Discovery London: Regional BM's, Admins & Trainees (Users)

The table below is a collection of requirements, considerations, must have's and must not's, process, features and functionality gathered from workshops with Senior/Regional Business Managers and Local Administrators for the 'Trainee Application'.

Workshop(s) feedback ordered by most recent date

London: Trainee workshop 26/02/19

Attendees

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Feature	Element	Interaction	Comments	Actions
All features	Syncing all data	No duplications	If the application does not sync with other systems I will not use it	We need to make sure that any features in the application do not require duplication of effort to update other systems with the same data. The application should automatically update any other systems with the same data tables.
Personal details	Contact details	Sync all systems with this data	The ability to sync all my contact details. My multiple emails for work into one central place for contacting me	Investigate how this might work. Who owns these different contact emails. We may need the user to submit all and we update in TIS?
	Personal details and training grade	Incorrect information	The ability to review and then update this to be correct	If we do not allow the users the ability to edit this area due to ESR we may need to find a way to log a 'notification' that is sent to the Admin to let them know this is incorrect
Programme membership	CCT Date calculator	Interactive	We need to look at exactly what they need this to do. Does this have more opportunity to calculate other things for the user? Is this off the shelf plug-in, or is this tied into other features and has other dependencies?	We would need to look at the tech for this. Is this something we build or is this off the shelf?
	High-level details	Read-only/links?	Who's who. Organizational structure. Who is the 'Dean' for the Trust I am working with? Who are the senior people or people who I may need to know and how do I contact them?	A way of showing the hierarchy of an establishment so that the Trainee feels they know the right people before they begin. Helps with support
	Training	Contracts	No contracts for training	Think this is frustration and causes lots of issues with benefits
Placements	Rotations	Read-only	Rotation dates and trusts (These must be correct)	We would need to check how this would pull into the application?
	Rotations	Interaction/notification	Leave request for future placements	How would this feedback to the Administrator? Is this a form or a request for a form?
	Rotations	Read-only/links	A frustration is that they have no way of knowing about job opportunities (eg. Fellowships)	We should investigate this further if they want to see the opportunities. Maybe a lost with links?
	Placements	Read-only	A list of future placements and rotations	The ability to view upcoming rotations and placements scheduled for the trainee. This gives them the ability to flag up anything that is wrong or they need to change
	Placements	Read-only/links	Contact details for placements	A list of details for each placement that is scheduled for trainee

	Placements	Read-only	Payroll contact details for each placement	This falls into HR/SBS finance. Need to look at the legality of doing something like this
Assessments	ARCP	Read-only/links?	ARCP Checklist (Tickbox culture)	We should check exactly what data needs to be on this list? Does anything cause issues with data protection?
	ARCP	Read-only/Interaction	These may tie into the 'Calendar' so that the Trainee is able to plan and schedule around these dates: RCOA e-portfolio style checklist was mentioned, think of a traffic light style checklist of essential documents for ARCP	Think around how this may work in a Checklist that they follow and ticks off as they complete different actions around ARCP. Think about how this may also tie in with a calendar and how the Admins feed these dates into this feature through TIS?
Forms	Leave	Input/review/sign-off	Eligibility for financial compensation. eg Annual leave allowance	Check the current form and digitalise. Check on any dependencies/sign off process
	All	Read-only	Information about what each form is for	This will help the new Trainees understand what they need and how to use it
	Form R	Input/review/sign-off	Simplify the current Form-R	Work already done on this by Steve. Check on any dependencies/sign off process
	Resignation	Read-only Input/review/sign-off	Information on the process and the form itself	Check the current form and digitalise. Check on any dependencies/sign off process
	LTFT	Input/review/sign-off	LTFT Application • Applications • Contacts • Admin paperwork	Check the current form and digitalise. Check on any dependencies/sign off process
	Travel allowance	Read-only Input/review/sign-off	• Information on process • Paperwork	Check the current form and digitalise. Check on any dependencies/sign off process
	Base hospital?	Read-only	Can't find the base hospital? Check if this is in fact in forms?	Check this
	Inter deanery	Read-only input	Interdeanery transfer process and application	Check the current form and digitalise. Check on any dependencies/sign off process
	OOP	Read-only input	• Application • Process information	Check the current form and digitalise. Check on any dependencies/sign off process
	All	Signature	All forms need to be electronic signature so no download needed	Check on digital signatures and any legality/constraints
	Occupational health	Read-only	• Process information	Check this as may require a form too
Notifications	Interim review Form R	• Link • Read-only	Interim review date and link to • Checklist • Form R	Check how this may work and prototype the flow/user journey
	ARCP	• Link • Read-only	ARCP date and link to • Checklist • Form R	Check how this may work and prototype the flow/user journey
	Summary	• Read-only	Summary emails	Investigate further
	Taxonomy	• Read-only • Link	Sign up for alerts about certain types of events	Check how this may work, where do we get the events information from, who adds this? Prototype the flow/user journey
	Data protection	• Read-only • Consent	For interests and preferences, to make sure that nobody (deans etc) can view your preferences, searches etc	Check how this may work, where do we get the events information from, who adds this? Prototype the flow/user journey

Calendar	Teaching	• Read-only • Link	Up to date teaching calendar specific to my specialty	Check how this may work, where do we get the information from and how will we keep this up to date. Does it sync with the data in TIS? and elsewhere?
	Events	• Read-only • Link	This would be a great way to see what events are on that I may find interesting. This would be great if it could be 'General' events, and then also 'Specific' events sent to me around my preferences. It would also be worth looking at Regional events and training opportuntites	We could look into a way of setting up multiple calendars around events, specialties etc, that the user can choose to receive and view. This way we a=only need to update specific calendars that will automatically update in each users application
	Integration	• Link	The users would like to have a way of making sure that 'Calendar' entries also sync with other systems. An example would be SBS and Portfolios.	Investigate this further, how would a calendar help with this? Maybe this is more 'Notifications'
	Training	• Read-only • Link	The calendar could also send the users a notification around 'Training days scheduled' but also show additional training opportunities with a link for the User to opt into this training	We need to look into how 'Interactive' we make the calendar. If we allow users to make changes in the calendar these must also sync with other systems/TIS/HR etc or send a notification/request to Admins about these changes/requests
	RTD Dates	• Read-only	• RTD to be updated regularly by deanery events • RTD dates on the calendar (London & KSS)	
On/Off-boarding	Revalidation	• Read-only	Summary of revalidation till the first consultant appraisal	We need to check what this currently looks like and also see about how this might be automatically generated every time they need it
	Summary	• Download link	Summary of everything completed with a link to download all the Trainee needs	We can check what they usually request annually and when they finish. We can work out how to package this up and give them a download
	Directory	• Read-only • LInks	Everything you need to know, and the contact details of the people who you may need to speak with	This is essentially ties in with HR too, we need to investigate what they currently have for on-boarding
Support	Contacts	Read-only/links	Who do I contact for help with central I.T issues, like NHS emails etc	We can look at adding a directory for important contacts at a high-level
	Sign-posting	Read-only/links	This is helpful for non-UK trained doctors	We need to look into this. How do they currently provide this support
	Tech	Contact point	24-hour tech support	Obviously, we can't give 24-hour support for tech, but we can find a way for them to submit issues easily
	Help	Contact point	Trainee in difficulty support/list of contacts for different issues?	We can check with how they offer this, adding a directory if needed
	Features	Requests	Feature suggestions option with evidence of being considered	Investigate this further, think they mean the release of features and support in using the features
Other ideas	Employment	Frustrations/Requirement	No lead employer is frustration around payment/training and access to benefits. The said that having a 'Master' employer would solve this issue. • Mortgages • Maternity leave • Pay	HR issue, but essentially there are a lot of problems with having to change employer every 3 months
	Leave manager	Read-only	Approval chains, for transparency	We would need to look into this, is this a part of TIS?

COC	Interactive	They have issues with being able to change the 'days of work'.		Investigate this further. What systems are involved in this? ESR? TIS?
SMP & Maternity allowance	Interactive	They would like a way for them to apply for or review the SMP & Maternity allowance staus/detail or to apply for this		Investigate how this might work. Think we need to look at the current process in more detail (Forms, who is signing this off?)
HR/Reps/TPD	Read-only/links	Contact details for Reps/HR for placements		We can look into who would be responsible for adding this into the app. HR details may be accessible through TIS?
Key people	Read-only/links	Contact details for key people in the business so that the Trainees know who to speak with for each area of their training should they need to		Check on heads of departments, how would this information be added to each persons 'App'
Base hospital	Expenses	A base hospital for excess travel claims/relocation		Not sure if this falls under anything we can help with?
Travel	Parking permits	Can we get these through the application		Investigate who is responsible, how would this work in the app?
Travel	Facilities	Travel facilities for after long/night shifts. Information on where I can stay/go (as per new contract)		Investigate who is responsible, how would this work in the app?
Teaching programme	Read-only/links	A way to show all the programmes available to a trainee		Investigate who is responsible, how would this work in the app?
Off-line	Read-only	Make sure that what we can show off-line, we do, as often no signal in hospitals		This is a great piece of insight, we should aim to think about how they use the app
Salary calculator	Interactive	Check contract rates from work schedules to know exactly what I should be/am being paid.		Investigate the tech for this. Plenty of examples to use.
Exception reporting link	Link	Need to investigate what this actually involves?		If this flags up again we need to find out what and who would be involved.
SBS	Change of current	The users would like 1 account for 1 person. Not 1 account per placement		Speak with SBS and why this is the case
Fellowships	Read-only	This needs to be clarified		More details for this?
Bursary info	Read-only	This needs to be clarified		More details for this?
Study leave	Calculator	To build a leave decision calculator		How would this work? Where is the value?
Benefits	Read-only	To have Childcare options at Trusts		Do they want to have childcare facilities or information on childcare? Investigate this further
CESR	• Read-only • Support	Checklist and signposting		What do they currently have for this? Digitalise that solution?
Leave	Read-only	Annual, Study and Compassionate leave - Allocations /details		This ties into Calendar comments, we need to speak with HR too about this. Leave seems to be a big issue
ESR	Frustration	The issue around different ESR accounts?		This was flagged up as a frustration. HR issue?
CCT	Interaction	CCT dates with a planner. How will an OOP/LTFT Affect CCT		We should look into the benefits of this and what else does this tie in with. Calendar? Forms?
Accessibility	Read-only/translations	Information for overseas trainees wanting to transfer into UK training		We should look into this as adds value and includes good Accessibility standards
HR	Read-only	Record of mandatory training		We need to check how the App may interact with HR. I have a feeling this may be an issue, but some of the read-only requests may be possible
HR	Read-only	Pay and Taxes record: The users would like to see their pay and taxes (tax bracket?)		
HR	Read-only	Incorrect pay/No pay: The users would like to be able to check this and have a contact to resolve any issues in the app		

HR	Read-only	Inductions: They have inductions every 3 months which is a frustration. Is there a way the app can help with this?
HR	Read-only	NHS emails: Duplicates/Collected emails for each post? This is frustrating as they would like one 'Master' email instead of multiple
HR	Read-only	Payroll: The users would like to see payroll information for bank details, contact details
HR	Read-only	Leave: Can the app help with applying for leave in advance?
HR	Read-only	Leave: How much annual leave am I entitled to?
HR	Read-only	A/L and S/L allowance
HR	Read-only	Paternity/Maternity leave requests/review
HR	Read-only	DBS: Sharing DBS between trusts
HR	Read-only	Seamless HR and the induction to working in one trust whilst having a bank in another
HR	Read-only	Occupational health: Sharing records between trusts
HR	Read-only	Occupational health: Induction dates between placements

What does success look like and how do we measure this?	Success	Measure
	An app that helps me get paid correctly	Check the issues in detail and check if these issues happen again with the assistance of the app
	An application that I find useful enough to want to use it fortnightly	Check how often the users are accessing/using the app. If we see this is regular we see the value
	Makes my life easier	Decreases repetitive paperwork
	An application that supports my planning, my learning opportunities and makes me aware of what opportunities are available	We see an increase in training, event registration, schedule improvements, and benefits
	An application with ongoing support and investment so that I can respond to changing challenges and needs	An improvement in relationships between Trainees and Admins/deaneries
	An application that helps me to apply for things like LTFT/OOP/Interdeanery transfers	An increase in applications, or less time required for Admins to help with this
	An application that streamlines movement between different placements	Less time required for Admins and Trainees having to work these out
	An application that is informative but not overloaded with trivial information	Usability testing with users once we launch. Check on what they see as useful what we can improve
	Saving time on forms every 3 months repeating MAST	We improve the process os they do not have to do this
	Have access to RTDs dates	I can access RTDs dates that I could not access earlier
	I have access to up to date training dates and locations	I can see all the training, events and dates around 'learning' which I can use to register for if I want to attend
	I can book study leave easily and have documentation	I can easily book the leave I need through the app without having to speak with Admin

User stories created by Trainees (Users) at the workshop

We asked the trainees to prioritize their top 3 feature requests/functionality which they had added to the wall with Post-its. We then asked them to take these Post-its and write User Stories based on the template we provided to help them to firstly prioritize an MVP and to also establish the value in this choice.

Prioritised requests users starred	Additional user stories

'As a'	'I want to'	'So that'
Doctor in training	Working LTFT I want to make sure I get paid correctly and check this, when I change jobs every 3 months	I can pay my mortgage, pay for childcare and not become overdrawn
Doctor in training	Have a record of my mandatory training	This can be shared between hospitals and I do not have to waste time repeating mandatory training every 3 months
Doctor in training	Be able to apply for leave in advance. I want to have the details of which hospital I will be working in and who to contact in the department, HR and Payroll	I can plan my life, reply to wedding invitations, book holidays and arrange childcare
Doctor in training	Have a lead employer	I don't waste time every 3 months doing repetitive induction paperwork and correspondence. Also so that I get paid correctly
Doctor in training	Easily access trainee difficulty support	I can get help easily if I am having problems
Doctor in training	Receive my ARCP date with a link to a checklist	I know what evidence I need to provide and pass my ARCP
Doctor in training	Have a list of upcoming rotations/placements	I can contact the department in advance to plan my training and planning leave
Doctor in training	- Know when my interim review date is - Know what documentation I need for my interim review (checklist) - Know where I can fill in my Form-R (link)	- It is easy for me to prepare for my interim review - My supervisors also have the same checklist - The deanery has my Form-R in advance and I don't have to print it out/scan it to e-portfolio
LTFT Trainee	Access regional teaching day dates for my speciality in my deanery/allied (neighbouring) deaneries in my calendar	- Plan in advance which RTDS I can attend, depending on the days I work - Helps the deanery have a record of which RTDS I have attended (to show at ARCP)
Doctor in training	The multiple online programs/systems to sync with each other	- I don't have to spend endless time repeating the same information (personal details, Mast training, occupational health etc) - Links into 'streamlining' project - Makes me want to use the discussed application
Doctor in training - Core specialist trainee (ST1-ST3) - Subspecialty trainee (ST4-ST5) - Post CCT (Fellow)	Assess training dates/events in my personalized calendar for the below: - Regional teaching days - ARCP & Interim review date - PSU events	- I know what educational opportunities are available - Apply for study leave (let rota manager know not to put me on call) - Apply for study leave budget (if necessary)
Doctor in training	- Know what is my CCT date (CCT Date calculator) - Know progression points (specialty specific)	- I can plan my training in advance with my supervisors - The ARCP panel knows what my bespoke progression points and CCT date is (LTFT trainees, OOPs, maternity leave) - Documentation of progression point (ST3) where pay changes (Most royal colleges - RCP/RCR, have a calculator on an excel sheet that should be easy to link to/import
Trainee	Who is not sure if I was paid correctly I would like to know how much I was supposed to be paid, and who to contact to sort it out	I can be paid correctly
Trainee	Apply for the cycle to work scheme and other benefits easily without having the issue of not being able to apply due to my role changing some often an employee not being the same over long periods of time which you need to have to apply for these benefits	I can take advantage of these benefits and purchase discount products to help me get to work easier
Trainee	To have the ability to reset my password immediately and have a username reminder as I have locked myself out of the system the night before my ARCP deadline	I can complete my ARCP paperwork on time

Trainee	Know how the organization is structured, to understand how doctors training works and I would also like to know the pathways, and what the acronyms mean as I have just started.	I can relate to trainee doctors
Trainee	Have seamless HR/Induction of working in one trust but having my previous bank in another trust	I get paid correctly
Trainee	Arrange LTFT/OOPE/Placement changes/maternity leave but need to know who to talk too, know who is responsible for which area and know who is accountable to who, for appeal	I can talk to the right person without being passed from pillar to post
Trainee	know what placement I will be in, a little about it, details/copies of the onboarding paperwork and contact details to sort out onboarding	I can make the transition to my new placement (eg commute, pay, HR, occupational health, LTFT issues, leave requests) as seamlessly as possible
Trainee	Know when the deanery last submitted information for the GMC for revalidation and also what they sent	I can plan when I next need to revalidate and get an idea of what information I need to revalidate
Trainee	Who is struggling and thinking of quitting, I would like to know what support is available within the deanery (eg PHP/Careers advice) or LTFT/OOP	Can get over my difficulties
Trainee	To apply for paternity leave and LTFT easily	I can spend time with my family
Trainee	Who wants to book annual leave and I don't know if my course is approved on the centralized approval list but want to apply anyway through a streamlined process	I can make the most of my training opportunities
Trainee	Who wants to know about what educational opportunities and events are going on in the region	I can plan my additional learning, book study leave and make sure I'm meeting my educational personal development plan
Trainee	To know what my placement will be in 1 year - 18 months time as I got engaged and may need to submit leave requests for a placement	I can book my wedding day
Trainee	I would like to have opportunities for support which is easy to access. Where I can speak with my Head of Clinical Services in regards to a possible change in specialties and receive support and encouragement to leave/make a change	My new specialty will have a better understanding

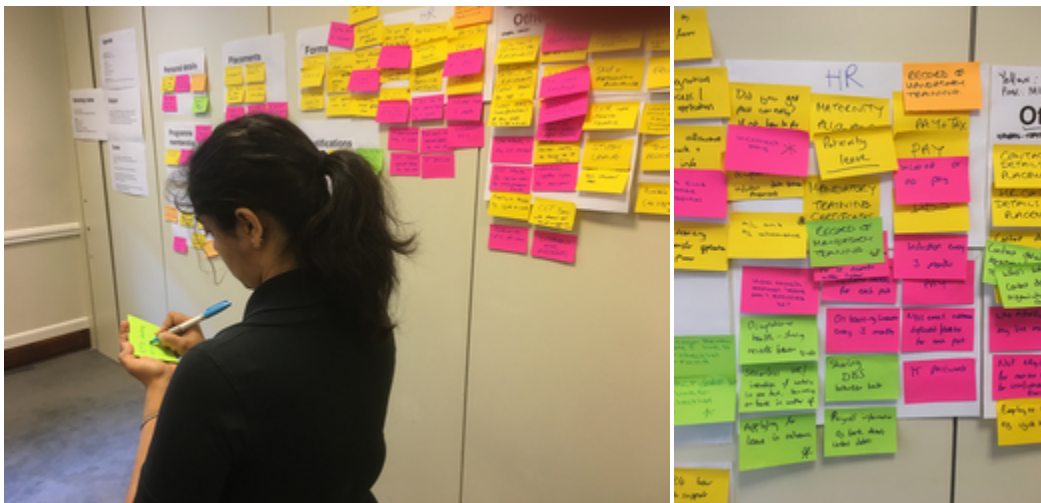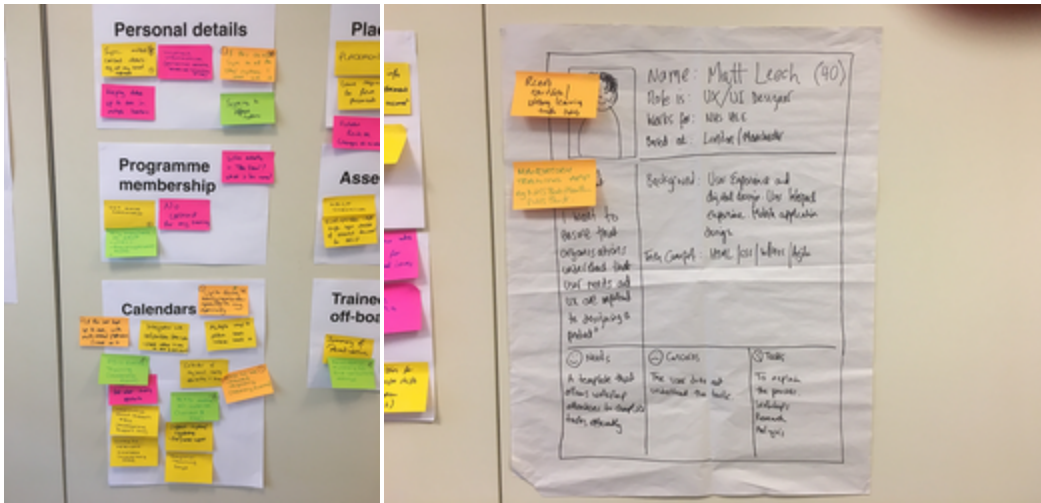### Gallery & Videos for Trainee workshop

Vimeo video link 1:

Post-its: Yellow - needs/wants | Pink: Pain-points/frustrations | Green: Value

London: Administrators workshop 05/02/19

Attendees

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Feature	Element	Interaction	Comments	Actions
Personal details	Personal information	Edit	• ***Concern:** We need to investigate how this will work with **ESR**	Investigate how this might work
	Contact details	Edit	▪ ***Concern:** We need to investigate how this will work with **ESR**	Investigate how this might work
	GDC/GMC	Read-only	▪ They will not need to edit this but good that users can review	Prototype
Programme membership	Programme (1,2,3)	Read-only	▪ Add TPDs and to be linked to programmes/rotations for info and approval. ▪ The Admins said that it needs to be read-only as they do this already on e-portfolios for posts and too important for rotations ▪ A comment made about the value of this as they also have with Synapse	Investigate how this might work
	Curriculum	Read-only	• We need to check with users is this of value?	Investigate value
Placements	Future	Read-only	• How far into the future should we allow the users to view placements? *(1 yr - 3 yrs/depends on the programme)* • Add Educational Supervisor with Email and Trust for Approvals • ***Concern:** Queries can be raised in **PSP** (We need to investigate the PSP and how this will affect the Application). • *Trainers:* Would need to see an overview of all their Trainees placements within the application • Can this link to the Trust website?	Investigate how this might work
	Current	Read-only		
	Past	Read-only		
Assessments	Review assessments	Read-only	• ***Concern:** An API with e-portfolios in both directions • An overview of their assessments. Need to investigate how much detail the Trainees would like to see • Validation within the system. They currently have to design their own to create the reporting	Investigate how this might work
	Log-book	Input/Edit	• The Trainees have e-portfolio for this. However, we need to investigate if they do in fact use this, as we have had a number of Trainees ask about having this feature in the 'application' so possible that the e-portfolio Log-book is not very usable and causing issues.	Investigate how this might work
Forms	Form-R	Review/Input/Sign	• Historical archiving of forms • Document manager for forms so Trainees and Admin can access any forms they need to (completed forms/partially completed forms) • TIS to automatically update CCT date regarding OOP and LTFT forms • LTFT Forms: Will they automatically update programmes? • Notifications for Trainees and Admins on the status of forms. Example: When a form has been sent to the Trainee they receive a notification to tell them when this needs to be completed by. Once completed and sent for approval the Admin should receive a notification. • ***Concern: PSP** How this affects some of these forms and how the Trainees currently use **PSP** to access the forms? • *Trainers:* Does a Trainee record become a Trainer record or does the Trainer start with a new record? • Exporting forms: When made inactive at the end of a programme can we export the following into a PDF and send to the trainee for their own archive: (The Admin's say they often get Trainees asking for these forms/records long after they have completed the programmes which are a frustration as the Admins have to find the old forms and records manually). - Training records (Posts) - Forms approved	Investigate all forms individually as to what areas need to have input from the User, what will be auto-generated and how the forms need to be approved/accepted once completed.
	LTFT (Less than full time)	Review/Input/Sign		
	OOP (Out of programme)	Review/Input/Sign		
	Relocation expenses	Review/Input/Sign		
	POG (Period of grace)	Review/Input/Sign		
	COC (Change of circumstance)	Review/Input/Sign		
	IDT (Inter deanery transfer)	Review/Input/Sign		
Notifications	Assessment reviews	Read-only	• This would inform the trainee they had an Assessment to review	Investigate value
	RTDs (Resend training dates)	Link	• Linking from dates to the event?	Investigate value
	Placement notification	Read-only	• 12-week COP (Code of practice)	Investigate value
	Save the date	Link	• Linkins to Calendar or maybe just read-only	Investigate value
	Final ARCP and CCT reminder to organise	Read-only	• This would help the Trainee to organise their ARCP & CCT with Admins	Investigate value

Calendar	ARCP Dates/conflicts	Input/edit	• This would help trainees to organise with admins	Investigate value
	Save the date	Input/edit	• This could be used for a number of things linked through the notifications	Investigate value
	Placements	Read-only	• Current and Future placements could be added to the Calendar to help with managing tasks/time/planning	Investigate value
Log in/Log out	Cookies & Policy	ReviewSign	• We need to have this in place for the application. Design work completed for this already just need to have the final copy for T&Cs	Review
On/Off-boarding	Accessing data once left	Download/export	• How will the Trainees access the Assessments/Forms and any other data once they leave the programme? We need to establish with Trainees what information they need, why they need it, and how long they need access to this information. Archiving	Investigate how this might work
Support	Chatbot	Tech	• This will require some investigation into tech and cost	Cost, investigate for value for the user
	Return to work	Admin help	• Support for trainees who are returning to work after time off for stress/bereavement, children?	This may be a process we implement where users can submit a request to talk about problems?
Other ideas	Training days	Read-only/link	• A list of training days that the Trainee may wish to attend with a link to that specific website/trust page	Needs a conversation with BM's/Stakeholders
	FAQS	Read-only	• A FAQS page on information that the trainees need through-out their training	Needs a conversation with BM's/Stakeholders
	Output CCT Calculator as a form	Input/edit	• We would need to investigate this idea further and establish the value for trainees	Needs a conversation with BM's/Stakeholders
	Link all to PSP	2 in 1	• Make sure that any changes in TIS/Trainee app also links back to PSP so no duplicates/repeat of the process	Needs a conversation with BM's/Stakeholders
What does success look like and how do we measure this?		• Launching the app • An application that Trainees accept • Able to access information and aware of the stage in the process • An app that has a genuine purpose where the trainees can access important information • Simplicity and reduce manual data entry • Reduce the duplication of info • Clear accessible info resulting in fewer phone calls and queries		• The app launches on time (MVP) • Survey the trainees to find out if they accept the app • Reduction in queries trainee has ownership • The trainees can use the app and consider it useful • Less frustration for everyone • Positive trainee feedback • Reduce simple trainee queries to HEE

User stories created by Admin workshop attendees

I asked the Administrators to consider their own Trainees, and think about what motivates them, what triggers them into action, and what they need to complete these tasks or requests. We then asked them to create 'User stories' to fill these needs and wants for their users, to help us define 'Personas', 'User Groups' and then 'User stories' once we begin the workshops with the Trainees themselves.

'As a'	'I want to'	'So that'
Trainee	I want clarity on where to go for information and forms	It gives me confidence in HEE and cuts down on me making queries to HEE
Trainee	I want Trainee/TPD/ES Electronic forms & signatures to be easily accessible	It will save time, be clear and accurate information and efficient
Trainee	I would like to know my future placement	I can rent or buy property
Trainee	I would like to know what happens with my privacy and digital footprint	I know what information is kept on once I CCT so that I have control over my personal information giving me peace of mind
Trainee	Log in with facial recognition	I do not have to remember another password, also looks cool
Trainee	To find all the forms in one location	I don't waste my time searching for them and then downloading them
Trainee	Have one platform	I don't have several logins for other platforms
Trainee	One centralized system	I am not managing and updating multiple platforms and duplicating my work
Trainee	Access Trust, HR, TPD, and other contacts	So that I have all of the people/places I need to speak too in one place

Trainee	Access assessments once completed	I can complete any outstanding tasks/be updated on my progress
Trainee	Know my progress on my OOP	I can plan my relocation and organize a visa
Trainee	One clear master calendar which provides key dates	I can conveniently see when important events are
Officer	Ensure I have the correct address for Special Circumstance Trainee	I can find a vacancy within a reasonable commute
TPD	See all trainees enrolled in a programme or rotation	I can get contact info to get up to date overview
Admin	One filing system	I do not need to look in multiple places
Admin	To be notified if a change I make is going to cause a conflict or error	I do not make that conflict or error and find an alternative solution
Admin	To have a prompt when deleting a record	I do not delete things easily from TIS
Admin	To avoid additional queries caused by the Trainee app	I am not gaining more work
Admin	Forms to collect signatures	I do not have to chase the trainee offline or end up with different forms with different signatures on different copies
Admin	Better placement data validation	It saves time and resources when it adds up to 100's of errors
Admin	Like my placements for 2 years	I can plan where I live and for the children's schools

### Senior Regional BM's/Stakeholders workshop 28/01/19

This workshop was to establish considerations and constraints, must have's and not's. It was an hour session so quite high-level with no detail on functionality, ie edit/read-only solutions to the features so the below will require further investigation with Administrators and users to establish the value be it this is what the business thinks they may need in the application.

Feature	Comments	Actions
Personal details	• National insurance number	Investigate with Administrators and Users as to the value of this suggestion
	• GMC Integration LRMP/Status	Investigate with Administrators and Users as to the value of this suggestion
	• Upload a photo of themselves	Investigate with Administrators and Users as to the value of this suggestion
	• Regional training days	Investigate with Administrators and Users as to the value of this suggestion
	• Info to trainees	Investigate with Administrators and Users as to the value of this suggestion
	• Immigration Tier 2 Visa progress/status	Investigate with Administrators and Users as to the value of this suggestion
Programme membership	• In programme preferencing	Investigate how this might work
	• Support – return to work	Investigate how this might work
Placements	• NETS Allowing completion of surveys	Investigate how this might work
Assessments	• View completed assessment outcomes	Prototype: Verify content of this overview
	• Verify data prior to events	Investigate how this might work

	• Trainee choosing a preference for assessment dates	Investigate with Administrators and Users as to the value of this suggestion
	• Appeals	Investigate how this might work
Forms	• Form R	Refer to Admin table
	• LTFT	Refer to Admin table
	• OOP	Refer to Admin table
	• Change of circumstances form (ESR-TIS)	Refer to Admin table
	• Maternity leave application	Investigate with Administrators and Users as to the value of this suggestion
	• Post 12 week change form	Investigate with Administrators and Users as to the value of this suggestion
	• NOC form (London review)	Investigate with Administrators and Users as to the value of this suggestion
	• Acting up	Investigate with Administrators and Users as to the value of this suggestion
	• Trainee declaration form	Investigate with Administrators and Users as to the value of this suggestion
Notifications	• Trainee to report inaccuracies	Investigate how this might work
	• Placement acknowledgments	Refer to Admin table
Log in/out	• Password reset	Prototype
	• Trainee access removed on PG end date	Investigate how this might work
On/Off-boarding	• Trainee accounts auto set-up	Investigate how this might work
	• Align to archiving	Refer to Admin table
Other ideas	• Whistleblowing	Investigate with Administrators and Users as to the value of this suggestion

Gallery of Admin workshop in London
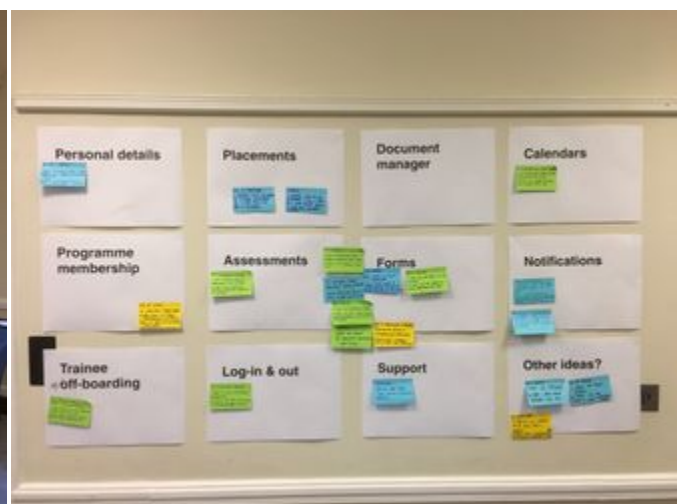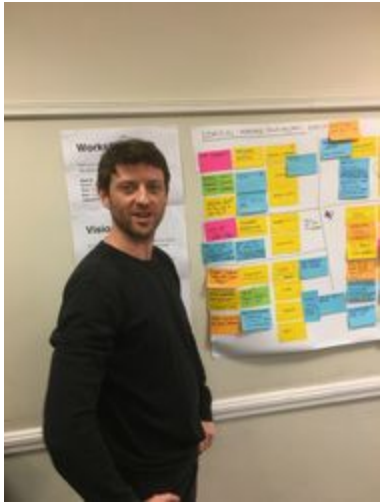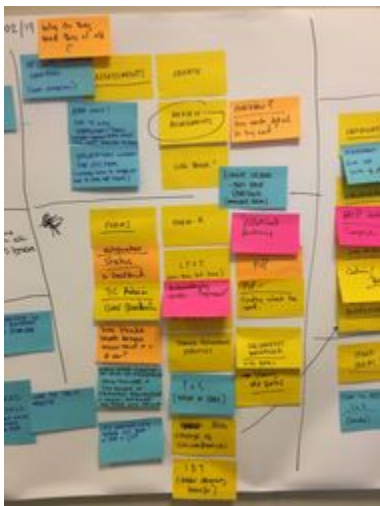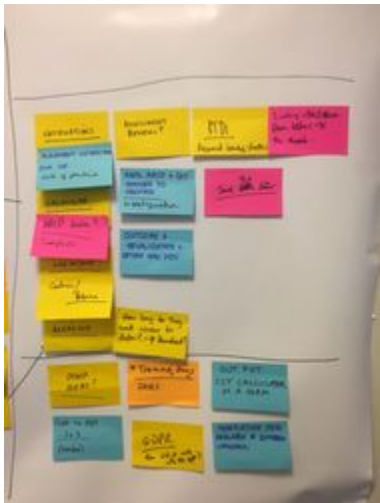
Stakeholder feedback document: The document used for Discovery with attendees, and to gather feedback for non-attendees (Stakeholders/Regional Business Managers)

NHS HEE Trainee...p feedback.pptx