

# Health Education England eCollection Guidance Pack

Mental Health Workforce Data Collection Template

February 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 Mental Health Workforce Collection 22/23 Tool, developed by Health Education England (HEE) in collaboration with NHSE/I.

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 Mental Health Workforce 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 Mental Health Workforce Collection 22/23 Tool

The Mental Health Workforce Collection 22/23 Tool (MHWC 22/23 Tool) can be accessed via the e-Collection web portal.

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

## Mental Health Workforce Collection Overview & Guidance

The Operational Planning process for 2022/23, will include a separate ICS/STP led system level Mental Health workforce plan covering 1<sup>st</sup> April 2022-31<sup>st</sup> March 2023 by quarter and annual review for 2023/2024 as of 31<sup>st</sup> March 2024.

The Mental Health workforce plan will be carried out separately through the HEE e-collections portal. Submissions will only be required from Mental Health Trusts and ICSs/STPs.

Mental Health Trusts will be required to provide a provider-level submission: ICSs will be responsible for the overall system workforce plan and the system-level submission.

*Please note that mental health providers are required to complete **both** the SDCS collection and the HEE e-collection.*

ICSs/STPs will lead this Mental Health workforce planning process and agree a workforce plan at system level, to include workforce in i) Mental Health Trusts ii) Non-Mental Health Trusts i.e., Community, Ambulance, Acute iii) Primary Care and iv) non-NHS organisations.

The Mental Health workforce plan for 2022/23 will enable ICSs/STPs to understand supply and demand across defined service pathways and staff professions, track investment on workforce and broaden understanding at system level including partnership working across care settings. ICS/STP level plans once completed and aggregated, will provide a national overview of the workforce position in Mental Health and allow identification of risks, mitigation strategies and levers to support delivery of the Mental Health workforce growth required for 2022/23 and 2023/24, as laid out in the [Mental Health Implementation Plan \(MHIP\)](#) and [Mental Health LTP analytical tool](#)

For further information please refer to the relevant guidance by clicking on the links below:

Implementation guidance:

[NHS England » 2022/23 priorities and operational planning guidance: Implementation guidance](#)

Operational Planning Detailed Submission guidance, Technical guidance and the Technical Definitions document can be found at: [NHS Planning - Future NHS Collaboration Platform Supporting Guidance 2022/23](#)

**In order to access the material on the NHS Planning FutureNHS Collaboration Platform, please ensure you request to 'join' the associated workspace – <https://future.nhs.uk/>**

## Timeline

All ICSs/STPs will submit their final consolidated template by **23<sup>rd</sup> June**, this will need to be signed-off by ICS/STP Mental Health Leads.

Timeline	Activities	Owner
28 <sup>th</sup> Feb 2022	HEE to send e-mail to Mental Health Trust and ICS leads to provide access to HEE e-collection portal. NHSEI to notify Mental Health Regional Leads of the eCollection go-live for communication cascade	HEE/NHSEI MH workforce collection delivery group
28 <sup>th</sup> April 2022	First (draft) submission of HEE e-collection workforce template by Mental Health NHS Provider Trust Lead & ICS lead	MH Trust CEO and identified MH ICS Leads
6 <sup>th</sup> May 2022 tbc	Validation product shared to regions by nominated contacts in NHSEI	NHSEI Nominated contacts
23 <sup>rd</sup> June 2022	Final submission of HEE e-collection workforce template by Mental Health NHS Provider Trust Lead & ICS lead	MH Trust CEO and identified MH ICS Leads
30 <sup>th</sup> June 2022 tbc	Final validation product shared with regions by nominated contacts in NHSEI	NHSEI Nominated contacts

## Templates

The templates for the Mental Health Trust and for the ICS have been designed to collect Whole Time Equivalent (WTE) values for:

- Staff in Post
- Establishment
- Planned Establishment

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

**Please note that eCollection will only accept uploads of the official template downloaded from the Mental Health 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. Once uploaded the data will be validated and, if it reports any errors, it will provide an opportunity to correct it.

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 Mental Health Trust Template & ICS Templates contain the following fields and definitions. The terms and definitions as stated below have been reached via consensus and are now applied as standard within a workforce context.

<b>Staff-In-Post (WTE)</b>	The number of staff directly employed by the Provider organisation (exclusive of; vacancies, agency, bank, locum or hosted staff), at a point in time, usually measured in terms of Whole Time Equivalent (WTE)
<b>Establishment (WTE)</b>	<p>Sometimes referred to as 'Baseline Demand' or 'Demand'; sometimes as 'Authorised' or 'Planned' or 'Budgeted' resource. Generally expressed as 'WTE' (see below)</p> <p>This item is the WTE of staff in post plus WTE of vacancies. For example, if you had 20 WTE of nurses and 1 WTE vacant nurse position, your establishment would be 21 WTE. This may be greater than, less than or equal to actual staff in post, depending on the number of vacancies the organisation has now.</p> <p>The employing healthcare provider should capture all their employees under establishment</p>
<b>Planned Establishment (WTE)</b>	<p>Sometimes referred to as Future Demand or Forecast Demand. The future estimated workforce required to deliver a given (level of) service at a particular point in time (reflective of the replacement for leavers plus predicted change in capacity required plus vacant posts).</p> <p>The employing healthcare provider should capture their planned establishment as the total WTE of employees required to deliver the totality of the service for which an organisation has funds to provide at a point in time.</p>
<b>Whole Time Equivalent (WTE)</b>	<p>This may also be known as "Full time equivalent" (FTE). This is the standard method for defining the amount of work of an employee or in a position. It is the basis for most planning and monitoring of the workforce. The workforce is usually expressed in terms of WTE and Headcount numbers.</p> <p>Contracted</p> <p>WTE is calculated by dividing Contracted Hours or Contracted Sessions by the Standard Hours (or Sessions) for the Grade. For example: if the standard hours for a nurse are 37.5 and an individual Staff Nurse contracts to work 22 hours per week, then that employee's WTE is <math>22 \div 37.5 = 0.59</math> WTE.</p> <p>If the standard hours for a full time Junior Doctor are 40 hours a week and an individual Junior Doctor contracts to work 40 hours per week, then that employee's WTE is <math>= 1.00</math> WTE.</p>
<b>Y/E 31st March 2022</b>	Mental Health Workforce 22/23 is a snapshot data collection and data is required for the date as specified.

## Validations

No required cells should be left blank, and all figures entered must be numeric. Sub-categories must not exceed totals.

## Using the Mental Health Workforce Collection 22/23 Tool

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

If the NHSEI National Mental Health Planning Team has registered you as a user of the MHWC 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.

### As an existing user

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 Mental Health Workforce Collection website.

### MHWC 22/23 Tool Login page

**eCollection UAT**  
The HEE portal for co-ordinated data

**2022/23 Mental Health Workforce**

The Operational Planning process for 2022/23 will include a separate ICS/STP led system level Mental Health workforce plan covering 1st April 2021 - 31st March 2023 by quarter.

The Mental Health workforce plan will be carried out separately through the HEE e-collections portal. Submissions will only be required from Mental Health Trusts and ICSs/STPs.

Mental Health Trusts will be required to provide a provider-level submission: ICSs will be responsible for the overall system workforce plan and the system-level submission, which will capture mental health workforce for non-mental health NHS trusts, primary care and non-NHS organisations. Please note that mental health providers are required to complete both the SDCS collection and the HEE e-collection template.

ICSs/STPs will lead this Mental Health workforce planning process and agree a workforce plan at system level, to include workforce in i) Mental Health Trusts ii) Non-Mental Health Trusts i.e. Community, Ambulance, Acute iii) Primary Care and iv) non-NHS organisations.

The Mental Health workforce plan for 2022/23 will enable ICSs/STPs to understand supply and demand across defined service pathways and staff professions, track investment on workforce and broaden understanding at system level including partnership working across care settings. ICS/STP level plans once completed and aggregated, will provide a national overview of the workforce position in Mental Health and allow identification of risks, mitigation strategies and levers to support delivery of the Mental Health workforce growth required for 2022/23, as laid out in the Mental Health Implementation Plan (MHIP) and the Mental Health LTP analytical tool.

For further information regarding the collection please review the guidance documentation:

- [Mental Health Workforce Collection User Guidance](#)
- [NHS England + 2022/23 priorities and operational planning guidance: Implementation guidance](#)

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

- [Mental Health LTP analytical tool](#)
- [Operational Planning 2020/21 Detailed Submission guidance and Technical Definitions document](#) can be found at: [NHS Planning FutureNHS Collaboration Platform](#) > Library and resources > 2022/23 Supporting Guidance

In order to access the material on the NHS Planning FutureNHS Collaboration Platform, please ensure you request to 'join' the associated workspace.

**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 Mental Health Workforce enquiries**

For all general queries relating to the health workforce planning collection, including queries about definitions, guidance and content, please contact: [England.nhs-planning@nhs.net](mailto:England.nhs-planning@nhs.net)

Populate the email address and password fields appearing on the left side of the MHWC 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 Mental Health Workforce Collection Tool

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

### *Invitation to Contribute*

#### **Mental Health Workforce**

##### **Data Collection 2022**

Dear Nafeez Kurreembukus

Health Education England (HEE) would like to collect information about the mental health workforce in West Eneigley NHS Trust in the following role:

- **Workforce Planner**

The Operational Planning process for 2022/23 will include a separate ICS/STP led system level Mental Health workforce plan covering 1st April 2022-31st March 2023 by quarter & annual view for 2023/24 as at 31st March 2024.

The Mental Health workforce plan will be carried out separately through the HEE e-collections portal. Submissions will only be required from Mental Health Trusts and ICSs/STPs.

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The latest version of the user guidance for the Mental Health Workforce Collection e-collection tool can be found here:

[Mental Health Workforce Collection User Guidance](#)

For further information regarding the collection please review the guidance documentation:

- [Mental Health Workforce Collection User Guidance](#)
- [NHS England > 2021/22 priorities and operational planning guidance: Implementation guidance](#)

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

- [Mental Health LTP analytical tool](#)
- Operational Planning 2022/23 Detailed Submission guidance, Technical guidance and Technical Definitions document can be found at: [NHS Planning FutureNHS Collaboration Platform](#) > Library and resources > 2022/23 Supporting Guidance

In order to access the material on the NHS Planning FutureNHS Collaboration Platform, please ensure you request to 'join' the associated workspace, a href="<https://future.nhs.uk/>"><https://future.nhs.uk/>

Technical Support

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:

- MHWC 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 MHWC 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

## 2022/23 - Mental Health Workforce

### 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 MHWC 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 Mental Health Workforce 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 MHWC 22/23 Tool login page
- Click the panel titled *REGISTER TO USE 2022/23 – MENTAL HEALTH WORKFORCE*

### REGISTER TO USE 2022/23 - MENTAL HEALTH WORKFORCE

If you would like to sign up to use 2022/23 - Mental Health Workforce, 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 - Mental Health Workforce*

Email address

Enter a valid email address

Please provide an email address

Next

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

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

Org Code

Org Code

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

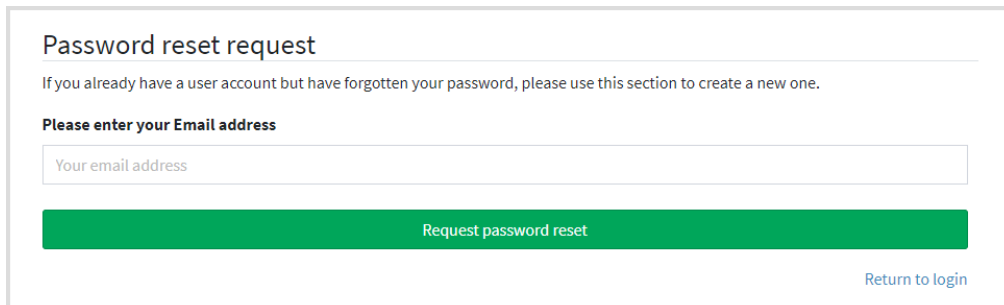
Next

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

## Forgotten password

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

- Click “*Forgotten your password?*” on the MHWC 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. The text "If you already have a user account but have forgotten your password, please use this section to create a new one." is displayed. Below this is the instruction "Please enter your Email address". A text input field contains the placeholder text "Your email address". A prominent green button labeled "Request password reset" is positioned below the input field. 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 MHWC 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)

## Mental Health Workforce Collection Tool home page

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

### MHWC 22/23 Tool home page

**2022/23 - Mental Health Workforce** 28 Feb - 23 Jun 2022

The Operational Planning process for 2022/23 will include a separate ICS/STP led system level Mental Health workforce plan covering 1st April 2022-31st March 2023 by quarter & annual view for 2023/24 as at 31st March 2024.

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Timeline	Activities	Owner
28th Feb 2022	HEE to send e-mail to Mental Health Trust and ICS leads to provide access to HEE e-collection portal. NHSEI to notify Mental Health Regional Leads of the eCollection go-live for communication cascade	HEE/NHSEI MH workforce collection delivery group
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- Mental Health Workforce Collection User Guidance
- NHS England - 2022/23 priorities and operational planning guidance: Implementation guidance

### Navigation buttons



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

- Home – returns you to the home page
- Select – switching between different data collections or plans (if assigned to more than one)
- Help - Provides help and support on the system
- My Account - Manage your account and account details - see [Change User details](#)
- Log out – log out of the system and be sent back to the login screen - See [Login page link](#)

The “Select” button will only appear for those users who are working across simultaneous collections. Clicking through this button will allow you to select which collection you would like to view. For this specific collection, some users may be working on the collections for two or more Trusts and will need to switch between organisations, as can be seen below

Organisation	Collection name	Start Date	Your role(s)	Current Status
Kent and Medway	2022/23 - Mental Health Workforce	06 Dec 2021	ICS Workforce Planner	In progress
KENT AND MEDWAY NHS AND SOCIAL CARE PARTNERSHIP TRUST	2022/23 - Mental Health Workforce	06 Dec 2021	Workforce Planner	In progress

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

### Change User details

#### Your user account

Your details

Full name  
John Smith

Phone number  
07000 123456

Job title  
Workforce Planner

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 (Mental Health Trust view)



A Mental Health Trust will see the following navigation features:

My Trust	
	My Organisation
	Assign Contributors



Workforce Plan	
	Mental Health Trust
	Download Template


Sign Off	
	Mental Health Trust Sign-Off
	Submit Return

### Dashboard Navigation Features (ICS view)






An ICS will see the following navigation features:

My Organisation	
	My Organisation
	Assign Contributors


  

Preview Trust Plans	
	Trusts



  

ICS Workforce Plan	
	Mental Health Trusts
	Primary Care
	Non-NHS
	Non-Mental Health Trust
	Download





  

Narrative	
	Narrative


  


Sign Off	
	ICS Sign-Off
	Submit Return


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


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

### 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

My Organisation [Redacted]

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

<b>Location</b>	<b>About</b>
<b>Address</b>	<b>Organisation Type</b>
<input type="text"/>	<input type="text" value="STP"/>
<b>Postcode</b>	<input type="text" value="HEE"/>
<input type="text"/>	<input type="text" value="Health Education England"/>
	<input type="text" value="HEE - Local Office"/>
	<input type="text" value="West Midlands"/>
	<input type="text" value="HEE - Regional teams"/>
	<input type="text" value="Midlands &amp; East"/>
	<input type="text" value="STP in NHSE1"/>
	<input type="text" value="Birmingham and Solihull"/>
	<input type="text" value="Region in HEE"/>
	<input type="text" value="03_MIDLANDS"/>
	<input type="text" value="NHS7 Regions 18"/>
	<input type="text" value="Midlands"/>
	<input type="text" value="HEE Region 17"/>
	<input type="text" value="M&amp;E"/>
	<input type="text" value="HEE - Regional Team"/>
	<input type="text" value="M&amp;E"/>
	<input type="text" value="HEE - Region"/>
	<input type="text" value="Midlands"/>

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

## Assign Contributors

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

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	
<b>University Administrator</b>			<a href="#">Add another</a>
<input type="text" value="lily@heavyenergy.com"/>	<input type="text" value="Lily Piper"/>	<input type="text" value="Administrator"/>	<span>🗨️</span> <span>✉️</span> <span>✖️</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>🗨️</span> <span>✉️</span> <span>✖️</span>
<input type="text" value="Add email address"/>	<input type="text" value="Add contact name"/>	<input type="text" value="Add job title"/>	<span>🗨️</span> <span>✖️</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>🗨️</span> <span>✖️</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="button" value="Comment"/> <input type="button" value="Email"/> <input type="button" value="Close"/>
<input type="text" value="billy@heavyenergy.com"/>	<input type="text" value="Billy Williamson"/>	<input type="text" value="Administrator"/>	<input type="button" value="Comment"/> <input type="button" value="Email"/> <input type="button" value="Close"/>

- 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 ×

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

- 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.

## Mental Health Trust users

### Mental Health Trust Workforce Plan

In the initial Mental Health Trust user view, there should be two tabs; a tab labelled *Total* and a tab labelled with the name of the lead ICS for the user's respective Mental Health Trust.

Area/Role	Baseline		Plan				Planned Establishment	
	Staff in Post	Establishment	SIP - Quarterly				2022/23	2023/24
	Y/E - 31st Mar 2022	Y/E - 31st Mar 2023	Q1 - 30th Jun 2022	Q2 - 30th Sep 2022	Q3 - 31st Dec 2022	Q4 - 31st Mar 2023	Y/E - 31st Mar 2023	Y/E - 31st Mar 2024
<b>Children and Young People</b>	<b>129.00</b>	<b>72.00</b>	<b>78.00</b>	<b>112.00</b>	<b>21.00</b>	<b>24.00</b>	<b>41.91</b>	<b>20.00</b>
Psychiatrist - consultant	1.00	2.00	↑ 3.00	↓ 2.00	2.00	↓ 1.00	1.00	1.00
Psychiatrist - non consultant	1.00	1.00	↑ 2.00	↓ 1.00	1.00	1.00	1.00	2.00
Nursing	1.00	2.00	↑ 3.00	3.00	↓ 1.00	1.00	1.00	2.00
Pharmacist	1.00	3.00	↑ 2.00	↑ 11.00	↓ 1.00	↑ 2.00	22.00	2.00
Psychologist	0.00	45.00	↓ 0.00	0.00	0.00	0.00	0.00	0.00
Psychotherapists and psychological professionals	5.00	3.00	↓ 1.00	↑ 2.00	↓ 1.00	↑ 3.00	1.00	3.00
of which are Educational Mental Health Practitioners	2.00	2.00	↑ 1.00	↑ 3.00	3.00	↑ 4.00	4.00	5.00
of which are Children's Wellbeing Practitioners	2.00	3.00	↑ 2.00	↓ 1.00	↑ 3.00	↑ 13.00	2.00	2.00
Occupational Therapists	100.00	3.00	↑ 50.00	↑ 80.00	↓ 0.00	0.00	0.01	0.00
Other therapists / other STT	1.00	2.00	2.00	2.00	↓ 1.00	1.00	2.00	1.00
Paramedics	1.00	1.00	↑ 2.00	↓ 1.00	↑ 3.00	↑ 4.00	1.00	1.00
Support to clinical staff	5.00	1.00	↑ 3.00	↓ 1.00	↑ 2.00	↓ 1.00	3.00	1.00
of which are Nursing Associates	1.00	1.00	↑ 3.00	↓ 3.00	2.00	2.00	1.00	2.00
of which are Trainee Nursing Associates	1.00	3.00	3.00	↓ 2.00	↓ 1.00	↑ 3.00	2.00	2.00
of which are Trainee Educational Mental Health Practitioners	1.00	4.00	↑ 5.00	0.00	↓ 4.00	↓ 2.00	1.00	1.00
of which are Trainee Children's Wellbeing Practitioners	1.00	3.00	↑ 4.00	↓ 3.00	↓ 2.00	↓ 1.00	1.00	3.00
Physicians Associates	1.00	2.00	↑ 3.00	↓ 2.00	↓ 1.00	↑ 2.00	1.00	2.00
Admin	5.00	3.00	↑ 4.00	↓ 3.00	↓ 2.00	↓ 1.00	4.00	3.00

#### Total:

The Total tab displays a view of the aggregated total of the workforce plans (tabs) submitted by the Mental Health Trust ie all the workforce plans submitted by the Mental Health Trust for ICSs for whom they provide services.

#### Adding a template for an additional ICS:

For those Mental Health Trusts who provide services to more than one ICS and would like to complete a workforce plan to reflect this, there is the facility to add further tabs for additional ICS's. When you click on the orange 'Add ICS' button, a list with all the ICS's will be displayed.

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

Area/Role	Baseline		Plan				Planned Establishment	
	Staff in Post	Establishment	SIP - Quarterly				2022/23	2023/24
	Y/E - 31st Mar 2022	Y/E - 31st Mar 2023	Q1 - 30th Jun 2022	Q2 - 30th Sep 2022	Q3 - 31st Dec 2022	Q4 - 31st Mar 2023	Y/E - 31st Mar 2023	Y/E - 31st Mar 2024
<b>Children and Young People</b>	<b>72.00</b>	<b>78.00</b>	<b>78.00</b>	<b>112.00</b>	<b>21.00</b>	<b>24.00</b>	<b>41.91</b>	<b>20.00</b>
Psychiatrist - consultant	2.00	↑ 3.00	↓ 2.00	2.00	↓ 1.00	1.00	1.00	
Psychiatrist - non consultant	1.00	↑ 2.00	↓ 1.00	1.00	1.00	1.00	2.00	
Nursing	2.00	↑ 3.00	3.00	↓ 1.00	1.00	1.00	2.00	
Pharmacist	3.00	↓ 2.00	↑ 11.00	↓ 1.00	↑ 2.00	22.00	2.00	
Psychologist	45.00	↓ 0.00	0.00	0.00	0.00	0.00	0.00	
Psychotherapists and psychological professionals	3.00	↓ 1.00	↑ 2.00	↓ 1.00	↑ 3.00	1.00	3.00	
of which are Educational Mental Health Practitioners	2.00	↑ 1.00	↑ 3.00	3.00	↑ 4.00	4.00	5.00	
of which are Children's Wellbeing Practitioners	3.00	↓ 2.00	↓ 1.00	↑ 3.00	↑ 13.00	2.00	2.00	
Occupational Therapists	3.00	↑ 50.00	↑ 80.00	↓ 0.00	0.00	0.01	0.00	
Other therapists / other STT	2.00	2.00	2.00	↓ 1.00	1.00	2.00	1.00	

## Deleting an ICS tab:

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

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

Delete tab and data ✖

You are about to delete the tab and associated data. The data will be archived and inaccessible to you.

Would you like to proceed?

Cancel Yes

## Completing the Workforce plan:

When you click on the tab for an ICS a blank template should initially be displayed, and you should be able to input data into the cells. In the top right of the screen there will be options to save, download and upload data (via the respective buttons as indicated).

Area/Role	Baseline		Plan				Planned Establishment	
	Staff in Post	Establishment	SIP - Quarterly				2022/23	2023/24
	Y/E - 31st Mar 2022	Y/E - 31st Mar 2022	Q1 - 30th Jun 2022	Q2 - 30th Sep 2022	Q3 - 31st Dec 2022	Q4 - 31st Mar 2023	Y/E - 31st Mar 2023	Y/E - 31st Mar 2024
<b>Children and Young People</b>	<b>129.00</b>	<b>72.00</b>	<b>78.00</b>	<b>112.00</b>	<b>21.00</b>	<b>24.00</b>	<b>41.91</b>	<b>20.00</b>
Psychiatrist - consultant	1.00	2.00	↑ 3.00	↓ 2.00	2.00	↓ 3.00	1.00	1.00
Psychiatrist - non consultant	1.00	1.00	↑ 2.00	↓ 1.00	1.00	1.00	1.00	2.00
Nursing	1.00	2.00	↑ 3.00	3.00	↓ 1.00	1.00	1.00	2.00
Pharmacist	1.00	3.00	↓ 2.00	↑ 11.00	↓ 1.00	↑ 2.00	22.00	2.00
Psychologist	0.00	45.00	↓ 0.00	0.00	0.00	0.00	0.00	0.00
Psychotherapists and psychological professionals	5.00	3.00	↓ 1.00	↑ 2.00	↓ 1.00	↑ 3.00	1.00	3.00
of which are Educational Mental Health Practitioners	2.00	2.00	↓ 1.00	↑ 3.00	3.00	↑ 4.00	4.00	5.00
of which are Children's Wellbeing Practitioners	2.00	3.00	↓ 2.00	↓ 1.00	↑ 3.00	↑ 13.00	2.00	2.00
Occupational Therapists	100.00	3.00	↑ 50.00	↑ 80.00	↓ 0.00	0.00	0.01	0.00
Other therapists\ other STT	1.00	2.00	2.00	2.00	↓ 1.00	1.00	2.00	1.00
Paramedics	1.00	1.00	↑ 2.00	↓ 1.00	↑ 3.00	↑ 4.00	1.00	1.00
Support to clinical staff	5.00	1.00	↑ 3.00	↓ 1.00	↑ 2.00	↓ 1.00	3.00	1.00
of which are Nursing Associates	1.00	1.00	↑ 3.00	↓ 2.00	2.00	2.00	1.00	2.00

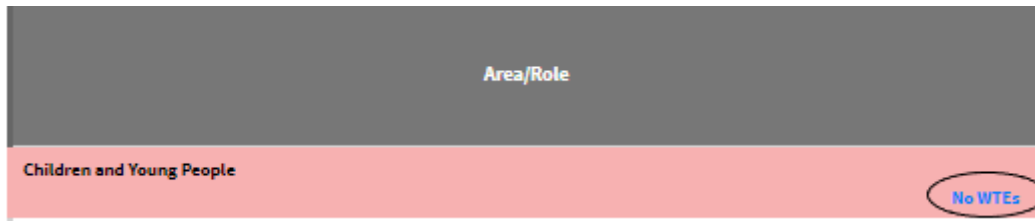
There are three ways which you can use to navigate between cells. You can:

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

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

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

Clicking on a coloured header shows the option “No WTEs”, which fills all the empty cells within that section with zeros.



Clicking on the “No WTEs” link in the above example will fill any empty cell in the whole staff group with a zero.

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

1. Comments
2. No WTE's
3. Clear
4. Undo

Area/Role	Baseline	Baseline	Plan				Planned Establishment	
	Staff in Post	Establishment	SIP - Quarterly				2022/23	2023/24
	Y/E - 31st Mar 2022	Y/E - 31st Mar 2023	Q1 - 30th Jun 2022	Q2 - 30th Sep 2022	Q3 - 31st Dec 2022	Q4 - 31st Mar 2023	Y/E - 31st Mar 2023	Y/E - 31st Mar 2024
<b>IAPT</b>	31.00	31.00	31.00	31.00	32.00	32.00	32.00	34.00
Psychiatrist - consultant	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Psychiatrist - non consultant	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00
Nursing	4.00	4.00	4.00	4.00	4.00	4.00	4.00	5.00
Pharmacist	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
<b>Psychologist</b> <a href="#">Comments</a> <a href="#">No WTEs</a> <a href="#">Clear</a> <a href="#">Undo</a>	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00
Psychotherapists and psychological professionals	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00
of which are High Intensity Therapists	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
of which are Psychological Wellbeing Practitioners	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00

When you click on the blue No WTEs link, all the cells in that row are filled with zero.

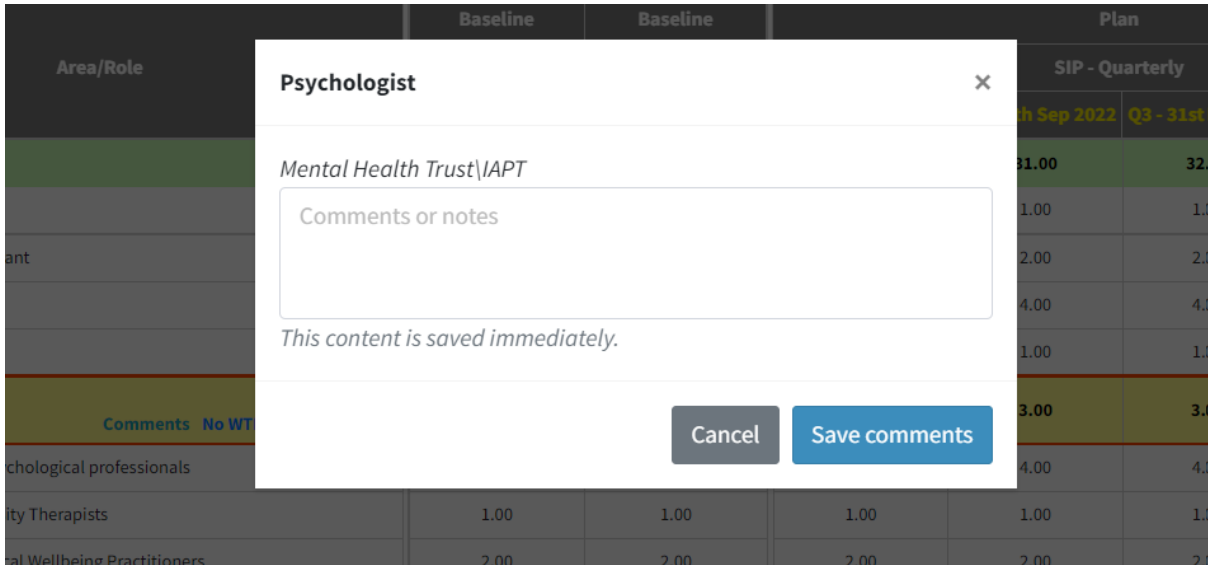
When you click on the black Clear link, all the cells are emptied

When you click on the red Undo link, all your changes are reverted to what they were before - when you entered the screen

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

## Entering Comments:

To enter comments, click on the green “comments” (as per the illustration above). A pop-up text box will be displayed for entering comments, perhaps to detail any assumptions, actions, risks or mitigations, relating to the row in question.



Once completed, click “Save Comments” and the text will be saved.

A symbol of a pen will appear by the job title or service area of the row to indicate that a comment has been included, as per the image below.

Area/Role	Baseline	Baseline	Plan				Planned Establishment	
	Staff in Post	Establishment	SIP - Quarterly				2022/23	2023/24
	Y/E - 31st Mar 2022	Y/E - 31st Mar 2022	Q1 - 30th Jun 2022	Q2 - 30th Sep 2022	Q3 - 31st Dec 2022	Q4 - 31st Mar 2023	Y/E - 31st Mar 2023	Y/E - 31st Mar 2024
<b>IAPT</b>	31.00	31.00	31.00	31.00	32.00	32.00	32.00	34.00
Psychiatrist - consultant	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Psychiatrist - non consultant	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00
Nursing	4.00	4.00	4.00	4.00	4.00	4.00	4.00	5.00
Pharmacist	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
<b>Psychologist</b>	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00
Comments No WTEs Clear Undo								
Psychotherapists and psychological professionals	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00

The comment can be edited as necessary by clicking on the green “comments link.

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

Staffing Categories	Baseline		Plan				Planned Establishment		Commentary
	Staff in Post	Establishment	SIP - Quarterly				2022/23	2023/24	
	Y/E - 31st Mar 2022	Y/E - 31st Mar 2022	Q1 - 30th Jun 2022	Q2 - 30th Sep 2022	Q3 - 31st Dec 2022	Q4 - 31st Mar 2023	Y/E - 31st Mar 2023	Y/E - 31st Mar 2024	
<b>Children and Young People</b>	28.50	29.50	28.50	28.50	30.50	30.50	31.50	37.50	
Psychiatrist - consultant	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	
Psychiatrist - non consultant	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	
Nursing	5.00	5.00	5.00	5.00	5.00	5.00	6.00	7.00	
Pharmacist	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	
Psychologist	2.00	2.00	2.00	2.00	2.00	2.00	2.00	3.00	
Psychotherapists and psychological professionals	3.00	3.00	3.00	3.00	4.00	4.00	4.00	5.00	
of which are Educational Mental Health Practitioners	1.00	1.00	1.00	1.00	2.00	2.00	2.00	1.00	
of which are Children's Wellbeing Practitioners	1.00	1.00	1.00	1.00	1.00	1.00	1.00	2.00	
Occupational Therapists	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	
Other therapists \ other STT	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	
Paramedics	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Support to clinical staff	4.00	5.00	4.00	4.00	5.00	5.00	5.00	7.00	
of which are Nursing Associates	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	
of which are Trainee Nursing Associates	1.00	2.00	1.00	1.00	2.00	2.00	2.00	3.00	
of which are Trainee Educational Mental Health Practitioners	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	
of which are Trainee Children's Wellbeing Practitioners	1.00	1.00	1.00	1.00	1.00	1.00	1.00	2.00	
Physicians Associates	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	
Admin	6.00	6.00	6.00	6.00	6.00	6.00	6.00	7.00	
Peer support worker	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

## Workforce Demand sections (Columns)

Baseline	Baseline	Plan				Planned Establishment	
Staff In Post	Establishment	SIP - Quarterly				2022/23	2023/24
Y/E - 31st Mar 2022	Y/E - 31st Mar 2022	Q1 - 30th Jun 2022	Q2 - 30th Sep 2022	Q3 - 31st Dec 2022	Q4 - 31st Mar 2023	Y/E - 31st Mar 2023	Y/E - 31st Mar 2024

As you can see from the figure above, there are several different columns in each of the forms. These columns represent the following:

- **Staff in Post** - Column containing the actual number of staff in each job role in WTEs (Whole Time Equivalents)
- **Establishment** - Column containing the required number of staff in each job role in WTEs
- **Plan SIP-Quarterly** – Column containing planned staff in post in each role in WTEs (Whole Time Equivalents) as at the end of the respective quarter for example 30th June 2022 for Q1"
- **Planned Establishment** - Column containing the estimated workforce for following years in WTEs.
- **Y/E 31<sup>st</sup> March 2022** – Mental Health Workforce 2022/23 is a snapshot data collection and data is required for the date as specified

More detailed definitions for these terms have been [provided above](#).

## Workforce Demand sections (Rows)

Area/Role	Baseline	Baseline	Plan				Planned Establishment	
	Staff In Post	Establishment	SIP - Quarterly				2022/23	2023/24
	Y/E - 31st Mar 2022	Y/E - 31st Mar 2022	Q1 - 30th Jun 2022	Q2 - 30th Sep 2022	Q3 - 31st Dec 2022	Q4 - 31st Mar 2023	Y/E - 31st Mar 2023	Y/E - 31st Mar 2024
<b>Children and Young People</b>	10.00	52.00	76.00	51.00	59.00	60.00	85.00	50.00
Psychiatrist - consultant	0.00	4.00	↓ 3.00	↓ 2.00	↑ 4.00	↑ 7.00	5.00	4.00
Psychiatrist - non consultant	0.00	3.00	↑ 4.00	4.00	4.00	↓ 2.00	8.00	4.00
Nursing	0.00	5.00	↑ 7.00	↓ 2.00	↑ 3.00	↑ 5.00	8.00	3.00
Pharmacist	0.00	3.00	↑ 9.00	↓ 7.00	6.00	↓ 3.00	3.00	3.00
Psychologist	0.00	4.00	↓ 3.00	↓ 2.00	↑ 4.00	↑ 7.00	5.00	4.00
Psychotherapists and psychological professionals	10.00	3.00	↑ 4.00	4.00	4.00	↓ 2.00	8.00	4.00
of which are Educational Mental Health Practitioners	3.00	5.00	↑ 7.00	↓ 2.00	↑ 3.00	↑ 5.00	8.00	3.00
of which are Children's Wellbeing Practitioners	3.00	3.00	↑ 9.00	↓ 7.00	6.00	↓ 3.00	3.00	3.00
Occupational Therapists	0.00	4.00	↓ 3.00	↓ 2.00	↑ 4.00	↑ 7.00	5.00	4.00
Other therapists \ other STT	0.00	3.00	↑ 4.00	4.00	4.00	↓ 2.00	8.00	4.00
Paramedics	0.00	5.00	↑ 7.00	↓ 2.00	↑ 3.00	↑ 5.00	8.00	3.00

(This screenshot is to illustrate the point below and is not from a live collection)

The figure above, shows the rows function in the following way

- The service areas or pathways are presented in sections. Each service area (indicated in the coloured rows and blue when downloaded on a spreadsheet – for example “Children and Young People” in the example above) consist of all related job roles which follow in the rows below.
- When values are entered into the row for each job role, the values are summed for all qualified staff for this speciality and the sum of entries is displayed in the service area row above.
- Rows starting 'of which ...' are a subset of the job role immediately above them. The 'of which ...' rows do not sum up into the related job role or service areas subtotals or overall total for the plan.

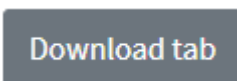
## Downloading and Uploading demand data

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

Users can download the MH Trust template in the 'Downloads' tab on the homepage. There are options to download this as:

- Demand template (blank)
- Demand template (with data)

Templates for a specific tab can also be downloaded from the associated tab in the template screen by pressing the grey 'Download tab' button:

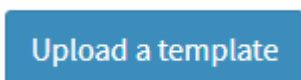


You can also download a complete Template which includes all the tabs by clicking the 'Download Template' option in the navigation bar on the left:

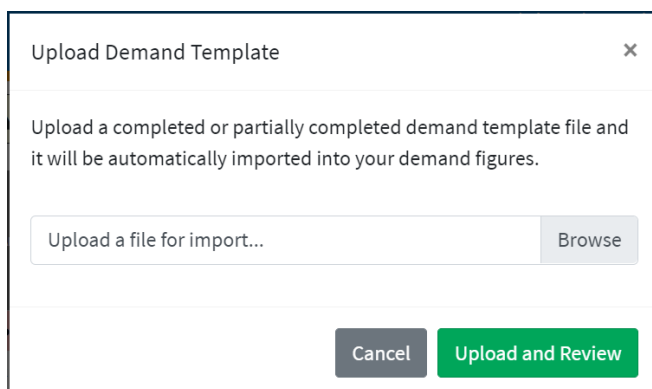


**Please note, a template downloaded from the “Download Template” menu item will have a locked view and cannot be reuploaded to the Tool itself. The totals on this version will be static and will not reflect any changes that you may make to the ICS’s data in Excel.**

From the template page for each of the ICS tabs, there is also the option to upload a template by clicking on the blue 'Upload a template' 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 a template” button from the tab of the ICS the template belongs to, you will receive the option to select a file to import:



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

Import Demand Data ✕ Cancel Import Import

Test

Internal ID	Area/Role	Staff In Post	Establishment	Q1 - 30th Jun 2022	Q2 - 30th Sep 2022	Q3 - 31st Dec 2022	Q4 - 31st Mar 2023	Y/E - 31st Mar 2023	Y/E - 31st Mar 2024	Errors
✕ 42629	Children and Young People									Empty - No data will be imported
✓ 42659	Psychiatrist - consultant	1.00	4.00	3.00	2.00	4.00	7.00	5.00	4.00	
✓ 42687	Psychiatrist - non consultant	1.00	3.00	4.00	4.00	4.00	2.00	8.00	4.00	
✓ 42715	Nursing	3.00	5.00	7.00	2.00	3.00	5.00	8.00	3.00	
✓ 42743	Pharmacist	5.00	3.00	9.00	7.00	6.00	3.00	3.00	3.00	
✓ 42771	Psychologist	1.00	4.00	3.00	2.00	4.00	7.00	5.00	4.00	
✓ 42803	Psychotherapists and psychological professionals	1.00	3.00	4.00	4.00	4.00	2.00	8.00	4.00	
✓ 42804	of which are Educational Mental Health Practitioners	3.00	5.00	7.00	2.00	3.00	5.00	8.00	3.00	
✓ 42805	of which are Children's Wellbeing Practitioners	5.00	3.00	9.00	7.00	6.00	3.00	3.00	3.00	
✓ 42835	Occupational Therapists	1.00	4.00	3.00	2.00	4.00	7.00	5.00	4.00	
✓ 42863	Other therapists \ other STT	1.00	3.00	4.00	4.00	4.00	2.00	8.00	4.00	
✓ 42891	Paramedics	3.00	5.00	7.00	2.00	3.00	5.00	8.00	3.00	
✓ 42951	Support to clinical staff	5.00	3.00	9.00	7.00	6.00	3.00	3.00	3.00	
✓ 42952	of which are Nursing Associates	1.00	4.00	3.00	2.00	4.00	7.00	5.00	4.00	
✓ 42953	of which are Trainee Nursing Associates	1.00	3.00	4.00	4.00	4.00	2.00	8.00	4.00	
✓ 42954	of which are Trainee Educational Mental Health Practitioners	3.00	5.00	7.00	2.00	3.00	5.00	8.00	3.00	

Please check the data you have entered is correct on this page and click on the green “Import” button in the top right if there are no issues.

Once the upload has been completed the following message will be displayed.

### Import Demand Data

Currently there are no pending demand data uploads.

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

### Editing Uploaded Data

Changing data is an easy task to do in the application. Simply locate and click on the field you wish to update and make your amendments.

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 demonstrated with a green tick.

Validation errors include negative numbers (ensure only positive numbers are entered) and blank cells (enter as zero).

### File Versions

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

## Sign-off

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

The screenshot shows the 'Mental Health Trust Sign-Off' page. The header includes 'eCollection UAT' and 'The HEE portal for co-ordinated data'. The left sidebar has a menu with 'Mental Health Trust Sign-Off' selected. The main content area has a 'Confirmation' section with a text box for the CEO's name, 'Clement Davey', and a 'Yes' button selected. A 'Save' button is visible at the top right.

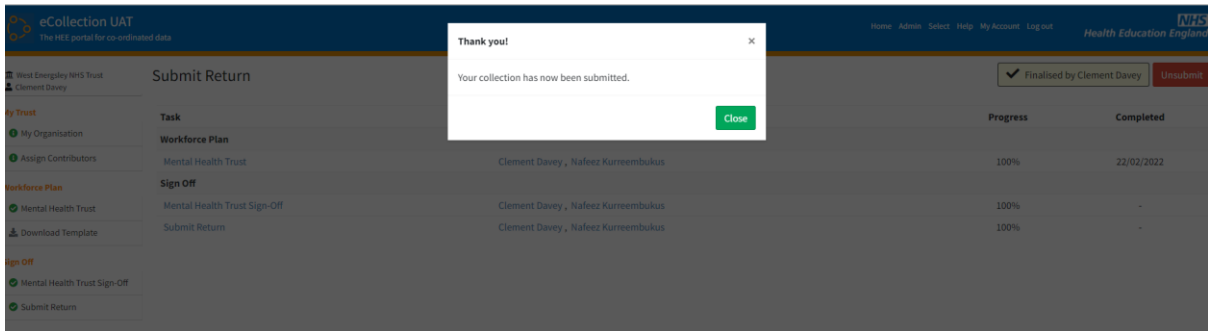
The screenshot shows the 'Submit Return' page. The header includes 'eCollection UAT' and 'The HEE portal for co-ordinated data'. The left sidebar has a menu with 'Submit Return' selected. The main content area displays a table with the following data:

Task	Contributor(s)	Progress	Completed
<b>Workforce Plan</b>			
Mental Health Trust	Clement Davey , Nafeez Kurreembukus	100%	22/02/2022
<b>Sign Off</b>			
Mental Health Trust Sign-Off	Clement Davey , Nafeez Kurreembukus	100%	-
Submit Return	Clement Davey , Nafeez Kurreembukus	0%	-

To complete the collection, click on the “Submit Return” menu item. Click on the green submit button at the top right of the screen, a confirmation box will appear:

The screenshot shows a confirmation dialog box titled 'Sign off collection?'. The text inside reads: 'You are about to sign-off your collection. Please ensure you are happy with the data provided before you proceed.' There are two buttons at the bottom: 'Cancel' (orange) and 'Proceed' (green).

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



Click the green “Close” button.

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



## ICS users

The ICS workforce plan contains the stages in the left-hand menu as illustrated below. The sections entitled “Trusts” and “Mental Health Trusts” are read-only for ICS leads and show the individual and aggregate plans respectively for all mental health provider trusts who have submitted (or are in the progress of completing) plans for the ICS.

The ICS is responsible for completing the workforce plans for the “Primary Care”, “Non-NHS” and “Non-Mental Health Trust” sections, and then signing-off and submitting the system level ICS mental health workforce plan.

The screenshot shows a user interface for an ICS user. At the top, it displays the user's name 'Clement Davey' and their organization 'Birmingham & Solihull'. Below this, the menu is organized into several sections:

- My Organisation**: Contains 'My Organisation' (checked) and 'Assign Contributors' (unchecked).
- Preview Trust Plans**: Contains 'Trusts' (unchecked).
- ICS Workforce Plan**: Contains 'Mental Health Trusts' (unchecked), 'Primary Care' (checked), 'Non-NHS' (checked), 'Non-Mental Health Trust' (checked), and a 'Download' button.
- Narrative**: Contains 'Narrative' (checked).
- Sign Off**: Contains 'ICS Sign-Off' (unchecked) and 'Submit Return' (unchecked).

## Preview Trust Plans

In the ICS users view, the “Trusts” section contains a read-only view of the individual workforce plans completed by each mental health provider trust who provides mental health services for the ICS templates.

### My Organisation

- My Organisation
- Assign Contributors

### Preview Trust Plans

- Trusts

### ICS Workforce Plan

- Mental Health Trusts

## Viewing Comments in the “Trusts” plan

When viewing an individual trusts plan in the “Trusts” screen, please note that where a comment has been added to a row it will show with a pen symbol in the service area/job role field for the row, as per illustration below. To view the comment, download the template to excel.

Area/Role	Baseline	Baseline	Plan				Planned Establishment	
	Staff in Post	Establishment	SIP - Quarterly				2022/23	2023/24
	Y/E - 31st Mar 2022	Y/E - 31st Mar 2022	Q1 - 30th Jun 2022	Q2 - 30th Sep 2022	Q3 - 31st Dec 2022	Q4 - 31st Mar 2023	Y/E - 31st Mar 2023	Y/E - 31st Mar 2024
Children and Young People	43.00	43.00	43.00	44.00	45.00	49.00	49.00	58.00
Psychiatrist - consultant	1.00	1.00	1.00	1.00	1.00	↑ 2.00	2.00	2.00
Psychiatrist - non consultant	2.00	2.00	2.00	2.00	2.00	↑ 3.00	3.00	3.00
Nursing	5.00	5.00	5.00	5.00	6.00	6.00	6.00	7.00
Pharmacist	2.00	2.00	2.00	2.00	2.00	2.00	2.00	3.00
Psychologist	4.00	4.00	4.00	4.00	4.00	↑ 5.00	5.00	6.00
Psychotherapists and psychological professionals	5.00	5.00	5.00	6.00	6.00	6.00	6.00	7.00
of which are Educational Mental Health Practitioners	2.00	2.00	2.00	2.00	2.00	↑ 3.00	3.00	3.00
of which are Children's Wellbeing Practitioners	2.00	2.00	2.00	2.00	2.00	2.00	2.00	3.00

## ICS Workforce Plan

### Mental health Trusts:

In the ICS users view, the “Mental Health Trusts” section contains a read-only aggregate view of all Mental Health Trusts providing services within the ICS who have submitted workforce plans.

### ICS Workforce Plan

- Mental Health Trusts

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

Download

## Primary Care, Non-NHS and Non-Mental Health Trust workforce plans:

The ICS lead is responsible for completing the mental health workforce plans for the Primary Care, Non-NHS and Non-Mental Health Trust sections.

When you select either the Primary Care, Non-NHS or Non-Mental Health Trust sections a workforce plan will be displayed in eCollection. The template is the same in each screen.

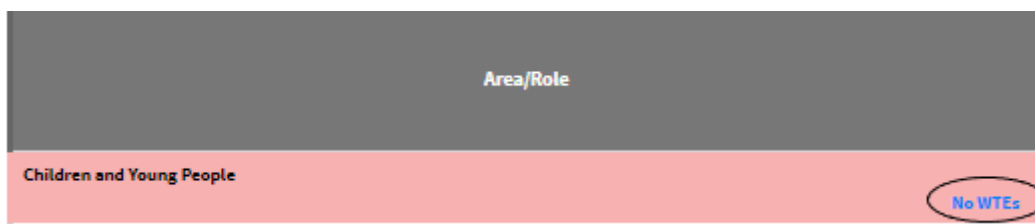
At the top right of the screen there will be options to save, download and upload data (via the respective buttons as indicated). In order to enter information/data you need to click on the cells and enter your value.

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

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

**You must enter some data in all cells (even if zero) to complete the section.**

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



Clicking on the “No WTEs” link in the above example will fill any empty cell in the whole staff group with a zero.

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

1. Comments
2. No WTE's
3. Clear
4. Undo

Area/Role	Baseline	Baseline	Plan				Planned Establishment	
	Staff in Post	Establishment	SIP - Quarterly				2022/23	2023/24
	Y/E - 31st Mar 2022	Y/E - 31st Mar 2023	Q1 - 30th Jun 2022	Q2 - 30th Sep 2022	Q3 - 31st Dec 2022	Q4 - 31st Mar 2023	Y/E - 31st Mar 2023	Y/E - 31st Mar 2024
<b>A&amp;E and Ward Liaison</b>	59.00	52.00	60.00	73.00	52.00	65.00	68.00	76.00
Psychiatrist - consultant	2.00	2.00	↑ 5.00	↑ 8.00	↓ 4.00	↑ 6.00	1.00	5.00
Psychiatrist - non consultant	4.00	8.00	↓ 5.00	↓ 2.00	↑ 3.00	↑ 5.00	7.00	9.00
<b>Nursing</b>	5.00	2.00	↑ 3.00	↑ 5.00	4.00	↓ 3.00	7.00	3.00
Pharmacist	2.00	2.00	↑ 5.00	↑ 8.00	↓ 4.00	↑ 6.00	1.00	5.00
Psychologist	4.00	8.00	↓ 5.00	↓ 2.00	↑ 3.00	↑ 5.00	7.00	9.00

When you click on the blue No WTEs link, all the cells in that row are filled with zero.

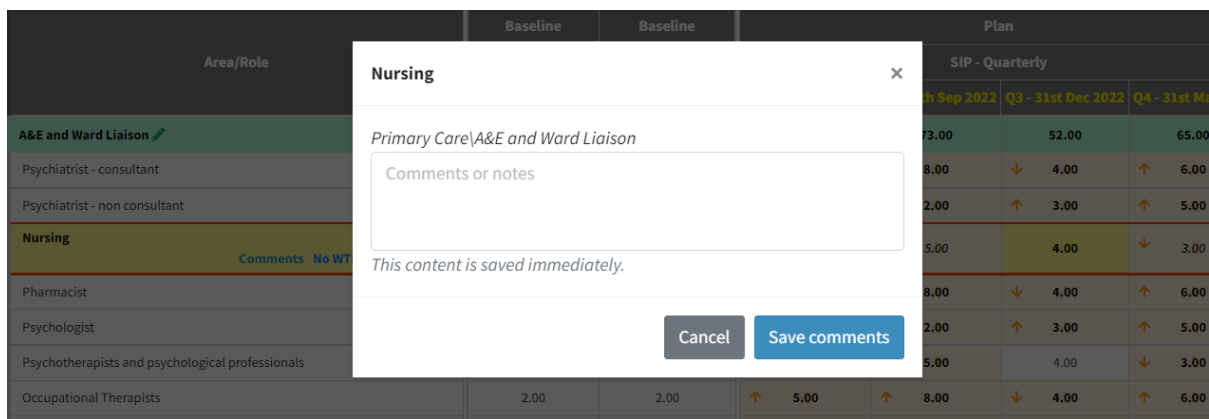
When you click on the black Clear link, all the cells are emptied

When you click on the red Undo link, all your changes are reverted to what they were before - when you entered the screen

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

### Entering Comments:

To enter comments, click on the green “comments” (as per the illustration above). A pop-up text box will be displayed for entering comments, perhaps to detail any assumptions, actions, risks of mitigations, relating to the row in question.



Once completed, click “Save Comments” and the text will be saved.

A symbol of a pen will appear by the job title or service area of the row to indicate that a comment has been included, as per image below.

Area/Role	Baseline	Baseline	Plan				Planned Establishment	
	Staff in Post	Establishment	SIP - Quarterly				2022/23	2023/24
	Y/E - 31st Mar 2022	Y/E - 31st Mar 2022	Q1 - 30th Jun 2022	Q2 - 30th Sep 2022	Q3 - 31st Dec 2022	Q4 - 31st Mar 2023	Y/E - 31st Mar 2023	Y/E - 31st Mar 2024
A&E and Ward Liaison	59.00	52.00	60.00	73.00	52.00	65.00	68.00	76.00
Psychiatrist - consultant	2.00	2.00	↑ 5.00	↑ 8.00	↓ 4.00	↑ 6.00	1.00	5.00
Psychiatrist - non consultant	4.00	8.00	↓ 5.00	↓ 2.00	↑ 3.00	↑ 5.00	7.00	9.00
Nursing	5.00	2.00	↑ 3.00	↑ 5.00	4.00	↓ 3.00	7.00	3.00
Pharmacist	2.00	2.00	↑ 5.00	↑ 8.00	↓ 4.00	↑ 6.00	1.00	5.00
Psychologist	4.00	8.00	↓ 5.00	↓ 2.00	↑ 3.00	↑ 5.00	7.00	9.00

The comment can be edited as necessary by clicking on the green “comments link.

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

**NB Comments will not show in the Commentary column of the Mental Health Trusts plan when downloaded as this is an aggregate view of all the plans submitted by Mental Health Trusts for an ICS and the comments might therefore be contradictory. To view comments for a mental health trust plan you will need to view the individual plan in the “Trusts” section**

Staffing Categories	Baseline		Plan				Planned Establishment		Commentary
	Staff In Post	Establishment	SIP - Quarterly				2022/23	2023/24	
			Y/E - 31st Mar 2022	Y/E - 31st Mar 2022	Q1 - 30th Jun 2022	Q2 - 30th Sep 2022			
	Y/E - 31st Mar 2022	Y/E - 31st Mar 2022	Q1 - 30th Jun 2022	Q2 - 30th Sep 2022	Q3 - 31st Dec 2022	Q4 - 31st Mar 2023	Y/E - 31st Mar 2023	Y/E - 31st Mar 2024	
<b>A&amp;E and Ward Liaison</b>	59.00	52.00	60.00	73.00	52.00	65.00	68.00	76.00	Text text service area
Psychiatrist - consultant	2.00	2.00	5.00	8.00	4.00	6.00	1.00	5.00	
Psychiatrist - non consultant	4.00	8.00	5.00	2.00	3.00	5.00	7.00	9.00	
Nursing	5.00	2.00	3.00	5.00	4.00	3.00	7.00	3.00	
Pharmacist	2.00	2.00	5.00	8.00	4.00	6.00	3.00	5.00	
Psychologist	4.00	8.00	5.00	2.00	3.00	5.00	7.00	9.00	
Psychotherapists and psychological professionals	5.00	2.00	3.00	5.00	4.00	3.00	7.00	3.00	
Occupational Therapists	2.00	2.00	5.00	8.00	4.00	6.00	1.00	5.00	
Other therapists \ other STT	4.00	8.00	5.00	2.00	3.00	5.00	7.00	9.00	
Paramedics	5.00	2.00	3.00	5.00	4.00	3.00	7.00	3.00	
Support to clinical staff	10.00	2.00	5.00	8.00	4.00	6.00	1.00	5.00	
of which are Nursing Associates	4.00	8.00	5.00	2.00	3.00	5.00	7.00	9.00	
of which are Trainee Nursing Associates	5.00	2.00	3.00	5.00	4.00	3.00	7.00	3.00	
Physicians Associates	5.00	2.00	3.00	5.00	4.00	3.00	7.00	3.00	
Admin	2.00	2.00	5.00	8.00	4.00	6.00	1.00	5.00	
Peer Support worker	4.00	8.00	5.00	2.00	3.00	5.00	7.00	9.00	
Social worker	5.00	2.00	3.00	5.00	4.00	3.00	7.00	3.00	
<b>Adult Community Crisis</b>	51.00	52.00	60.00	73.00	52.00	65.00	68.00	76.00	
Psychiatrist - consultant	2.00	2.00	5.00	8.00	4.00	6.00	1.00	5.00	
Psychiatrist - non consultant	4.00	8.00	5.00	2.00	3.00	5.00	7.00	9.00	

## Workforce Demand sections (Columns)

Area/Role	Baseline		Plan				Planned Establishment	
	Staff in Post	Establishment	SIP - Quarterly				2022/23	2023/24
	Y/E - 31st Mar 2022	Y/E - 31st Mar 2022	Q1 - 30th Jun 2022	Q2 - 30th Sep 2022	Q3 - 31st Dec 2022	Q4 - 31st Mar 2023	Y/E - 31st Mar 2023	Y/E - 31st Mar 2024

As you can see from the figure above, there are several different columns in each of the forms. These columns represent the following:

- **Staff in Post** - Column containing the actual number of staff in each job role in WTEs (Whole Time Equivalents)
- **Establishment** - Column containing the required number of staff in each job role in WTEs
- **Plan SIP-Quarterly** – Column containing planned staff in post in each role in WTEs (Whole Time Equivalents) as at the end of the respective quarter for example 30th June 2022 for Q1"
- **Planned Establishment** - Column containing the estimated required workforce for following years.
- **Y/E 31st March 2022** - Mental Health Workforce 22/23 is a snapshot data collection and data is required for the date as specified.

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

## Workforce Demand sections (Rows)

Area/Role	Baseline		Plan				Planned Establishment	
	Staff in Post	Establishment	SIP - Quarterly				2022/23	2023/24
	Y/E - 31st Mar 2022	Y/E - 31st Mar 2022	Q1 - 30th Jun 2022	Q2 - 30th Sep 2022	Q3 - 31st Dec 2022	Q4 - 31st Mar 2023	Y/E - 31st Mar 2023	Y/E - 31st Mar 2024
<b>Children and Young People</b>	32.00	52.00	76.00	51.00	59.00	60.00	85.00	50.00
Psychiatrist - consultant	1.00	4.00	↓ 3.00	↓ 2.00	↑ 4.00	↑ 7.00	5.00	4.00
Psychiatrist - non consultant	1.00	3.00	↑ 4.00	4.00	4.00	↓ 2.00	8.00	4.00
Nursing	3.00	5.00	↑ 7.00	↓ 2.00	↑ 3.00	↑ 5.00	8.00	3.00
Pharmacist	5.00	3.00	↑ 9.00	↓ 7.00	6.00	↓ 3.00	3.00	3.00
Psychologist	1.00	4.00	↓ 3.00	↓ 2.00	↑ 4.00	↑ 7.00	5.00	4.00
Psychotherapists and psychological professionals	1.00	3.00	↑ 4.00	4.00	4.00	↓ 2.00	8.00	4.00
of which are Educational Mental Health Practitioners	3.00	5.00	↑ 7.00	↓ 2.00	↑ 3.00	↑ 5.00	8.00	3.00
of which are Children's Wellbeing Practitioners	5.00	3.00	↑ 9.00	↓ 7.00	6.00	↓ 3.00	3.00	3.00
Occupational Therapists	1.00	4.00	↓ 3.00	↓ 2.00	↑ 4.00	↑ 7.00	5.00	4.00
Other therapists \ other STT	1.00	3.00	↑ 4.00	4.00	4.00	↓ 2.00	8.00	4.00
Paramedics	3.00	5.00	↑ 7.00	↓ 2.00	↑ 3.00	↑ 5.00	8.00	3.00
Support to clinical staff	5.00	3.00	↑ 9.00	↓ 7.00	6.00	↓ 3.00	3.00	3.00
of which are Nursing Associates	1.00	4.00	↓ 3.00	↓ 2.00	↑ 4.00	↑ 7.00	5.00	4.00
of which are Trainee Nursing Associates	1.00	3.00	↑ 4.00	4.00	4.00	↓ 2.00	8.00	4.00
of which are Trainee Educational Mental Health Practitioners	3.00	5.00	↑ 7.00	↓ 2.00	↑ 3.00	↑ 5.00	8.00	3.00
of which are Trainee Children's Wellbeing Practitioners	5.00	3.00	↑ 9.00	↓ 7.00	6.00	↓ 3.00	3.00	3.00

(This screenshot is to illustrate the point below and is not from a live collection)

The figure above shows the rows function in the following way:

- The service areas or pathways are presented in sections. Each service area (indicated in the coloured rows and blue when downloaded on a spreadsheet – for example “Children and Young People” in the example above) consist of all related job roles which follow in the rows below.
- When values are entered into the row for each job role, the values are summed for all qualified staff for this speciality and the sum of entries is displayed in the service area row above.
- Rows starting '*of which ...*' are a subset of the job role immediately above them. The '*of which ...*' rows do not sum up into the related job role or service areas subtotals or overall total for the plan.

### Downloading and Uploading demand data


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

Users can download the Primary Care, Non-NHS, and Non-Mental Health template from the respective template page by pressing the grey 'Download page':

[Download page](#)

- Demand template (blank)
- Demand template (with data)

All the templates can also be downloaded in a single excel file by clicking on the 'Download' option in the navigation bar on the left:

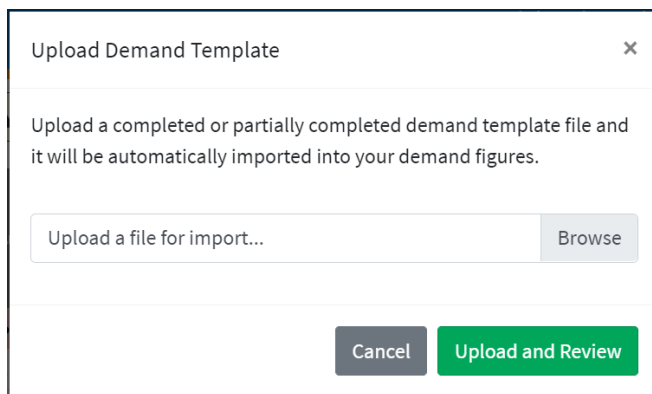
 [Download](#)

This will download the 'Primary Care', 'Non-NHS', and 'Non-Mental Health Trust' under the ICS Workforce Plan section in an excel file, which can then be edited outside the Tool.

From the 'Non-Mental Health Trust', 'Primary Care' and 'Non-NHS' template page, there is also the option to upload a template by clicking on the blue 'Upload a template' button:

[Upload a template](#)

Once you click on the "Upload a template" option, you will receive the option to select a file to import:



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

Internal ID	Area/Role	Staff In Post	Establishment	Q1 - 30th Jun 2022	Q2 - 30th Sep 2022	Q3 - 31st Dec 2022	Q4 - 31st Mar 2023	Y/E - 31st Mar 2023	Y/E - 31st Mar 2024	Errors
42621	Children and Young People	22.00	100.00	44.00	102.00	26.00	118.00	56.00	90.00	
42652	Psychiatrist - consultant	1.00	7.00	4.00	9.00	3.00	7.00	5.00	5.00	
42680	Psychiatrist - non consultant	3.00	6.00	1.00	6.00	2.00	9.00	3.00	7.00	
42708	Nursing	1.00	8.00	4.00	7.00	1.00	9.00	4.00	7.00	
42736	Pharmacist	1.00	7.00	4.00	9.00	3.00	7.00	5.00	5.00	
42764	Psychologist	3.00	6.00	1.00	6.00	2.00	9.00	3.00	7.00	
42794	Psychotherapists and psychological professionals	1.00	8.00	4.00	7.00	1.00	9.00	4.00	7.00	
42795	of which are Educational Mental Health Practitioners	1.00	7.00	4.00	9.00	3.00	7.00	5.00	5.00	
42796	of which are Children's Wellbeing Practitioners	3.00	6.00	1.00	6.00	2.00	9.00	3.00	7.00	
42828	Occupational Therapists	1.00	8.00	4.00	7.00	1.00	9.00	4.00	7.00	
42856	Other therapists \ other STT	1.00	7.00	4.00	9.00	3.00	7.00	5.00	5.00	
42884	Paramedics	3.00	6.00	1.00	6.00	2.00	9.00	3.00	7.00	
42928	Support to clinical staff	1.00	8.00	4.00	7.00	1.00	9.00	4.00	7.00	
42929	of which are Nursing Associates	1.00	7.00	4.00	9.00	3.00	7.00	5.00	5.00	

**Please note, this will only show you the information for the page on which you have selected to upload the template ie the screen you are in when uploading a template.**

**If you have made changes to the template downloaded via the ‘Download’ option in the Toolbar, these will be reflected in the Tool once uploaded. Any changes made to the ‘Mental Health Trusts’, ‘Primary Care’, ‘Non-NHS’, ‘Non-Mental Health Trust’ spreadsheet will be ignored at this point.**

*Please note you can only upload one tab at a time*

Please check the data you have entered is correct on this page and click on the green “Import” button in the top right if there are no issues.

Once the upload has been completed the following message will be displayed.

### Import Demand Data

Currently there are no pending demand data uploads.

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

## Editing Uploaded Data

Changing data is an easy task to do in the application. Simply locate and click on the field you wish to update and make your amendments.

## Useful tip

The template needs to be completed 100% before submitting. Please note any negative values will prevent submission and will need to be corrected. After all the values have been corrected the icon will change from red to green. This will be an indication that the form is ready to be submitted.

## 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.

## Narrative

In this section there are 3 text boxes where the ICS lead can summarise the plan (system) level assumptions that underpin the numerical mental health workforce plan submission, any actions to be taken, and highlight any risks, issues and mitigations.

The screenshot shows the 'eCollection UAT' interface for 'Narrative' submission. The header includes 'The HES portal for co-ordinated data' and 'Health Education England'. The user is identified as 'Nafes Kureembokus (99)'. The main content area is titled 'Narrative' and contains three sections: 'Assumptions', 'Actions', and 'Risks, issues & mitigations', each with a corresponding text input box. A left-hand navigation menu lists various categories like 'My Organisation', 'Trusts', 'Mental Health Trusts', and 'Narrative' (which is currently selected). The 'Narrative' section includes instructions: 'Please summarise the key assumptions that underpin the numerical mental health workforce plan submission, highlighting any key risks and issues. Narrative submissions should set out any system actions that are critical to the delivery of the planned workforce levels including recruitment and retention, use of bank and agency, redesign of teams and roles, deployment across sectors and/or organisations and sickness absence. Please ensure the workforce plan underpins the activity levels assumed within the mental health activity planning submission.' and 'Please complete all sections. It is recommended that narratives remain strategic, are succinct and to the point. A suggested maximum word count of 500 words is recommended for the narrative in its entirety, however this is not restricted in the template formatting and should not act as a barrier to providing the information required to support each section below.' Below the instructions, there are three text input boxes for 'Assumptions', 'Actions', and 'Risks, issues & mitigations'.

## Sign-off

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

The screenshot shows the 'ICS Sign-Off' page in the eCollection UAT system. The page includes a navigation menu on the left with categories like 'My Organisation', 'Preview Trust Plans', 'ICS Workforce Plan', 'Narrative', and 'Sign Off'. The main content area contains a 'Confirmation' section with explanatory text, a text input field for the 'Name of ICS Lead' (filled with 'Chief executive of organisation'), and a section for 'Has this submission been signed off by the ICS Lead' with radio buttons for 'Yes' (selected) and 'No'. At the top right, there is a 'Your Task (100%)' progress indicator and 'Cancel' and 'Save' buttons.

To complete the collection, click on the “Submit” menu item. Click on the green submit button at the top right of the screen, a confirmation box will appear:

The screenshot shows a confirmation dialog box titled 'Sign off collection?'. The message inside the dialog reads: 'You are about to sign-off your collection. Please ensure you are happy with the data provided before you proceed.' At the bottom right of the dialog, there are two buttons: 'Cancel' (orange) and 'Proceed' (green). The dialog is overlaid on a dark background with a user name 'Keith Riviera, Tony Curtis' visible at the bottom.

Click “Proceed” to submit your return. Once submitted the section will reflect this a message will be displayed saying that the collection has now been submitted, as below.

eCollection UAT  
The HEE portal for co-ordinated data

Home Admin Select Help My Account Logout Health Education England NHS

Cambridgeshire and Peterborough  
STP  
Clement Davey

Submit Return

Finalised by Clement Davey Unsubmit

**Thank you!** X

Your collection has now been submitted.

[Close](#)

Task	Contributor(s)	Progress	Completed
<b>My Organisation</b>			
My Organisation	Clement Davey	100%	22/02/2022
<b>Preview Trust Plans</b>			
Trusts	Clement Davey	100%	22/02/2022
<b>ICS Workforce Plan</b>			
Mental Health Trusts	Clement Davey	100%	22/02/2022
Primary Care	Clement Davey	100%	22/02/2022
Non-NHS	Clement Davey	100%	22/02/2022
Non-Mental Health Trust	Clement Davey	100%	22/02/2022
<b>Narrative</b>			
Narrative	Clement Davey	100%	-
<b>Sign Off</b>			
ICS Sign-Off	Clement Davey	100%	-
Submit Return	Clement Davey	100%	-

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

eCollection UAT  
The HEE portal for co-ordinated data

Home Admin Select Help My Account Logout Health Education England NHS

Cambridgeshire and Peterborough  
STP  
Clement Davey

Submit Return

Finalised by Clement Davey Unsubmit

Task	Contributor(s)	Progress	Completed
<b>My Organisation</b>			
My Organisation	Clement Davey	100%	22/02/2022
<b>Preview Trust Plans</b>			
Trusts	Clement Davey	100%	22/02/2022
<b>ICS Workforce Plan</b>			
Mental Health Trusts	Clement Davey	100%	22/02/2022
Primary Care	Clement Davey	100%	22/02/2022
Non-NHS	Clement Davey	100%	22/02/2022
Non-Mental Health Trust	Clement Davey	100%	22/02/2022
<b>Narrative</b>			
Narrative	Clement Davey	100%	-
<b>Sign Off</b>			
ICS Sign-Off	Clement Davey	100%	-
Submit Return	Clement Davey	100%	-

## 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 Mental Health Workforce enquiries

For all general queries relating to the health workforce planning collection, including queries about definitions, guidance and content, please contact your regional NHSEI Mental Health contact [england.nhs-planning@nhs.net](mailto:england.nhs-planning@nhs.net)

For further information regarding the collection please review the guidance by clicking on the links below:

#### [Mental Health Workforce Collection User Guidance](#)

Implementation guidance [NHS England » 2022/23 priorities and operational planning guidance: Implementation guidance](#)

Operational Planning Detailed Submission guidance, Technical guidance and the Operational Planning Technical Definitions document can be found at: [NHS Planning - Future NHS Collaboration Platform Supporting Guidance 2022/23](#)

**In order to access the material on the NHS Planning FutureNHS Collaboration Platform, please ensure you request to 'join' the associated workspace. – <https://future.nhs.uk/>**

#### Additional Resources

- Mental Health LTP Analytical Tool  
[Mental Health LTP analytical Tool](#)
- Mental Health Implementation Plan:  
[Mental Health Implementation Plan](#)
- Stepping Forward:  
[Stepping Forward](#)
- Interim People Plan:  
[Interim NHS People Plan](#)

**You will need to request to 'join' the associated workspace before being able to access the Mental Health LTP Analytical Tool.**