**Step by step guide to the ESR/Intrepid interface**

**Recruitment Interface – new starters only**

The recruitment interface is to be used to update ESR with trainee data held in Intrepid for new starters to a Trust only. A ‘New starter’ can be a trainee who has never been at a Trust or has not been in a post within a trust for a set period of time i.e. 3, 6 or 12 months.

**Pre – interface work**

**Step 1 – Trusts to review ESR user guide / Deanery Interface Guide**

Responsibility - Trust

- Time and resources need to be available in trusts to create positions and vacancies.
- Appropriate resource must be allocated the relevant Medical Staffing Notification Role and Recruitment Administration URP within ESR to update data and receive notifications from the interface processes.

**Step 2 – Agree timescales with the Deanery**

Responsibility - Trust

- Tell the Deanery that as a Trust you wish to activate the interface
- Agree timescales to go live based on:-
  - Resources in Trust to set up positions (i.e. 500 Deanery posts = 500 position numbers and a number of vacancies)
  - Time reserved to validate the Deanery data held in Intrepid and agree the new starters with effect from specific date (i.e. more than 6 months out of Trust or never been in post within that trust)
  - Training required if necessary to ensure ESR users are competent with the Recruitment interface
  - Data to be interfaced anything between 6 weeks and 2 weeks before the rotation start date

**Step 3 – Agree trainees in post as of agreed ‘go live’ date**

Responsibility – Trust/Deanery

The Deanery will provide the trust with a list of trainees in post with start date and end date. This will ensure that the Deanery data is accurate and highlight any discrepancies. This is often Trust appointed trainees or non-Deanery doctors

These agreed trainees are only the ‘New starters’ to be interfaced on the Recruitment interface.
Step 4 – Deanery to provide trusts with list of Deanery posts

Responsibility – Deanery

The post lists will be mapped to agreed funding schedules used by the Deanery Business Managers. Note that the Deanery will provide the trust with a list of all posts associated to the Trust and not just those relating to the next round of recruitment.

Step 5 – Trust to set up position numbers and advise Deanery of relationship

Responsibility – Trust

There must be a one to one relationship between the ESR position number and the Deanery post number. Refer to the McKesson user guide on NESC website.

<table>
<thead>
<tr>
<th>ESR position Number</th>
<th>Deanery Post Number</th>
<th>Trainee in post</th>
</tr>
</thead>
<tbody>
<tr>
<td>12345667</td>
<td>WES/RHU03/800/PGSTR/001</td>
<td>Dawn Day</td>
</tr>
</tbody>
</table>

Note that the trust should enter the Deanery Post Number against every position (in DPN field on ESR-Workstructures-Positions) and not just those relating to the next round of recruitment. This is a one-off exercise and, once complete, there should be no need to amend the Deanery Post Number unless post/position structures change and further instruction is provided by the Deanery.

Interface work – Day 1

Step 1 – Vacancy created on ESR

Responsibility – Trust

A vacancy must be created for every new starter at the trust (see definition in introduction). A vacancy should be uniquely numbered and must be linked to a Position with a valid Deanery Post Number.

The Vacancy must be associated with a Requisition (this can be on a many Vacancies to 1 Req basis) and the Vacancy Activity, must have the Type selected as “Deanery Body” in order for the interface to work properly.

The trust should notify the Deanery that a vacancy has been created.

Any vacancy linked to a Deanery Post Number will be transferred to Intrepid by the interface.

Step 2 – Data transfers from ESR via the NHS Hub into a holding account within Intrepid (overnight process)

Responsibility – McKessons/Hicom

No action by Trusts or the Deanery.

Day 2
Step 3 – Data arrives on Intrepid to be mapped to the relevant Deanery post on Intrepid

Responsibility – Deanery/Hicom

No action by Trusts or the Deanery unless omissions/anomalies identified in the vacancy data (for example incorrect Deanery Post Number) in which case the Deanery will notify the Trust and remedial action will be required before repeating from Step 1 above.

Day 3+

Step 4 – Post-recruitment appointment record linked to vacancy

Responsibilities – Deanery

After the recruitment campaign is completed and the successful candidates appointed *, the Vacancy associated to the Deanery Post Number is linked to the new starter record on Intrepid. This information is then sent to ESR via the interface (overnight process).

* Note that most new starters will already be on Intrepid but, in the event that recruitment is ongoing, the new starter will not be transferred to the ESR until the recruitment campaign is completed.

Day 4+

Step 5 – Data transferred to the ESR via the NHS Hub

Responsibility – Hicom, McKesson & Trust

Hicom will automatically transfer new starter data to the ESR via the NHS hub and McKesson will validate the transfer and the integrity of the data.

On receipt of the data into ESR, (the Medical Staffing Officer role will receive a notification to this effect) the new starter will appear as an Applicant and the Trust will be required to hire the individual at least 1 days before their start date.

If any data is missing or any errors are identified, the Trust will need to notify the Deanery and raise an SR with McKesson.

Any additional information about the new starter (such as Occupational Health/pre-employment checks etc) can be added onto the starter’s employment record in ESR.

Update interface

Trusts who go live post April 2010

All Deanery Post Numbers should be mapped to their respective ESR Position prior to going live with the recruitment interface. The mapping of these posts initiates the update interface.

Trusts who went live with the interface pre April 2010
Trusts who went live with the interface before April 2010 only went live with the new starters at the agreed date and not all posts were mapped. Therefore, with these Trusts the missing posts need to go through the process as detailed below:

**Step 1 – Agree timescales with the Deanery**

Responsibility - Trust

- Agree timescales to go live based on:-
  - resources in Trust to set up positions  (i.e 500 Deanery posts = 500 position numbers and a number of vacancies)
  - Time reserved to validate the Deanery data held in Intrepid and agree the new starters with effect from specific date (i.e. more than 6 months out of Trust or never been in post)

**Step 2 – Deanery to provide trusts with list of Deanery posts**

Responsibility – Deanery

The post lists will be mapped to agreed funding schedules used by the Deanery Business Managers

**Step 3 – Trust to set up position numbers and advise Deanery of relationship**

Responsibility - Trust

There must be a one-to-one relationship between the ESR position number and the Deanery post number. Refer to the McKesson user guide on NESC website

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**Step 4 – Data transferred to Intrepid**

Details of any trainee linked to a position (via an assignment) that has a valid Deanery Post Number will be automatically transferred to Intrepid whenever the details are added or updated. The following information is transferred to Intrepid when changed:

- Person
- Address
- Position
- Assignment
- Qualification
- Professional body

*Please see the Guide to the Deanery Interface document for a full set of fields within these functional areas*
Ongoing management of the interface

To ensure that the data remains accurate the Deanery will provide the following:-

- Annual vacancy matrix report in June/July before new academic year
- A post/trainee report 6 weeks before start date for new starters
- A cross check of data interface to ensure all trainees interface correctly
- User training

To ensure that the Deanery and Trust data matches, the Trusts need to:-

- Tell the Deanery of any changes to trainee posts
- Map positions on ESR to the Deanery Post Numbers in the reports provided.
- Maintain the Assignment records of Trainee Doctors during their rotations within the agreed Deanery Position framework, ensuring at all times that Deanery Position Numbers are allocated against the ESR Position details.
- Raise an SR for any issues/queries with the interface from an ESR perspective via the Remedy system (see your local ESR Lead for further information).
- Ensure that all Medical Staffing ESR users have received appropriate training on ESR to manage the interface processes.