Discovery North West: Admin & Trainee workshops

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

Liverpool: Admin workshop 15/04/19

Attendees

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User Groups with notes on what they thought they need (We worked through their top 3 key users)

Trusts	Head of School & TPDs	Revalidation team	LTFT team	Lead Employer	Admins	Trainees
• Read-only • Medical Staffing • Finance	• Read-only • Limited access • Would require training • Trust issues	• Read-only	• Read-only	• Read-only	• Full access • Bi-directional information updates	• Read-only • Personal information needs to be editable • Forms

User Personas

Details	Persona	
Name	**John Doe**	
Role	Trainee	
Based	N/A	
Background	Your average post-graduate	
Tech stories	Tech savvy, young, uses mobile a lot, just finished Uni	
Needs	**Concerns**	**Tasks**
• Access to an app • Different levels of access some sections only need to be read-only • It needs to work well without IT support • See placements • See upcoming assessments • Update information in a timely fashion	• They won't use the app • They may amend our data • IT fails/lack of support • Who will see my info? • I have dyslexia - how will I access some of the more complicated areas? • Will be out of date information	• Train the people using the app? • Have read-only sections • IT Backup • Update TIS asap with relevant and correct information
Name	**Dr.Gomez**	
Role	Trainee Doctor	
Based	MRI	

Background	• University education with Medical degree • First job in NHS not born in the UK • Unfamiliar with NHS acronyms • English not his first language	
Tech stories	Good with modern technology but not at an expert level	
Needs	**Concerns**	**Tasks**
• An app that is easy to understand and use • Needs to be in simple English • The opportunity to translate things into other languages (first language)	• Use of acronyms that he won't understand • Has not received staff training • Information held not correct/up to date so worries that he makes a mistake if changing anything he does not understand	• Access to further information • Training provided to understand the app and processes • Ability to make changes easily and it's clear • Support if he needs it
Name	Dr.Smith	
Role	Trainee Radiologist	
Based	Liverpool/Mersey	
Background	• Comes from Spain but lived in England since childhood • Has sight issues around contrast/short sighted • University qualified • English second language	
Tech stories	• Tech savvy • Comfortable using phone	
Needs	**Concerns**	**Tasks**
• Simple language • Simple processes • Zoom feature • Large icons • Distinctive colours	• He las large fingers so small UI on phones can cause issues • Poor eyesight	• Find another way to access information if the user finds it difficult on a mobile (Desktop version) • Make sure it's scalable

Workshop domain feedback

Feature	Element	Interaction	Comments	Actions
Concerns	Process	Pain-point/concern	Everything is so time-consuming at the moment this needs to be simpler and fewer duplicates	Improve the process, make sure that we are not adding to the process but streamlining it.
	e-portfolio	Pain-point/concern	We are concerned around duplicates and e-portfolio. Why will the Trainees use both?	We need to check how the e-portfolio's m
	I.T support for Trainees	Support: Online and Live chat/chatbots	The potential App needs to be supported if the Trainees have any tech issues we need to offer a solution for them, otherwise, they will not value/use the app	We need to make sure we consider support as a part of the road map
	Duplicates	Multiple systems	If this Application is another system that the Trainees have to use as well as existing systems they would prefer to leave this out. If the solution actually streamlines the current issue with duplicating data efforts on multiple platforms, they think it would be a good idea	Any part of this proposed application that adds to the process should be removed/read-only. An example is ESR, if they have to update their personal details in the App and ESR, do not bother having this in the App
Personal details	• Email • Phone • Address	Edit/update	This would be very helpful if it updated in all the other systems 'real-time' so that they could easily keep their personal details updated and everyone knows this is accurate	We need to make sure that this pulls through to ESR and other systems where their details are stored
	Notifications	• Read-only • Links	If there is the option for the Trainee to update their details, can this notify the Administrators/any other parties that there has been a change made to a trainees record	We can look into what this might look like. A notification with link tot he Trainee? Maybe a simple email noting the record?

Posts	Placements • Future • Current	Read-only	We need to set a rule that means the Trainees cannot see future posts until a certain date	We can set rules to the placements view, we need to confirm what the date range is
	Post info	Read-only	We can allow the Trainees to check the details of a Post to make sure they are correct: • Dates • Grade • O/O • Programme	We need to make sure that the information rendered is up to date and correct
	• LTFT • Sickness • Annual • Maternity • OOP	Read-only/Edit	We can add value here by showing: • Code of practice • Trainee satisfaction • Real-time change to these • TPDs less aggregated	The Admins feel this is a great opportunity to have real-time data updates to some of the issues they face around posts, and how long it takes to get the detail they need around leave etc. We can aim to have a notification process in place that informs the Admins when a Trainee updates any of the detail suggested
	Rotations	Read-only	• COP: Have a release date for information • LTFT real-time from LTFT team	This will also need to feed back into any other systems, but essentially they want real-time data updates around posts and rotations
	Programme details	Read-only	• Programme name • NTN Number	A read-only view of the programme detail to be determined
Assessments	Mandatory training	Read-only	Give the details of Mandatory training to the Trainee easily	We need to make sure the information is correct/real-time
	Uploading documents	Interactive	This would only be needed if any of the forms/paperwork was not digitalised.	This feature would only be available in desktop format
	ARCP	Read-only	• Last ARCP information • New ARCP information • Automatic update into a Calendar	The Admins would like the information . to be read-only and possibly have a way for any dates to be added to the Trainees calendar which they can accept or decline taking ownership of the arranging of the ARCP
	Out of sync Trainees	Read-only	It would be good if we could help with out of sync trainees	We need to investigate this further and how it might work with TIS
Forms	Form R	Interactive/input/edit	• Autofill feature for form • Placements past • Personal details • Past incidences and timeout - self-fill in • One point access for Admins and Reval team	The form needs to be auto-generating where possible with easy to add content fields/dropdowns for the Trainee where needed. This will save time and no need for Admins to email the Trainees
	• LTFT • OOP	Interactive/input/edit	Direct feedback to bodies	These forms must update the different parties involved in real-time with some kind of notification, to avoid duplicates and wasting time
	All forms	Concern	Reliant on the system app to be functioning well is busy periods and filling out forms.	If this does not work efficiently, and the forms work correctly, we will waste a lot of time and cause duplicates
Other ideas	Calendar	Interactive • ARCP dates • Away days • Relevant meetings	This could allow the Admins to add dates for certain events into the Tarienes calendar. ON accepting these proposed dates for ARCP/Assessments, forms etc, the Trainees are taking ownership and committing to an action. This also keeps the Admins form having to chase the Trainees	We need to make sure that the Calendar works well, and is synced similar to say 0365 Calendar and scheduling work
	Lead Employer info	Read-only?	A frustration is waiting for information from the Lead Employer if we could find a way to time-sync this we could improve the process	Investigate what information they wait for, how is this delivered

	e-portfolio	Syncing	Can we look into how e-portfolio could also feed into the app making it of even more value and a one-stop-place for Trainees	We need to have a chat around what information e-portfolio has on Trainees and what we could sync with the app
	ESR - TIS	Syncing	If we are unable to sync ESR and TIS/Trainee app then the app needs to be limited to read-only for most of it, no duplicates or additional process because of the App	We basically need to make sure that anything that is interactive does not cause duplicates but actually helps with the process. Apart from that anything else should be Read-only

User stories created by Admins 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.

'As a'	'I want to'	'So that'
Trainee	Be able to complete OOP & LTFT applications and my Form R online, and to be able to track their progress in the approval process	I understand where I am in the process and I do not have to download, scan and email the forms/paperwork saving me time and effort
Trainee	Have a simple system, easy to navigate, which is also a central system for all my vital information	I do not have to go through so many websites to find XYZ for 'Different reasons' plus an online form-R would dave on time and paper
Trainee	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
Trainee	Be able to go to one place with one click and have all relevant forms there	I can spend more time doing what I am training to do rather than search the internet
Trainee	Access my post records on TIS to check where I will be likely placed at any given time, instead of waiting several weeks to be emailed by lead employer	I can plan my living arrangements/family commitments and rotas in plenty of time
Trainee	Be able to see the following records in real time: • Placements - Current/Future • Assessments due date • Access forms - Form R, LTFT, OOP • Update my personal details	I can plan my commute and childcare and know when I have to have my assessment records ready for
GP Trainee	Update my sick leave on one system (eg upload a sick note)	I do not waste time emailing numerous people/departments. Also, Trainee is confident the information uploaded is accurate

Gallery & Videos for Trainee workshop

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

ASSESSMENTS

only

ASSESSMENTS

Trainee Name: Dr Smith
Role: Trainee Radiologist
Based: Liverpool / Mersey
Background:
• Come from Spain
• University qualified
• English Second language
Tech Stories:
• Tech Savvy
• Comfortable using phones
Needs:
• Simple Language
• Zoom Feature
• Large Icons
• Distinctive colours
Concerns:
• Large Fingers
• Bad eye sight
Tasks:
• ...

Trainee

Needs	Concerns	Tasks
Access app	They won't use	Show them
Levels of Access – some sections Lead only	They may email out data	Have read only sections
Work. Well (IT)	IT fail / lack of support	IT Backup
See placements	Who will see my info?	
See upcoming assessments	I have admin – how will I access?	
Update info in timely fashion	Live be out of date info	Update the app with relevant & correct info

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FORMS

POSTS