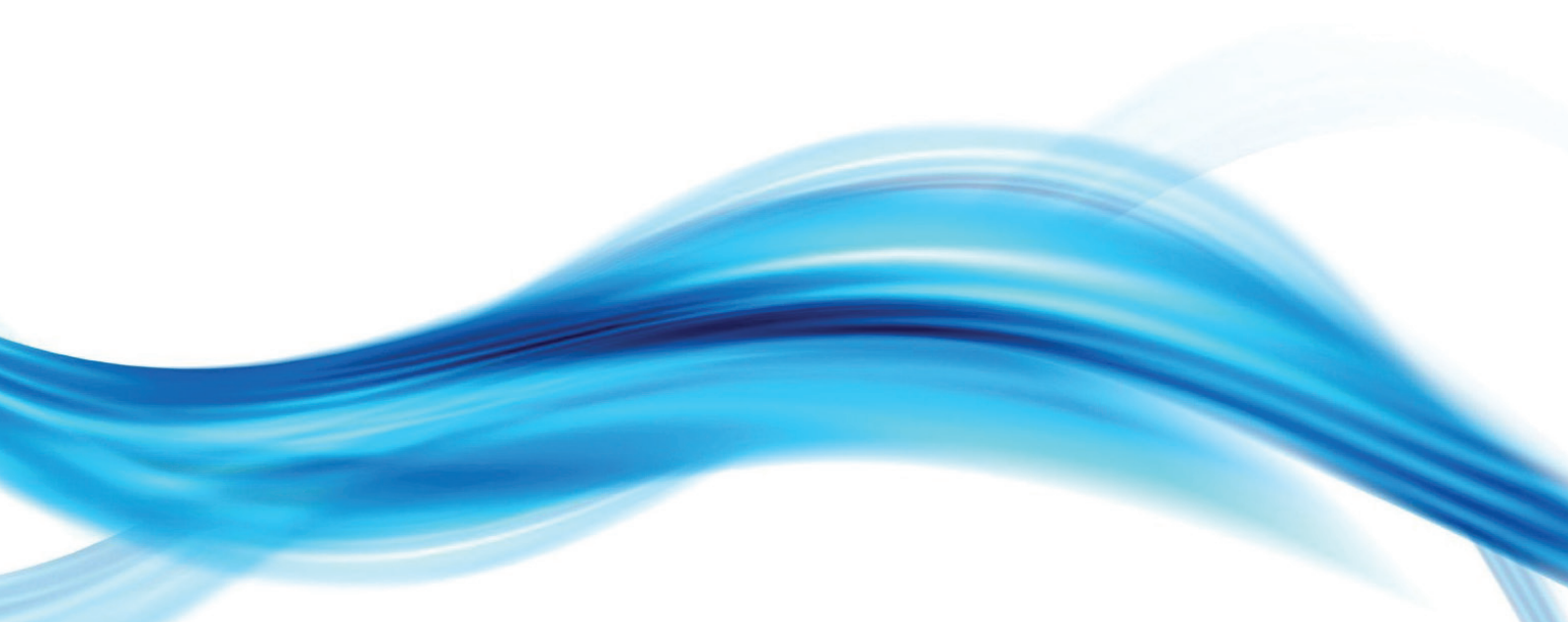


TIS User Guide



A self help guide to using the TIS system



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Login:

Solving username/password problems

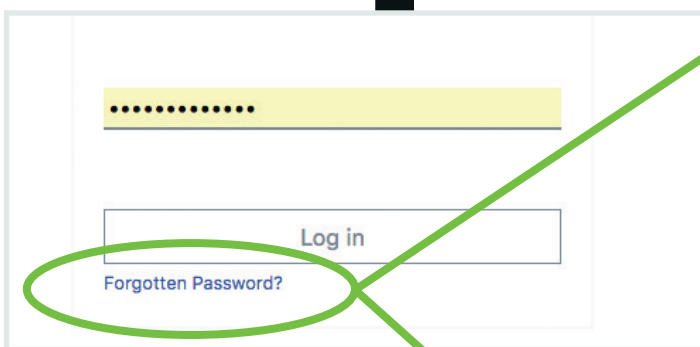
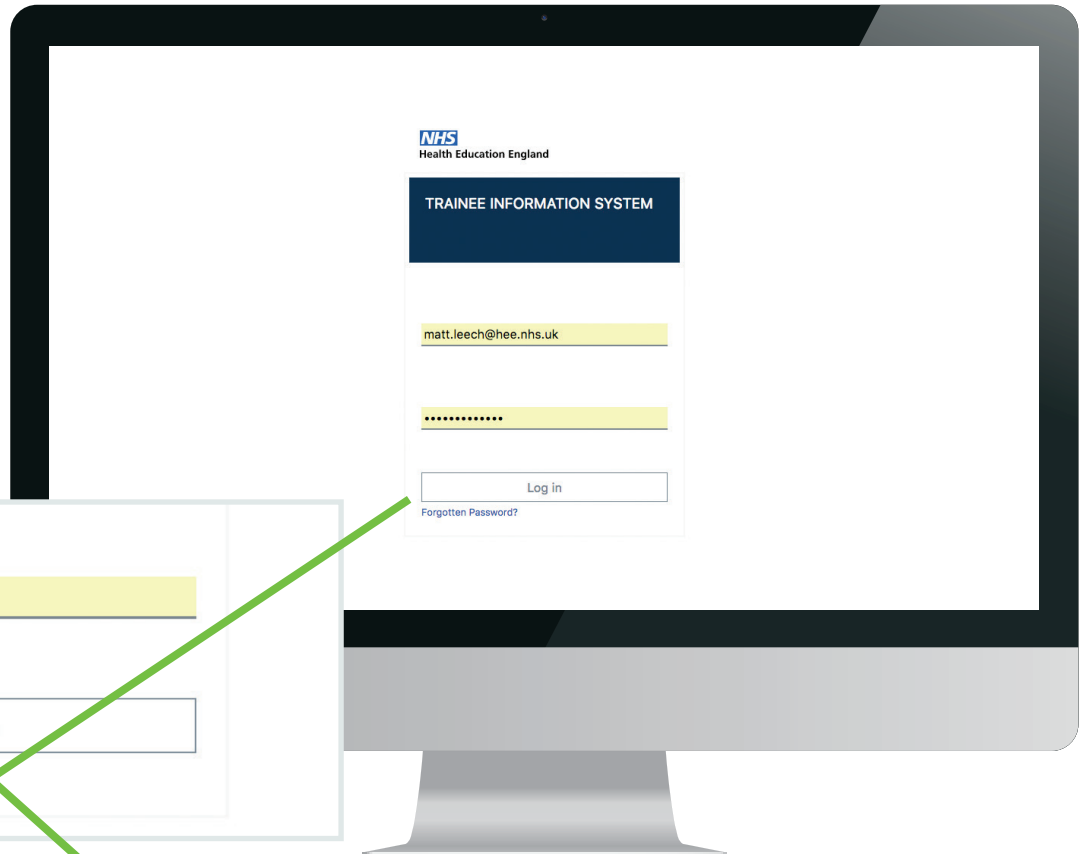
Summary

You will require a verified email (Username) and password to enter TIS.

This should be supplied to you through your administrator.

Hyperlink to system area.

<https://apps.tis.nhs.uk>



FORGOTTEN YOUR PASSWORD?

Submit

[« Back to Login](#)

Enter your username or email address and we will send you instructions on how to create a new password.

Username solution

If your username does not work, please contact your administrator and they will reset this for you.

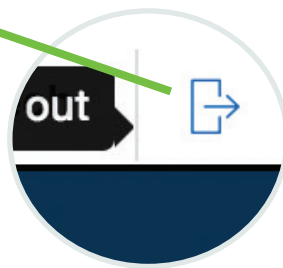
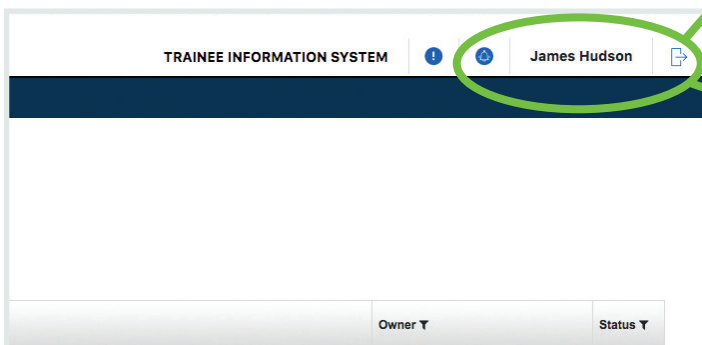
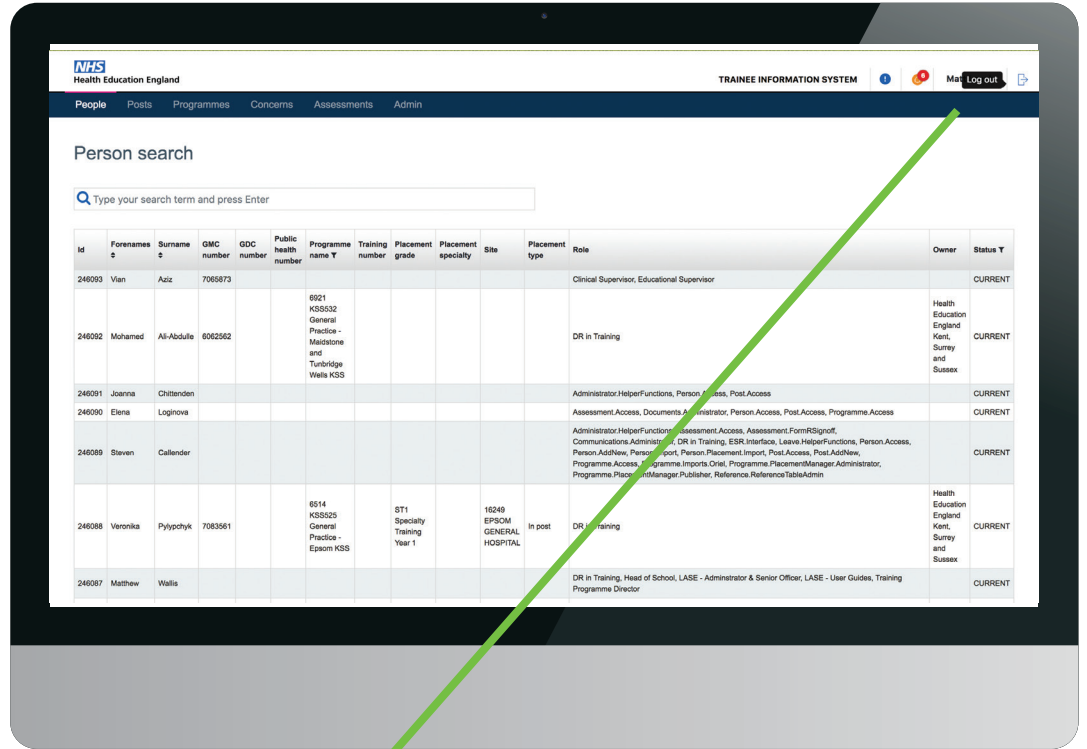
Password solution

You can reset your password following the 'Forgotten Password' link and instructions. This will automatically send a new password to your registered email address, with instructions on how to reset your password.

Logout: Where is this?

Summary

To log out of the TIS system, please use the icon in the top right of the header navigation.



Logout icon

If you select this icon it will automatically log you out of the system returning you to the 'Login' screen.

Searching in TIS: What do I do, and how does this work?

Summary

There is a (Smart type) search functionality in all areas of TIS. This allows you to type and search for content.

Smart search means that when you start to type on a 'Search' area. The search will automatically begin to filter using the letters you are typing. This will help to quickly find the word/content you are looking for without having to type the whole word, sentence or phrase

The following shows how you can search for content in each area.

Person search

Q Paul

Id	Forenames	Surname	GMC number	GDC number	Public health number	Programme name	Training number	Placement grade	Placement specialty	Site	Placement type	Role
246093	Vian	Aziz	7065873									Clinical Supervisor, Educator
246092	Mohamed	Ali-Abdulle	6062562			6921 KSS532 General Practice - Maidstone and Tunbridge Wells KSS						DR in Training
246091	Joanna	Chittenden										Administrator.HelperFunction
246090	Elena	Loginova										Assessment.Access, Document
246089	Steve	Callender										Administrator.HelperFunction Communications.Administrator Person.AddNew, Person.Imj Programme Access, Program

Search rules on TIS

1. Search one column at a time
2. Searching for forename and surname together will not work, e.g. John Smith. Instead search for surname (e.g. Smith) and use the filter for first name
3. Not all columns are searchable. The following columns are the searchable columns in each area of TIS:

You are not able to search multiple columns. Example: Forename (space) Surname will not work in this current functionality. Please search by 'one column' and filter this search. (Shown in the following area of this document: Filters)

Searching in 'People'

ID Number, Surname, Forename, GMC/GDC/PH number

Searching in 'Posts'

National post number, Programme name, Current trainee GMC number

Searching in 'Programmes'

Programme name, Programme number, Owner

Searching in 'Assessments'

Curriculum name, Surname, Forename, Type

Q Paul

Id	Forenames	Surname	GMC number	GDC number	Public health number
246075	Paula	Gullett	N/A		
246050	Paulette	Scale			
246048	Pauline	Elcome	UNKNOWN		
245968	Paula	Willis			
245959	Paul Simeon	Stonela	3068577		
245946	Paul	Deeley	UNKNOWN		
245784	Moli	Paul	3196366		
245773	Paul	Finery	2388373		
245652	Kevin Paul	Hollier	4405070		

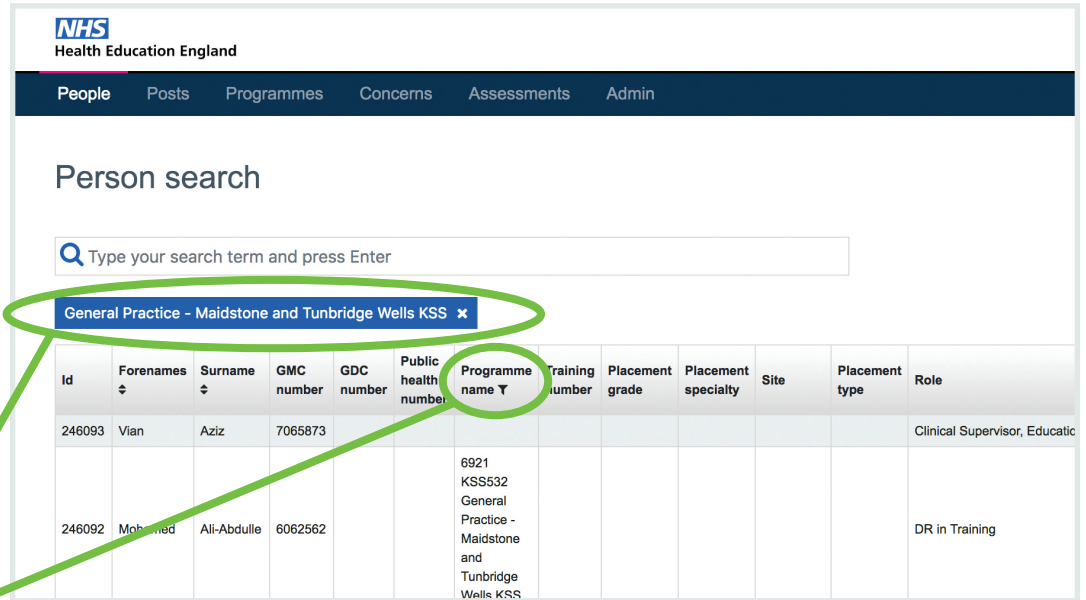
Example: Searching by 'Paul' in People results in all records of Paul. These results are automatically ordered in alphabetical order

Table filters in TIS: How do I filter content to help with my search?

Summary

There are a number of filters available in table column headers throughout TIS.

On arriving in the TIS Environment, the 'Owner' filters are automatically applied to help you with the areas you are most likely wanting to search within. You can clear these filters easily to have a wider search.



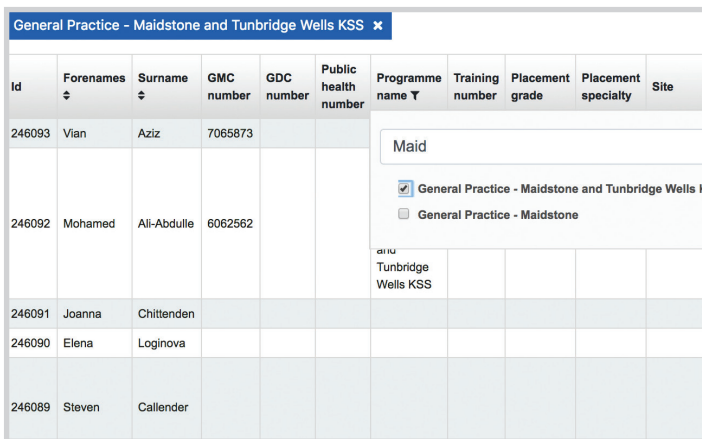
Filters in TIS

What are 'Filters' and how do they work?

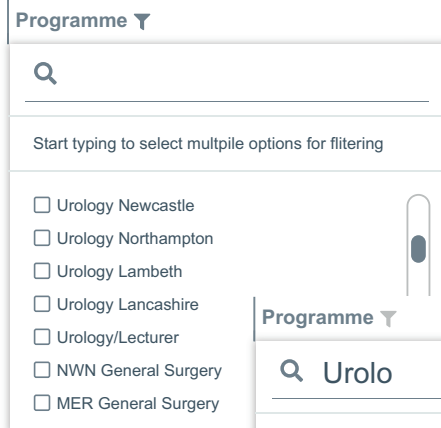
Sorting: This arranges the content into 'Alphabetical' order or reverses the order.

Filtering: This functionality allows you to select multiple list items in order to narrow your search. For lists that are long, there is the additional option to 'Quick type' for what you are looking for. You are able to select as many list items as you wish. The filter icon will display by the column heading when a filter is being used. Example below.

Filters vary on each component table. If the list items are only small, you will have the option to select them without having to scroll or 'fast type' for results in the filter. The QuickType solution is to help with larger fields of filtering.

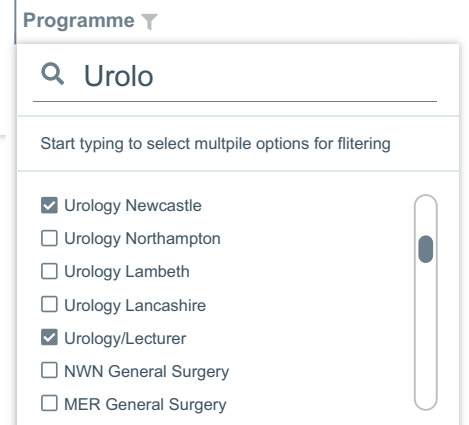


Entering 'Maid' in the quick type area allows me to find 'Maidstone and Tunbridge'. On selecting this it appeared in the filters above (in blue). You can remove these filters in the filter columns by deselecting them or by removing them using the crosses in the actual filter itself



Here is an illustrated example of the quick type functionality and selecting multiple list items. Once you have found what you are looking for, you can start typing again to continue with your filtering list

Example of the 'QuickType search' and how it filters results.



Records in TIS: How do they work?

Summary

Records are collections of data (usually associated to a 'Person' or 'Group'). They can be created/edited/assigned or de-assigned in a variety of different areas of TIS, they are a collection of forms and inputs that belong to a person, be it a placement, programme, rotation or simple personal details. All are easily accessible and editable in the TIS environment.

NHS Health Education England TRAINEE INFORMATION SYSTEM

People Posts Programmes Concerns Assessments Admin

Back Bozena Poller - 7071164 + Create placement

Placements

Starts	Ends	Site	Specialty	Grade	Type	Status
Future						
28/07/2018	31/07/2018	12870 Northern General Hospital	Medical Virology	Specialty Training Year 4	In post	FUTURE
Current						
31/07/2017	27/07/2018	5797 Out of Programme	General Surgery	Specialty Training Year 4	OOPE	CURRENT
Past						
18/10/2016	30/07/2017	13002 Royal Hallamshire Hospital	Geriatric Medicine	Specialty Training Year 4	In post	PAST
03/08/2016	17/10/2016	13002 Royal Hallamshire Hospital	Medical Microbiology and Virology	Specialty Training Year 3	In post	PAST
18/10/2016	02/08/2016	13002 Royal Hallamshire Hospital	Medical Microbiology and Virology	Specialty Training Year 3	In post	PAST
01/08/2015	17/10/2015	13002 Royal Hallamshire Hospital	Stroke Unit	Specialty Training Year 2	In Post	PAST
26/05/2015	31/07/2015	2323 Out of Programme (South)	Medical Microbiology and Virology	Specialty Training Year 2	OOPE	PAST

Placements in a Person record

There are a variety of tables containing 'Records' or data in TIS. Records can be accessed through the landing page for each component clicking on a 'Record' in a table will then take you to that record/or data set.

The example above is how TIS breaks down records that are Past, Current and Future. This is an example of 'Placements'. By selecting on a record of a placement (in a Person) you are able to edit and updated this data if required. As shown below.



NHS Health Education England

People Posts Programmes Concerns Assessments Admin

Personal details
Sensitive data
Qualifications
Programme membership
Placements
Assessments

Starts	Ends	Site	Specialty
Future			
28/07/2018	31/07/2018	12870 Northern General Hospital	Medical Virology
Current			
31/07/2017	27/07/2018	5797 Out of Programme	General Surge
Past			
18/10/2016	30/07/2017	13002 Royal Hallamshire Hospital	Geriatric Medic

In every 'Person record' you have the ability to navigate to a number of separate records associated to that specific person. Using this drop down will allow you to access these areas, and manage a 'Persons' record much more efficiently.

Placements

Starts	Ends	Site	Specialty	Grade	Type	Status
28/07/2018	31/07/2018	12870 Northern General Hospital	Medical Virology	Specialty Training Year 4	In post	FUTURE

POST

Personal details
YH0RHHQNGI075/STN/008
Site: Northern General Hospital
Domain: Health Education England Yorkshire and the Humber
Grade: Specialty Training Year 4

Location
Date from: 28/07/2018
Date to: 31/07/2018

PLACEMENT
Requestor: YH0RHHQNGI075/STN/008
Status: FUTURE
Training description: [Empty field]
Update

Current

Starts	Ends	Site	Specialty	Grade	Type	Status
31/07/2017	27/07/2018	5797 Out of Programme	General Surgery	Specialty Training Year 4	OOPE	CURRENT

You can easily select any record data in a table, which will open up to show the detail of this record. You can edit and update the fields in any record you have permissions to access.

Personal details

PERSONAL

Title: [Empty field] Legal forenames: [Empty field] Surname: [Empty field]

Title is required Surname is required

Forenames: [Empty field] Initials: [Empty field] Legal surname: [Empty field]

Forenames is required Initials is required

Some of the fields in TIS are 'Mandatory' and some are 'Optional'. All 'Mandatory fields (highlighted in red) must be completed for the form to be 'Saved' or 'Updated'.

Creating a record in TIS: How do I do this?

Summary

Creating a record is very simple in TIS. The following example is of 'creating' a 'Programme' record. All records are accessible on the 'Components' landing page table. Using the 'Search' and 'Filters' you are able to access these records.

Programme name	Programme number	Owner	Status
MER Medical microbiology	MER3998	Health Education England North West	CURRENT
Paeds Dentistry - Lecturer - Local	WMDPDENIL - Local	Health Education England West Midlands	CURRENT
Clinical genetics/Lecturer	WMD925/L	Health Education England West Midlands	CURRENT
Special Care Dentistry	EMD 070	Health Education England East Midlands	CURRENT
Repatriation	EOERPPT	Health Education England East of England	CURRENT
General (Internal) Medicine	NOR087	Health Education England North East	CURRENT
Urology/Lecturer	WMD991/L	Health Education England West Midlands	CURRENT
NWN General Surgery (run through)	NWD4040	Health Education England North West	CURRENT
MER General Surgery (run through)	MER4036	Health Education England North West	CURRENT
Aviation and space medicine	EDE4013	Health Education England East of England	CURRENT
Medical microbiology	WES4000	Health Education England Wessex	CURRENT
Medical Virology	WES3999	Health Education England Wessex	CURRENT
Diagnostic Neuropathology	EMD4035	Health Education England East Midlands	CURRENT
MER Otolaryngology Run Through	MER4034	Health Education England North West	CURRENT
Dummy HENW Programme for Posts	NWV_DUMMY_Post	Health Education England North West	CURRENT
NWN Otolaryngology Run Through	NWD4032	Health Education England North West	CURRENT
Dummy HENW Programme for People	HENW_DUMMY_Person	Health Education England North West	CURRENT
024 - 2008/9 starters	Trent FP 024		INACTIVE
028 - 2008/9/10 starters	Trent FP 028		INACTIVE

Creating a Programme record

Step 1

Create a new programme using the button in the top right hand corner or in the primary navigational area as shown opposite. These create buttons are positioned here in all component areas where records can be created.

Step 2

Complete the form (mandatory fields must be completed)

Step 3

Once the form fields have been filled in (some have drop-downs to help with this process) the Save or Update button will become active. Press this to complete the task.

Step 4

You have now successfully created a record. You will have received feedback that this has been completed on the screen with a small green tab appearing at the top of the page.

Step 5

Depending on what area of TIS you are creating the record, you will be re-directed to the 'Table' of records related to what you created. Here you are able to view or edit the record you have created.

Alternatively you may remain on the screen that you created the record in, as there are also additional option for further data inputs or the ability to assign this record to a specific person (For example).

Search programmes
Create programmes

Programme name

Programme number

Owner

Programme name

Programme number

Owner

Step 1: Create the 'Record'

Programme 342677

Programme name

Programme number

Status

Owner

programme name is required

Owner is required

Step 2: Complete the form fields where required

Programme 342677

Programme name

Programme number

Status

Owner

Test programme

CURRENT

Health Education England North East

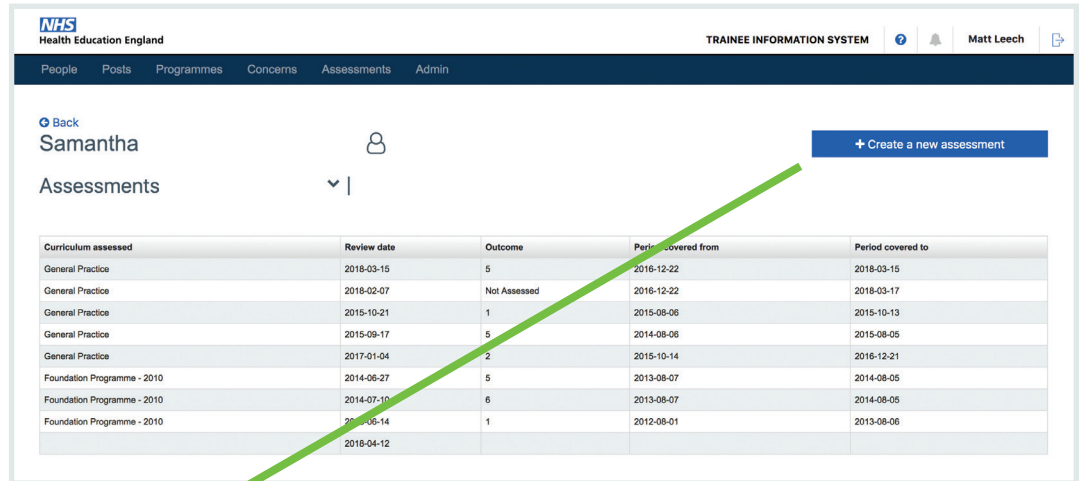
Save

Step 3: Save or Update the form to create or update the record

Creating & editing content in TIS: Mandatory data and what you need to know?

Summary

In many parts of TIS there are areas of content that need to be created first, before other pieces of data/content can be added to them. This page explains why this needs to happen and how this works.



The process for creating an Assessment

Step 1

To add data to a form for a person record go to that component (Assessments in this example) and use the 'Create' button to begin the process.

Step 2

It is important to understand that some fields are mandatory, meaning they must be filled in to complete the process. The reason behind this is that some of these fields also generate content in other areas of TIS, creating ID's and also generating specific data fields required for the process to be completed.

Step 3

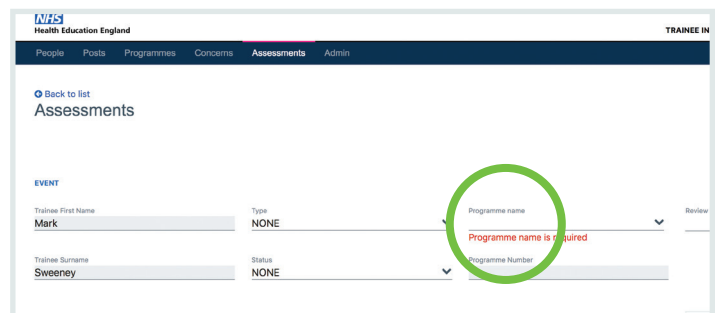
On completing each stage of this process, you will find that additional areas become available, for you to populate when needed.

Step 4

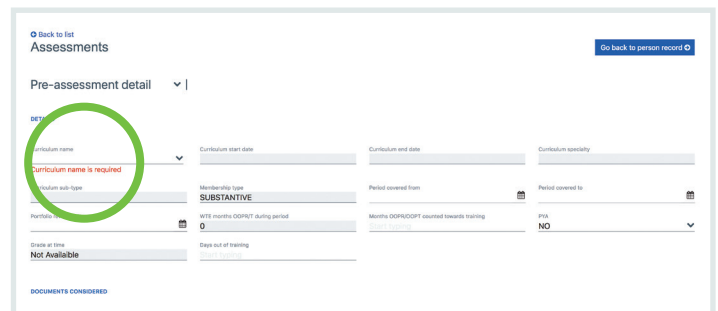
When editing content in TIS, be careful to make sure that you do not delete an area of mandatory content as this can affect the content in other areas and what is available to you as admin. In addition, you will not be able to save the changes you've made to a record if all mandatory fields are not completed

Step 5

The user journeys for each of these areas are quite simple to follow. In the L3 navigation you can access these areas on populating the fields in the correct process.



Step 1: The first stage of this particular process is to create an 'Event'. As you can see the red field is 'Mandatory', this needs to be completed before you are able to move onto the next part of 'Creating an Assessment.'



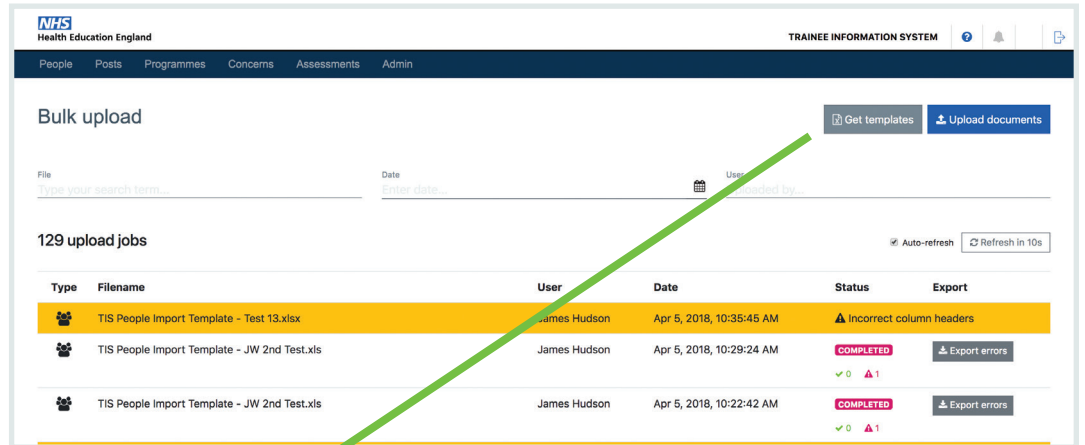
Step 2: You are now directed to Pre-Assessment. This must be completed to move onto stage 3, Post-Assessment below. Once completed the Assessment is available to view in that persons 'Assessments' table view. If at anytime you remove a mandatory piece of data, the record of this Assessment will be removed.



Bulk uploads in TIS: How do they work?

Summary

Bulk uploads allows the user to create or update multiple records at once. There are rules associated to how the uploads are added to TIS. All uploads must be done through 'Templates' populated in Excel. The templates can be downloaded from the Bulk uploads area. Follow the process below to populate TIS using bulk uploads.



The process for uploading in bulk

Step 1

Navigate to 'Bulk uploads' in Admin on the primary navigation.

Step 2

Download the template from TIS.

Step 3

Populate the spreadsheet with records (people in this example).

Step 4

Upload spreadsheet back into TIS with the upload feature.

Step 5

The system validates spreadsheet and presents validation errors if there are any in the document.

Step 6

The system creates/updates new records based on spreadsheet values

Step 7

Where system finds matching person records on TIS, it will update the Person record with details being uploaded.

Step 8

Where system cannot find a matching person record on TIS, new Person record will be created.

Step 9

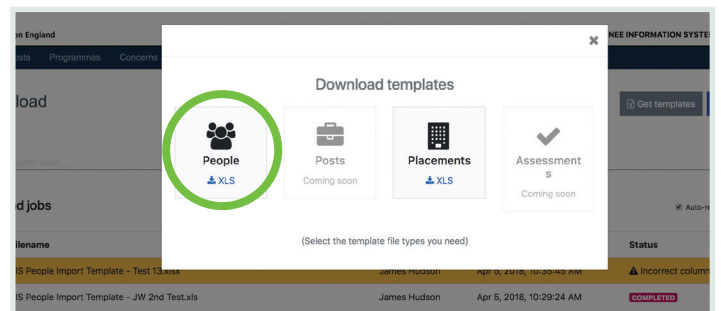
The system will display confirmation when process completes.

Step 10

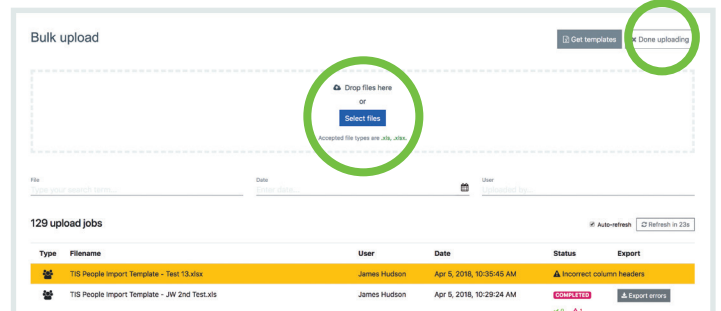
The system presents number of successful/failed rows.

Step 11

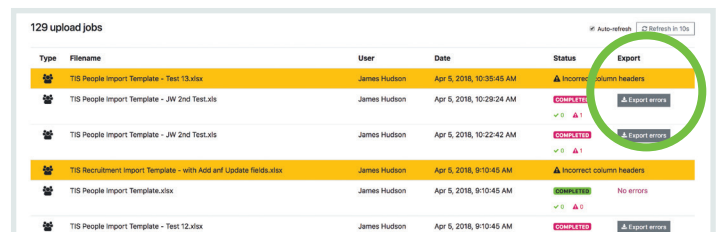
An error report can be downloaded to show the user where the errors are in the downloaded report. You are then able to fix these and re-upload into TIS.



Templates: Download the template you require. This example is for 'People'. Populate the template, making sure to follow the template structure (This is also explained on the following page of this guide).



Uploads and exports: Upload the populated template back into TIS through the up-loader. The uploaded file will appear in the list table below. The status column will inform you of how many of the rows 'data records' are now in TIS and how many have 'errors'. You are then able to export those areas as shown below, enabling you to fix the errors and re-upload into TIS.

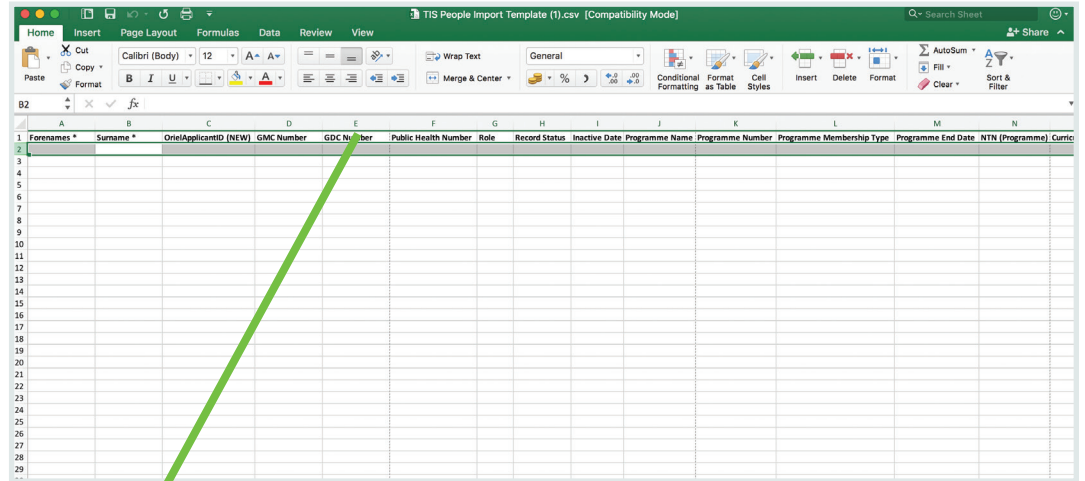


Bulk upload templates in TIS:

How do I use them?

Summary

There are several templates that are specific to separate components in TIS. They all require certain areas of data to be populated correctly for TIS to be able to process the data into a record correctly. The example below is for 'People' uploads.



The rules for data columns

1. Column headers marked as 'Addition' in the template can only be added to a person record if populated
2. Column headers marked as 'Addition' in the template, if left blank, and are not mandatory, will be left as blank when person record gets created
3. Column headers marked as 'Update' in the template, if person matching criteria are met, will be updated with the populated values.
4. Column headers marked as 'Update' in the template, if person matching criteria are met, but left blank, will not update existing values held on TIS.
5. Column headers marked as 'Matching Criteria' are used to determine if the Person already exists on TIS and therefore Add/Update the rest of the specified fields.
6. Column headers marked with an asterisk (*), are mandatory. However, one of the registration numbers (GMC/GDC/PH) should also be provided and not marked as an asterisk.
7. If matching criteria are not met, i.e. Both Surname AND Registration number in combination (GMC/GDC/PH No.) do not match to an existing person, a new person record created.

An example of 'Addition/Update/Matching' criteria below

Addition

Role
Programme Name
Programme Number

Update

Record Status
Inactive Date

Matching

Surname
GMC Number
GDC Number

Please use the links below to access the templates with all column values for each component

People column value template: [Download here](#)

Placement column value template: [Download here](#)

User	Date	Status	Export
James Hudson	Apr 5, 2018, 10:35:45 AM	Incorrect column headers	
James Hudson	Apr 5, 2018, 10:29:24 AM	COMPLETED	Export errors
James Hudson	Apr 5, 2018, 10:22:42 AM	COMPLETED	Export errors

Errors: Once your upload template has been populated, any error rows or records of people that have issues/errors will be highlighted in the table. Once the upload is complete, you can export the error list to repair those records ready to be uploaded again.

James Hudson	Apr 5, 2018, 10:29:24 AM	COMPLETED	Export errors
James Hudson	Apr 5, 2018, 10:22:42 AM	COMPLETED	Export errors
James Hudson	Apr 5, 2018, 9:10:45 AM	Incorrect column headers	
James Hudson	Apr 5, 2018, 9:10:45 AM	COMPLETED	No errors
James Hudson	Apr 5, 2018, 9:10:45 AM	COMPLETED	Export errors

Once a template has been successful, the indicator will turn to green to let you know that your full upload is now complete. Any successful records uploaded will be automatically added to TIS. You will not need to re-upload these every time, to add the template. TIS will upload the whole document adding the remaining records that you have updated.

Type	Filename	User	Date	Status	Export
	TIS People Import Template - Test 13.xlsx	James Hudson	Apr 5, 2018, 10:35:45 AM	Incorrect column headers	
	TIS People Import Template - JW 2nd Test.xls	James Hudson	Apr 5, 2018, 10:29:24 AM	COMPLETED	Export errors
	TIS People Import Template - JW 2nd Test.xls	James Hudson	Apr 5, 2018, 10:22:42 AM	COMPLETED	Export errors

If the whole template has an issue 'Incorrect column headers' for example will be indicated in the table as above. These issues will not work in TIS.

Notifications in TIS:

How do they work, and where do I find them?

Summary

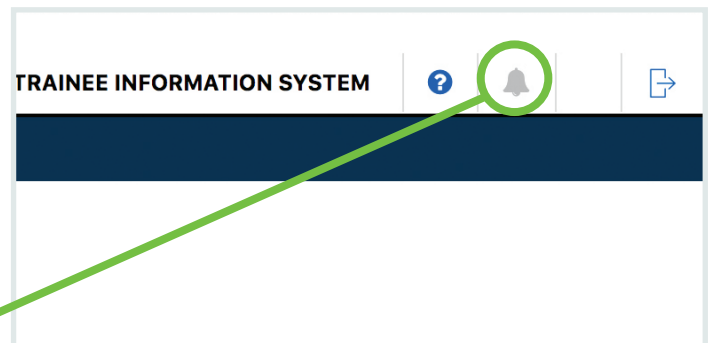
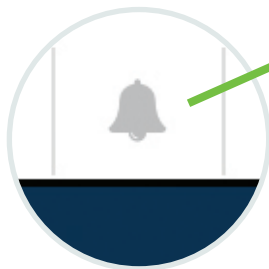
Notifications in TIS are now temporarily disabled. This feature will be coming soon.

ID	Forename	Surname	GMC	GDC	PH	Programme	Training	Placement grade	Placement speciality	Placement type	Role	Owner	Status
249018	Maye	Thrasher	7544101								DR in Training	Health Education England North West London	CURRENT
249017	Panayiota	Vourou	7602353								DR in Training	Health Education England North West London	CURRENT
249016	Joseph	Harris	7601234								DR in Training	Health Education England North West London	CURRENT
249015	Diya	Kapila	7604526								DR in Training	Health Education England Kent, Surrey and Sussex	CURRENT
249014	Anthony	Tan	7606991								DR in Training	Health Education England North West London	CURRENT
249013	Ali	Dogan	7602093								DR in Training	Health Education England Kent, Surrey and Sussex	CURRENT
249012	Jacob	Levi	7604551								DR in Training	Health Education England North West London	CURRENT
249011	Neel	Kapoor	7601264								DR in Training	Health Education England North West London	CURRENT
249010	Joanne	Butler	7596053								DR in Training	Health Education England Kent, Surrey and Sussex	CURRENT
249009	NIKITA	JOLAPARA	7630217								DR in Training	Health Education England North West London	CURRENT
249008	Sheikh Naheed	Chowdhury	7602000								DR in Training	Health Education England North West London	CURRENT
249007	Elizabeth	Page	7597673								DR in Training	Health Education England North West London	CURRENT

Notifications Disabled

What does this mean?

Having the notifications disabled will not affect your day to day work in TIS. If there is anything that we feel is important for you to review, we will send this to you directly and keep you informed of updates to the system and also releases via MS Teams.



Notifications icon

This is grey to indicate it is disabled.

Getting help with TIS:

Where do I go for help?

Summary

There is a direct link to the 'TIS Support' channel in the main header area of TIS. This will guide you to an area where you can utilise a number of resources to help you with your tasks. FAQ's, Technical support, Contact links and even this Guide is available in this area.

NHS Health Education England TRAINEE INFORMATION SYSTEM

People Posts Programmes Concerns Assessments Admin

Person search

🔍 Type your search term and press Enter

CURRENT x Health Education England Kent, Surrey and Sussex x Health Education England East Midlands x Health Education England North West London x
Health Education England North Central and East London x Health Education England South London x Health Education England North West x

ID	Forename	Surname	GMC	GDC	PH	Programme	Training	Placement grade	Placement speciality	Site	Placement type	Role	Owner	Status
249018	Maya	Thrasher	7544101									DR in Training	Health Education England North West London	CURRENT
249017	Panayiota	Vourou	7602383									DR in Training	Health Education England North West London	CURRENT
249016	Joseph	Harris	7601234									DR in Training	Health Education England North West London	CURRENT
249015	Diya	Kapila	7604526									DR in Training	Health Education England Kent, Surrey and Sussex	CURRENT
249014	Anthony	Tan	7606991									DR in Training	Health Education England North West London	CURRENT
249013	Ali	Dogan	7602093									DR in Training	Health Education England Kent, Surrey and Sussex	CURRENT
249012	Jacob	Levi	76012051									DR in Training	Health Education England North West London	CURRENT
249011	Neel	Kapoor	7601264									DR in Training	Health Education England North West London	CURRENT
249010	Joanne	Udder	7596053									DR in Training	Health Education England Kent, Surrey and Sussex	CURRENT
249009	Nikhil	JOLAPARA	7630217									DR in Training	Health Education England North West London	CURRENT
249008	Sheikh Naheed	Chowdhury	7602057									DR in Training	Health Education England North West London	CURRENT

Get help link

What do I do?

Click this link and it will direct you to an area where you have access to, what we hope, is everything you need to solve any issues you may have. If you can't find it here, use one of the contact links or channel chats to ask any questions you may have. Somebody on the team will get back to you as soon as they are available.

Get help icon

Click this blue icon to access the support area.

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