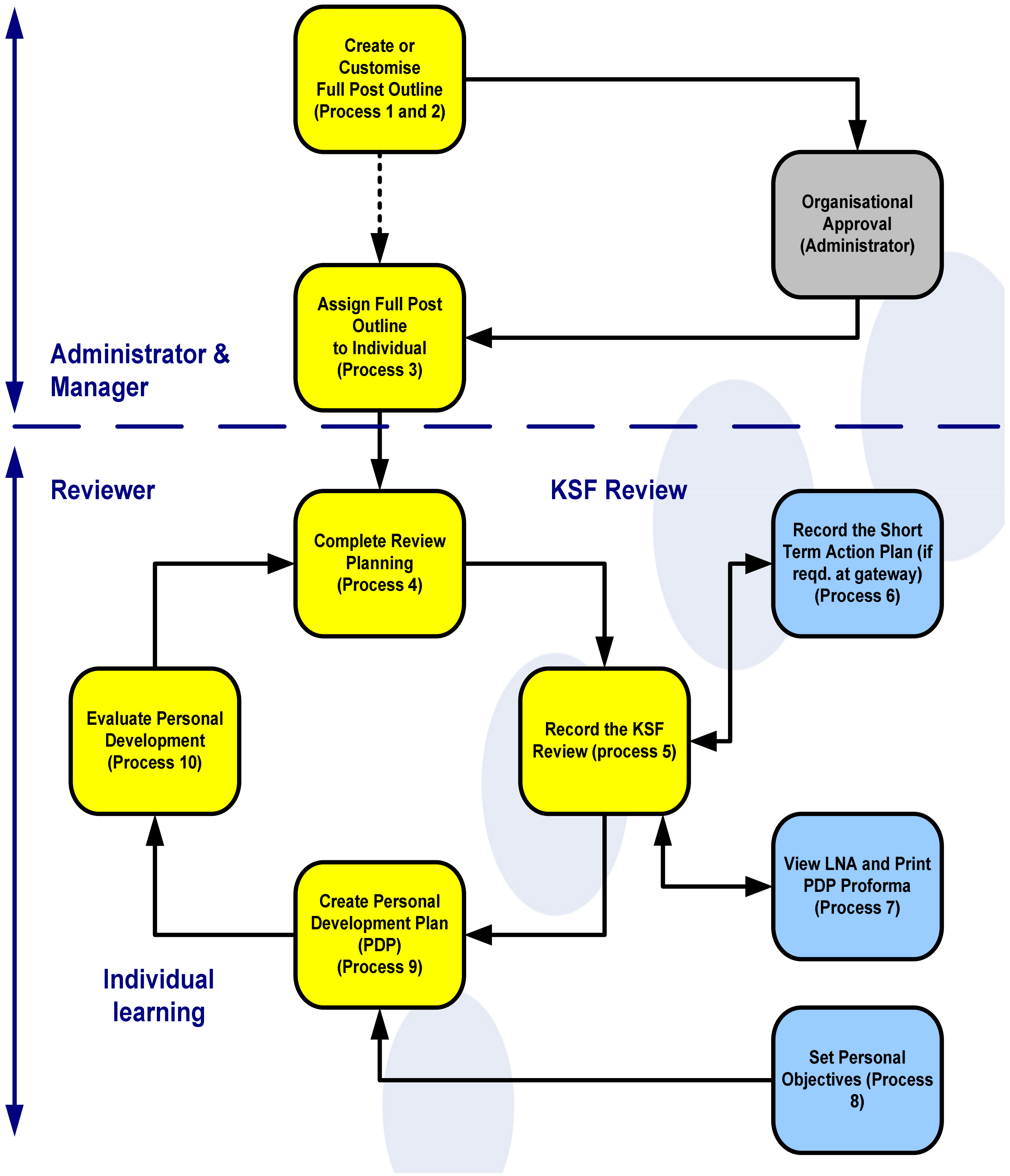
# e-KSF Process Diagrams

These processes refer to e-KSF version 6.1

# Overall Process Map



# 1. Create a post outline and submit for approval

## Used by: MANAGERS, ADMINISTRATORS

### Process

Go to www.e-ksf.org

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Enter your "**Username and Password**" and select **"Login"**

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Select "**Create/Customise KSF Post Outline**" from the available functions

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Select "**Create From Scratch**" from the pop-up box

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Enter basic post outline details and Select "**Save & Proceed**"

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Select the "**Add Specific Dimensions**" button and browse to select dimensions from the list, then select **"Save"**

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Select the "**Level**" for each dimension of the full outline (left column) and the foundation outline (right column)

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Select the Magnifier "**View Details**" icon to edit the specific examples of application for foundation outline

↓

Select "**Submit for Approval**" to save the role and for your KSF panel to approve

### Notes

If you've also got administrator access, you'll need to navigate from the admin screen to the manager screen by using the icons under the NHS logo

Basic post outline details include:
- Practice post outline yes/no
- Broad post outline yes/no
- Title of Post
- Reporting to (Post)
- Post outline tracking code
- Job Purpose:
- Keywords (used to help other people find the post details, so enter a few useful words here, separated by commas)
- Number of expected employees to be covered

You can also click "select indicators" to identify a subset for the foundation outline

# 2. Find an existing post outline and customise it

## Used by: MANAGERS, ADMINISTRATORS

| Process | Notes |
| --- | --- |
| Go to www.e-ksf.org | If you're already logged in, you won't need to do these first two steps |
| Enter your "**Username and Password**" and select **"Login"** | |
| Select "**Create**/**Customise KSF Post Outline**" from the available functions | |
| Select "**Copy and Customise draft (or approved) outline**" and then **"Search"** for a specific field, or click "**Browse"** | You can use the search boxes on this page to narrow the list of post outlines returned, for example, using keywords |
| **"Select"** the outline title which most closely matches your needs. | |
| Review the outline, and click "**Cancel"** to select a different one, or "**Copy and Customise Post Outline"** to use | |
| Give the template a new name and then click "**Details for Editing**" to customise it | |
| Select **"Edit Outline Now"** and create the post outline over the next two pages | Alternatively you can select "Save Outline for Later" |
| When you've finished, select "**Submit for Approval**" | Customised outlines need to be re-approved before use |

# 3. Assigning a post outline to an individual

## Used by: MANAGERS

| Process | Notes |
| --- | --- |
| Go to [www.e-ksf.org](http://www.e-ksf.org) | If you're already logged in, you won't need to do these first two steps |
| Enter your "**Username and Password**" and select "**Login**" | |
| Select "**Assign Post Outline to staff**" | |
| Select "**Search**" or "**Browse**" from the next pop-up to find an individual | The use of the search boxes provides a narrower search of the list of names |
| Click the icon under the "Assign Post Outline" column, against the individual you want to assign the post to | You can also click on the individual's name to check details and make sure you've selected the right person |
| Select "**Search**" or "**Browse**" from the pop up box to find the relevant outline | The use of the search boxes provides a narrower search of the list of post outlines |
| The list that you see is all of the posts approved for use by you. Click "**Select**" against the one you want to assign | |
| Check that the post outline title is correct (you can edit this to differentiate it from the template) | |
| When NOT linked to ESR or SWISS, enter **Specific Post Title, Pay Point** (Gateway will autofill) and **Increment Date** and select "**Submit**" | When linked to ESR or SWISS, the assignment number(s) (ESR) or job title(s) (SWISS) will show and these require confirmation. The Spine point and increment date will autofill. Click "**Submit**" to complete. |

# 3a. Alternative process to assign an outline to an individual

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## Used by: MANAGERS

| Process | Notes |
|---|---|
| Go to www.e-ksf.org | If you're already logged in, you won't need to do these first two steps |
| Enter your "**Username and Password**" and select **"Login"** | |
| Select "**View Local library of outlines**" | |
| Select "**Search**" or "**Browse**" from the next pop-up to find an outline | The use of the search boxes provides a narrower search of the list of names |
| Click the "**Assign**" icon to the right of the relevant outline. | |
| Select "**Search**" or "**Browse**" in the pop-up to find the relevant individual. | The use of the search boxes provides a narrower search of the list of post outlines |
| Click "**Select**" against the individual you want to assign the outline to. | |
| Check that the post outline title is correct (you can edit this to differentiate it from the template) | |
| When NOT linked to ESR or SWISS, enter **Specific Post Title, Pay Point** (Gateway will autofill) and **Increment Date** and select "**Submit**" | When linked to ESR or SWISS, the assignment number(s) (ESR) or job title(s) (SWISS) will show and these require confirmation. The Spine point and increment date will autofill. Click **"Submit"** to complete. |

# 3b. Assigning a post outline to multiple staff members.

## Used by: MANAGERS

### Process

1. Go to www.e-ksf.org
2. Enter your "**Username and Password**" and select **"Login"**
3. Select "**Assign Post Outline to multiple staff**"
4. Select "**Search**" or "**Browse**" from the next pop-up to find the outline
5. Click "**Select**" against the outline you want to assign to multiple staff
6. Select staff by entering their names and clicking "**Search**"
7. Check the box next to the relevant staff and click **"Add to list"**
8. Repeat the previous 2 steps until all relevant staff are added to the list
9. When NOT linked to ESR or SWISS, enter **Specific Post Title, Pay Point** (Gateway will autofill) and **Increment Date** and select "**Submit**"

### Notes

If you're already logged in, you won't need to do these first two steps

The use of the search boxes provides a narrower search of the list of names

When linked to ESR or SWISS, the assignment number(s) (ESR) or job title(s) (SWISS) will show and these require confirmation. The Spine point and increment date will autofill. Click **"Submit"** to complete.

# 4. Complete review planning for reminders about activities

## Used by: REVIEWERS AND INDIVIDUALS

| Process | Notes |
|---|---|
| Go to www.e-ksf.org | |
| Enter your "**Username and Password**" and select **"Login"** | If you're already logged in, you won't need to do these first two steps |
| From your **Reviewer** homepage identify the individual you want to plan a review with, and select the "**Planning Information**" icon against their name | The individual needs to have a post outline assigned before you can select this link |
| Enter dates in all the necessary fields – review period and proposed dates for PDR, PDP Creation and PDP Progress Meeting | e-KSF will use these dates in the future to remind both reviewer and reviewee about agreed meetings |
| Tick the "**Reviewer**" box to show that you agree with the data entered | |
| For this exercise, assume the individual is sitting next to you. Tick the box under "**Staff**" and click "**Submit**" | Alternatively, you could select the other option and the system will email the individual to prompt them to log on separately and approve the dates – or change them for the reviewer to re-approve. |
| From the pop-up box, tell the system that the individual is with you and click "**Submit**". The system will prompt the individual to enter their password. | |
| Enter the **Password** and select "**Submit**" then "**OK**" to complete the process | Click the calendar on your Homepage to view scheduled review meetings. |

# 5. Record the Personal Development Review discussion

## Used by: REVIEWERS, INDIVIDUALS, (MANAGERS - read only)

| Process | Notes |
|---|---|
| Go to www.e-ksf.org | If you're already logged in, you won't need to do these first two steps |
| Enter your "**Username and Password**" and select **"Login"** | |
| From your reviewer's home page identify the individual you want to record a review with, and select the "**Review**" icon against their name | Reviews can only be recorded once a post outline has been assigned to the individual |
| Click "**Create new personal development review document"** link. Then select the "**Editable**" link to enter data for the current period | If you don't see an editable document, click the **"Create new personal development review document"** at the bottom of the box first |
| You'll now see the KSF Development Review form. Use the drop-down boxes to record how the individual is doing against their post outline, adding evidence as required for each dimensions' indicators | You can add general comments on the review by selecting the "Staff" or "Reviewer Comments" link at the top of the screen.<br><br>You could also click the "Add dimension for Career Development"  link to add additional (non-Post Outline) dimensions to track and review. These would not form part of any gateway decisions. |
| When all information is complete and agreed by both parties, click the **sign off** buttons. If the individual is with you, they will be prompted to enter their Password to agree to the review notes. | If the individual doesn't have an e-KSF password, but has completed and signed this process on paper, change both the manager and individual sign-off boxes to "Yes" and then tick the "Individual is Completing this Process on Paper" box |
| Click "**Save**". The system will record that the review document is complete and signed-off (and now un-editable). Create a new document for next year's evidence. | Complete on Paper Process functionality will need to be enabled for your organisation to do this. |

# 6. Record gateway outcomes and short term action plan, if necessary

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## Used by: REVIEWERS, INDIVIDUALS, (MANAGERS - read only)

| Process | Notes |
| --- | --- |
| Complete the KSF Development Review stage for a gateway year | You'll only see this process if you've recorded on e-KSF that an individual has not met the knowledge and skill requirements of their post, in a foundation or second gateway year. |
| If you've recorded that the reviewee is not working at the necessary Levels… | |
| Enter the reasons for not passing the gateway, and some comments | Note that if pay progression is to be deferred, you'll need to inform payroll separately. |
| You'll be returned to your homepage. Click the "Review" icon again, and then the new "Short Term Action Plan" link | Whatever the reason the gateway is not passed, you'll need to create a short term action plan to close any knowledge and skills gaps. |
| Fill in all the boxes on this page – including actions for each of the dimensions where there is a current gap – and sign off the page as usual | |
| Completing the 'new' PDR screen will resolve the Action Plan and conclude the review process | |
| Another joint development review can be created on e-KSF at any time, to record progress after the short-term action plan is completed | Note that KSF policy is that the gateway discussion is not repeated – an individual will only have one foundation gateway review and one second gateway review per post/band. |

# 7. View LNA and print out PDP Pro-forma

## Used by: REVIEWERS, INDIVIDUALS, MANAGERS

| Process | Notes |
|---|---|
| Go to www.e-ksf.org | If you're already logged in, you won't need to do these first two steps |
| Enter your "**Username and Password**" and select "**Login**" | |
| From your reviewer's home page select "**Personal Development Review**" against the relevant individual | |
| Select "**View LNA**" from the pop-up box to view this individual's current status against their post outline | LNA stands for "Learning Needs Analysis" |
| Select "**Print LNA with Evidence**" to view and print out a paper form for recording the LNA | |
| Select "**Close**" to return to your reviewer's homepage, then select "**Print Details**" again against the individual's name | Some reviewers will prefer to conduct PDP discussions in front of a computer and enter data directly, in which case they won't need to print out paper forms |
| Select "**Print blank form for review notes**" and "**Print blank PDP form for notes**" then "**Close**" to return to the manager homepage again | All of this data is also accessible from the individual homepage |

# 8. Set Personal Objectives

## Used by: REVIEWERS AND INDIVIDUALS

### Process

Go to www.e-ksf.org

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Enter your "**Username and Password**" and select **"Login"**

↓

From your Reviewer homepage identify the individual you want to plan a review with, and select the "**Objectives**" icon against their name

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Select the "**Create New Objective Document**" link from the pop-up box

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Select the **"Editable"** link and record the objectives (1 per row), entering information in the text boxes.

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Continue clicking "**Add Objective**" as required. When completed, click **"Save"**

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At this stage, **sign off** the Objectives, ticking the appropriate boxes (Reviewer and / or Individual) to complete.

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When objectives are signed off, users can chart their progress against them.

### Notes

If you're already logged in, you won't need to do these first two steps

Enter information on the Performance Objective, Target completion date, Constraints and Action Plan and Evaluation Process.

Once objectives are signed off, users can go back into the objectives page and record progress and comments

# 9. Create a Personal Development Plan (PDP)

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## Used by: REVIEWERS AND INDIVIDUALS

| Process | Notes |
| --- | --- |
| Go to www.e-ksf.org | |
| Enter your "**Username and Password**" and select **"Login"** | If you're already logged in, you won't need to do these first two steps |
| From your reviewer's home page identify the individual you want to create a PDP for, and select the "**PDP**" icon. | |
| Click **"Add New Activity"** and complete the fields with relevant information | Including Target completion date, Learning Aim/Purpose, and Priority |
| To use the learning and development database or www.at-learning.org , select "**Link Activity**" and then "**Browse**" before selecting activities | If you don't see any boxes, select "**Add New Activity**" at the bottom of the page. You can do this multiple times to add multiple activities, enter one per row |
| Select "**More Details**" against an activity to add further information. Click "**Save**" when you've finished adding these details | You can also click "**View Details**" to read more about the activity<br>Here you can add details such as sources of funding |
| Select "**View Linked Dimensions**" to view the list of KSF dimensions. "**Tick**" those which should be addressed by the activity | |
| Tick the "**Reviewer**" boxes for each activity, to show that the reviewer has agreed this development | If the individual is with you they can tick the Staff box and enter their password to confirm they accept the PDP activities. |
| On completion, individuals will be required to reflect on the learning activity to finalise the record. | |

# 10. Mark Personal Development Activity as completed

## Used by: INDIVIDUALS

| Process | Notes |
| --- | --- |
| Go to www.e-ksf.org | If you're already logged in, you won't need to do these first two steps |
| Enter your "**Username and Password**" and select **"Login"** | |
| Click the "**View my PDP**" segment from the right-hand side of the Personal homepage | |
| You'll see the PDP data that has already been entered. Tick the boxes under "**Staff**" to record that you agree with the identified development. | The status column will change from "Pending" to "Agreed" |
| You can add a new development activity by clicking "**Add New Activity**" and add text in the boxes. When you have completed adding PDP activity information Select **"Save"** | Note that your manager / reviewer does not need to approve ad hoc development activities – the individual "owns" their own PDP |
| When an activity has been completed select "**Completed**" from the drop down menu. The e-KSF system will prompt you to enter more information about this activity. Click "**Save**" when you have entered the details. | |
| This information has now been recorded in your learning and development history | |
| Click "**Home**" to return to your home page. | |