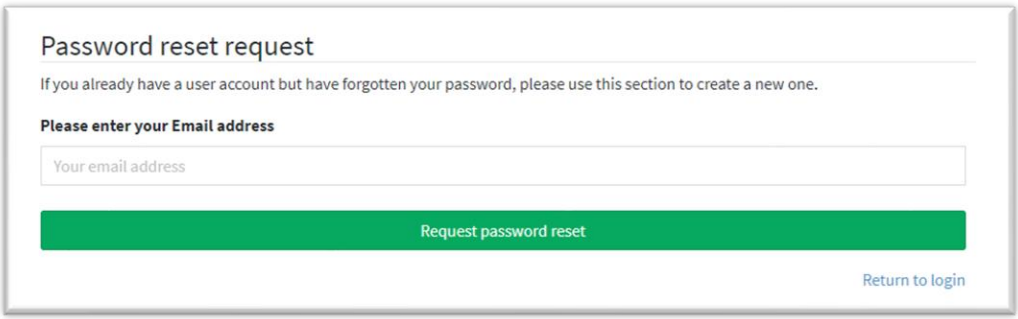
Once submitted, your registration request will be reviewed by an NHS England administrator, from within your regional team.

If your request is accepted, you will be sent an invitation email inviting you to contribute.

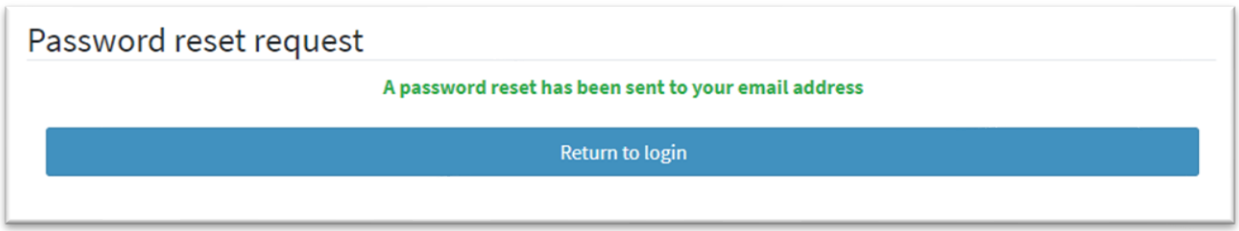
Forgotten Password

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

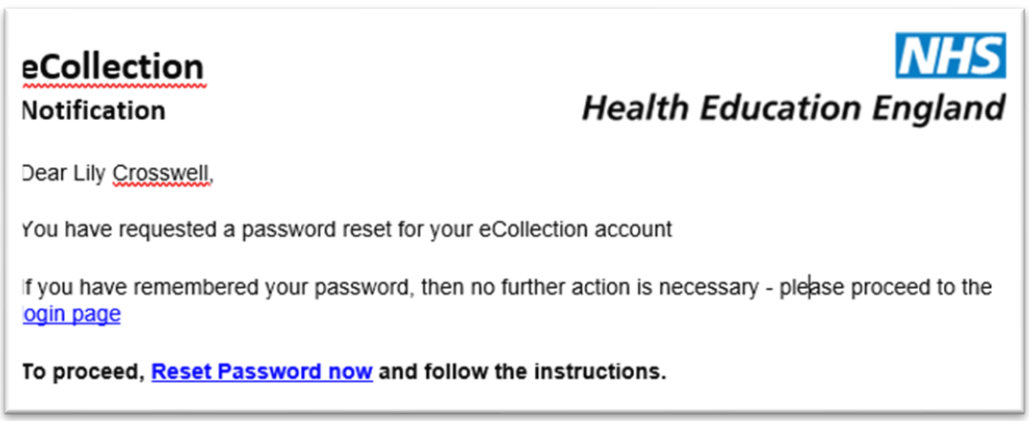
- Click “Forgotten your password?” on the Undergraduate Medical and Dental Data Collection login page. This will display the Password Reset page.



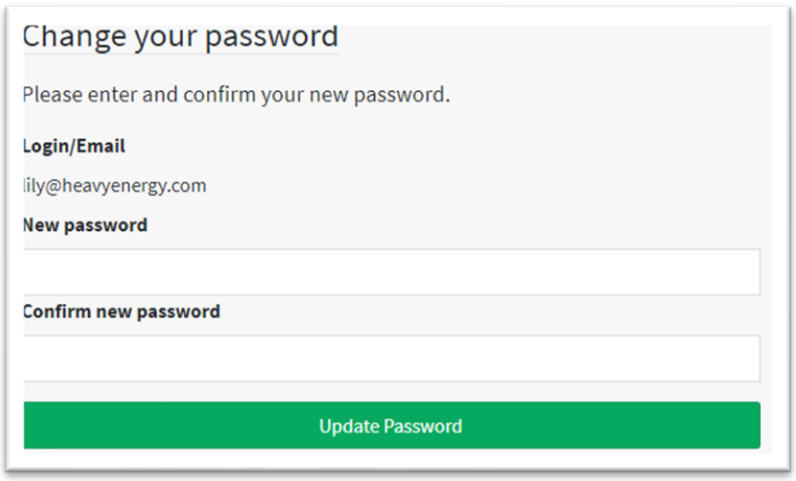
- Enter your email address and click the “*Request password reset”* button. If successful, the following message will be displayed.



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



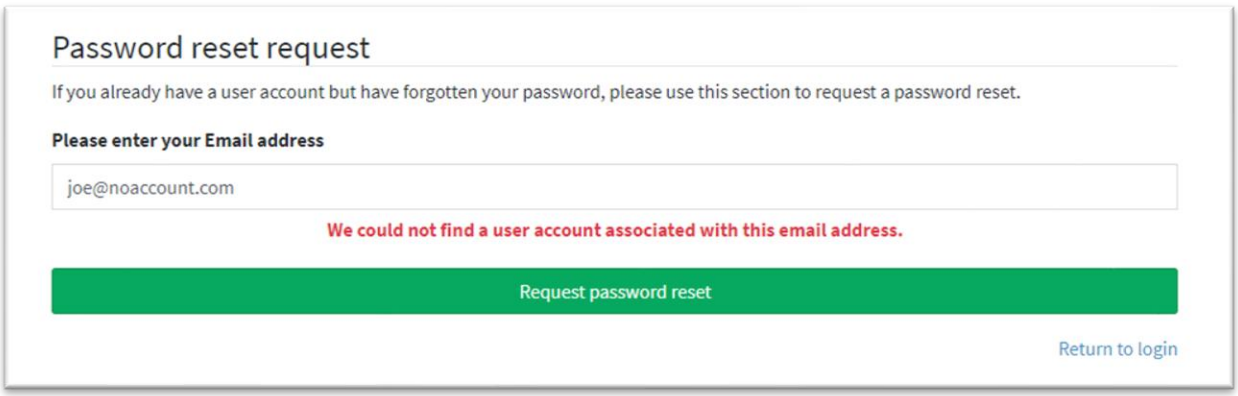
- Click the Reset Password Now link and your browser will display the change your password page



- 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.

Unregistered email addresses

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



Possible causes for this might include:

- The email you provided was incomplete or mistyped.
- You had previously received an invitation email to access Undergraduate Medical and Dental 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 your NHS England Regional Team. The NHS England Regional Team contact details are provided on page 31 in this guidance document.

Dashboard Navigation

Upon successful login you will be forwarded to the UGM&D 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 e-Collection 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 Undergraduate Medical and Dental Data Collection Tool documentation and downloads.

Navigation buttons - Page header



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 – Click here

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

My Trust

- My Organisation
- Assign Contributors

Download Templates

- Download Empty Template

Upload

- Upload File
- Uploads

Uploaded Data

- Student Activity Current
- Placement Activity Current
- Student Activity Planned
- Placement Activity Planned

Sign Off

- Submit to HEE

e-Collection general commands

Cancel - Red buttons cancel an action and lose all changes

Save - Green buttons perform an action which accepts changes

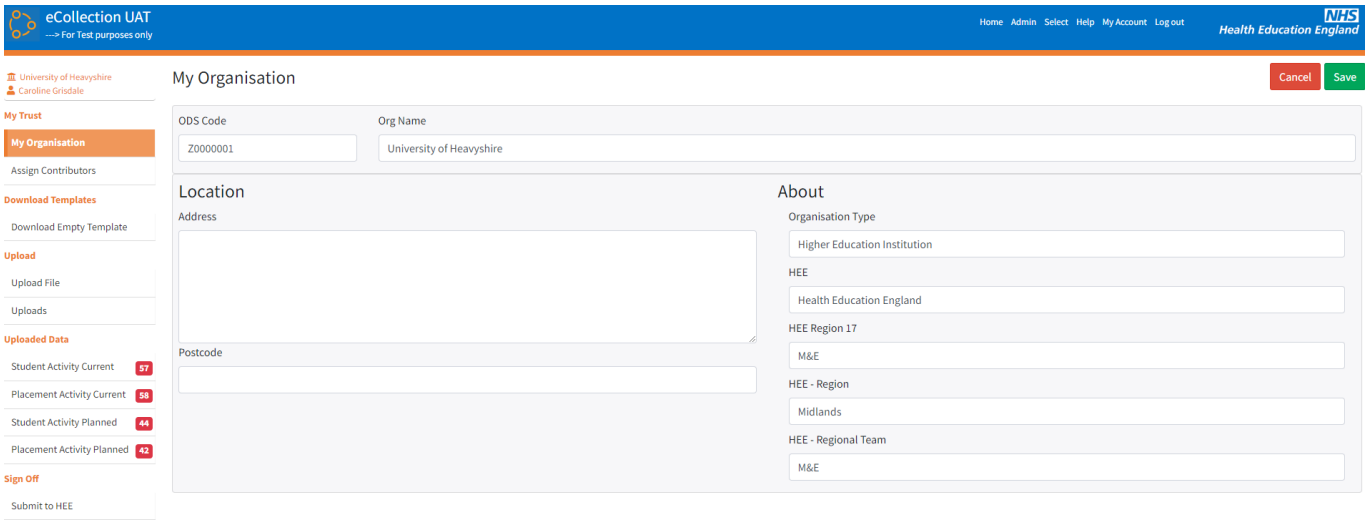
Download - Blue buttons perform actions – like download/upload data

- Amber buttons perform special action

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 subsections: 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.



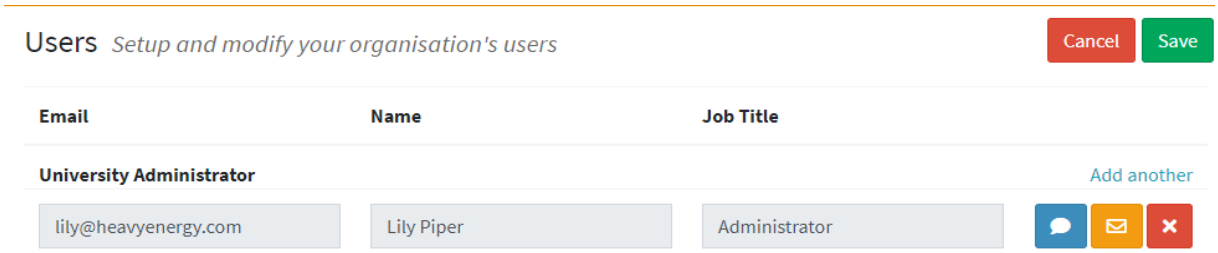
You can change your organisation's address here and review other details. Click the green save button once any necessary changes, if any, have been made.

Assign Contributors

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

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.

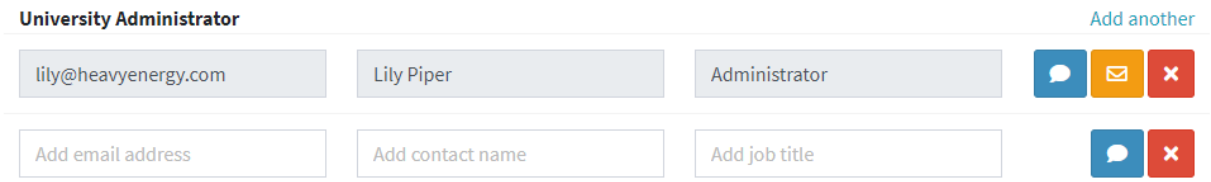
Assign Users



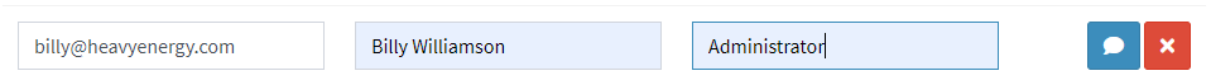
Adding a user

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

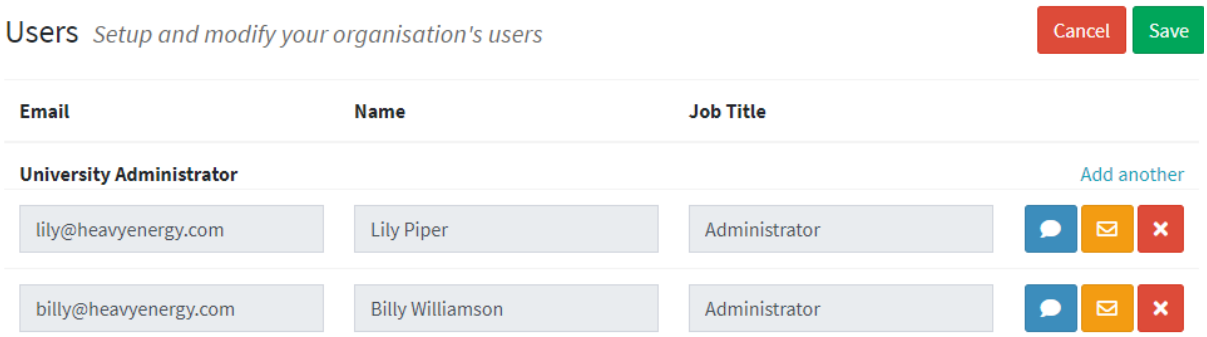
- Click “Assign Contributors” in the side menu
- Click the “Add another” link which will result in a new row being displayed



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



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



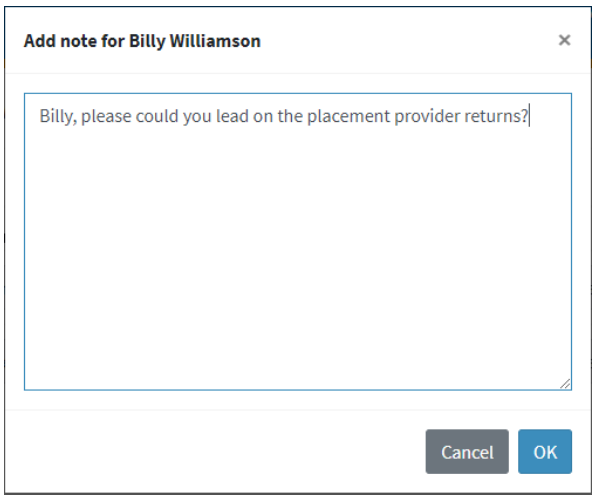
An invitation will then be sent to the new users giving further instructions for how to complete their registration

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 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.

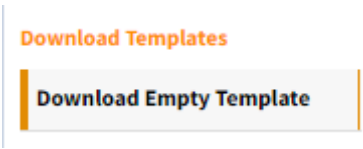
- Click the red cross button by the user you wish to remove. 
- Once clicked, the user details will change to highlight the item as tagged for deletion.



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

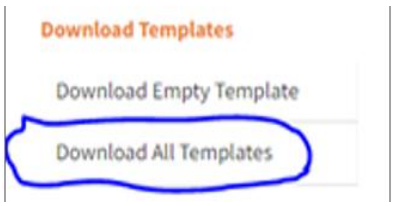
Downloading - Users will have two options:

1. Download Empty Template



Users can download the UGM&D template in the ‘Download Empty Template’ tab on the homepage. If you find it easier, you can download the demand data and do the editing in Microsoft® Excel.

2. Download All Templates



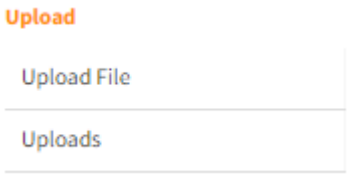
Users can access previous submissions by clicking on the new ‘Download All Templates’

When clicked the user will then see the below and can click on the relevant submission and download from there.

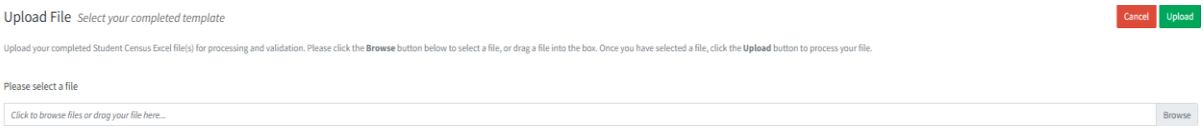


Uploading data

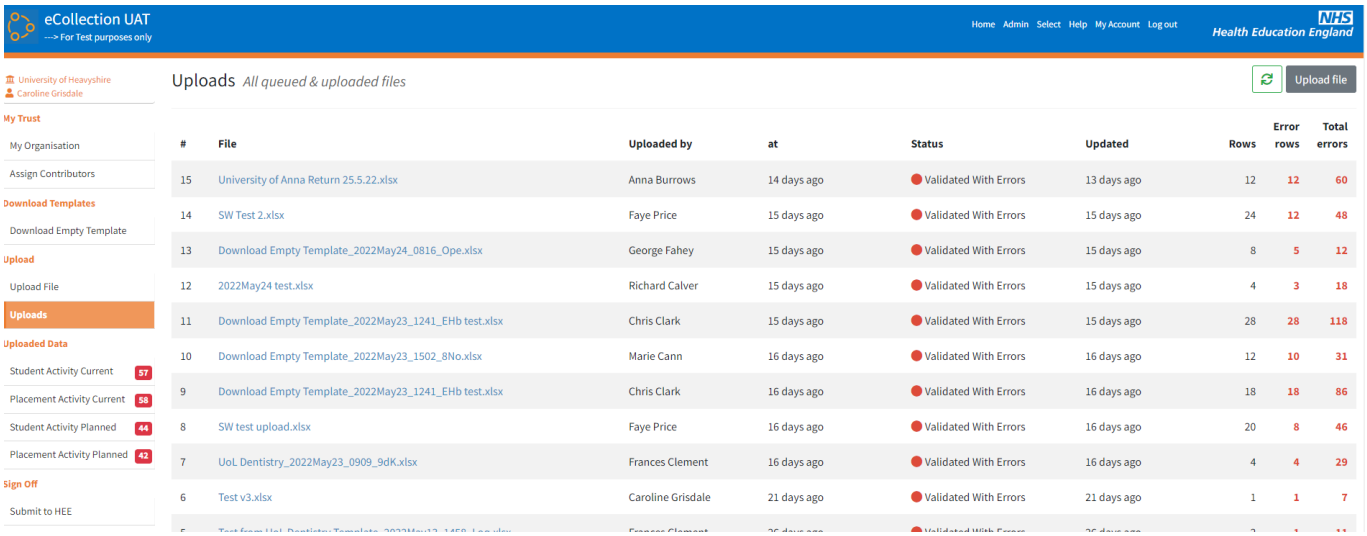
Once data has been filled into the excel spreadsheet you can now upload the template by clicking on the 'Upload File' button:



Once you have downloaded and filled out a template using Microsoft® Excel, you can reupload it to the e-Collection Tool. Once you click on the "Upload" button from the tab you will receive the option to select a file to import:

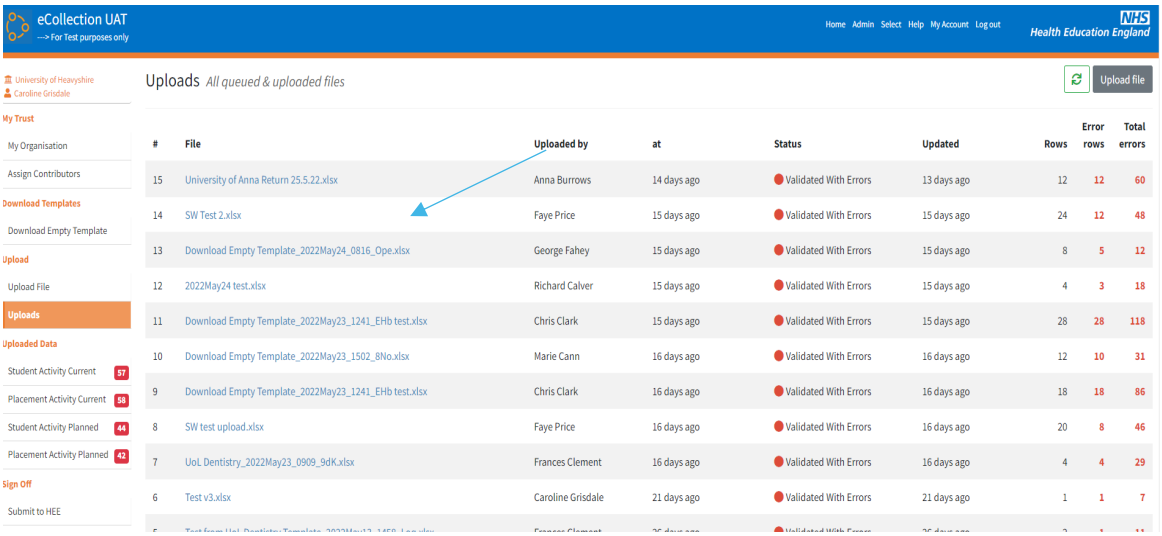


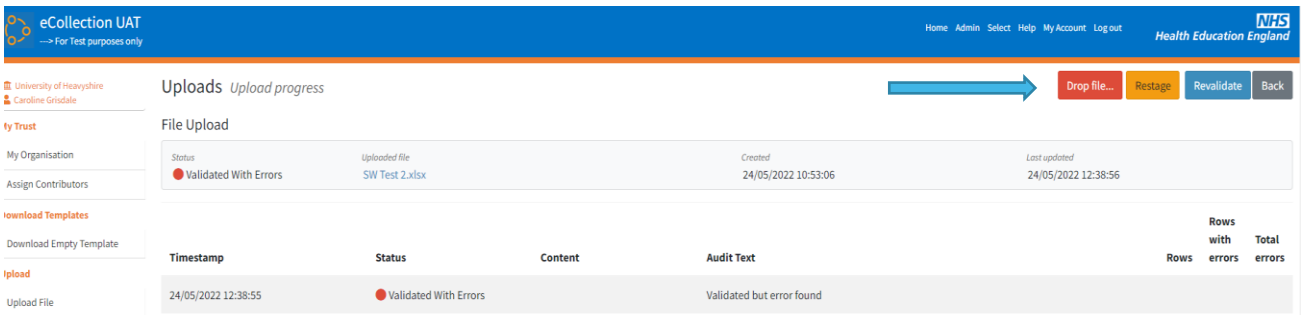
Once you have chosen the file and clicked on the green "Upload" button, you will be taken through to the staging area (as seen on a test below). At this point, you can review your uploads.



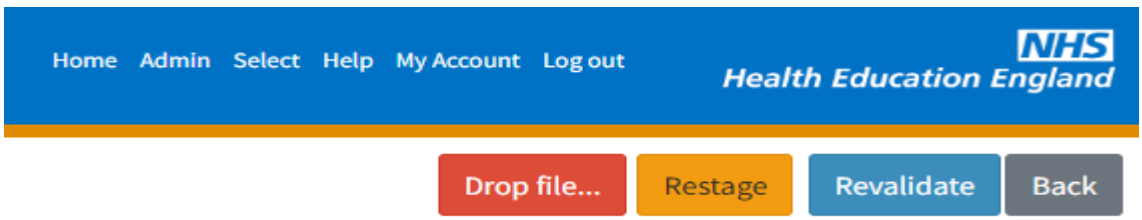
Removing an Uploaded File 'Drop File'

To remove a file that you no longer require click on the row of the file you wish to drop but not the link as below:





Click Drop file…

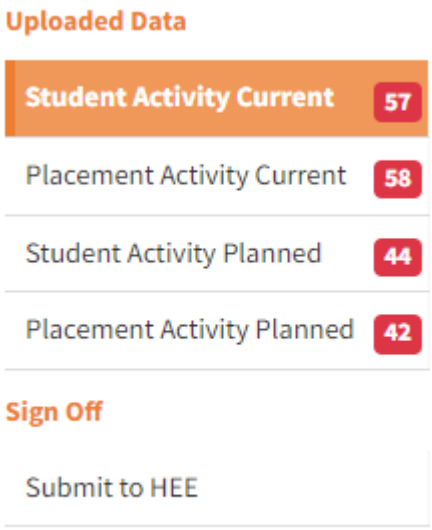


You can upload multiple files however please be sure to not submit duplicate data. If you do upload multiple files with duplicate data use the Drop file function as above.

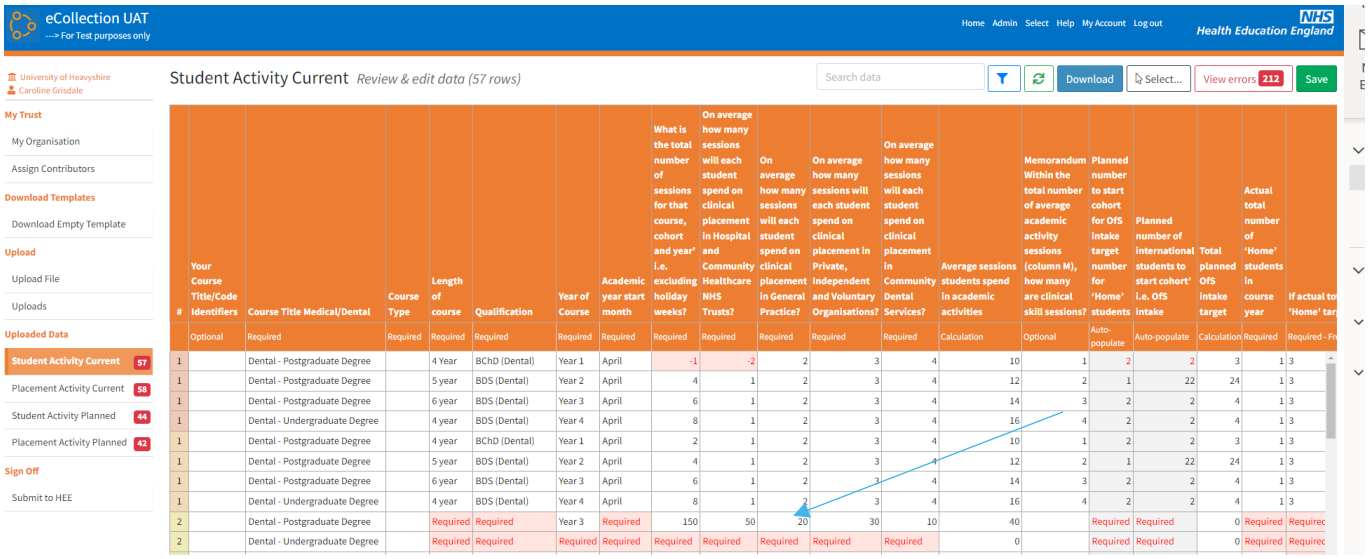
Editing Uploaded Data

Changing data is an easy task to do in the application.

Click on the relevant tab for which you wish to see the relevant data in the side menu under Uploaded Data



Simply locate and click on the field you wish to update and make your amendments.



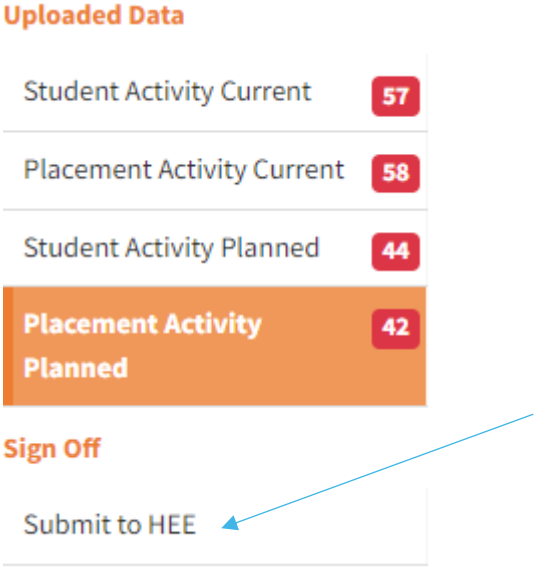
Please note: Any cells highlighted in red demonstrate a validation error and must be corrected before 100% completion can be achieved and the data collection submitted.

Validation errors include negative numbers (ensure only positive numbers are entered) and blank cells (enter as zero) also if the wrong data is entered on either the downloaded template or on the tool itself, it will be highlighted in red. Any free text in cells that have a drop-down menu that does not match the drop-down list will be highlighted in red.

After making amendment in the portal be sure to click Save

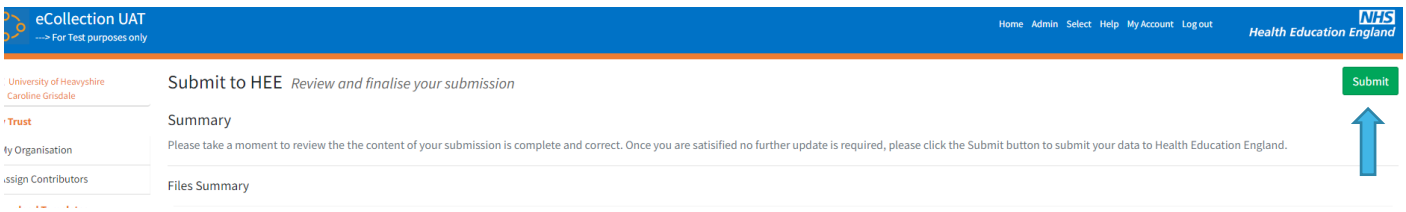
Submit to NHS England

Once you have completed your data return and validated all errors you can Submit to NHS



England.

You will be then taken to a Summary page where you can Review and Finalise your submission.



Once you have reviewed and finalised your submission, please confirm this by clicking Submit in the top right-hand corner of the page.



Support

Technical Support & UGMD Collection General Support Requests

For technical support (eg to access the NHS England e-collection portal, to amend user details, to set up additional users or any other technical enquiries), and for general support requests (for example policy, financial) relating to the Undergraduate Medical and Dental data collection please raise a support request with the **NHS England National Service Desk (NSD).** There are two ways to register a support request:

Logging a request on the NHSE NSD support request portal:

Customer Service Portal - Customer Support

Or send an email to

ssd.nationalservicedesk@nhs.net

Guidance for raising support requests via the NHS England National Service Desk (NSD) is available to be downloaded from the downloads section on the home page of the UGMD data collection.

Regional Support

If you do require regional support with the Undergraduate Medical and Dental data collection, please contact your regional UGMD lead.