

# Health Education England eCollection Guidance Pack

Workforce Development Funding Data Collection Template

June 2022

Developing people  
for health and  
healthcare

[www.hee.nhs.uk](http://www.hee.nhs.uk)



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## **Introduction**

This pack contains guidance for the use of the Workforce Development Funding 22/23 Data Collection Tool, developed by Health Education England (HEE).

The guidance provided includes:

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

## **e-Collection**

HEE has developed 'e-Collection', a suite of data collection tools, one of which is the Workforce Development Funding Data Collection Tool.

The benefits of e-Collection 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 required login for each tool can access the data submitted at the level they require

## **Where to find the Workforce Development Funding Data Collection 22/23 Tool**

The Workforce Development Funding Data Collection Tool can be accessed via the e-Collection web portal.

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

## **Workforce Development Funding Collection Overview & Guidance**

As ICSs become statutory entities from July 2022 and assume responsibility for a number of key deliverables, including the leadership of workforce transformation and new ways of working – HEE has committed to supporting systems achieve better definition and prioritisation of workforce solutions, which enable both *more* and *different*.

To support this, for 2022-23, HEE has invested £50m in Workforce Development Funding to be focused on the improvement and transformation of care delivery. This is driven by employer and service intent such as change to the service model. Funding is invested in projects, programmes, education and training that require scale and pace which are sufficient for delivery of change.

This might include for example, Person Centred Coaching to scale personalised care, training in the application of digital technologies to deliver new models of care and project management to spread and adopt best practice initiatives; the focus of the education and training requirement being to move towards a different way of working.

Workforce Development investment should be aligned to the five enablers of workforce transformation as described in the HEE Star (Supply, Up-skilling, New roles, New ways of working and Leadership) to ensure appropriate use of resource, avoid duplication of investment with other funding streams and establish a common understanding of shared workforce priorities.

The reporting framework is aligned to the five key enablers of the HEE Star to facilitate aggregation and analysis at regional and national level – providing improved oversight of economies of scale, gaps in activity and impact/outcomes.

## Timeline

HEE regional teams are required to submit a return using the Workforce Development Funding Data Collection Tool three times during 2022-23:

- 15<sup>th</sup> July
- 13<sup>th</sup> October
- 13<sup>th</sup> April

Regional submissions will draw on intelligence gathered from relevant systems and providers in accordance with their agreed processes.

## Templates

The templates have been designed to collect data for each region. They can also be downloaded and cascaded to systems and providers for completion if required.

Data can be entered either straight into the template within the WD 22/23 Tool, or downloaded as an excel file, completed, and then uploaded back to the WD 22/23 Tool.

**Please note that eCollection will only accept uploads of the official template downloaded from the WD eCollection portal.**

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. The data has validation functionality in both the downloaded and uploaded template and corrections can be made at either stage. Once the template has been uploaded, eCollection will report to see how many errors there are and will provide an opportunity to correct it although you can correct the data at any stage where an error has been flagged.

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.

## Template Fields and Definitions

The WD template contains the following fields and definitions.

<b>Section A - Organisation information</b>	
Region	Please select from the drop down list provided.
Integrated Care System	Please select the ICS area from the drop down list. This will be driven by your selection for Region. If an investment covers more than one ICS, please ensure these are reflected as separate lines.

	For region-wide activity, please select Region-wide at the bottom of the dropdown list.
Provider	Please select the provider from the drop down list. This will be driven by your selection for ICS. For region-wide activity please select the option Region-wide. If the spend relates to Primary Care, please select Primary Care - GP Practice staff (excluding GPs) from the drop down.
<b>Section B - About the investment</b>	
Type of activity	Please select the type of activity from the drop down list below: <ul style="list-style-type: none"> <li>• Accredited training</li> <li>• Non-accredited training</li> <li>• Project activity (time bound activity with a clear output that is ideally subject to an evaluation of impact and where appropriate / possible, showcased on the HEE Star. Examples include retention initiatives, attraction strategies, specific campaigns such as suicide prevention and workforce redesign programmes. This may include project delivery roles.)</li> <li>• Infrastructure (strategic roles leading workforce redesign across ICSs)</li> <li>• Other (please use the description cell to explain)</li> </ul>
Investment title	Please give the investment a suitable, self explanatory, title (no more than 500 characters). This should make sense to a person not directly involved with the activity and avoid use of acronyms, abbreviations or vague statements.  Examples <ul style="list-style-type: none"> <li>• Advanced digital learning training programme</li> <li>• Nursing Associate trainee rotations pilot</li> <li>• Apprenticeship and Education Project Manager</li> </ul> Please avoid using the investment theme from the WD menu as the title.
Investment status	This section is designed to determine what stage of deployment funding is at in relation to each investment listed. Please select from the following options: <ul style="list-style-type: none"> <li>• Anticipated = plans being finalised</li> <li>• Committed = plans agreed and funding allocated, with contracts in place where appropriate</li> </ul>

<p>Training and education provider</p>	<p>Please enter the education and training provider delivering the activity where this is known (either confirmed or intended). If you are reporting indirect funding, or funding allocated to HEIs, please select the HEI name here. If the training or education provider is not listed in the drop-down menu please free text this into the appropriate cell. Please note that this will show as a validation error but the text will be accepted.</p>
<p>Description</p>	<p>Please provide a clear description of the investment. This should provide enough information to understand the investment being made and make sense to a person not directly involved with the activity (i.e. avoid use of acronyms, abbreviations, or vague statements such as 'workforce transformation').</p>
<p>Type of spend</p>	<p>Please select from:</p> <ul style="list-style-type: none"> <li>• System spend - any money that has been allocated to systems to determine how it will be deployed - this includes monies originally held by the HEE Regional Director at the start of the year that they have subsequently taken the decision to pass on to systems.</li> <li>• RD spend - pre-existing commitments and any regional activity that is defined and led by HEE, i.e. not the system directly. Examples may include Regional Director commissioned training programmes / contractual commitments that span across the previous financial year into the current financial year.</li> </ul>
<p>Does this relate to elective care recovery?</p>	<p>Elective care recovery continues to be a priority for the NHS throughout 2022-23.</p> <p>Please select from the drop down menu whether this investment is supporting elective care recovery.</p>
<p>Does this support multidisciplinary team working?</p>	<p>HEE's Business Plan 2021-22 has an objective to <i>Support the expansion and development of multi-disciplinary teams to achieve a diverse, sustainable skills mix in primary care.</i></p> <p>We need to capture where investment is focused on developing multi-disciplinary / integrated ways of working between professional groups e.g. leadership development training for an MDT to learn together.</p>

	<p>To ensure the accuracy of returns and to assist in collating evidence for the HEE Business Plan deliverables please only select multi-disciplinary where the activity is designed to commence or improve MDT working in health and care.</p> <p>Please select from the drop down menu whether this investment is supporting multidisciplinary working.</p>
<p>Digital related?</p>	<p>HEE's Business Plan 2021-22 has a strategic goal to <i>Transform today's workforce to work in a co-operative, flexible, multi-professional, digitally enabled system.</i></p> <p>Please select from the drop down menu whether this investment is supporting building a digitally literate workforce and/or digital expertise.</p> <p>Examples may include (but are not limited to) training activity to up-skill the workforce or investment in digital kit.</p>
<p><b>Section C - Strategic drivers</b></p>	
<p>HEE Star domain</p>	<p>Please select the HEE Star domain the investment most strongly aligns with:</p> <ul style="list-style-type: none"> <li>• Supply - Identifying current and future workforce availability in terms of skills, capabilities and numbers, in order to identify the appropriate workforce interventions.</li> <li>• Up-skilling - Focused on role enhancement; increasing the depth of a job by extending the skills and responsibilities of an existing role to enable practice at the top of one's license.</li> <li>• New roles - Health and care roles designed to meet a defined workforce requirement, warranting a new job title; the likely ingredients including additionality to the workforce, a formal education and training requirement (whether that be vocational or academic), an agreed scope within the established Career Framework, and national recognition (although not necessarily regulatory) by clinical governing bodies.</li> <li>• New ways of working - Emphasis on developing an integrated workforce culture that empowers it to break through system barriers and deliver person centred care.</li> <li>• Leadership - The support of individuals, organisations and systems in their leadership development - ranging from individual behaviours and skills, to organisational development of systems through partnerships.</li> </ul>

HEE Star domain sub-category	Please select an option from the drop down list (driven by selection in the previous category).
ICS outcomes	Please select the ICS People Function Outcome Area this investment most strongly aligns with from the drop down list.
NHS People Plan priority	Please select the NHS People Plan priority this investment most strongly aligns with from the drop down list.
<b>Section D - Professional group</b>	
Multiple staff groups	This is a locked calculated field. This is pre-populated with the wording 'Complete column R'. If column R 'Main staff group' <b>only</b> is completed 'Multiple staff groups' will be auto-populate with 'No'. If column R 'Main staff group' and <b>one or more</b> columns S – V, 'Additional staff groups' are completed then column R will auto-populate with 'Yes'.
Main professional group	<p>Please select the professional group this investment will predominantly impact:</p> <ul style="list-style-type: none"> <li>• Nursing and Midwifery Registered</li> <li>• Allied Health Professionals – includes Therapists (Art, Drama, Music), Podiatrists, Dietitian, Occupational Therapist, Orthoptist, Orthotist, Paramedic, Physiotherapist, Prosthetist, Radiographer, Speech &amp; Language Therapist, Osteopath, Advanced Practitioner and Operating Department Practitioner</li> <li>• Additional Professional Scientific and Technical – includes Optometrist, Pharmacist, Social worker, Psychologist and Mental Health practitioners</li> <li>• Healthcare Scientists – includes Clinical Scientist and Biomedical Scientist</li> <li>• Additional Clinical Services – includes Healthcare Assistants, Trainee Scientists or Practitioners, Psychological Wellbeing Practitioner, Peer Support Worker</li> <li>• Administrative and Clerical – includes Manager, Clerical worker, Non-Emergency call handler</li> <li>• Estates and Ancillary</li> <li>• Physician Associates</li> <li>• SAS Grade Doctors</li> </ul> <p>For further information please see the <a href="#">NHS Digital job role codes</a>.</p>
Additional professional group	There is space to select up to four additional professional groups where the investment impacts across more than one

	group. If there are more than four, please add further details to the description cell.
<b>Section E - Priority area</b>	
Multiple priority areas	This is a locked calculated field. This is pre-populated with the wording 'Complete column X'. If column X 'Main priority areas' <b>only</b> is completed 'Multiple priority areas' will be auto-populate with 'No'. If column X 'Main priority areas' and <b>one or more</b> columns Y – AB, 'Additional priority areas' are completed then column X will auto-populate with 'Yes'.
Main priority area	Please select the priority area this investment will predominantly impact.  Please only select system-wide in cases where the investment transcends priority areas (for example a strategic workforce role). If this is selected please leave additional priority area columns blank as these are not required.
Additional priority area	There is space to select up to four additional priority areas where the investment impacts across more than one group. If there are more than four, please add further details to the description cell.
<b>Section F - Impact and evaluation</b>	
Is this evaluation being evaluated?	<p>Since the inception of the WD funding menu, there has been a national requirement that any WD funded investment over £100k is subject to external, independent evaluation for service benefit, workforce impact and return on investment. The £100k is calculated based on an aggregation of all activity within a system or provider relating to the same workforce transformation issue. For example, three separate projects of £50k relating to nursing placements would need to be collectively evaluated for their impact on nursing placements in the locality as they pass the £100k threshold.</p> <p>Arrangements for evaluation of investments under £100K should be determined locally based on agreed local processes and what is determined to be proportionate.</p> <p>For each investment, please select one of the following options:</p> <ul style="list-style-type: none"> <li>• Evaluation complete</li> <li>• Evaluation in planned</li> <li>• Evaluation in progress</li> <li>• No evaluation</li> </ul>

	<p>Please note that where funding is being used for activity that already falls under an existing quality framework (for example, ongoing HEI accredited courses that are subject to existing HEI assurance processes) and therefore has evaluation built into the investment, you may choose the “evaluation planned / in progress” option and state the rationale as described above in the additional notes column. This should not preclude the opportunity for post training impact evaluation, for example the impact of up-skilling training on skill and role mix in service or patient care.</p>
<p>Evaluation notes</p>	<p>Please use this space to provide further details based on your selection in the previous cell:</p> <ul style="list-style-type: none"> <li>• Where evaluation complete has been selected, please provide title and publish date.</li> <li>• Where evaluation in planned / in progress has been selected, please provide draft title and targeted publish date</li> <li>• Where no evaluation has been selected, please provide reason.</li> </ul> <p>Example evaluation titles</p> <ul style="list-style-type: none"> <li>• Assessing the impact of [insert name of postgraduate training] courses on patient outcomes in [insert name of service] in [insert time period].</li> <li>• How have the deliverables of [insert name of transformation project] impacted on the [insert name of workforce transformation pressure] during [insert financial year].</li> <li>• Did the increase of placement capacity in [name of ICS] for [name of profession] improve local supply and close the vacancy gap from [year to year]?</li> </ul>
<p>Map to quadruple aim</p>	<p>Please select from the drop down list the aim the investment most strongly aligns with.</p>
<p>Metrics</p>	<p>Please enter the metrics to be used to demonstrate the intended impact of the investment.</p> <p>Examples</p> <ul style="list-style-type: none"> <li>• Increased retention</li> <li>• Reduced vacancies</li> <li>• Reduced sickness absence</li> </ul>

<b>Section G - Financial information</b>	
Total quantity	Where relevant, please enter the number of staff/volume of activity the investment will support. If not applicable (i.e. for project activity), please enter 0.
Unit cost	Please enter the unit cost of the investment (i.e. cost per head or cost per product). If not applicable (i.e. for project activity), please enter 0.
Sub-total (quantity x cost)	Will self-populate based on the data entered into the previous two cells.
Other associated costs	Please enter the sub-total of any other associated costs e.g. project management, admin support, development fees. Enter 0 if none apply.
Overall cost	Will self-populate based on the data entered into the previous two cells.
Spend confidence	<p>This section is designed to determine the level of confidence systems / providers have that the funding allocated to investments will be spent in-year.</p> <p>Please ensure this column is revisited and updated prior to the financial year end return. At the financial year end, we would anticipate the vast majority of activity to be tagged as guaranteed unless an underspend is expected. If underspend is anticipated, please inform your regional reporting lead.</p>

## Validations

- 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.
- Cells will highlight in **amber** in columns R – V and X – AB if duplicate staff groups or priority areas are selected across the row.
- Blank required cells will only be validated once uploaded to eCollection. They will highlight in red and be shown amongst the error count.
- 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.
- 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.

## Using the Workforce Development Funding Collection 22/23 Tool

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

If you have been nominated as a user of the WD 22/23 Tool, you will receive an electronic invitation to access the system. This section provides guidance on how to log in, and also what to do if you have not received the required information.

### Technical guidance

If you already have a user account, you can login using your login credentials.

### Logging in

The login page will be the first page you see when you browse to the WD Collection website.

#### WD 22/23 Tool Login page

The screenshot shows the login page for the eCollection UAT tool. The page is titled "2019 Strategic System Plan Submission Process Data Collection". It features a login form on the left with fields for "Email address" (containing "Nafeez.Kurreembukus@hee.n") and "Password", and a "Log In" button. Below the form is a link for "Forgotten your password?". The main content area includes the NHS logo and the text "Health Education England". It also contains a section titled "2019 Strategic System Plan Submission Process Data Collection" with a paragraph about the NHS Long Term Plan and a list of actions: "enhance existing workforce supply", "grow future workforce supply", "mitigate current and future workforce demand", "acknowledge that actions are required throughout the health care system by national, regional, local system, and individual organisations", and "empower different parts of the system to pull those levers they are best positioned to pull". At the bottom, there are three boxes: "HAVE AN INVITE CODE?", "REGISTER TO USE EWORKFORCE", and "COLLECTION GUIDANCE".

Populate the email address and password fields appearing on the left side of the WD 22/23 Tool 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 Workforce Development Collection Tool

An invitation to contribute will be sent to all those registered to contribute to the WD 22/23 Tool as below:

## Invitation to Contribute

Invitation to contribute



noreply@datacollections.hee.nhs.uk  
To Nafeez Kurreembukus

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

### Healthcare Science Workforce

#### Data Collection 2019

Dear Nafeez Kurreembukus,

You have been invited to participate in the Workforce Development Funding data collection by HEE.

This text is just sample text and is currently in the process of being edited to include the correct communications and text.

You already have a user account to access the Tool.

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

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

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 taking action in relation of the contents of this information is strictly prohibited and may be unlawful.

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:

- [WD 22/23 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 WD 22/23 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

Name

Telephone

Job title

### 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 WD 22/23 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 Workforce Development Funding Collection 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 WD 22/23 Tool login page
- Click the panel titled *REGISTER TO USE 2022/23 – WORKFORCE DEVELOPMENT COLLECTION*

**REGISTER TO USE EWORKFORCE**

If you would like to sign up to use eCollection UAT, 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 2022/23

Email address Enter a valid 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.

### Your organisation code 2022/23 - Mental Health Workforce

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

ODS Code      Org Name

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

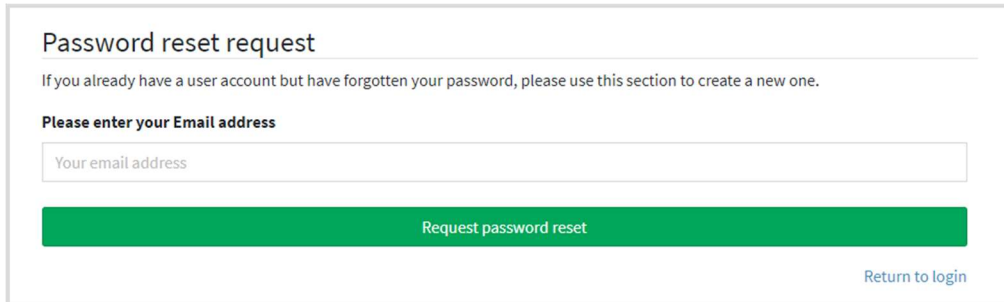
[Next](#)

- 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 WD 22/23 Tool 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 large green button labeled "Request password reset". In the bottom right corner of the form area, there is a 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.

**eCollection**  
Notification

**NHS**  
**Health Education England**

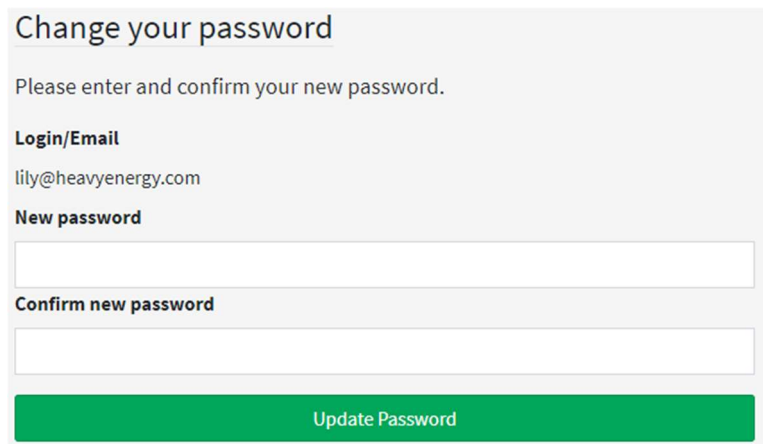
Dear Lily Crosswell,

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.



Change your password

Please enter and confirm your new password.

**Login/Email**  
lily@heavyenergy.com

**New password**

**Confirm new password**

Update Password

- 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

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 WD 22/23 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](mailto:DataService@hee.nhs.uk)

## Workforce Development Funding Collection Tool home page

Upon successful login, you will be forwarded to the WD 22/23 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 WDF 22/23 Tool documentation and downloads.

### WD 22/23 Tool home page

Workforce Development Funding June 2022

As ICSs become statutory entities from July 2022 and assume responsibility for a number of key deliverables, including the leadership of workforce transformation and new ways of working – HEE has committed to supporting systems achieve better definition and prioritisation of workforce solutions, which enable both more and different.

To support this, for 2022-23, HEE has invested £50m in Workforce Development Funding to be focused on the improvement and transformation of care delivery. This is driven by employer and service intent such as change to the service model. Funding is invested in projects, programmes, education and training that require scale and pace which are sufficient for delivery of change.

This might include for example, Person Centred Coaching to scale personalised care, training in the application of digital technologies to deliver new models of care and project management to spread and adopt best practice initiatives; the focus of the education and training requirement being to move towards a different way of working.

Workforce Development investment should be aligned to the five enablers of workforce transformation as described in the HEE Star (Supply, Up-skilling, New roles, New ways of working and Leadership) to ensure appropriate use of resource, avoid duplication of investment with other funding streams and establish a common understanding of shared workforce priorities.

The reporting framework is aligned to the five key enablers of the HEE Star to facilitate aggregation and analysis at regional and national level – providing improved oversight of economies of scale, gaps in activity and impact/outcomes.

**Timeline**

HEE regional teams are required to submit a return using the Workforce Development Funding Data Collection Tool three times during 2022-23:

- Mid-July 24th June – 15th July 2022
- Mid-October
- Mid-April

For further information regarding the collection please review the guidance documentation: [Click here](#)

**Technical Support**

For support to access the HEE e-collection portal, to amend user details, to set up additional users please refer to the guidance and for any other technical enquiries please contact [DataService@hee.nhs.uk](mailto:DataService@hee.nhs.uk).

**All other Workforce Development Funding Queries**

For all general queries relating to Workforce Development Funding data collection, including queries about definitions, guidance and content, please contact: [Lucy Dodkin Lucy.Dodkin@hee.nhs.uk](mailto:Lucy.Dodkin@hee.nhs.uk)

**FILES UPLOADED**  
17 Uploads

**TOTAL ROWS UPLOADED**  
125 rows of data

**ERRORS FOUND**  
99 rows with 1574 errors

**UPLOAD FILE**  
Select or drag a file to upload and process  
Click to browse files or drag your file here...

**DOWNLOADS**  
No files available to download

**SUPPORT CONTACT**  
Contact not set

### 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](#)

## Change User details

### Your user account

Your details

**Full name**

**Phone number**

**Job title**

[Update](#)

Change your password

**Current password**

**New password**

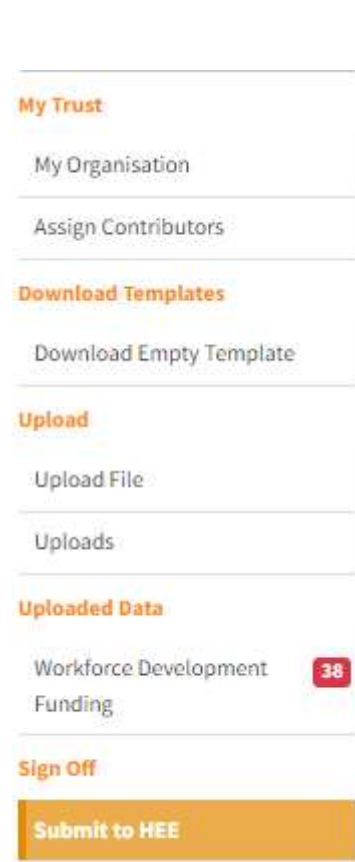
**Confirm new password**

[Change password](#)

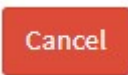
You will find the following navigational features listed down the left-hand side of the dashboard.


## Dashboard Navigation Features Workforce Development Funding

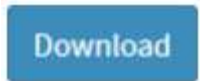
Workforce development funding user will see the following navigation features:




## e-Collection 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

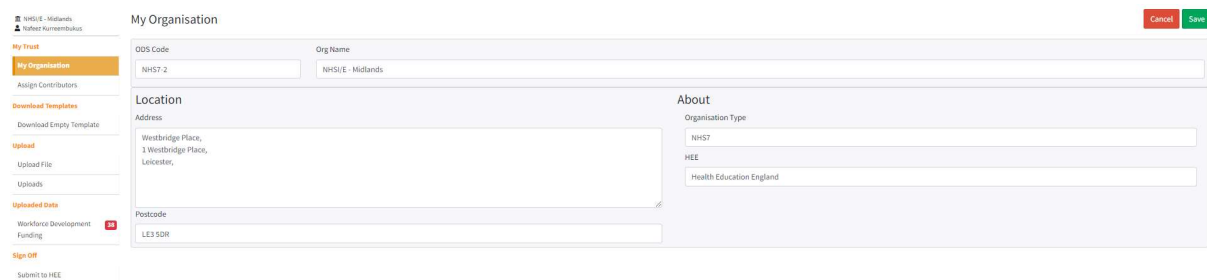
 - Amber buttons perform special actions

## 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 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.

### My Organisation Page



The screenshot shows the 'My Organisation' page with the following details:

- ODS Code:** NHS7-2
- Org Name:** NHS/E - Midlands
- Location:**
  - Address: Westbridge Place, 1 Westbridge Place, Leicester.
  - Postcode: LE3 5DR
- About:**
  - Organisation Type: NHS7, HEE, Health Education England

Buttons: Cancel (red), Save (green)

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

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

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

### 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







University Administrator Add another

<input type="text" value="lily@heavyenergy.com"/>	<input type="text" value="Lily Piper"/>	<input type="text" value="Administrator"/>	<span>Chat</span> <span>Email</span> <span>Delete</span>
<input type="text" value="Add email address"/>	<input type="text" value="Add contact name"/>	<input type="text" value="Add job title"/>	<span>Chat</span> <span>Delete</span>

- 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"/>	<span>Chat</span> <span>Delete</span>
--	---	--	---------------------------------------

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


Email	Name	Job Title	
University Administrator			<a href="#">Add another</a>
<input type="text" value="lily@heavyenergy.com"/>	<input type="text" value="Lily Piper"/>	<input type="text" value="Administrator"/>	  
<input type="text" value="billy@heavyenergy.com"/>	<input type="text" value="Billy Williamson"/>	<input type="text" value="Administrator"/>	  

- 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 note for Billy Williamson ×

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.

## Workforce Development Funding Users

In the initial WDF Trust user view, there should be a Download Empty Template, Upload file, Uploads, Uploaded Data and Sign off section on the left-hand side.

Organisation Information		
#	Region	ICS
	Required	Required
1	East of England	Cambridgeshire and Peterborough STP
2	London	Mid and South Essex STP
2	North East and Yorkshire	Cheshire & Merseyside
2	Midlands	Coventry & Warwickshire
3	East of England	Mid and South Essex STP
3	East of England	Mid and South Essex STP
3	London	North West London Health & Care Partnership
3	London	North West London Health & Care Partnership
3	London	Our Healthier South East London
3	Midlands	Hertfordshire and West Essex STP
3	North East and Yorkshire	Our Healthier South East London

### 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 WDF Trust template in the 'Download Empty Template' tab on the homepage.



### Workforce Development Funding sections (Columns)

- **Region-** Select from the drop-down list
- **ICS-** Select from the drop-down list
- **Provider-** Select from the drop-down list
- **Type of activity-** Select from the drop-down list
- **Investment Title-** Free text (must be Completed)
- **Investment Status-** Select from the drop-down list
- **Training and Education Provider-** Select from the drop-down list
- **Description-** Free text (must be completed)
- **Type of Spend-** Select from the drop-down list
- **Does this relate to elective care recovery?-** Select from the drop-down list
- **Does this support multidisciplinary team working?-** Select from the drop-down list

- **Digital related?** - Select from the drop-down list
- **HEE Star domain-** Select from the drop-down list
- **HEE Star domain subcategory-** Select from the drop-down list
- **ICS outcomes-** Select from the drop-down list
- **People Plan priority-** Select from the drop-down list
- **Multiple Staff Groups-** This is a calculation field and doesn't need to be filled in.
- **Main professional group- Select from the drop-down list**
- **Additional professional group 1-** Select from the drop-down list
- **Additional professional group 2-** Select from the drop-down list
- **Additional professional group 3-** Select from the drop-down list
- **Additional professional group 4-** Select from the drop-down list
- **Multiple priority areas-** This is a calculation field and doesn't need to be filled in.
- **Main priority area-** Select from the drop-down list
- **Additional priority area 1-** Select from the drop-down list
- **Additional priority area 2-** Select from the drop-down list
- **Additional priority area 3-** Select from the drop-down list
- **Additional priority area 4-** Select from the drop-down list
- **Is this investment being evaluated?** - Select from the drop-down list
- **Evaluation notes-** Free text (must be Completed)
- **Map to quadruple aim-** Select from the drop-down list
- **Metrics-** Select from the drop-down list
- **Total quantity-** this is a numeric field and needs to be filled in
- **Unit cost-** this is a numeric field and needs to be filled in
- **Sub-total (quantity x unit cost)-** This is a calculation field and doesn't need to be filled in
- **Other associated costs-** this is a numeric field and needs to be filled in
- **Overall cost-** This is a calculation field and doesn't need to be filled in
- **Spend confidence-** Select from the drop-down list

More detailed definitions for these terms can be found [here](#).

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.

Uploads *All queued & uploaded files* Upload file

#	File	Uploaded by	at	Status	Updated	Rows	Error rows	Total errors
11	_2022May09_1042_AIK.xlsx	Nafeez Kurreembukus	less than a minute ago	Queued	less than a minute ago	-	-	-
10	Test 2.xlsx	Caroline Grisdale	4 days ago	Validated With Errors	4 days ago	1	1	7
9	_2022Apr28_1506_3AS.xlsx	Nafeez Kurreembukus	11 days ago	Validated With Errors	11 days ago	2	2	30
8	_2022Apr27_1249_DLE.xlsx	Nafeez Kurreembukus	12 days ago	Validated With Errors	12 days ago	2	2	29
7	_2022Apr27_1249_DLE.xlsx	Nafeez Kurreembukus	12 days ago	Validated With Errors	12 days ago	2	2	29
6	File rejected	Nafeez Kurreembukus	12 days ago	Upload Failed	12 days ago	-	-	-
5	Download Empty Template_2022Apr27_0958_1BT.xlsx	Caroline Grisdale	12 days ago	Validated With Errors	12 days ago	1	1	7
4	Download Empty Template_2022Apr13_0721_E64_amydummydata.xlsx	Amy Carter	26 days ago	Validated With Errors	26 days ago	10	1	1
3	Workforce Development Funding_NHS7_2_NHSIE_Midlands_2022Apr12_1417_HOP.xlsx	Nafeez Kurreembukus	27 days ago	Validated	27 days ago	16	-	-
2	Workforce Development Funding_NHS7_2_NHSIE_Midlands_2022Apr07_1317_2mHTEST.xlsx	Amy Carter	about a month ago	Validated With Errors	about a month ago	3	2	49
1	Download Empty Template_2022Apr04_1538_3Ad.xlsx	Tomy Curtis	about a month ago	Validated With Errors	about a month ago	1	1	3

## 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:

eCollection UAT For Test purposes only Home Admin Select Help My Account Logout NHS Health Education England

NHS/E - Midlands   
 Caroline Grisdale

Uploads *All queued & uploaded files* Upload file

#	File	Uploaded by	at	Status	Updated	Rows	Error rows	Total errors
17	Midlands WDF combine report v03.xlsx	Mark Richards	26 days ago	Validated With Errors	26 days ago	58	58	999
16	Midlands WDF combine report v02.xlsx	Mark Richards	26 days ago	Declined	26 days ago	-	-	-
15	Midlands WDF combine report.xlsx	Mark Richards	26 days ago	Declined	26 days ago	-	-	-
14	UAT - TEMPLATE - SM - v1.xlsx	Simon Mahoney	27 days ago	Validated With Errors	27 days ago	5	5	47
13	SW_ecolTestDataUpload_1.xlsx	Molly Thomas	27 days ago	Validated With Errors	27 days ago	7	7	42
12	_2022May06_1243_70a_Lincolnshire.xlsx	Mark Richards	28 days ago	Validated With Errors	28 days ago	17	17	331
11	_2022May09_1042_AIK.xlsx	Nafeez Kurreembukus	28 days ago	Validated	28 days ago	0	-	-
10	Test 2.xlsx	Caroline Grisdale	about a month ago	Validated With Errors	about a month ago	1	1	7

You will be taken to a screen as below

Home Admin Select Help My Account Log out Health Education England NHS

Uploads Upload progress

Drop file... Restage Revalidate Back

File Upload

Status	Uploaded file	Created	Last updated
Validated With Errors	Midlands WDF combine report v03.xlsx	11/05/2022 13:59:06	11/05/2022 13:59:12

Timestamp	Status	Content	Audit Text	Rows	Rows with errors	Total errors
11/05/2022 13:59:11	Validated With Errors		Validated but error found			
11/05/2022 13:59:11	Content Validated With Errors	WDFunding		58	58	999
11/05/2022 13:59:10	Content Validating	WDFunding				

Home Admin Select Help My Account Log out Health Education England NHS

Drop file... Restage Revalidate Back

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. 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.

## File Versions

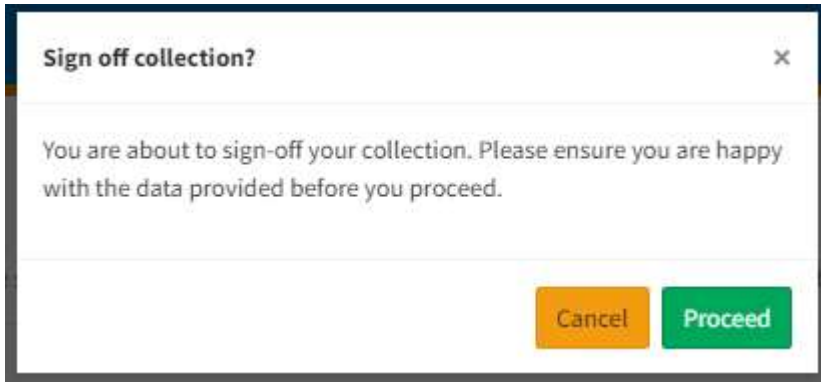
The upload template may be updated between subsequent data collections. Please ensure you are using the current version of the file when completing your return.

## Sign-off

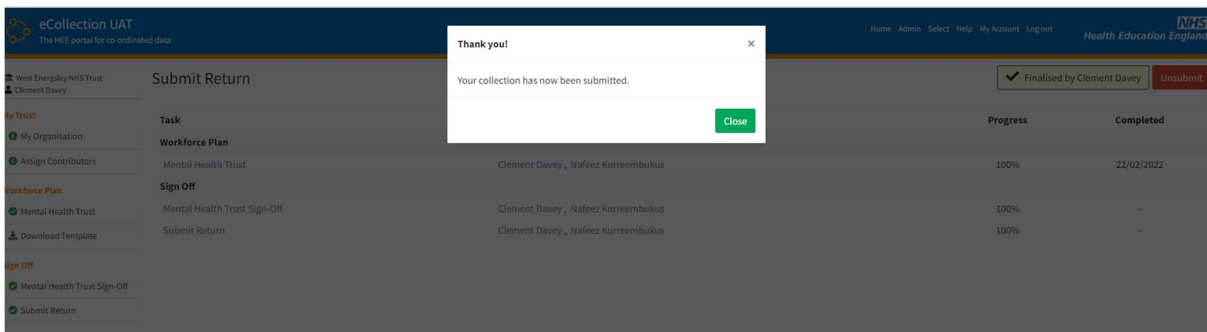
Once the template has been completed and verified you can now click on the green submit button on the top right-hand side within the 'Submit to HEE' section.

Sign Off

Submit to HEE



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

## Support Section

### Technical Support

For support to access the HEE e-collection portal, to amend user details, to set up additional users or any other technical enquiries please contact [DataService@hee.nhs.uk](mailto:DataService@hee.nhs.uk)

### All other Workforce Development Funding enquiries

For all general queries relating to Workforce Development Funding, including queries about definitions, guidance and content, please contact Lucy Dodkin [Lucy.Dodkin@hee.nhs.uk](mailto:Lucy.Dodkin@hee.nhs.uk)