



The e-KSF/ESR link roll-out schedule – covering introduction



Version 1.2

Release date 11/04/07

Introduction

This document explains the “e-KSF/ESR roll-out schedule”, published to all e-KSF administrators, ESR account managers and implementation consultants, and also via the KSF network. The schedule outlines when individual NHS organisations in England and Wales will be able to take advantage of the national e-KSF/ESR link.

The document should be read in conjunction with the file “PUBLISHED *e-KSF and ESR roll-out schedule.xls*”

Who should read this document?

This document, and the associated schedule, is aimed at KSF leads, e-KSF leads, e-KSF administrators and ESR leads in all organisations in England and Wales.

How to interpret the schedule

We will be activating the e-KSF/ESR link for organisations in batches, starting with 8 organisations in batch A in January 07, and then running increasingly larger batches through 2007 until we complete the link for batch J in Spring 08.

The schedule has been created as an Excel file. You can re-sort the spreadsheet or use Excel “find” function to look up your own organisation.

The file shows organisation name along with ESR organisation code and wave number. The other columns indicate:

- The batch code for each organisation
- The date by which we need a fax confirmation from you, if we are to include you in this batch
- The date by which an organisation in this batch would need to have completed e-KSF data cleansing
- The target date on which the e-KSF/ESR link goes live for an organisation in this batch, provided data cleansing is completed in time.

We’ve published exact dates for batches A-E. For batches F-J, we have indicated approximate timescales, and the exact dates will be released once we know more about how the earlier batches are progressing.

How the schedule was created

The schedule, including the order of organisations and the dates, was created by the joint e-KSF/ESR project team, with sign off from the Department of Health. The order of organisations was decided using the following principles:

1. Organisations with larger numbers of active e-KSF users are earlier in the schedule, as the link will benefit these organisations most in terms of saved administration resources priority (NB active rather than total registered)
2. An organisation can't activate the link after its go-live date with ESR. However there's no direct comparison between "batches" and "ESR waves".
3. Merged organisations (e.g. reconfigured PCTs, Ambulance Trusts) go in the same batch (and not until the last element of the new organisation has ESR)
4. Organisations not currently using e-KSF are scheduled in a later batch – batch H.
5. Organisations in Wales are all in Batch B
6. SHAs as employing organisations are all in batch G or later.

What you need to do next

Please first read the "e-KSF / ESR roll out planning" document, available for download from www.e-ksfnow.org. This contains an explanation of what your organisation will need to do in order to activate the link, so it may affect your plans and approaches. There will usually be some initial activity and effort required in your organisation, to take advantage of the long term benefits of the link.

Then, **complete and send back the confirmation fax at the end of this document.** This confirms that you wish to go ahead with the e-KSF/ESR link as planned, and gives us some important information about contact points and the method of integration. (*if you've already completed one of these forms, there's no need to re-send it*)

Once we receive the fax, we'll send back additional information to help you prepare for, and manage, the new e-KSF/ESR link.

We won't do anything with your organisation's data until we receive this fax from you.

What to do if you have questions

If you have any questions about this schedule, please in the first instance contact our integration support desk on ESRlink@e-ksf.org.

Please note that we won't be able to bring the date of switch-on of your e-KSF/ESR interface forward – this schedule has been agreed nationally between the two project teams and the Department of Health

Other activities to kick off now

Even if you aren't able to send back the fax immediately, there are some things it's worth you thinking about now:

- 1) Ensure that your organisational stakeholders (e.g. your HR director, staff side leads) understand the benefits of e-KSF, and then benefits of linking e-KSF and ESR. The plans to link the systems together are a good opportunity to explain that e-KSF is here to stay, and that this is an important project to help your organisation save administration resource, and also make the best use of KSF data for workforce strategy, planning, and development, as well as equal opportunities monitoring. However, your organisation can only realise these benefits if they invest some time and energy in planning, and preparing for, the link.
- 2) Ensure that all existing users of e-KSF have an accurate and consistent "unique identifier" – like payroll number – for their accounts. You may need to discuss internally the most useful identifier for your organisation, and make sure that the same identifier is used for all staff. You can update unique identifiers via the e-KSF admin homepage. There's more advice about what identifier to use, in the e-KSF/ESR rollout planning document.
- 3) Make sure that the e-KSF and ESR teams in your organisation treat this as a joint project! The link is being managed jointly by the national e-KSF and ESR teams, and we'd expect that this joint working, and joint effort, is mirrored in local organisations, too. For example, you may find that the ESR team can help by providing the payroll references and ESR numbers that you'll need to cleanse your e-KSF data. You may also find that you can combine resources and data to the benefit of both projects – by only collecting manager/staff relationship information once, for example
- 4) Ensure that all new staff added to e-KSF (either via the admin homepage, or via self-registration) also have the same unique identifier format as existing users. If you use self-registration, it's worthwhile to communicate to all staff to explain how to register, and ask them to enter a consistent unique identifier. If you ask them to use payroll numbers, please also be consistent about whether it's a full reference (usually 8, 10 or 11 digits) or a local reference (often only 5 or 6 digits). If you use the full reference, then data cleansing and linking will be easier.

Further resources and help for you

You can find more documentation to help you understand, explain, and prepare for, the e-KSF/ESR link at <http://www.e-ksfnow.org/>

- Your ESR account manager and ESR implementation consultant have also received this information, so should be able to help you with any ESR questions.
- For specific questions about the e-KSF/ESR link you can contact us at ESRlink@e-ksf.org
- For general support about e-KSF, please log in to the e-KSF system and click the "support" button
- If your organisation is not yet using e-KSF, please contact us at support@e-ksf.org and we'll help you to get set up.

Confirmation Fax - Initiating the e-KSF / ESR link

To: ESR/E-KSF Integration Team
Fax: 0117 344 5004

Your Full Organisation Name:	
ESR organisation ID:	
Person overall accountable in the organisation for the link project. This person should also sign this form.	
(email/phone details in case of queries)	
Lead person for e-KSF	
Lead person for ESR	
Lead people for KSF	

Please read the section on employee identifiers here - <http://www.e-ksfnw.org/cleansingdata.html> - before answering the following question: What employee identification data do you plan to add to e-KSF, to help the manual matching process? (please tick one):

Legacy payroll number	[]	ESR employee number	[]
National Insurance number	[]	ESR assignment number	[]
Employee date of birth	[]		

The data linking process will be **easier for you** if we delete any e-KSF users who have not yet used the system (and who have not yet been assigned a post outline) and replace these with new ESR data. However, we should not do this if you have already distributed usernames and passwords for these users, as replacing the data with new ESR data will result in new usernames and passwords. Please tick to tell us whether you would like us to:

a) delete any inactive users and replace them with ESR data	[]
b) keep inactive users – the local e-KSF and ESR administrators may need to do some additional data matching before we switch on the link	[]

One of the benefits of having the e-KSF/ESR link is that you save time and resource in updating employee data. However, you may wish to maintain some of your existing data on e-KSF rather than having replaced by ESR. By default, we'll replace the following e-KSF data with ESR data, unless you tell us otherwise:

Please <u>don't</u> overwrite my e-KSF department structure with ESR data	[]
Please <u>don't</u> overwrite my e-KSF manager/staff relationships with ESR "supervisor" data	[]

You can find your scheduled batch in the e-KSF / ESR roll-out schedule. Please read that, before completing the next stage of this form.

Yes, I wish to go ahead with the e-KSF/ESR link in the batch listed in the roll-out schedule (remember that you need to have completed any e-KSF data cleansing by the dates listed in the schedule document)	[]
No, I'd like to activate the link in a later batch (remember that you can't move to an earlier batch than we have planned, but you can opt to move to a later one)	[] (enter preferred batch letter here)

I have read and understood the "e-KSF / ESR Roll-out planning for your organisation" document, and the e-KSF / ESR roll-out schedule. I confirm that the information entered on this form is correct.

Signed (by person overall accountable for the link)	
Name, Position	
Date	