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| **No** | **Component/Feature** | **Description** | **Additional areas of interest/questions** |
| 1 | Educational attainment (E-portfolio) | Recording the learner’s progress towards achieving competencies required on training programme. Multiple versions exist throughout the training landscape. |  |
| 2 | Assessment | The management of the assessment pathway. Learners are assessed against the competencies/requirements of the curriculum/curricula they are following throughout their training. Formal assessment will occur at least once a year. Encompasses the planning the assessment to final outcome. |  |
| 3 | Case management/Concerns log | Record of any issues or concerns about the learner in their learning process N.B. not academic concerns as these are captured in the Assessments component. |  |
| 4 | Study leave recording and tracking | Record of the study leave a learner 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.  Captures what was undertaken and when. |  |
| *5* | TOOT (Time out of Training) | Any time out of training that could cause the learner’s completion date to change. |  |
| 6 | Person record (Learner and Trainer) | A person either undertaking training (learner) or involved in the delivery of training (trainer). |  |
| 7 | Programme Management | The management of the training programmes delivered within HEE (at a local office level). Links to curriculum management, posts, placements, approvals, people, assessments and revalidation. |  |
| 8 | Curriculum Management | The collection of competencies that a learner must achieve in order to successfully complete their training programme. This falls under the remit of Royal Colleges for many training programmes but possibly not all. | It is the responsibility of HEE and its Local Offices to provide learners with the opportunity to obtain the competencies required in the curriculum/curricula they are following in their training programmes.  It is the Royal Colleges (or equivalent) responsibility to formulate the content of the curricula. |
| 9 | Course Booking/Event management | A system to support the management and delivery of events and courses. |  |
| 10 | Placement management | Formerly known as rotation management. The management of placing learners into posts which can deliver the competencies they need at that stage in their training. |  |
| 11 | Post management | The management of the establishment of posts in each local office area – links to approvals and funding. Each training post should deliver an element of the competencies required within the curriculum/curricula attached to the training programme. |  |
| 12 | Finance | The management and recording of the funding of training. This can be post funding, funding linked directly to the trainee and study leave funding. |  |
| 13 | Revalidation | A GMC governed process which requires that each doctor is revalidated every five years. Comes under the remit of the Responsible Officer in each local office. |  |
| 14 | Approvals | All training programmes should be approved by the appropriate regulator, College or other approval giving body or individual. |  |
| 15 | Reporting, dashboard, analytics, questionnaires and surveys. | The system’s ability to produce information in a format required by the user. |  |
| 16 | Oriel (recruitment system)/HR/ESR | The interface between the recruitment system, TIS and ESR. To support new starter information flow and the transfer of changes to the learner record. |  |
| 17 | General principals/good practice |  |  |
| 18 | Non-functional requirements (NFR) |  |  |
| 19 | Quality | The overarching management and governance of the quality of the training programme. |  |