Access to trainee record and the Data Protection Act

Data is managed and protected under the DPA 1998. All users can only see trainees within their Trust, but this includes past, current and future. Access is based on permissions associated to user’s role. If a user cannot see a trainee within their trust, then the Deanery who will amend accordingly if approved.

From Home page click on ‘Staff List’

A list of trainees will be visible. These will include past and future trainees.
Click on ‘**search**’ and input the GMC number or name.

To filter to only see current trainees then click on ‘**Filter**’ and select the Trust, Grade and specialty. As a minimum select the Trust.

Once all filters have been selected click on ‘**Run**’ and the filtered lists will show.

If a trainee is not found, then click ‘**Find Staff Record**’, type in trainee’s name and if a record is held within the organisation a user will be able to ‘**request**’ access subject to approval.

Anytime a filter is run that may be used again it can be saved as a favourite. The yellow box is a favourite symbol and will be seen throughout the system.

When the box pops up name the filter and click on OK. Now the filter will show on the favourite’s column of the user’s home page.
## Process

### Accessing and understanding a trainee record

Double Click on relevant record and individual record will open

Information with Red line around filed name is mandatory and must be filled in by the Deanery. The address can often be out of date and if it needs to be amended please contact the Programme Team. The data on the top half of the screen is linked to the trainees ESR record within the trust payroll system.

The page will open on Post history which details the training posts of a trainee. Past posts are ‘P’, current posts are ‘C’ and Future are ‘F’.
Process | Access and view staff post data

To access a post and view detail double click on the post highlighted

The post site, grade and specialty are derived from the National post number. The usual format is WES/RHM01/020/001. However, if the post ends in any of the following suffix it is funded outside the Deanery funding schedules.

- /F01 = Supernumerary Flexible trainee
- /M01 = Military trainee
- /CF1 = Clinical Fellow
- /CL1 = Clinical Lecturer
- /S01 = special post set up to provide additional training
- /A01 = Foundation academic post

The information on the right provides start date, end date of training.

‘Type of post’ relates to trainee post. A ‘Service post’ is standard training post or an OOP trainee would be recorded as ‘In contract but absent’.

‘Nature of contract’ relates to hours worked and full time is ‘whole time’, part time is ‘Flexible part-time’ or ‘Slot share’

If the trainee is a SpR, then the SpR year will be recorded
Process Viewing Study Leave

Click on ‘Entitlement (Leave)’ across the middle of the screen

This shows the annual leave taken in days and budget per trainee. A detailed breakdown can be viewed in Education/leave.

Process Viewing Relocation Expenses

Click on ‘Entitlement (ad-hoc)’ across the middle of the screen

This shows trainees relocation claimed over their training period. To view actual claim double click on row.
All qualifications and exams for a trainee are recorded and their original country of qualification.

All trainees after foundation will have an NTN (National Training Number) or DRN (Deanery Reference Number) which will be linked to their training specialty. The number is issued at the start of their programme and the CCT date is the date that they are due to complete training. This can be changed but will be updated. The period of grace is 6 months and is anticipated end date.
Process Viewing assessments and reviews

Click on ‘Assessments/Reviews' tab

The trainees have to be assessed annually and this is recorded on the assessment/review tab. Not all users can see this, so users may need to request access.

Process Viewing Equality and Diversity Data

All data on sexuality, religion and disability is recorded on Intrepid dating back to 2007 recruitment. However, due to the sensitive nature only a few users have access to it. If this is requested please email the IT team.

Process Viewing assessments and reviews

From home page click on Post list' and the user will see the list of posts in the Trust as on page 2 the filter can be applied to filter by Trust, site, grade and specialty and a favourite can be applied.
Process | Running basic standard reports

From the Home Page, click on Report Menu

The main reports are highlighted below:

- Trainee list – list of all trainees in post on set date
- Leave – Study leave summary
- Individual Summary – Study leave details for an individual
- Vacancy Matrix – All trainees in post over 1-12 months by post in matrix format to export to Excel
Standard Reports

Each report has the same filters. Click on Trainee list and select the relevant trust, grade and specialty. Multiple options can be selected in each drop down list. If you want to see all trainees in the trust you only need to select the Trust. By default the date that it will run data for is always already in as today’s date.

There are several reports that can be run from the trainee list and they are as follows:-

**Trainees in post on a specific date** – ensure that you include a date which could be past, today or future

**New starters on a set date** – this will show you all staff who are new to the specified trust on a date and it will highlight them. For example if you want to see all new starters in the month of the start date then you need to enter ‘1’. This will show you all trainees who are new the trust in December and were not in post in November.

**New starters only** – this will show you a list of only new starters according to the months given. For example if you state 01/12/2010 and 2 months for new starters it will show all trainees who start in the trust 01/12/2010 but were not in post 01/10/2010. Each trust will have a different guideline as to what classifies a new starter.

**Including ESR Vacancy reference** – this is useful for Trusts who are using the ESR interface as it will show who is in post on a specific date and who we have mapped to ESR at any point.

**Any variation of the above can be used to create the required report**
Vacancy matrix report

This report is useful when looking at the trainees in a post over a period of time. By running the post matrix and staff matrix at the same time it will show trainees in post over the period of time requested using one spreadsheet work book for posts and another for trainees. The data has to be exported to Excel so once the filters have been selected click on Excel. It will check that you want to export all data and just click OK.
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