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| **No** | **Component/Feature** | **Detail** | **Additional areas of interest/questions** |
| 1 | Educational attainment (E-portfolio) | Exams and competences logging. |  |
| 2 | Assessment | The recording and reporting of the entire assessment pathway. From preparation to final outcome. This will link to Revalidation. |  |
| 3 | Case management/Concerns log | Links to Revalidation (component 17). This is the ability of local offices to record any concerns against a trainee record. This will be linked to the Revalidation function.  |  |
| 4 | Study leave recording and tracking | Record study leave a trainee or trainer has taken and the funding related to each study leave episode. This can be courses, training sessions or study leave as we currently know it. Capture what was undertaken and when. | Consider trainee access and local team access and responsibilities.  |
| *5* | *Trainee finance* | A quasi component that links with many other components so may not necessarily be one overall component – rather it could be a part of other components e.g. Post management, study leave, placement management, relocation expenses. |  |
| 6 | Learner Record | The TIS Output Specification calls this area the Learner Record and details the requirement for a Person Type category to differentiate between the categories of person record. This will contain the core dataset of information including :* Personal name details, including legal and “used” surname.
* Personal contact details, such as home address, telephone and email and email
* Equality and diversity and other sensitive personal data as defined under the Data Protection Act (protected characteristics).
* Professional registration details, noting that in some cases these may be linked with regulators (e.g. GMC).
* Educational qualifications and achievements.
* Unique ID numbers, such as HEI references, NI number and other attributes.
* Contract information e.g. WTE and other details pertaining to the “self”, supernumerary.
* Immigration status (the system will manage a process for supporting Tier 2 sponsored directly managed learners).
* The system will support processes that may change the “state” of the person record i.e. out-of-programme, or to change to part-time working

Will need to connect person to programme and from there to posts (as a placement), to assessments and Revalidation. For directly managed learners, a process to verify a photograph and other documents to assist in pre-employment checks.TIS will be focussed on a multi professional workforce meaning that the structure should be flexible enough to manage the information of professions in addition to doctors and dentists i.e. nurse, midwives and pharmacists. Each person record should be appropriately associated to the business processes designed to support that person such as a particular assessment function related to their programme of training. Trainee type records can therefore be placed into subcategories of Learner Type. Depending on the learner type the person record should be able to manage the sometimes complex training pathways of HEE learners. The person and learner type can dictate the programmes a person can be connected to.Related to programmes, the system should:* Identify ‘orphan’ learner records. Those learner records not attached to a programme.
* Auto calculate CCT date (dependent on WTE and OOP status).
* The system will detail the accumulated time in training for a learner.
 | Will need to finalise list of data items that fall under this category.Starters and Leavers data could be captured under Programme information as could Form R Part A and NTN/DRN allocation. Equally so could the contract information shown in the details column. However a process for the creation and change of status of records from Current to Inactive will need to be both built into the system and agreed within HEE. The TIS Output spec states that ‘Equality and diversity information to include Northern Irish requirements’. Will need to check if this is still required.This can be recorded in the programme area of the learner record or in the main body of the learner record.Links to an HR function carried out by lead employers in some local offices or to training trust requirements. |
| 7 | Trainer record - Trainer Type of Clinical supervisor | Separate to Trainer Management (see component 9)This component allows the recording of clinical supervisors against a trainee/post or placement |  |
| 8 | Trainer record – Trainer Type of Educational supervisor | Separate to Trainer Management (see component 9).This component allows the recording of Educational Supervisors against a trainee. | Are Educational Supervisors only linked to the trainee or are they recorded against a post? The duration of the relationship of an educational supervisor with the trainee suggests that it is the person to person link that is important.Are GP, Foundation and Psychiatry the exceptions? |
| 9 | Trainer record (Trainer management) | More detailed view of the trainer population inc. approvals, training etc. The TIS Output Specification document defines this as ‘a person who participates in the management of a learner in a formal support capacity’.  | Not all local offices will capture equal amounts of information on their trainers – look at differences and why they exist. What can one local office do that another can’t?Look at differences (if any) of the GP trainer management and the approval of the Psychiatry trainer/supervisor |
| 10 | Course Booking (system) | Ability to organise an event or course. Includes inviting delegates and speakers, certificates, catering etc.  | Events management?ARCP room bookings, hospitality arrangements.Why are so many course booking/event management systems in place in HEE? What are they and what are the differences between them. Again, what can one do that another can’t and what is needed? |
| 11 | Placement management | Support local offices with the placing of trainees into posts = placements. Depending on the programme and level of the trainee each post will support the trainee to obtain different competencies. Much of this knowledge exists in the training programme directors head  | Formerly known as rotation management.Can monitor trainee progression here. |
| 12 | Post management | Includes post establishment, approvals and funding. Substantive, supernumerary, academic and military – have we missed any? |  |
| 13 | Out of Programme | The system will manage out-of-programme activity from application through to completion. With doctors this links with GMC process and is different to absence management (see component 15) |  |
| 14 | Less than full time applications |  |  |
| 15 | Absence management | Sick leave, career breaks, parental leave. |  |
| 16 | Curriculum management | Learners follow a curriculum, or a similar framework that defines their education and training outputs. Curricula can be locally or nationally defined, or have a mix of local and national. For some learner-types the curricula learning objectives will be detailed and outcomes recorded in an e-portfolio system. Although some components of the curricula requirement are likely to be person-role derived, there is likely to be a core structure.A learner will be on one or more curricula when on a training programme.* The system will enable the management of curricula at a local and national level.
* The system will enable the recording of curricula delivery against an individual learner.
* The system should make it possible to map elements of the curricula to training posts, including certain generic professional capabilities.
 | Link to approvals, trainer record, posts, programme. Can also be Academic, Dual, sub-specialty. |
| 17 | Revalidation |  |  |
| 18 | Reporting, dashboard and analytics. |  | Think about what to report on, the level of reporting, knowledge of the operator and where we want to report from. |
| 19 | Questionnaires and Surveys |  |  |
| 20 | General principals/good practice |  |  |
| 21 | Non-functional requirements (NFR) | Security, auditing, access platforms etc. |  |
| 22 | Quality |  | Need to find out what the Quality teams in local offices do – how (if at all) does this extend to the national teams? |
| 23 | Programme Management | The training programme provides the parameters that dictate what happens to a learner and how their education and training is ordered and arranged. This is the curriculum detail (see component 16). The programme can be simple and linear or more complex depending on its character.The following is taken from the TIS Output spec document and indicates the construction of a training programme (note this is not exhaustive): A training programme:* May be fully or partially derived from the curricula.
* May hold the “stock” – or capacity, or commissions – of learner numbers that indicate the ceiling for training programme, or cohort. A training number could be held by named learner, or may be allocated as a “counter”.
* Training posts, which for some learner-types inherits detail from the training programme. Within some training programmes the training post is a critical item of that connects the learner to a placement. Currently, posts are only necessary for directly managed learners.
* Training placements represent the instance of a learner being trained and educated. It may also represent a non-training event e.g. a break from training.
* Approvals cover a series of processes whereby all, or elements of, a training programme are approved as being legitimate or fit for purpose.
* May hold the specialisms/specialties, sub specialties and special interest attributes (which may be a feature of curricula).
* The system should allow programme management (and parts thereof) to be syndicated to third parties, such as “lead employers”

However, as a basic system principle any learner must belong to a training programme as the programme provides the “reason for being”. |  |
| 24 | Interfaces | Must be able to receive and pass data with ESR via the Streamlined ESR and Deanery interface |  |