



## COMPLETE LIST OF E-KSF VERSION 6 REVISIONS AND NEW FEATURES

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Shaun Wilde, Launch Manager for e-KSF version 6

This document summarises all of the changes and enhancements we're making as part of e-KSF version 6, to be launched in early October 2007.

Please see [www.e-ksfnow.org](http://www.e-ksfnow.org) for latest news and updated training and implementation materials.

| Key development | Summary   | Description   |
|-----------------|---|---|
| !               | Multiple managers, and multiple post outlines, per employee                             | <p>e-KSF now allows admin users to set up multiple managers for each member of staff. Managers can also assign multiple post outlines to employees, to deal with those staff who have two or more different posts in the organisation. This also allows for accurate integration and data exchange with ESR (England and Wales) and SWISS WIR (Scotland).</p> <p>Confidentiality rules are enforced so that manager B cannot see the review or PDP details entered by manager A, or their reviewers. The exception to this is PDP activities marked "statutory/mandatory" which are visible to all reviewers, minimizing the risk of duplicated training course attendance.</p> |
| !               | More space for evidence on KSF review pages   | On the e-KSF review pages, the "evidence" box can now be completed by clicking a magnifying glass icon and opening up a large pop-up. This allows for easy entry and view of evidence.  |
| !               | Assign Post Outlines in bulk  | Managers and administrators can now assign one post outline to multiple staff much more rapidly than before.  |
| !               | Objective and PDP icons now visible irrespective of whether a post outline is assigned. | The "objectives" and "PDP" sections of e-KSF can now be accessed even if KSF post outlines have not been assigned to an employee. This allows e-KSF to be used as a development tool, even before the KSF process is fully implemented in an organisation.  |



| Key development | Summary   | Description   |
|-----------------|---|---|
| !               | New, more powerful locally defined alerts tool  | <p>Administrators can now set up their own email and alerts text on e-KSF. They can select trigger events (e.g. increment date due), date range (e.g. 60 days before), customized text, and decide who to send the alert to (e.g. manager, reviewer and individual).</p> <p>This powerful new tool will help organisations to fully implement and manage the KSF process, and will help managers and staff by reminding them of their responsibilities under the KSF processes.</p>   |
| !               | Confidentiality rules – reviews and PDPs hidden from new managers/reviewers, unless individual reviewee decides otherwise | <p>When an individual reviewee is assigned to a new manager (either within the organisation, or to a new organisation), their historical reviews, objectives and PDP activities are hidden from this new manager, and the new reviewee.</p> <p>The reviewee can select to “unhide” these via links on their e-KSF staff homepages.</p>  |
| !               | e-KSF / SWISS link in Scotland  | <p>The technical work to create a data link from the SWISS WIR to the e-KSF system, in Scotland, is now complete. The actual data exchange will be activated in November.</p>   |
| !               | e-KSF / Skills for Health link  | <p>Skills for Health (the Sector Skills Council for Health) in collaboration with the e-KSF team have established a link that allows e-KSF users to access a database of all National Workforce Competences and National Occupational Standards relevant to the Health sector. The benefits of this include:</p> <ul style="list-style-type: none"> <li>• The ability to see relevant National standards to specific dimensions and levels of the KSF</li> <li>• The ability to assign National standards to post outlines</li> <li>• The ability to use the detail of the standards as examples of application and to inform personal development plans</li> <li>• Regular updates to the database ensuring users have access to the most up-to-date national standards</li> </ul> |



## Functions for local managers, reviewers and staff

| Summary   | Description   |
|---|---|
| Stronger links between e-KSF PDP and KSF dimensions   | On the guidance of the UK KSF Group of the NHS Staff Council, it is now mandatory to select a "linked dimension" for every PDP activity. This reinforces the importance of relating development activities to the KSF process and review.   |
| X codes displayed on e-KSF where present  | On using the "assign outline" function, e-KSF displays any previously uploaded "X code" pay points to help managers select the right pay band and point. Note that X codes will only appear here if they have already been uploaded by a local e-KSF administrator  |
| Interim KSF review status added   | When a new KSF review is created on e-KSF, for an individual who is due a gateway review within the next 12 months, e-KSF now prompts the reviewer to select whether this review is the gateway decision review, or an interim review. E-KSF prompts: "This looks like a [foundation/second] gateway year, for [reviewee] with increment date [date]. Do you want to use this review as a gateway decision, or will you have another review later in the year?". If "later" is selected, this review becomes a non-gateway review document. |
| Quick-assign manager to multiple users  | This new multi-purpose admin function allows administrators to rapidly assign managers to multiple users at once. (previously this was a slow, employee-by-employee, process)   |
| Staff Group Categorisation for Post Outlines  | If your organisation has categorised KSF post outlines by staff group, you can now search for post outlines using this same criteria.   |
| Printing of KSF review pages  | Comments made on a review, and the names of any attached files, are now displayed when reviews are printed.   |
| Deleting Objectives   | Rows on the e-KSF "objectives" page can now be deleted prior to sign-off.   |
| Printing of Objectives pages  | The objectives pages now include a date on the printout.  |
| The "evidence" fields on the KSF review pages are no longer mandatory, if the user selects the 'Complete on Paper Process' check box. | If the "complete on paper" process has been activated by the local e-KSF administrator (allowing reviewer and reviewee to say that the review has been completed on paper, and only a summary added to e-KSF) then the evidence boxes are no longer mandatory. This allows reviewer or reviewee to quickly record a summary of their paper notes on e-KSF.  |



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| Clearer list of gateway stages on e-KSF.                           | <p>Previously on e-KSF, it was sometimes hard to tell whether an individual was below or above their second gateway. This has now been improved, so the list of gateway statuses is now as follows:</p> <ol style="list-style-type: none"> <li>1) FOUNDATION GATEWAY THIS YEAR</li> <li>2) WORKING TOWARDS SECOND GATEWAY</li> <li>3) SECOND GATEWAY THIS YEAR</li> <li>4) ABOVE SECOND GATEWAY</li> </ol>                                       |
| Career development dimensions on KSF review page                   | When adding career development dimensions to KSF review page, users can now click the dimension title to read more details from the KSF handbook.  |
| JRD, PDR or Review?  | We've clarified the language used on e-KSF, so that we use the word "Review" (not JDR) for the KSF development review pages.   |
| Post Outline "Purpose" Field                                       | There is now no (practical) limit to the amount of text entered in the post outline "job purpose" field.   |
| User decides whether to receive login reminders in an email or not | A security enhancement launched just prior to version 6 but explained here. When registering or logging in to e-KSF for the first time, users can select whether they ever want their login details to be re-set on-screen through a secret question and answer, and if so whether they ever want their login details to be sent to their email account. This increases security for users who don't have secure access to their email accounts. |
| New spell checker on KSF review evidence page                      | KSF "evidence" boxes now have a spell checker  |
| More text allowed on objectives page                               | The amount of text that you can add to the personal objectives boxes on e-KSF has now been greatly increased.  |
| Link Activity to KSF dimensions on e-KSF PDP                       | When the L&D administrator adds an activity to e-KSF's built-in "learning activities database", they can associate KSF dimensions and levels to the activity. These dimensions/levels are now visible to reviewers and reviewees using e-KSF, and activities can be searched for using this criteria, too.   |
| Second gateway point displayed on-screen                           | The second gateway pay point for each band is now clearly displayed on screen, to managers when they assign outlines. This helps managers to see whether a second gateway review is due for this staff member.   |
| PDP Printouts  | Printouts and PDFs of the personal development review pages now accurately display all text entered on the PDP on-screen.  |



## Functions for Local Administrators

| Summary   | Description  |
|---|--|
| "Under Review" check box for managing post outlines | When reviewing post outlines for approval, administrators now have a new check box "under review" to help admins keep track of which outlines have been passed to KSF partnership groups for review and approval.  |
| New disability monitoring fields                    | A new "registered disabled?" field has been added, and is used in new equal opportunities reports available in e-KSF version 6. This field can be edited by local administrators, or via links to ESR in England and Wales. The default setting is "not stated".   |
| Self registration pages                             | If an organisation has switched off self-registration for e-KSF (as is recommended when preparing for, or after activating, links between e-KSF and ESR or SWISS), then when the user clicks this organisation name on the self-registration page, a prompt is shown explaining why the self-registration has been switched off.                                       |
| Improvements to e-KSF reports                       | All e-KSF reports have been tested and revamped, to make them more accurate and easier to understand.  |
| Searching post outline draft library by creator     | e-KSF administrators can now search their draft library of outlines by creator name.   |
| Admin rights to Edit Post Outlines on Approval      | e-KSF administrators can now make minor changes to post outlines submitted for approval. This saves to-ing and fro-ing of outlines between managers and administrators, when only minor changes to e.g. post outline title, or corrections to typing, are needed.  |
| Consistency checking report – by department         | The post outline consistency checking report can now be split down by department, as well as organisation-wide. (this report is only available to e-KSF administrators)  |
| Post outlines "not accepted" rather than "rejected" | Rather than "rejecting" post outlines, e-KSF administrators now click to mark them "not accepted". Managers can then act on the administrator's comments before re-submitting the outline.   |
| Date of Birth Field                                 | Date of birth and age fields have now been added to e-KSF, to improve integration with ESR and SWISS and also in preparation for future National Staff Council equality (age discrimination) reporting.  |
| Local codes for post outlines                       | e-KSF administrators can now add local codes to post outlines when they are accepted into the local library. This helps to track outlines and make links to other processes e.g. job descriptions, recruitment processes. Users can now search outlines by these codes, as well.   |
| Disassociate from Department Structure              | Administrators can now remove individuals from the department structure. This is useful when updating e-KSF to reflect organisational changes and restructures.  |
| Duplicate Check on email address                    | The duplicate check has now been removed from user's email addresses on e-KSF. This allows two different user accounts to share a single email address. This is useful for administrators who need access to more than 1 e-KSF organisation (and so have more than 1 e-KSF account) but still want email alerts about e-KSF to be delivered to a single email address. |
| Approving new registrants on e-KSF                  | Administrators can now see additional information about people self-registering for e-KSF, to help them decide whether to accept them or not.  |



## Other National Functions

| Summary  | Description   |
|--|---|
| New global alerts function for central e-KSF team                                    | The central e-KSF team can now send "for info" and "for action" alerts to administrators, staff and/or managers, via the e-KSF system. We'll use this, along with our existing communication mechanisms, to make sure that everyone is kept up to date with the e-KSF system  |
| Editing rights on outlines submitted to National Library                             | The UK KSF Group of the NHS Staff Council can now make minor changes to post outlines before accepting them to the e-KSF National Library. This avoids any to-ing and fro-ing with local administrators to correct simple typos and spelling. (Note that KSFG will not make any substantive changes to outlines, this feature will only be used to correct typing errors).  |
| How often are outlines used as the basis for other outlines (copied and customised?) | e-KSF now stores, behind the scenes, the "parent outline" title for all outlines created via the "copy and customise" process. This will be used in the future to display how "popular" outlines are i.e. how many times they are used as the basis for other outlines. The National KSF Group will be able to track this data for outlines in the National Library, too, ensuring that this Library is effective and useful. |
| National Library of Post Outlines classified by staff group                          | The e-KSF National Library of outlines is now classified, by the National KSF Group, by staff group. This makes searching and browsing for outlines easier, and also helps the KSFG to decide which new outlines are required in the library.   |