Person Workgroup

Review of person work streams and activities

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1. Background and Objectives
This document follows on from the discussions of the Person Workgroup. The Person Workgroup is one of the three workgroups that the Deanery Data Group has established prior to the release of Intrepid v10. The purpose of the workgroups has been to gather information and make recommendations concerning the processes and data that should appear in the new system.

2. Constraints
There have been a number of important and inevitable constraints on the work of the group, notably:
- The diversity of practices across the various deaneries
- The fact that only a subsection of the deaneries and other stakeholders could be represented at the meetings.
These constraints coupled with the sheer weight of detail involved, have meant that the discussions have not achieved the level of specificity that would have been ideal.

3. Deliverables
Because of the above-mentioned constraints, this document focuses on the information gathering part of the brief rather than on the making of firm recommendations. We envisage that the latter exercise will figure largely in the next steps in which the deaneries focus, with suppliers, on the processes that are required in order to support each identified work stream.

We have tried to provide a categorisation of all the items that are relevant to persons within deanery systems. At the highest level, this breaks down into:
- Person Types
- Person-related inputs to the system
- Person-related outputs from the system
- Person related work streams
At the lower levels, where time has permitted, process flows and datasets have been identified.

4. Person Types and Contact Information

4.1. Person Types
People records are able to have more than one person type assigned. This will be defined by the system administrator.

The workgroup addressed the issue of person types with following objectives:
1. To review the person types currently in use within the deanery systems – note the list is not exhaustive.
2. To review how the person types are defined eg when a consultant agrees to work as a Clinical Supervisor are there some fields that could be attached to this person that could help with other workflows, such as assigning a supervisor to a trainee might be assisted by the location and specialty of the supervisor.
3. To review how these person types can interact with Deanery database as a default e.g. what fields are they able to update and validate, what forms they can complete, etc.
4. Can a person have more than one role, how should each of them be limited, are different roles able to do different things.

<table>
<thead>
<tr>
<th>Person Types</th>
<th>Defined / Limited by</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specialty type</td>
<td>GP; Foundation; Core; Specialty; etc;</td>
<td>Type of specialty defines workflows</td>
</tr>
<tr>
<td>Trainee</td>
<td>Programme linked to</td>
<td>In approved training post</td>
</tr>
<tr>
<td>LAT</td>
<td>Programme linked to</td>
<td>In approved training post</td>
</tr>
<tr>
<td>LAS</td>
<td></td>
<td>In approved training post filling short term gap in a service capacity</td>
</tr>
<tr>
<td>SAS</td>
<td></td>
<td>Non training grade</td>
</tr>
<tr>
<td>Consultant</td>
<td>Approved location, programme &amp; specialty</td>
<td></td>
</tr>
</tbody>
</table>
Educational Supervisor | Specialties supervised, and approved location | Linked to a programme. See Post Report Dataset Item PL11
Clinical Supervisor | Defined by type of trainee supervised, specialty and location | Linked to a programme and a post as the default. See Post Report Dataset Item PL11
Clinical Tutor | Defined by type of trainee supervised, specialty and location | Linked to a programme. See Post Report Dataset Item PL11
Training Programme Director | Linked to a programme | 
Specialty Training Committee | | Members can have varying roles on STC i.e. Quality Rep, Academic etc
Royal College Regional Advisor | College appointment | Sometimes but not always STC Chair
Head of School | | Can be linked to a group of STC’s and programmes
Associate Postgraduate Dean | | Deanery appointment
Foundation Programme Director | | Deanery appointment
Administration Staff | Location, person types, specialties editable, | Only able to edit certain locations. May need levels of administration staff to allow limiting of functionality and data access
GP Educator | | 
GP Education Fellows | | 
GP Tutor | | 
Director of Medical Education (DME) | | 
Lay Representative | | 
Royal College External Advisor | | 

Some of the questions explored within the Workgroup
- Educational supervisors: Are they linked to a trainee for the duration of a training appointment or will a trainee have a number of Educational Supervisors over the course of their training?
- What is the purpose of the Specialty Training Committees and Regional Advisor roles are there some specific workflows for these person types.
- By integrating GPs fully into the system a separate module would not be required but will require further development work by the data group.

4.2. Contact details
For all person types except for administrator.

<table>
<thead>
<tr>
<th>Field</th>
<th>Defined / Limited by</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Contact Address</td>
<td>Primary default address used for communications</td>
<td>Ideally updated by self service ability</td>
</tr>
<tr>
<td>Primary Email</td>
<td></td>
<td>Mandatory system or operator</td>
</tr>
<tr>
<td>Secondary Email</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Telephone 1 or Mobile</td>
<td></td>
<td>Not mandatory</td>
</tr>
<tr>
<td>Telephone 2 or Mobile</td>
<td></td>
<td>Not mandatory</td>
</tr>
</tbody>
</table>
5. Trainee Workflow

- Immigration status
- Recruitment
- Qualification
- Joiner (Trainee) (5.i)
- Trainee Placement (5.ii)
- NTN or DRN (5.iii)
- Form R
- ARCP
- Accreditation
- OOP
- Leaver

Annually completed
5.1. Trainee Joiner

a) **Applicable to:** Anyone with the person type “Trainee”

b) **Purpose:** To create an ‘active’ trainee record on the database to assist in the management of training.

c) **Scope:**
   Start = recruitment offer accepted and details of successful applicant received by the deanery.
   End = active trainee record on the database

d) **Process:** Details of successful applicant received by deanery and relevant appointment details are added. The following table would be the required dataset for a new joiner.

<table>
<thead>
<tr>
<th>Field</th>
<th>Example</th>
<th>Type</th>
<th>Source and notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deanery</td>
<td>West Midlands</td>
<td>Defined national list</td>
<td>Recruitment</td>
</tr>
<tr>
<td>Title</td>
<td>Doctor</td>
<td>Defined national list</td>
<td>Recruitment</td>
</tr>
<tr>
<td>Surname</td>
<td>Finlay</td>
<td>Free-text</td>
<td>Recruitment and then updated by GMC interface</td>
</tr>
<tr>
<td>Given name</td>
<td>Alan</td>
<td>Free-text</td>
<td>Recruitment and then updated by GMC interface</td>
</tr>
<tr>
<td>Initials</td>
<td>AF</td>
<td></td>
<td>Derived from Given Name (used for communications/reporting)</td>
</tr>
<tr>
<td>Marital status</td>
<td>Married</td>
<td>Defined national list</td>
<td></td>
</tr>
<tr>
<td>Data Protection Consent</td>
<td>Yes</td>
<td>Yes / No</td>
<td>National Data Protection statement is being developed (Mar 2011)</td>
</tr>
<tr>
<td>Gender</td>
<td>Male</td>
<td>Defined national list</td>
<td></td>
</tr>
<tr>
<td>NI Number</td>
<td>Set format</td>
<td>ESR</td>
<td></td>
</tr>
<tr>
<td>GMC/GDC number</td>
<td>6999554</td>
<td>Numeric</td>
<td>Recruitment, used in GMC interface, would need to allow for both simultaneously</td>
</tr>
<tr>
<td>GMC/GDC Registration Status</td>
<td></td>
<td></td>
<td>GMC interface</td>
</tr>
<tr>
<td>GMC/GDC Expiry Date</td>
<td></td>
<td></td>
<td>GMC interface</td>
</tr>
<tr>
<td>PMQ Date</td>
<td></td>
<td>Date</td>
<td>Recruitment and GMC</td>
</tr>
<tr>
<td>PMQ type</td>
<td></td>
<td>Defined national list</td>
<td>Recruitment and GMC</td>
</tr>
<tr>
<td>PMQ country</td>
<td></td>
<td>Defined national list</td>
<td>Recruitment and GMC</td>
</tr>
<tr>
<td>Medical School</td>
<td>Dundee</td>
<td>Defined national list</td>
<td>Recruitment and GMC</td>
</tr>
<tr>
<td>Specialty 1</td>
<td>Geriatric Medicine</td>
<td>Defined national list</td>
<td>Recruitment</td>
</tr>
<tr>
<td>Specialty 2</td>
<td>General (Internal) Medicine</td>
<td>Defined national list</td>
<td></td>
</tr>
<tr>
<td>Specialty 3</td>
<td></td>
<td>Defined national list</td>
<td></td>
</tr>
<tr>
<td>Sub-specialty</td>
<td>Stroke Medicine</td>
<td>Defined national list</td>
<td></td>
</tr>
<tr>
<td>Grade</td>
<td>ST3</td>
<td>Defined national list</td>
<td>Recruitment</td>
</tr>
<tr>
<td>Programme Start Date</td>
<td>01/08/10</td>
<td>Date</td>
<td>Would a default date be useful, does this change by trainee type eg Foundation to Specialty?</td>
</tr>
<tr>
<td>Appointment Type</td>
<td>LAT</td>
<td>Defined national list</td>
<td></td>
</tr>
<tr>
<td>Programme End Date</td>
<td></td>
<td></td>
<td>For substantive specialty trainees this will be the same as their CCT date</td>
</tr>
<tr>
<td>CCT Anticipated 1</td>
<td>01/08/15</td>
<td>Date</td>
<td>Due to the arrival of CESR (CP) should this be renamed “predicted date of completion” or “predicted date of specialist registration”</td>
</tr>
<tr>
<td>CCT Anticipated 2</td>
<td>01/08/15</td>
<td>Date</td>
<td></td>
</tr>
<tr>
<td>Field</td>
<td>Example</td>
<td>Type</td>
<td>Source and notes</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>--------------------------</td>
<td>--------------------------</td>
<td>----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>College Curriculum</td>
<td>See Post Report Dataset Item PR12 for cross reference</td>
<td>Defined list from Programme</td>
<td>This should be the defined link between the Trainee and the Programme</td>
</tr>
</tbody>
</table>

The Trainee is associated with a programme through the curriculum and this implies that curriculum records will be recorded.

### 5.3. NTN/DRN Allocation

Trainee is assigned a training number in accordance with the deanery, specialty and grade. For trainees at core level training or in LAT or FTSTA posts a Deanery Reference Number is issued. Those in substantive specialty posts are issued National Training Numbers.

<table>
<thead>
<tr>
<th>Field</th>
<th>Example</th>
<th>Type</th>
<th>Source and notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Training Number or Deanery Reference Number</td>
<td>WMD/008/001/A</td>
<td>Defined format.</td>
<td>Set by deanery, specialty and grade. Unique identifier is issued on next available basis.</td>
</tr>
</tbody>
</table>
For the above fields historical records need to be routinely maintained which includes details of who made the change, when and why; so there is always a clear audit trail of changes within the database.

6. Form R & Person Related Workflow Data

6.1. Form R Initial Process

6.1.1. First iteration
Purpose - Form Rs must be completed after recruitment to confirm basic details and entry to the programme.

6.1.2. Scope
Start = active trainee record on database
End = Completed Form R and training number formally issued
6.1.3. Process
1. Trainee sent pre-populated Form R or interactive web based Form R (to be developed)
2. Trainee confirms details (adds photo if necessary) and Form returned to deanery or completed
on line.
3. Training number formally issued to trainee
4. Form R report sent to College or Faculty which acts as the trigger for enrolment.

<table>
<thead>
<tr>
<th>Field name</th>
<th>Example</th>
<th>Type</th>
<th>Source and notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Form R sent</td>
<td>01/05/10</td>
<td>Date</td>
<td></td>
</tr>
<tr>
<td>Date Form R received</td>
<td>03/08/10</td>
<td>Date</td>
<td></td>
</tr>
<tr>
<td>Date photo received</td>
<td>15/08/10</td>
<td>Date</td>
<td></td>
</tr>
<tr>
<td>Date photo confirmed</td>
<td>02/09/10</td>
<td>Date</td>
<td></td>
</tr>
<tr>
<td>Who confirmed photo</td>
<td>Bloggsj</td>
<td>Person Name</td>
<td>Link to another person record</td>
</tr>
</tbody>
</table>

6.2. Form R Subsequent Process
6.2.1. Subsequent years
Form Rs must be completed each year to confirm basic contact and programme details.

6.2.2. Scope
Start = Active trainee record on database and 12months passed since Form R last updated
End = Completed Form R

6.2.3. Process
1. Trainee sent pre-populated Form R or completes on line
2. Trainee confirms details (adds photo if necessary) and Form returned to deanery or completed
   on line.

6.2.4. Historical records
Historical versions of all Form Rs should be maintained so they can be provided to Colleges and
GMC if requested.

Questions
- For electronic Form R – as many relevant fields as possible must be pre populated. Comment
  boxes available for all fields to allow trainee to edit and update any invalid data. Deanery
  Administrator can then choose to import/overwrite updated data if they are content with that data
  – if not follow up with trainee to validate. Date of change should be automatic default.
- If they do change some fields will they have to say why? Yes - for example CCT why has it
  changed? So short explanation will be needed.
- What is the consequence of not filling in a Form R at the time of appointment? College is not
  aware of trainee existence and if we are to ensure better data sharing in the future then it is
  important that trainee is chased. Colleges might be willing to add requirement for annual Form R
  to be added to their checks for maintaining trainees college enrolment/registration and EPortfolio
  access.

6.3. Future On Line Form R Capability
6.3.1. Introduction
The purpose of this process is to provide a standard and consistent approach for administrators,
managers and trainees.

6.3.2. Workflow Description
Start
Entering a trainee onto the system, adding them to a post and issuing a National Training Number
would trigger an automated email. This email would be sent to the trainee’s primary email address
requesting them to complete an electronic web based Form R. The web based Form R must be pre
populated with as much data held by the Deanery as possible in order for the Trainee to verify that
data when they access the on line Form R.
Using the unique URL provided within the email the trainee would access the Trainee Person web self service system to validate or update their demographic data and their acceptance of the professional obligations of the programme, including active participation in the assessment and review process. The trainee will be issued with a secure password for access to the web self service system and enter any demographic data missing. If the system does not hold a representative photo of the trainee an upload facility will be needed – photo verifiable at recruitment stage or subsequent ARCP. Photo return by Post allowing Deanery to upload also needed. Once the Form R completed for the first time the trainee will be able to access the National Training Number allocated to them. Annually the trainee will be required to complete the Form R and this would be scheduled automatically prior to annual ARCP. Data Protection Act statement needed to ensure trainee knows where the form will be going to on completion. Electronic sign off needed.

**Administration**

The administrator(s) will be able to view the status of Form R submissions to send reminder alerts or contact trainees with outstanding submissions. They will be able to scan and import any trainee’s photos the Deanery has received via the post and also run reports for the Royal Colleges and other customers. All changes which the Trainee has made to their Form R can be accepted; pending subject to verification; or rejected (with reason).

**Royal Colleges**

Royal College administrator(s) will be able to access the web self service system to download the Form R report and access submissions statistic specific to their college. Process for how this will happen will have to be explored – various options available but system must be secure and agreed with all interested parties in terms of Data Protection Act etc.

**Optional**

If a complete electronic signoff is not appropriate then the trainee would printout the completed Form R, sign it and post to the Deanery. On receiving the signed Form R the administrator(s) would mark the trainees Form R record as complete and file the signed paper form; copied to respective College/Faculty.

**6.4. Future On Line Form R Capability Demographic Data: Inputs, NTN, Post Allocation**

<table>
<thead>
<tr>
<th>Field name</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deanery*</td>
<td></td>
</tr>
<tr>
<td>Surname*</td>
<td></td>
</tr>
<tr>
<td>Forename*</td>
<td></td>
</tr>
<tr>
<td>PMQ Med School*</td>
<td>GMC Deanery Interface</td>
</tr>
<tr>
<td>PMQ*</td>
<td>GMC Deanery Interface</td>
</tr>
<tr>
<td>Date of birth*</td>
<td></td>
</tr>
<tr>
<td>GMC/GDC*</td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
</tr>
<tr>
<td>Photo</td>
<td>Verifiable at next ARCP Passport size</td>
</tr>
<tr>
<td>Primary Address*</td>
<td></td>
</tr>
<tr>
<td>Work Place Address</td>
<td>Do we need both?? (From PLACEMENT)?</td>
</tr>
<tr>
<td>Primary E-mail*</td>
<td></td>
</tr>
<tr>
<td>Phone 1*</td>
<td></td>
</tr>
<tr>
<td>Phone 2</td>
<td></td>
</tr>
<tr>
<td>Appointment type*</td>
<td>Post Type or Appointment (e.g. LAT, Run Through, FTSTA etc)</td>
</tr>
<tr>
<td><strong>Immigration status</strong></td>
<td>Immigration Status (e.g. resident, settled, work permit required)</td>
</tr>
<tr>
<td>------------------------</td>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>GMC Programme Approval Number</strong></td>
<td>Pre populated (Deanery not trainee)</td>
</tr>
<tr>
<td><strong>DRN/NTN</strong></td>
<td>Pre populated (Deanery not trainee) but ability for trainee to comment if there are errors</td>
</tr>
<tr>
<td><strong>Specialty 1</strong></td>
<td>Derived</td>
</tr>
<tr>
<td><strong>Specialty 2</strong></td>
<td>Derived</td>
</tr>
<tr>
<td><strong>Specialty 3</strong></td>
<td>Derived</td>
</tr>
<tr>
<td><strong>Sub-specialty</strong></td>
<td>Where applicable derived</td>
</tr>
<tr>
<td><strong>CCT or Accreditation date</strong></td>
<td>Where applicable and known by trainee at time of completing the form. Date for programme completion where known for CESR Route ((Change to Form R required Accreditation Type))</td>
</tr>
<tr>
<td><strong>Accreditation Type</strong></td>
<td>CESR; CESR GP; CEGPR; CEGPT CP – drop down list ((Change to Form R required Accreditation Type))</td>
</tr>
<tr>
<td><strong>College/Faculty</strong></td>
<td>Royal College/Faculty assessing training for the award of CCT (if undertaking full prospectively approved programme). Drop down list. See Post Report PR05.1</td>
</tr>
<tr>
<td><strong>Programme start date</strong></td>
<td>Using the word programme continues the habit of referring to a trainee’s individual programme of placements ((Change to Form R required Programme Start Date)) Derived with rules</td>
</tr>
<tr>
<td><strong>Full-time, part time</strong></td>
<td>Derived. If less than 1 WTE then they are part time.</td>
</tr>
<tr>
<td><strong>%</strong></td>
<td>Current</td>
</tr>
<tr>
<td><strong>Appointment type</strong></td>
<td>Derived</td>
</tr>
<tr>
<td><strong>Year of training</strong></td>
<td>e.g. 1</td>
</tr>
<tr>
<td><strong>Electronic Sign off</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Data Disclaimer Notice</strong></td>
<td></td>
</tr>
</tbody>
</table>

All items marked with * should be pre-populated by the deanery as a default. Any changes made by the trainee are flagged to the deanery as changes, which need confirmation/approval before they are updated in the system. Record of changes to core data should be kept e.g. Specialty 3 added as trainee has been recruited to a programme leading to three CCTs not just the default two listed on the database.

**Action:**
Ask GMC if require deaneries to monitor accreditation type as this is currently listed on the Form R.

**6.5. Form R from 2010 Gold Guide**
Registering for Postgraduate Specialty Training

<table>
<thead>
<tr>
<th>SHA:</th>
<th>Forename(s):</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Deanery</strong></td>
<td><strong>Surname</strong></td>
</tr>
<tr>
<td><strong>Medical School awarding primary qualification:</strong> name and country</td>
<td><strong>Date of Birth:</strong></td>
</tr>
<tr>
<td><strong>Primary Qualification and date awarded:</strong></td>
<td><strong>GMC/GDC Reg No.:</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Attach passport photo</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Gender</strong></td>
</tr>
</tbody>
</table>
Work Address: |
Work Phone: |
Email: |

Home/Other Address: |
Home Phone: |
Mobile Phone: |
E-mail: |

Immigration Status: (eg resident, settled, work permit required) |
Post Type or Appointment: (eg LAT, Run through, FTSTA etc) |

GMC Programme Approval Number: (to be complete by Postgraduate Dean) |
National Training Number: (to be completed by Postgraduate Dean on first registration) |

Deanery Reference Number: |
Specialty: |

Specialty 1 for Award of CCT: |
Specialty 2 for Award of CCT |

I confirm that I have been appointed to a programme leading to award of a CCT subject to satisfactory progress |
I confirm that I will be seeking specialist registration by application for a CESR |
I confirm that I will be seeking specialist registration by application for a CESR CP |
I confirm that I will be seeking specialist registration by application for a CEGPR |
I confirm that I will be seeking specialist registration by application for a CEGPT CP |

Provisional Date for CCT/CESR/CEGPR Award: |
Royal College/Faculty assessing training for the award of CCT (if undertaking full prospectively approved programme): |

Initial Appointment to Programme: (Full time or % of Full time training) |
Date of Entry to Grade/Programme: (Substantive date started in Programme of appointment) |

I confirm that information recorded above is correct |
Specialty Trainee: __________________________ Date: __________ |
Postgraduate Dean/Head of School/STC Chair/TPD: __________________________ Date: __________ |

7. Qualifications

7.1. Purpose |
To record the qualification of trainees and trainers, etc. |

7.2. Scope |
To record attainment or completion of work-related examinations or courses for example: |
- Trainees |
  - Primary Medical Qualification |
  - MRCP |
  - ALS |
- Trainers |
  - Equality and Diversity |

7.3. Process |
Primary Medical Qualifications can be updated via the GMC interface for Hicom Deaneries.
Questions
How are mandatory exams recorded such as attainment of the MRCP?
In some areas this is being done and they will check where this request came from and whether they need to continue to do so. Qualifications is an area that can be built into an on line form for trainees to complete in the future. The following reference table is a consolidation of the London Deanery (Figure 4).

8. Training Numbers
8.1. Purpose
All trainees are issued with a training number which assists in tracking their training and confirms their basic details such as deanery, specialty and accreditation type. It should be possible to complete this workflow in bulk for cohorts of trainees.

8.2. Scope
Start = Recruited to a new position and had an active record assigned on the database
End = Training number provisionally issued and confirmed

LAT, FTSTA and CMT trainees are assigned Deanery Reference Numbers; substantive specialty trainees are assigned National Training Numbers.

8.3. Process
Deanery Reference Number
a. Appointed to a training post at LAT, FTSTA grade or in core specialty
b. Deanery Reference number assigned on the basis of:
   Date of entry to grade Specialty Type of appointment Deanery
   Format: - YY/AAA/Bnnnn/CC
   Where: YY = Year of appointment in two digits AAA = Specialty identifier
       B = Type of appointment nnnn =Counter, trainee to be automatically assigned next available one
       CC = Deanery

Intrepid should create Deanery Reference Numbers (DRN) in bulk. At the moment users have to create each DRN individually on an annual basis which is very time consuming. If there could be a function which creates the next DRN automatically after the first one has been recorded this would extremely beneficial. For example, a CMT DRN for the Northern Deanery looks like this – 10/CMT/C0001/NR. At the moment the user would have to create each subsequent DRN individually however if the process were automated to create the next in sequence (10/CMT/C0002/NR, 10/CMT/C0003/NR etc.) automatically it would save a huge amount of time.

National Training Number
Appointed to a substantive specialty training post
National Training Number assigned on the basis of:
Deanery Specialty Type of appointment
Format - DDD/EEE/nnn/F
Where: DDD = Deanery EEE = Specialty nnn = Counter, trainee to be automatically assigned next available one F = Type of appointment

“Next Available” counter
The “counter” function described above should not create sequential counter numbers incrementally, as NTNs come from a limited pool. The counter should assign the next available number from the pool, not add 1 to the previously assigned number. Should there be no NTNs available in the pool, a warning message should be generated for the operator.

Related Processes
• New joiner (trainee)
• Form R
• Accreditation
9. Change of Appointments / Training Programme Applications

- Decision to undertake OOP
  - OOP form completion
  - Programme Director approval
  - Deanery approval
  - CCT date change?
    - Yes
      - CCT date amendment
    - No
      - Sent to College
  - Training credit wanted
    - Yes
      - SAC approval
    - No
      - OOP recorded
  - CCT date amendment
  - Approval Confirmation to trainee and deanery
9.1. OOP / Programme Change Requests

9.1.1. Purpose
To record any change made to a planned programme of training for an individual and its approval by the relevant teams.

9.1.2. Scope
Start = Decision to vary the current programme
End = Completed and approved by all relevant bodies

9.1.3. Process for Programme Change Requests
1. Trainee decides to undertake OOP/Change of Programme
2. Change of Programme/OOP form completed by trainee
3. Approval recorded created on database
4. OOP/Programme Change form reviewed and signed by Educational Supervisor
5. OOP/Programme Change form reviewed and signed by Programme Director
6. OOP/Programme Change form reviewed and signed by Postgraduate Dean
7. OOP/Programme Change approval record updated and CCT date amended where required
   a. CCT revised completion date amendment may be required.
8. Where required OOP form sent to relevant College or Faculty for approval
9. College or Faculty approved forms returned to deanery
   a. Will confirm if approved
   b. Provisional credit for the post
10. Details of approved OOP sent to GMC where required
11. GMC approval number recorded

<table>
<thead>
<tr>
<th>Programme Change Type</th>
<th>OOPR</th>
<th>Defined national List</th>
<th>OOPT, OOPE, OOPR, OOPC from Out of Programme Request Form, Change of Sessions, IDT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Placement/Change Start date</td>
<td>01/08/10</td>
<td>Date</td>
<td></td>
</tr>
<tr>
<td>Placement/Change End date</td>
<td>01/08/13</td>
<td>Date</td>
<td></td>
</tr>
<tr>
<td>Placement IDs affected</td>
<td>Gastro post at Royal Hospital</td>
<td>Placement ID</td>
<td>Start/End dates of change can lookup against placements affected</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Prof. James Barrett</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date requested</td>
<td>01/02/10</td>
<td>Date</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>GMC Approval Number</th>
<th>GMC Connect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved?</td>
<td>No</td>
</tr>
<tr>
<td>Date of approval decision</td>
<td>01/04/10</td>
</tr>
<tr>
<td>Dean’s (final) approval date</td>
<td></td>
</tr>
<tr>
<td>Who did not approve the OOP/Change in programme?</td>
<td>Programme Director</td>
</tr>
<tr>
<td>Only to be completed where the OOP is not approved. Does name need to be recorded or just the position?</td>
<td></td>
</tr>
<tr>
<td>Why was the OOP/Change in programme not approved?</td>
<td>Failure to progress in clinical training</td>
</tr>
</tbody>
</table>
A future project for the Deanery Data Group will be to develop a national form for OOP requests which could be available for trainees to complete online in an interactive self service format in the future. This could be something that could be sent automatically to Colleges for approval/notification. Whilst there is an application form in Gold Guide – in practice it is changed within Deaneries to match local business processes. The challenge is to try and develop a standard on line form with scope to allow differing business processes within a Deanery.

9.2. OOP Annual Review
Undertaken for each year of OOP
1. Pre-populated OOP form sent to trainee
2. Trainee amends and/or signs the Form
3. OOP form reviewed and signed by Programme Director
4. OOP form reviewed by ARCP panel

9.2.1. Return to Clinical Training
- Confirmation of date of return and supporting evidence for any credit for clinical or research training to be submitted by the trainee to the deanery and the relevant approval body e.g. for medical trainees this would go to the JRCPTB.
- If claiming credit, details sent to SAC for confirmation of credit
- SAC decision logged on the database, CCT date amended if required and letter confirming credit sent to trainee and deanery.

9.2.2. Historical records
Records should be kept for all change of appointment / programme applications whether they are successful or not

Questions
- What fields on the OOP approval form are amendable by the trainee?
- If the trainee makes a change what happens?
- What happens if the form is not returned annually?
- How are these OOP requests transferred to the GMC?
- How is time out for maternity leave applied for? Is there a set form for this? MAT B1 – Paternity leave?
- Is the amount of credit for a particular OOP post recorded by the deanery?
- Is the approval by the College or Faculty and/or GMC recorded? If not should it be?

10. Tracking Accreditation Date
10.1. Purpose
To keep a history of changes to a trainee’s CCT, or CESR (CP) date, so if challenged by the GMC or College it can be defended.

10.2. Scope
Start = ARCP outcome 3 or 5, maternity, paternity or sick leave, change in % of training, some OOP, change in specialty / sub-specialty
End = Accreditation date is changed on database

10.3. Process
1. Input specifying extension to training time is received
2. Relevant Accreditation date fields are updated on the database and a reason for the change is recorded

<table>
<thead>
<tr>
<th>Field</th>
<th>Example</th>
<th>Type</th>
<th>Source and notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anticipated accreditation Date 1</td>
<td>01/08/15</td>
<td>Date</td>
<td>In the vast majority of cases the CCT dates should be the same across all the specialties a trainee is accrediting in</td>
</tr>
</tbody>
</table>
10.4. Historical records
Records to be kept of all CCT date changes including the reason for change, the date of the change and who made the change.

11. Leaver Process

---

11.1. Future Leaver Workflow Description

**Decision to leave programme**
- **Removed from payroll**
- **Leaver form created**
  - **Form Completed**
    - **Yes**
      - **Reason for leaving recorded**
    - **No**
      - **Chase form**
11.1.1. Introduction
The purpose of this process is to provide a standard and consistent approach for administrators, managers and leavers.

a. Start
A system administrator will mark a person as a leaver which will initiate the process. An automated email will be sent to the leaver’s primary email address listing their responsibilities within this process and directing them to trainee web site. Optional emails would also be sent to managers listing their responsibilities within the process and how to complete them depending on configuration.

b. Leaver
The leaver will log onto the online system via a link in the initial email and will be presented with a leaver screen. This leaver screen will contain information relating to the use of the system and display the status of their leaver checklist along with timescales.

From the leaver screen, the leaver will have the ability to complete the exit questionnaire, view their task details/guidance, mark their tasks complete, access downloadable documents and navigate to other areas of the system.

c. Manager
The manager(s) will log onto the online system via a link in the initial email and will be presented with a leaver screen. This leaver screen will contain information relating to the use of the system and list outstanding checklists associated with leavers along with timescales. If the manager logs onto the system via another link they will need to navigate to the leaver screen first. From the leaver screen the manager will have the ability to view leaver’s details, view the status of a leaver’s checklist, view their task details/guidance, mark their tasks complete, access downloadable documents and navigate to other areas of the system.

d. Administration
The administrator(s) will log onto the online system via their normal link. They will first need to navigate to the leaver section and will be then presented with a list of outstanding tasks. From the leaver screen the administrator will have the ability to view the status of leavers and managers checklists, override a leaver or manager task, view their task details/guidance, run processes, mark their tasks complete, access downloadable documents and navigate to other areas of the system.

e. Predecessors and Successors
Preceding workflow:  x
Following workflow:  Inter Deanery Transfer, NTN

f. Linked processes
11.2. Configuration
The nominated system supervisor(s) will be able to configure multiple leaver processes specific to the type and classification of the person and to their local policies. This will include:

- The content of the initial email that is sent to a leaver or manager(s)
- The content of escalation and reminder emails.
- The number and frequency of reminder emails.
- Potential for an exit questionnaire consisting of questions with free text answers, predefined list of answers or checkbox answers. This will automatically create an associated leaver task.
- Downloadable documents accessible by leaver and/or manager.
- A checklist of leaver tasks each with escalation timescales. Each task will detail the leaver's responsibilities along with instructions/guidance.
- Escalation rules for leaver tasks to administrators or managers once they fall outside of the timescales.
- Optional checklist of manager tasks with escalation timescales. Each task will detail the manager's responsibilities along with instructions/guidance.
- Ability to assign manager(s) from a static list or dynamically from a linked manager in the leaver's record or associated record (ie. trust/practice contact).
- The escalation of manager tasks to admin if they fall outside of the timescales.
• The final escalation to admin once all leaver and manager tasks are complete or if they all fall outside of the timescales.
• A checklist of administration tasks with instructions.

The initial email sent to a leaver or manager(s) will include a hyperlink to the Trainee Person web site, instructions for logging-on and terms & conditions and guidelines relating to the use of the system. Administration tasks must be simple text instructions, contain links to other systems with instructions, contain links to other processes within the system with instructions or run fully automated processes.

11.3. Leaving Reason
Reference table provided by The London Deanery after a consolidation period of 5 years (figure 6).

11.4. Leaver Process for ARCP
To close the loop on trainees who leave the programme early through resignation, poor progression or inter-deanery transfer.

11.4.1. Scope
Start = when ARCP outcome 4 is awarded, IDT application is approved or trainee submits a resignation
End = trainee record closed on the database

11.4.2. Process

<table>
<thead>
<tr>
<th>Field</th>
<th>Example</th>
<th>Type</th>
<th>Source and notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reason for leaving</td>
<td>Resignation</td>
<td>Defined national list</td>
<td></td>
</tr>
<tr>
<td>Destination</td>
<td>GP training</td>
<td>Defined national list</td>
<td></td>
</tr>
<tr>
<td>Leaving date</td>
<td>01/08/10</td>
<td>Date</td>
<td></td>
</tr>
</tbody>
</table>

Data capture on trainees who leave a Deanery is not a straight forward process. The intention is to complement local data capture; i.e. feedback from TPD, HR, PGC etc with web based self service feedback functionality which the trainee can complete when leaving a Deanery or post.
12. Training Accreditation

12.1. Notes
This has been mapped from the RCP perspective but there may be different processes in place in different deaneries and Colleges. However processes are similar between the respective Colleges.

12.2. Purpose
To manage the accreditation and certification routes of trainees and to close active trainee accounts.

12.3. Scope
Start = Notification form sent to trainee
End = Certificate awarded

Example JRCPTB Process
1. 9 months before CCT date the notification form is issued by the college to the trainee. Notification forms are only sent to those that have attended their PYA and paid all relevant training fees.
2. Trainee completes the CCT notification form
3. Trainee attends final RITA or ARCP where RITA G or ARCP outcome 6 is awarded
4. Programme Director reviews and signs notification form
5. Dean reviews and signs notification form
6. Notification Form returned to College/Faculty
7. Specialty Advisory Committee reviews and agrees the form
8. Recommendation for a CCT sent to GMC and trainee told to apply online to GMC for accreditation
9. Trainee applies online and pays accreditation fee (£500)

Field definitions
- CESR
- CESR(CP)
- CEGPR
- CEGPR (CP)
- Foundation
- Core
- CCT

CESR and CEGPR are equivalent to Certificates of Completion of Training (CCT) in the UK and certify that the recipient is eligible for entry onto the Specialist Register or the GP Register respectively. CCTs are only issued to doctors who complete full approved training programmes and CESR and CEGPR are for the certification of Specialist and GP training, qualifications and experience which is partly or completely acquired outside of approved programmes.

The Certificate of Eligibility for Specialist Registration - Combined Programme (CESR (CP)) route is in place for trainees who have been appointed above ST1/CT1 level to a Deanery and General Medical Council (GMC) approved training programme. Those training towards a CESR(CP) now have a training number ending in “L”, those ending in “E” refers to trainees getting a CESR. A CEGPR (Certificate Confirming Eligibility for GP Registration) is awarded to doctors who have not followed the standard CCT route and have not completed a full GMC approved training programme and wish to have their training, qualifications and experience assessed for eligibility for entry into the GP register.

13. Data Collection Inputs, Outputs and Work streams

13.1. Inputs
- ESR (if in use in that particular Deanery)
Update Interface, enabling changes to personnel, position, assignment, qualification and professional registration details to be (selectively) updated in Intrepid from data supplied by the ESR.

- GMC (Deanery – GMC Interface)
- Recruitment Systems
- Trainee Deanery Web Self Service (planned development 2011)
- Admin
- ePortfolio (future development)

13.2. Outputs

- GMC
  - Trainee Survey
    The National Survey of Trainee Doctors provides a picture of what the UK’s trainees think about their training. The survey is a vital source of feedback and the information we need to help improve the quality, now and in the future, of Specialty including GP training in the UK.
  - Trainer Survey
    The National Surveys of Trainers is a key opportunity for trainers to tell the regulator about their experiences as a trainer. Whether these are about a need for more time in job plans, more support from the local deanery or education providers, the survey provides the platform trainers need to voice their views. Outcomes help the regulator inform improvements in support for trainers.
  - ARCP/RITA Report

- Royal Colleges
  - Form R
  - ePortfolio
  - Trainee Reports

- DOH
  - Planning Extract
    The Planning Extract records all doctors and dentists issued with a Training Number or Deanery Reference Number
  - WOMAB
    The Specialty Training Monitoring form records all trainee doctors and dentists issued with a Training Number (TN) or Deanery Reference Number (DRN).

- Trusts
  - ESR
    Recruitment Interface, enabling vacancy data to be imported into Intrepid from the ESR and information on newly recruited trainees to be transferred back into the ESR from Intrepid.
  - TPD
  - HR
  - Postgraduate Centres
  - Educators

- Ad-hoc Reporting

- Deanery
  - Relocation Expenses
  - Foundation Annual Report
  - Leave
  - Courses
  - NTN/DRN
  - E&D (EQD)
  - Approval/Accreditation
  - Study Leave
  - ARCP
  - OOP
  - CCT
  - Doctors in Difficulty

13.3. Work Streams

- QA
- Starters
- OOP
- Sickness
• Leavers
• Maternity
• Update
• NTN
• Communications
  o Email
  o SMS
  o Fax
  o Telephone
  o Post

14. **Conclusion**
   The Person Workgroup have mapped some of the processes (because of time constraints) which happen now and looked at some new developments for the future; including a self service web based data capture ability by the trainee. Once in place the Person processes will have to be regularly reviewed and updated as regulations change and Deanery business processes require further enhancements to the data management processes.
15. Appendix 1
1a- Person Mind Map
16. Appendix 2
2a - Future Self Service workflow requirements for Hicom Deaneries - Introduction:

User Classes

The main benefit of Intrepid V10 would be a workflow-based approach. Different types of user should be presented with a bespoke set of data entry, reporting and review workflows. The workflows available should primarily be defined by the type of user, but the option should be given for administrators or superusers to assign custom workflows to each user where their job role requires it.

These diagrams should help to form the basis of which workflows are presented to each type of user.

Most workflow descriptions should be fairly self-explanatory and understandable, however it should be noted that this is a working document and not entirely complete (the workflows for consultants have not yet been defined) and subject to further development.

“DaDiD” refers to “Doctors and Dentists in Difficulty” - broadly speaking, this is the sensitive, personal data about a trainee’s individual circumstances and should be subject to strict access controls to prevent unauthorised viewing.

Episodes of Engagement

The concept of an Episode of Engagement is that a trainee may engage with a deanery several times, in several different capacities. For example, the first Episode of Engagement could be as a Foundation Trainee. Upon completion of the Foundation Programme, a second Episode could be recorded as the time taken to complete Core Medical Training. The trainee may then engage further as a higher specialty trainee, and on completion again as a supervising consultant.

Each of these Episodes of Engagement should be regarded as discrete; data pertinent to one episode should not be confused as being relevant to another; for example the trainee may have been working on a Less Than Full Time (LTFT) basis for the duration of his higher specialty training; when reporting it is important that LTFT working does not “contaminate” other Episodes where the trainee was working full time. There are several fields which are currently held in the “Staff” table in Intrepid which could affect reporting for all episodes of engagement; a method should be developed to obviate this problem.

Data Validation & Business Rules

One of the primary concerns of any database system is the validity of the information contained within it. The best place to highlight any problems with the validity of database data is at the point of data entry; a typo or slip of the mouse may easily create an input error, and “taking short-cuts” or poor operator involvement may cause errors of omission. It is acknowledged that people make mistakes, especially with repetitive tasks such as data entry. The goal should be to support the operator when these errors occur and prevent a minor typo or missing field from becoming a reporting error. With this in mind, an important facility would be the ability for administrators and superusers to programme validation and business rules. These, preferably, should take the form of “If/Then” conditional statements; for example

\[\text{IF } \text{[Less than Full Time]} \text{ equals “Yes” then “Whole Time Equivalent” must not equal “1.0”, or}\]
\[\text{IF } \text{[Contract type]}=\text{“LAT” then “NTN/DRN” must not begin “NTH”}\]

These data validation / business rules statements must be fully customisable, and be able to provide user-friendly, deanery defined warning messages to the operator. They must be powerful enough to support nested IF statements and multi-condition arguments.
User classes

These represent most of the users of Intrepid. Each user group is expanded upon in later stages of this document and workflows suitable for that group are presented.
Dental Users

The Dentistry Team require a very comprehensive set of workflows, as they perform the recruitment, administration and reporting functions for dental trainees.
**Specialty Programme Coordinators**

SPCs are the primary point of contact for trainee’s non-HR issues. The SPC will have involvement in any Doctors and Dentists In Difficulty processes, apply to the GMC for OOP approval and coordinate registration with the Royal Colleges through the FORM R process.

The SPC will be required to report on personal and sensitive information about trainees – for example equality and diversity metrics – however this should be a review-only position.
2e - Future workflow requirements for Hicom Deaneries – General Practice Trainee: -

**General Practice**

General Practice coordinators work with Vocational Training Schemes to deliver the same workflows for general practice trainees as SPCs and the Lead Employer Trust deliver for core and higher specialty trainees, however there are differences as to where these functions sit.

GP trainees are employed directly, not through a Lead Employer Trust arrangement; some of the HR functions are performed by the VTS schemes and some by the GPCs.
VTS Users

Rotational planning and post management of GP trainees is administered by the vocational training schemes. The VTS also look after a number of the HR workflows. GP trainees are employed directly by trusts and surgeries, therefore this is limited to creation of Out Of Programme, maternity/paternity posts and variations on working type – full or part time.

VTS users are the primary point of contact for GP trainees for updates to contact details and the DaDiD.
Foundation School

The Foundation School currently has the least use and potential use of Intrepid. As foundation trainees are employed directly by the trusts, the vast majority of input is done at the trust level. The Foundation school would require reporting functions and would have read-only access to a small number of workflows.

The Foundation school requires full access to the Doctors and Dentists In Difficulty workflow.
**The Information Team**

The information team can be split into two main functions; the "information team" workflows and the "system administration" functions.

The information team workflows support the other user classes and has a heavy emphasis on post management and reporting.

The system administration functions help maintain the smooth running of the database, facilitating other users to appropriately carry out their workflows.
Trust Education Centres have many different workflows. The workflow requirements vary based on the type of PERSON record being administered. Trusts have full responsibility for Foundation trainees, these being employed directly by the trusts, however other trainee (or staff) types will have different input/reporting requirements. The workflows available to the user should vary not only by the user type, but also based on the staff type of the record that the user is working on.

The trainee type here is represented by Episode of Engagement (EoE). Episodes of Engagement are defined at the start of this document.
The Lead Employer Trust

The Lead Employer Trust workflows centre around HR and rotational management functions. The LET recruits trainees, inputs data to the Minimum Data Set, rotates trainees through placements and determines the nature of the contract and training type.

The LET makes extensive use of the ESR system; where possible changes to ESR-linked fields should only be made on the ESR system and the link should reflect those changes into the deanery system.

The LET supplies all the information which feeds into the training numbers; this includes the nature of training, the suffix required and the specialty. It would be advantageous for the system to automatically assign a free NTN based on this information.
2k - Future Person Portals for Hicom Deanery Users

The future person portals would be available to all person types.

The trainee requirement will be dependant to some extent to the contractual arrangements Deaneries have with their suppliers. For Hicom Deaneries the requirement would be that the portal will allow a trainee to have access to the following modules dependant on arrangements between Deanery and supplier.

- Minimum Core Dataset (verifiable at every login)
- Form R
- Deanery Forms such as IDT, OOP, LTFT (yet to be fully developed)
- Report functionality
- Course Booking System
- Study Leave
- Careers Module (yet to be developed and defined)
- Trainee Support Module (yet to be developed and defined)
- Any other modules not already mentioned above

**Trainee primary screen**

After Login the trainee would have to verify with a simple tick box the following options before being allowed to progress to any of the above modules and options. The primary screen data would be valid at that particular moment in time:

- Given Name / Surname
- Primary Email
- Current Training Grade / Current Programme / Site / Specialty
- Current Educational Supervisor

The primary screen boxes should be pre-populated and the trainee will have the ability to change/amend data on display. Deanery administrator will then have the ability to accept the change – pending option to investigate further if not happy or reject the change if there is a disagreement. The Trainee must not be able to progress to any further screens until the Primary Screen data has been validated.

**Administrator Portal**

A warning box/message to be displayed whenever a person has updated information by the Person Portal.

Below is a suggested dataset for the ‘snap shot’ people tab to be displayed to the administrator on initial login. One issue that has been highlighted is that in order to see key information relating to a person, a user has to click on several tabs. The suggestion is that when a record is selected from the staff list and clicked to open, a snap shot of key data is shown on one screen. To see more data there would need to be a button ‘click here for full profile’.

All records would still need to be accessed on a permissions basis, but in some cases the snap shot of data would be all that is required. There would also need to be greater flexibility on ‘read/write’ permissions for users. For example, at the moment a Trust user that needs to amend study leave and relocation expenses has to have ‘read/write’ access. This means that we cannot restrict their ability to change staff or post data which is a Deanery function. Within the operator/permissions tables it is suggested that when setting up a trust user specific fields could be made ‘read only’.
21 - Data set for ‘snap shot of data’

**Status Details – showing inactive details if status is not current**

<table>
<thead>
<tr>
<th>Staff Record Status</th>
<th>Inactive from</th>
<th>Reason</th>
<th>Destination</th>
</tr>
</thead>
</table>

**Photo – trainee or person can upload their own photo. Any unverified photos would have a clear message that it was not an authorised image and must not be used for security checking**

<table>
<thead>
<tr>
<th>Photo (can be uploaded by Deanery of staff person)</th>
<th>Source (e.g. Recruitment, self upload, Deanery)</th>
<th>Verification status - a tick box with date and verification stamp (i.e. by who)</th>
</tr>
</thead>
</table>

**Contact Details (From Form R/Recruitment upload?)**

<table>
<thead>
<tr>
<th>Forenames (as appears on GMC records)</th>
<th>Surname (as appears on GMC records)</th>
<th>Known as</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>GMC number</th>
<th>GMC Status</th>
<th>GMC Expiry Date</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Primary Address</th>
<th>Preferred phone number (mobile?)</th>
<th>Primary email address</th>
</tr>
</thead>
</table>

**Post Details**

<table>
<thead>
<tr>
<th>Post number</th>
<th>Staff post grade</th>
<th>Staff post specialty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post Site</td>
<td>Post Trust</td>
<td>Nature of contract</td>
</tr>
<tr>
<td>Post type</td>
<td>WTE/hours</td>
<td></td>
</tr>
</tbody>
</table>

**NTN Details**

<table>
<thead>
<tr>
<th>NTN</th>
<th>NTN Specialty</th>
<th>Anticipated CCT Date</th>
</tr>
</thead>
</table>

**Programme History – As each programme is started/completed it is date stamped on the person history**

<table>
<thead>
<tr>
<th>Programme (e.g. Foundation)</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
</table>

In addition to the Snap Shot screen all other datasets described in this document would be needed in a future administration management portal. The screen displays must be user friendly with easy access to report functionality. An ability to email trainees from within a screen should be a key functionality if there is a query to chase.
17. **APPENDIX 3**

3a - Existing Out of Programme (OOP) Request and Annual Review Form from 2010

Gold Guide

Out of Programme (OOP) Request and Annual Review. (For new requests, this form should be sent to the Postgraduate Dean, after it has been signed by the trainee’s educational supervisor and training programme director. The Postgraduate Dean will use this to support the request for prospective approval from GMC where this is required. For annual review and renewal, the document should be signed by the trainee and training programme director)

<table>
<thead>
<tr>
<th>Trainee’s name: GMC no:</th>
<th>Training number:</th>
<th>GMC No:</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-mail address:</td>
<td>Training number:</td>
<td>Post/Programme approval number:</td>
</tr>
</tbody>
</table>

Contact address/e-mail address for duration of OOP if granted:

<table>
<thead>
<tr>
<th>Specialty:</th>
<th>Training Programme Director (TPD):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current indicative year of clinical programme:</td>
<td>Current provisional expected end of training date:</td>
</tr>
</tbody>
</table>

Have you discussed your plans to take time out of programme/continue your time out with your educational supervisor and/or training programme director? Yes  No

Please indicate if you are requesting time out for:

<table>
<thead>
<tr>
<th>New request</th>
<th>On-going</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Prospectively approved by GMC for clinical training (OOPT)</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Clinical experience not prospectively approved for training by GMC (OOPE)</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Research for a registered degree (OOPR)</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Career Break (OOPC)</strong></td>
<td></td>
</tr>
</tbody>
</table>

Give a brief description of what will be done during time out of programme and where it will take place (not required for on-going OOP). In addition, for:

**OOPT**: attach details of your proposed training for which GMC prospective approval will be required if the training does not already have GMC approval (e.g. if it is part of a recognised training programme in a different Deanery if will already be recognised training). For on-going OOP this document should accompany the assessment documentation for ARCP.

**OOPE**: describe the clinical experience you are planning to undertake (e.g. overseas posting with a voluntary organisation). For on-going OOP, a short report from your supervisor confirming that you are still undertaking clinical experience should accompany this for the ARCP.

**OOPR**: attach your outline research proposal to this document and include the name/location of your research supervisor. For on-going OOP a report from the research supervisor needs to be attached to this document for the ARCP.

**OOPC**: Please give a brief outline for your reasons for requesting a career break whilst retaining your training number

How long would you intend to take time out/still remain on your OOP? .................

What will be your provisional date for completing training if you take/continue with this time out of programme? ....../...../...

If time out or your programme is agreed, you will be required to give your training programme director and current/next employer 3 months notice of leaving the programme

Date you wish to start your out of programme experience (which must take into account the 3 months notice period): .........................

Date you plan to return to the clinical programme: .........................................................
I am requesting approval from the Postgraduate Dean’s office to undertake the time out of programme described above/continue on my current OOP whilst retaining my training number. I understand that:

a) Three years out of my clinical training programme will normally be the maximum time allowed out of programme. Extensions to this will only be allowed in exceptional circumstances that will need further written approval from the Postgraduate Dean.

b) I will need to liaise closely with my Training Programme Director so that my re-entry into the clinical programme can be facilitated. I am aware that at least 6 months notice must be given of the date that I intend on returning to the clinical programme and that the placement will depend on availability at that time. I understand that I may have to wait for a placement.

c) I will need to return an annual out of programme report for each year that I am out of programme for consideration by the annual review panel. This will need to be accompanied by an assessment report of my progress in my research or clinical placement. Failure to do this could result in the loss of my training number.

d) I will need to give at least 3 months notice to the Postgraduate Dean and to my employer before my time out of programme can commence.

Signature Block - Below
18. **APPENDIX 4**

For information Only Royal College of Physicians Data Collection Feedback

### 4a - EPortfolio user information

<table>
<thead>
<tr>
<th>Role Type</th>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trainee</td>
<td>Trainee</td>
<td>ePortfolio owner. Able to add most (but not all) information and edit/delete some types of information</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Clinical Supervisor</td>
<td>Able to view all information for trainees under supervision and to add to and comment on records. Needs to be linked to each trainee by their post. Suggested list of names is defined by post location.</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Educational Supervisor</td>
<td>Same as Clinical Supervisor</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Academic Supervisor</td>
<td>Same as Clinical Supervisor</td>
</tr>
<tr>
<td>Programme</td>
<td>Programme Director</td>
<td>Able to: view all information and to add to and comment on records for all trainees in a programme, defined by speciality within a geographic location. administer user and post details, alerts, local information etc. add ARCP outcome forms. run reports and data extracts</td>
</tr>
<tr>
<td>Programme</td>
<td>College Tutor</td>
<td>Same as Programme director except limited to viewing all trainee records in CMT / ACCS training within a trust or hospital (i.e. trainees in CT1-2, ST1-2, FTSTA1-2)</td>
</tr>
<tr>
<td>Admin</td>
<td>Limited Administrator</td>
<td>Able to: see what information has been recorded for all trainees in a geographic location and defined specialties but not the content of all information - i.e. can see what forms have been completed but not the content of all forms add new users in all roles. administer post details, alerts, local information etc. move and delete some forms add ARCP outcome forms run some reports (not analyse forms)</td>
</tr>
<tr>
<td>Admin</td>
<td>Administrator</td>
<td>Same rights as current Administrator roles plus able to run data extracts and able to review the content of forms.</td>
</tr>
<tr>
<td>Supervisor</td>
<td>ARCP / PYA Assessor</td>
<td>Able to: view all information for selected trainees for a limited period add ARCP outcome forms and PYA reports</td>
</tr>
<tr>
<td>Programme</td>
<td>Regional External Advisor</td>
<td>Able to view all information for trainees in a particular training programme, but not able to add or amend forms to a trainee. Writes external advisor report which is linked to the programme</td>
</tr>
</tbody>
</table>
4b - Royal College of Physicians Trainee Management Screen (currently being updated)

The format in the EPortfoliowill look something like the below and this similar type of layout might be of interest to the deaneries.

<table>
<thead>
<tr>
<th>Training Period - LAT - Wessex - Clinical pharmacology &amp; therapeutics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dr Anne Other (Programme Director) (01/09/2008 - 31/08/2010)</td>
</tr>
</tbody>
</table>

Enrolled

<table>
<thead>
<tr>
<th>Year</th>
<th>Location</th>
<th>Specialties</th>
<th>Dates</th>
<th>%</th>
<th>Supervisors</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Royal Bournemouth Hospital</td>
<td>Clinical pharmacology &amp; therapeutics</td>
<td>01/09/2009 - 31/08/2010</td>
<td>100</td>
<td>Dr George Harris (Educational Supervisor), Dr Alan Hunter (Educational Supervisor)</td>
</tr>
</tbody>
</table>

Training Period - CTN - Wessex - Core Medical Training

| Dr George Harris (Programme Director) (01/08/2007 - 31/08/2009) |

Enrolled

<table>
<thead>
<tr>
<th>Year</th>
<th>Location</th>
<th>Specialties</th>
<th>Dates</th>
<th>%</th>
<th>Supervisors</th>
</tr>
</thead>
<tbody>
<tr>
<td>CT1</td>
<td>North Hampshire</td>
<td>-</td>
<td>01/08/2007 - 04/12/2007</td>
<td>100</td>
<td>Dr George Harris (Educational Supervisor)</td>
</tr>
</tbody>
</table>

| CT1  | North Hampshire | - | 05/12/2007 - 01/04/2008 | 100 | Dr George Harris (Educational Supervisor) |

4c - OOP recording at JRCPTB

Process

- OOP request form received
- If credit requested by trainee for the post, note of receipt of the document is made on the database and the documentation is sent to the SAC for approval. When the decision is approved or if SAC approval is not required move to 3.
- Log the period of OOP on the database (below), the number of months credit to be gained for the post and the new CCT date. These details are automatically added to the training history (below).
- Letter automatically produced confirming OOP approval and sent to trainee and deanery.
# 19. Dataset

## Deanery Data Dictionary

<table>
<thead>
<tr>
<th>Record</th>
<th>Field Name</th>
<th>Rationale</th>
<th>Requirement</th>
<th>Validation Rule</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>PERSON</td>
<td>Deanery Unique Identifier</td>
<td>Unique system generated number for the person</td>
<td>System</td>
<td>Read only to users</td>
<td></td>
</tr>
<tr>
<td>PERSON</td>
<td>Deanery Code</td>
<td>Derived from Unique Deanery Identifier</td>
<td>Mandatory</td>
<td>From reference table</td>
<td>People records are able to have more than one person type assigned.</td>
</tr>
<tr>
<td>PERSON</td>
<td>Person Type</td>
<td>To identify the type of person - important for access, reporting, interfaces, etc.</td>
<td>Mandatory</td>
<td>From reference table see 4.i</td>
<td></td>
</tr>
<tr>
<td>PERSON</td>
<td>Surname</td>
<td>To identify person</td>
<td>Mandatory</td>
<td>Must match GMC/GDC data if the person has a GMC/GDC reference</td>
<td>Should track/record changes and date periods ie. When someone gets married</td>
</tr>
<tr>
<td>PERSON</td>
<td>Given Name(s)</td>
<td>As defined by the GMC interface</td>
<td>Mandatory</td>
<td>Must match GMC/GDC data if the person has a GMC/GDC reference</td>
<td>May include more than one name</td>
</tr>
<tr>
<td>PERSON</td>
<td>Initials</td>
<td>Used for communications/reporting</td>
<td>Housekeeping</td>
<td>Read only to users</td>
<td>Automatically derived from Given Name(s) by the system</td>
</tr>
<tr>
<td>PERSON</td>
<td>Title</td>
<td></td>
<td>From reference table</td>
<td>Professor, Mr, Dr, military ranks etc</td>
<td></td>
</tr>
<tr>
<td>PERSON</td>
<td>Marital Status</td>
<td>E&amp;D</td>
<td>From reference table</td>
<td>Protected characteristic under Equality Act 2010</td>
<td></td>
</tr>
<tr>
<td>PERSON</td>
<td>Data Protection Consent</td>
<td>To highlight the requirement as GMC/GDC, colleges, etc as regulators.</td>
<td>Housekeeping</td>
<td>Yes/No/blank</td>
<td>Data Protection statement is being developed (Feb 2011)</td>
</tr>
<tr>
<td>PERSON</td>
<td>NI Number</td>
<td>Used in the ESR interface for matching</td>
<td>System</td>
<td>2 alpha, 6 digit, 1 alpha (XX123456Y)</td>
<td>NI Number in prescribed format</td>
</tr>
<tr>
<td>PERSON</td>
<td>Military Trainee</td>
<td>To identify MOD funded trainees assigned within Deanery</td>
<td>Mandatory</td>
<td>Yes/No defaulted to No</td>
<td>Used in various reports</td>
</tr>
<tr>
<td>PERSON</td>
<td>PHOTO</td>
<td>To assist in identification of staff during placement rotation</td>
<td>Mandatory</td>
<td>Yes/No defaulted to No</td>
<td></td>
</tr>
<tr>
<td>PERSON</td>
<td>Photo received date</td>
<td>Date on which photo was submitted by trainee</td>
<td>Date</td>
<td>Updated when a new photo is uploaded, scanned or submitted</td>
<td></td>
</tr>
<tr>
<td>PERSON</td>
<td>Photo confirmed</td>
<td>Date verification of photograph likeness</td>
<td>Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PERSON</td>
<td>Photo confirmed by</td>
<td>Identifying staff member</td>
<td>Staff name (link to person record?)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RECORD</td>
<td>FIELD NAME</td>
<td>RATIONALE</td>
<td>REQUIREMENT</td>
<td>VALIDATION RULE</td>
<td>COMMENTS</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------------</td>
<td>------------</td>
<td>-------------</td>
<td>-----------------</td>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td>PERSON DEMOGRAPHIC</td>
<td>Date of Birth</td>
<td>E&amp;D</td>
<td></td>
<td></td>
<td>Protected characteristic under Equality Act 2010</td>
</tr>
<tr>
<td>PERSON DEMOGRAPHIC</td>
<td>EEA Resident</td>
<td>Immigration Law</td>
<td>Yes/No/Not known</td>
<td></td>
<td>Protected characteristic under Equality Act 2010</td>
</tr>
<tr>
<td>PERSON DEMOGRAPHIC</td>
<td>Permit to Work</td>
<td>Immigration Law</td>
<td>From reference table - only relevant if EEA Resident = &quot;No&quot;</td>
<td></td>
<td>Protected characteristic under Equality Act 2010</td>
</tr>
<tr>
<td>PERSON DEMOGRAPHIC</td>
<td>Settled</td>
<td>Immigration Law</td>
<td>Yes/No - only relevant if EEA Resident = &quot;No&quot;</td>
<td></td>
<td>Protected characteristic under Equality Act 2010</td>
</tr>
<tr>
<td>PERSON DEMOGRAPHIC</td>
<td>Visa Issue From</td>
<td>Immigration Law</td>
<td>Only relevant if EEA Resident = &quot;No&quot; and Work permit Status = &quot;Work permit&quot; or &quot;Visa required&quot;</td>
<td></td>
<td>Protected characteristic under Equality Act 2010</td>
</tr>
<tr>
<td>PERSON DEMOGRAPHIC</td>
<td>Visa Issue To</td>
<td>Immigration Law</td>
<td>Only relevant if EEA Resident = &quot;No&quot; and Work permit Status = &quot;Work permit&quot; or &quot;Visa required&quot;</td>
<td></td>
<td>Protected characteristic under Equality Act 2010</td>
</tr>
<tr>
<td>PERSON DEMOGRAPHIC</td>
<td>Visa Number</td>
<td>Immigration Law</td>
<td>Only relevant if EEA Resident = &quot;No&quot; and Work permit Status = &quot;Work permit&quot; or &quot;Visa required&quot;</td>
<td></td>
<td>Protected characteristic under Equality Act 2010. Work permit/visa number</td>
</tr>
<tr>
<td>PERSON E&amp;D</td>
<td>Nationality</td>
<td>E&amp;D</td>
<td></td>
<td>From reference tables (National list of values)</td>
<td>Protected Characteristic under 2010 Equality Act - Verify recruitment system data</td>
</tr>
<tr>
<td>PERSON E&amp;D</td>
<td>Dual Nationality</td>
<td>E&amp;D</td>
<td></td>
<td>From reference tables (National list of values)</td>
<td>Protected Characteristic under 2010 Equality Act - Verify recruitment system data</td>
</tr>
<tr>
<td>PERSON E&amp;D</td>
<td>Sexual Orientation</td>
<td>E&amp;D</td>
<td></td>
<td>From reference tables (National list of values)</td>
<td>Protected Characteristic under 2010 Equality Act - Capture from recruitment system</td>
</tr>
<tr>
<td>PERSON E&amp;D</td>
<td>Religious Belief</td>
<td>E&amp;D</td>
<td></td>
<td>From reference tables (National list of values)</td>
<td>Protected Characteristic under 2010 Equality Act - Capture from recruitment system</td>
</tr>
<tr>
<td>PERSON E&amp;D</td>
<td>Ethnic Origin</td>
<td>E&amp;D</td>
<td></td>
<td>From reference tables (National list of values)</td>
<td>Protected Characteristic under 2010 Equality Act - Capture from recruitment system</td>
</tr>
<tr>
<td>RECORD</td>
<td>FIELD NAME</td>
<td>RATIONALE</td>
<td>REQUIREMENT</td>
<td>VALIDATION RULE</td>
<td>COMMENTS</td>
</tr>
<tr>
<td>-------------------</td>
<td>--------------</td>
<td>---------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>PERSON E&amp;D</td>
<td>Disability Status</td>
<td>E&amp;D</td>
<td></td>
<td>From reference tables (National list of values)</td>
<td>Protected Characteristic under 2010 Equality Act</td>
</tr>
<tr>
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<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Created automatically from any change in the NTN, NTN Issue Date or NTN Release Date - Read-only table</td>
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<td></td>
</tr>
<tr>
<td>Demographic History</td>
<td>EEA Resident</td>
<td>Must record date of change and username of operator changing</td>
<td></td>
<td>Automatically created whenever a change is made to EEA Resident</td>
<td></td>
</tr>
<tr>
<td>Demographic History</td>
<td>Permit to Work</td>
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<td>Automatically created whenever a change is made to Permit to Work</td>
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</tr>
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<td>Settled</td>
<td>Must record date of change and username of operator changing</td>
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<td>Automatically created whenever a change is made to Settled</td>
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</tr>
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<td>Demographic History</td>
<td>Visa Issue From</td>
<td>Must record date of change and username of operator changing</td>
<td></td>
<td>Automatically created whenever a change is made to Visa Issue From</td>
<td></td>
</tr>
<tr>
<td>Demographic History</td>
<td>Visa Issue To</td>
<td>Must record date of change and username of operator changing</td>
<td></td>
<td>Automatically created whenever a change is made to Visa Issue To</td>
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</tr>
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<td>Must record date of change and username of operator changing</td>
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<td>Automatically created whenever a change is made to Visa Number</td>
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</tr>
<tr>
<td>Demographic History</td>
<td>Gender</td>
<td>Must record date of change and username of operator changing</td>
<td></td>
<td>Automatically created whenever a change is made to Gender</td>
<td></td>
</tr>
<tr>
<td>Demographic History</td>
<td>Nationality</td>
<td>Must record date of change and username of operator changing</td>
<td></td>
<td>Automatically created whenever a change is made to Nationality</td>
<td></td>
</tr>
<tr>
<td>RECORD</td>
<td>FIELD NAME</td>
<td>RATIONALE</td>
<td>REQUIREMENT</td>
<td>VALIDATION RULE</td>
<td>COMMENTS</td>
</tr>
<tr>
<td>-------------------------</td>
<td>---------------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>----------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Demographic History</td>
<td>Dual Nationality</td>
<td>Must record date of change and username of operator changing</td>
<td></td>
<td>Automatically created whenever a change is made to Dual Nationality</td>
<td></td>
</tr>
<tr>
<td>Demographic History</td>
<td>Sexual Orientation</td>
<td>Must record date of change and username of operator changing</td>
<td></td>
<td>Automatically created whenever a change is made to Sexual Orientation</td>
<td></td>
</tr>
<tr>
<td>Demographic History</td>
<td>Religious Belief</td>
<td>Must record date of change and username of operator changing</td>
<td></td>
<td>Automatically created whenever a change is made to Religious Belief</td>
<td></td>
</tr>
<tr>
<td>Demographic History</td>
<td>Disability Status</td>
<td>Must record date of change and username of operator changing</td>
<td></td>
<td>Automatically created whenever a change is made to Disability Status</td>
<td></td>
</tr>
<tr>
<td>PERSON NTN/DRN</td>
<td>National Training Number / Deanery Reference Number</td>
<td>In prescribed format</td>
<td></td>
<td>Derived from programme, specialty, appointment type etc</td>
<td>See separate guidance notes 5.iii</td>
</tr>
<tr>
<td>PERSON NTN/DRN</td>
<td>NTN/ DRN Issue Date</td>
<td>Date</td>
<td></td>
<td></td>
<td>See separate guidance notes 5.iii</td>
</tr>
<tr>
<td>PERSON NTN/DRN</td>
<td>NTN/ DRN Release Date</td>
<td>Date</td>
<td></td>
<td></td>
<td>See separate guidance notes 5.iii</td>
</tr>
<tr>
<td>Created automatically from any change in the NTN, NTN Issue Date or NTN Release Date - Read-only table</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NTN/DRN HISTORY</td>
<td>Original NTN/ DRN</td>
<td>Default from PERSON NTN/DRN field</td>
<td></td>
<td>Automatically created whenever a change is made to the NTN/DRN</td>
<td></td>
</tr>
<tr>
<td>NTN/DRN HISTORY</td>
<td>Original NTN/ DRN Issue Date</td>
<td>Default from PERSON NTN/DRN Issue Date field</td>
<td></td>
<td>Automatically created whenever a change is made to the NTN/DRN Issue Date</td>
<td></td>
</tr>
<tr>
<td>RECORD</td>
<td>FIELD NAME</td>
<td>RATIONALE</td>
<td>REQUIREMENT</td>
<td>VALIDATION RULE</td>
<td>COMMENTS</td>
</tr>
<tr>
<td>--------</td>
<td>------------</td>
<td>-----------</td>
<td>-------------</td>
<td>----------------</td>
<td>----------</td>
</tr>
<tr>
<td>NTN/DRN HISTORY</td>
<td>Original NTN/DRN Release Date</td>
<td>Default from PERSON NTN/DRN Release Date field</td>
<td>Automatically created whenever a change is made to the NTN/DRN Release Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PERSON GMC/GDC</td>
<td>GMC/ GDC Reference Number</td>
<td>Professionally required for some person types and used for matching</td>
<td>In pre-defined format</td>
<td>Mandatory for trainees in various reports</td>
<td></td>
</tr>
<tr>
<td>PERSON GMC/GDC</td>
<td>GMC/ GDC Registration Status</td>
<td>Professionally required for some person types and used for matching</td>
<td>From reference table (GMC list of values)</td>
<td>Mandatory for trainees in various reports</td>
<td></td>
</tr>
<tr>
<td>PERSON GMC/GDC</td>
<td>GMC/ GDC Expiry Date</td>
<td>Professionally required for some person types and used for matching</td>
<td>Date</td>
<td>Mandatory for trainees in various reports</td>
<td></td>
</tr>
<tr>
<td>PERSON CCT</td>
<td>Date Form R Received</td>
<td>Must be completed after recruitment to confirm basic details and entry to the programme.</td>
<td>Date</td>
<td>Track date Form R is received in Deanery and trigger allocation of NTN/DRN. See note para 8 next available counter.</td>
<td></td>
</tr>
<tr>
<td>PERSON CCT</td>
<td>Date Form R Sent</td>
<td>Sent to colleges for registration on ePortfolio and programme</td>
<td>Date</td>
<td>Track date Form R sent to College</td>
<td></td>
</tr>
<tr>
<td>PERSON CCT</td>
<td>Primary CCT Specialty</td>
<td>GMC/College/Deanery requirement</td>
<td>From reference table (National list of values)</td>
<td>Can be derived from trainee's current placement (see Post)</td>
<td></td>
</tr>
<tr>
<td>PERSON CCT</td>
<td>Sub-specialty</td>
<td>GMC/College/Deanery requirement</td>
<td>From reference table (National list of values)</td>
<td>Can be derived from trainee's current placement (see Post)</td>
<td></td>
</tr>
<tr>
<td>PERSON CCT</td>
<td>Dual CCT Specialty</td>
<td>GMC/College/Deanery requirement</td>
<td>From reference table (National list of values)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PERSON CCT</td>
<td>Tri CCT Specialty</td>
<td>GMC/College/Deanery requirement</td>
<td>From reference table (National list of values)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PERSON CCT</td>
<td>CCT Anticipated Date (Primary Specialty)</td>
<td>GMC/College/Deanery requirement</td>
<td>Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PERSON CCT</td>
<td>CCT Anticipated Date (Dual Specialty)</td>
<td>GMC/College/Deanery requirement</td>
<td>Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PERSON CCT</td>
<td>CCT Anticipated Date (Tri Specialty)</td>
<td>GMC/College/Deanery requirement</td>
<td>Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PERSON CCT</td>
<td>CCT Awarded Date</td>
<td>Used to determine post cct start date</td>
<td>Date</td>
<td>Final date of training</td>
<td></td>
</tr>
<tr>
<td>RECORD</td>
<td>FIELD NAME</td>
<td>RATIONALE</td>
<td>REQUIREMENT</td>
<td>VALIDATION RULE</td>
<td>COMMENTS</td>
</tr>
<tr>
<td>--------</td>
<td>--------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>------------------------------</td>
<td>-----------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td>PERSON CCT</td>
<td>CCT Applied</td>
<td>Track if trainee has completed CCT application form</td>
<td>housekeeping</td>
<td>Date</td>
<td>A trainee must request CCT application form from college</td>
</tr>
<tr>
<td>PERSON CCT</td>
<td>CCT Form PG Dean</td>
<td>To confirm PYA targets have been completed and there are no outstanding training issues</td>
<td>Date</td>
<td>Date</td>
<td>Date that CCT date has been signed by the PG Dean to track if this has been completed</td>
</tr>
<tr>
<td>PERSON CCT</td>
<td>Grace Period Start Date</td>
<td>To allow trainees time to apply for a consultant post</td>
<td>housekeeping</td>
<td>Date</td>
<td>Maximum allowable period of 6 months</td>
</tr>
<tr>
<td>PERSON CCT</td>
<td>Grace Period End Date</td>
<td>Used for succession planning within the Deanery</td>
<td>housekeeping</td>
<td>Date</td>
<td></td>
</tr>
<tr>
<td>PERSON CCT</td>
<td>Royal College or Faculty</td>
<td>Royal College or faculty who approves application to specialist register</td>
<td>From reference table</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PERSON CCT</td>
<td>Specialist Registration</td>
<td>Used for non training grades</td>
<td>From reference table</td>
<td>CESR, CEGPR, CESR GP, CEGPT CP</td>
<td></td>
</tr>
<tr>
<td>PERSON CCT</td>
<td>Specialist Registration Awarded</td>
<td>Used for succession planning within the Deanery</td>
<td>housekeeping</td>
<td>Date</td>
<td>Date for programme completion (where known)</td>
</tr>
</tbody>
</table>

**Created automatically from any change in the PERSON CCT Anticipated Dates (Primary, Dual or Tri) - Read-only table**

<table>
<thead>
<tr>
<th>CCT HISTORY</th>
<th>Specialty</th>
<th>Default from PERSON Primary/Dual/Tri Specialty</th>
<th>Automatically created whenever a change is made to the CCT Anticipated Dates</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>CCT HISTORY</td>
<td>CCT Type</td>
<td>System</td>
<td>Primary, Dual or Tri</td>
<td></td>
</tr>
</tbody>
</table>

**CCT HISTORY**

<table>
<thead>
<tr>
<th>Original CCT Anticipated Date</th>
<th>The original (pre-amendment) CCT date relating to the above specialty</th>
<th>Original date</th>
<th></th>
</tr>
</thead>
</table>

**Reason For Change**

| A drop-down menu | Mandatory | Reference table |                       |

**PERSON CONTACT**

<table>
<thead>
<tr>
<th>Telephone Number 1</th>
<th>To identify the primary phone number</th>
<th>A valid UK phone number</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone Number 2</td>
<td>To identify alternative phone number</td>
<td>A valid UK phone number</td>
<td></td>
</tr>
<tr>
<td>RECORD</td>
<td>FIELD NAME</td>
<td>RATIONALE</td>
<td>REQUIREMENT</td>
</tr>
<tr>
<td>--------</td>
<td>-----------------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>PERSON CONTACT</td>
<td>Primary Email Address</td>
<td>To identify the primary email address for communications</td>
<td></td>
</tr>
<tr>
<td>PERSON CONTACT</td>
<td>Secondary email address</td>
<td>Secondary email address to use if primary contact fails</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>A PERSON record has one Primary ADDRESS record although additional ADDRESS information can be added to a PLACEMENT (eg. work address)</strong></td>
<td></td>
</tr>
<tr>
<td>PERSON ADDRESS</td>
<td>Primary Address Line 1</td>
<td>Primary address for contacting the person.</td>
<td></td>
</tr>
<tr>
<td>PERSON ADDRESS</td>
<td>Primary Address Line 2</td>
<td>Free text field</td>
<td></td>
</tr>
<tr>
<td>PERSON ADDRESS</td>
<td>Primary Address Line 3</td>
<td>Free text field</td>
<td></td>
</tr>
<tr>
<td>PERSON ADDRESS</td>
<td>Primary Address Line 4</td>
<td>Free text field</td>
<td></td>
</tr>
<tr>
<td>PERSON ADDRESS</td>
<td>Primary Address Line 5</td>
<td>Free text field</td>
<td></td>
</tr>
<tr>
<td>PERSON ADDRESS</td>
<td>Primary Post Code</td>
<td>A valid post/zip code</td>
<td></td>
</tr>
<tr>
<td>PERSON ADDRESS</td>
<td>Secondary Address Line 1</td>
<td>Alternative secondary address for contacting the person.</td>
<td></td>
</tr>
<tr>
<td>PERSON ADDRESS</td>
<td>Secondary Address Line 2</td>
<td>Free text field</td>
<td></td>
</tr>
<tr>
<td>PERSON ADDRESS</td>
<td>Secondary Address Line 3</td>
<td>Free text field</td>
<td></td>
</tr>
<tr>
<td>PERSON ADDRESS</td>
<td>Secondary Address Line 4</td>
<td>Free text field</td>
<td></td>
</tr>
<tr>
<td>PERSON ADDRESS</td>
<td>Secondary Address Line 5</td>
<td>Free text field</td>
<td></td>
</tr>
<tr>
<td>PERSON ADDRESS</td>
<td>Secondary Post Code</td>
<td>A valid post/zip code</td>
<td></td>
</tr>
<tr>
<td>RECORD</td>
<td>FIELD NAME</td>
<td>RATIONALE</td>
<td>REQUIREMENT</td>
</tr>
<tr>
<td>--------</td>
<td>------------</td>
<td>-----------</td>
<td>-------------</td>
</tr>
<tr>
<td>A PERSON record can be related to many PERSON QUALIFICATION records</td>
<td>Qualification Type</td>
<td>Type of qualification</td>
<td>Reference table, e.g. basic degree, higher, etc.</td>
</tr>
<tr>
<td>PERSON QUALIFICATION</td>
<td>Year of Primary Qualification</td>
<td>Year (4-digit)</td>
<td></td>
</tr>
<tr>
<td>PERSON QUALIFICATION</td>
<td>Place of Primary Qualification</td>
<td></td>
<td>Reference table</td>
</tr>
<tr>
<td>PERSON QUALIFICATION</td>
<td>Primary Qualification Date</td>
<td>Date</td>
<td></td>
</tr>
<tr>
<td>PERSON QUALIFICATION</td>
<td>Primary Qualification</td>
<td>Name of qualification</td>
<td>Reference table</td>
</tr>
<tr>
<td>PERSON QUALIFICATION</td>
<td>Primary Qualification Country</td>
<td>Country of qualification</td>
<td>Reference table</td>
</tr>
<tr>
<td>PERSON QUALIFICATION</td>
<td>Primary Qualification Expiry</td>
<td>Date</td>
<td></td>
</tr>
<tr>
<td>Leaver Process - should be used to record when and why a PERSON will no longer be engaged with the deanery</td>
<td>Is Leaver?</td>
<td>Is the PERSON flagged as leaving / has left?</td>
<td>Mandatory</td>
</tr>
<tr>
<td>PERSON LEAVER</td>
<td>Reason for leaving</td>
<td>Why is the PERSON leaving / did leave</td>
<td>Reference Table para 11</td>
</tr>
<tr>
<td>PERSON LEAVER</td>
<td>Destination</td>
<td>What is the PERSON moving to?</td>
<td>Free Text</td>
</tr>
<tr>
<td>PERSON LEAVER</td>
<td>Leaving date</td>
<td>Proposed/actual date of departure - proposed/actual determined by &quot;Is leaving/has left&quot; flag</td>
<td>Mandatory</td>
</tr>
<tr>
<td>PERSON LEAVER</td>
<td>Manager workflows</td>
<td>Defined manager / supervisor workflows based on deanery requirements</td>
<td>Trigger any follow on processes</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>PERSON PROGRAMME</td>
<td>Programme start date</td>
<td>The date on which the trainee started on the programme of training. This may be different to the grade start date and the NTN/DRN issue date where the trainee has transferred from another deanery, or where the training started on a fixed-term or locum contract.</td>
<td>GMC requirement as per Daniel Smith Briefing Note 4 Date</td>
</tr>
<tr>
<td>PERSON PROGRAMME</td>
<td>Appointment type</td>
<td>Type of appointment - LAT, substantive, FTSTA</td>
<td>LAT, FTSTA, Substantive</td>
</tr>
<tr>
<td>PERSON PROGRAMME</td>
<td>Predicted / Actual Programme End Date</td>
<td>Either the predicted or actual exit date from programme - eg completion date of F2 or anticipated date of specialist registration</td>
<td>Date</td>
</tr>
<tr>
<td>PERSON PROGRAMME</td>
<td>Programme Type</td>
<td>The type of programme the trainee is engaged upon</td>
<td>Academic, specialty training, higher specialty training, core, industry, foundation</td>
</tr>
<tr>
<td>PERSON PROGRAMME</td>
<td>Programme Description</td>
<td>A description of the theme or flavour of the programme, eg &quot;Higher specialty training in gastroenterology&quot; or &quot;Foundation training&quot;</td>
<td></td>
</tr>
<tr>
<td>PERSON PROGRAMME</td>
<td>College Curriculum</td>
<td>See Post Report Dataset Item PR12 for Cross Reference Defined list from Programme</td>
<td>This should be the defined link between the Trainee and the Programme</td>
</tr>
<tr>
<td></td>
<td>Created automatically from any change in the NTN, NTN Issue Date or NTN Release Date - Read-only table</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Person Programme History</td>
<td>Programme start date</td>
<td>Must record date of change and username of operator changing</td>
<td>Automatically created whenever a change is made to Programme start date</td>
</tr>
<tr>
<td>Person Programme History</td>
<td>Appointment type</td>
<td>Must record date of change and username of operator changing</td>
<td>Automatically created whenever a change is made to Appointment type</td>
</tr>
<tr>
<td>-------------------------</td>
<td>------------------</td>
<td>---------------------------------------------------------------</td>
<td>------------------------------------------------------------------</td>
</tr>
<tr>
<td>Person Programme History</td>
<td>Predicted / Actual Programme End Date</td>
<td>Must record date of change and username of operator changing</td>
<td>Automatically created whenever a change is made to Predicted / Actual Programme End Date</td>
</tr>
<tr>
<td>Person Programme History</td>
<td>Programme Type</td>
<td>Must record date of change and username of operator changing</td>
<td>Automatically created whenever a change is made to Programme Type</td>
</tr>
<tr>
<td>Person Programme History</td>
<td>Programme Description</td>
<td>Must record date of change and username of operator changing</td>
<td>Automatically created whenever a change is made to Programme Description</td>
</tr>
</tbody>
</table>

**Programme Change Requests**

- Multiple changes can be applied for against a PROGRAMME. Many PROGRAMMES may be recorded against a PERSON

<table>
<thead>
<tr>
<th>PROGRAMME CHANGE</th>
<th>Programme change type</th>
<th>The type of change being applied for - eg change in working hours, OOP, IDT</th>
<th>Mandatory</th>
<th>If IDT go to LEAVER PROCESS</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROGRAMME CHANGE</td>
<td>Placement(s) affected</td>
<td>If any pre-arranged placement(s) would be affected by the change in circumstances, these must be highlighted</td>
<td>Mandatory</td>
<td>Lookup to PLACEMENT IDs based on Programme Change start/end dates</td>
</tr>
<tr>
<td>PROGRAMME CHANGE</td>
<td>Placement/Change Start Date</td>
<td>The start date at which the change would take place - for example the proposed OOP start date, the date on which the trainee starts working less than full time or the IDT transfer window</td>
<td>Mandatory</td>
<td></td>
</tr>
<tr>
<td><strong>PROGRAMME CHANGE</strong></td>
<td><strong>Placement/Change End Date (if applicable)</strong></td>
<td>If the trainee intends to change their training permanently or indefinitely (such as IDT or flexible working) or when the trainee is due to return from OOP</td>
<td></td>
<td></td>
</tr>
<tr>
<td>----------------------</td>
<td>---------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>PROGRAMME CHANGE</strong></td>
<td><strong>Placement / Change Requested Date</strong></td>
<td>The date on which the application was submitted</td>
<td>Mandatory</td>
<td></td>
</tr>
<tr>
<td><strong>PROGRAMME CHANGE</strong></td>
<td><strong>Placement / Change Requested Reason</strong></td>
<td>Reason why request has been made - OOP experience, reason for IDT, maternity/paternity</td>
<td>Mandatory</td>
<td></td>
</tr>
<tr>
<td><strong>PROGRAMME CHANGE</strong></td>
<td><strong>Placement / Change Approval Number (GMC)</strong></td>
<td>GMC approval number for Out of Programme Placement</td>
<td>Only required for certain OOP placements</td>
<td></td>
</tr>
<tr>
<td><strong>PROGRAMME CHANGE</strong></td>
<td><strong>Approval Refused</strong></td>
<td>Has approval been refused by any vetoing party?</td>
<td>Mandatory</td>
<td></td>
</tr>
<tr>
<td><strong>PROGRAMME CHANGE</strong></td>
<td><strong>Refusing party</strong></td>
<td>Name / position of refusing party</td>
<td>Mandatory Link to PERSON record or stipulate position only?</td>
<td></td>
</tr>
<tr>
<td><strong>PROGRAMME CHANGE</strong></td>
<td><strong>Refusal reason</strong></td>
<td>Reason why</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>PROGRAMME CHANGE</strong></td>
<td><strong>Date of Dean's Approval</strong></td>
<td>Dean has final authority for approval</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>PROGRAMME CHANGE</strong></td>
<td><strong>Completion date affected?</strong></td>
<td>Will the change in programme affect the date of CCT/completion?</td>
<td>Mandatory Yes/No/Unknown If yes move to CCT tracking workflow.</td>
<td></td>
</tr>
</tbody>
</table>

Mandatory fields are marked with an asterisk (*) in the original document.
20. Figures

Figure 1 - Screenshot of OOP recording page on JRCPTB database

Figure 2 - Screenshot of Trainee History on JRCPTB database

Figure 3 - Screenshot of CCT record tab on JRCPTB database
**Figure 4 – Values for Basic Qualifications.**
Reference table is a consolidation provided by the London Deanery.

<table>
<thead>
<tr>
<th>Local code</th>
<th>Description</th>
<th>Local code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unknown</td>
<td></td>
<td>28 LRCP</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Artsexamen</td>
<td>29 LRCS</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>BA</td>
<td>30 LRCS, LRCP</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>BChD</td>
<td>31 LRCS, LRCP, LMSSA</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>BChir</td>
<td>32 Master Physician</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>BDentSc</td>
<td>33 Masters</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>BDS</td>
<td>34 MB</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>BM</td>
<td>35 MB BCh</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>BM BCh</td>
<td>36 MB BChir</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>BM BChir</td>
<td>37 MB BS</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>BM BS</td>
<td>38 MB ChB</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>BM ChB</td>
<td>39 MD</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>BS</td>
<td>40 Medico</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Cand Med et Chir</td>
<td>41 Medico Cirujano</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>D Med</td>
<td>42 MFDS</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>D Med y Cir</td>
<td>43 Mjek i Përgjithshëm</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>DipDS</td>
<td>44 MPH</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Diplome Federal</td>
<td>45 MPharm</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Docteur en chirurgie dentaire</td>
<td>46 MRCS</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>Doctor - Medic</td>
<td>47 MSc</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Gydytojas</td>
<td>48 MSc Fac of Med</td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Hak-Sa</td>
<td>49 MUDr</td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Lakarexamen</td>
<td>50 PhD</td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Laurea</td>
<td>51 Ptychio Iatrikes</td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>Lekarz</td>
<td>52 State Exam</td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>Lic Med</td>
<td>53 Tip Doktoru</td>
<td></td>
</tr>
<tr>
<td>26</td>
<td>LMS</td>
<td>54 Vrac</td>
<td></td>
</tr>
<tr>
<td>27</td>
<td>LMSSSA</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Figure 5 – Leaving Reason Codes**
Reference table is a consolidation provided by the London Deanery.

<table>
<thead>
<tr>
<th>Local Code</th>
<th>Description</th>
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<tr>
<td>CONS1</td>
<td>Consultant In London</td>
</tr>
<tr>
<td>CONS2</td>
<td>Consultant Elsewhere In UK</td>
</tr>
<tr>
<td>CONS3</td>
<td>Consultant Overseas</td>
</tr>
<tr>
<td>CONS4</td>
<td>Consultant In KSS</td>
</tr>
<tr>
<td>CONS5</td>
<td>Consultant In Eastern (Essex &amp; Herts)</td>
</tr>
<tr>
<td>CONT</td>
<td>Contract Ended</td>
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<tr>
<td>CORE1</td>
<td>Core Trainee Gained TN In Another Deanery</td>
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<tr>
<td>CTELY</td>
<td>Voluntarily left Core Training Before End of Programme</td>
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<tr>
<td>CTEND</td>
<td>Completed Core Training</td>
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<tr>
<td>CTREM</td>
<td>Left Core Training Early - Panel Recommendation</td>
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<tr>
<td>DEATH</td>
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<td>Description</td>
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<tr>
<td>DENT1</td>
<td>Gone Into Private/NHS Dental Practice</td>
</tr>
<tr>
<td>FTTA1</td>
<td>FTTA Returned Overseas</td>
</tr>
<tr>
<td>FTTA2</td>
<td>FTTA Continuing Training Elsewhere In UK</td>
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<tr>
<td>GP1</td>
<td>Left To Go Into General Practice/GP Training.</td>
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<td>GRACE</td>
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<td>IDT</td>
<td>Interdeanery Transfer In UK</td>
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<td>ILL</td>
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<td>KSS Now Managing Trainee</td>
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<td>LAS1</td>
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<td>LAS Post In KSS</td>
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<td>LAS Post Elsewhere In The UK</td>
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<tr>
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<td>LAT2</td>
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<td>OSEAS</td>
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