

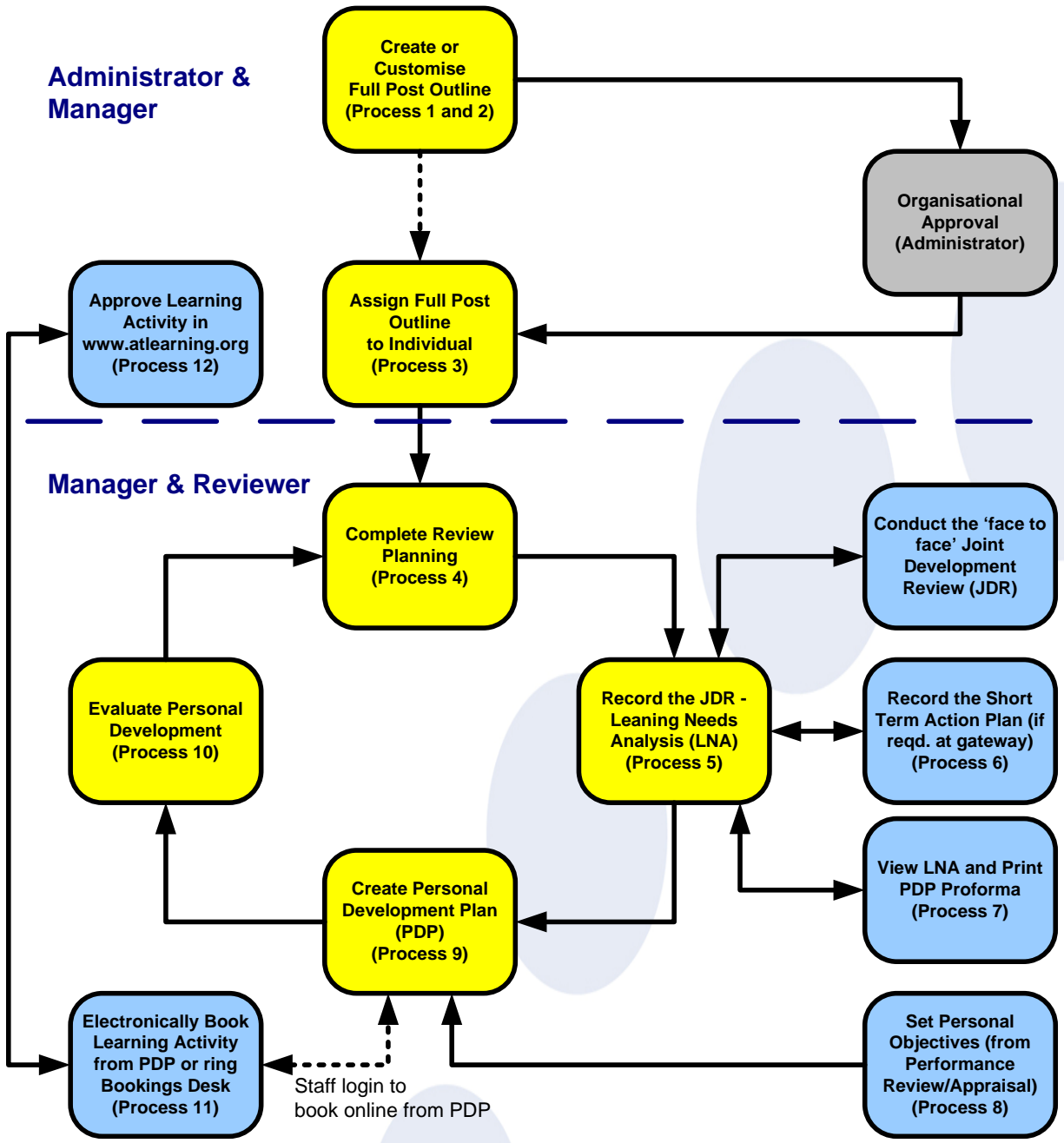
e-KSF & AT-Learning Process Diagrams

These processes refer to e-KSF version 6.0 and AT-Learning version 4.0

Overall Process Map

Administrator & Manager

Manager & Reviewer



1. Create a post outline and submit for approval

Used by: **MANAGERS, ADMINISTRATORS**

Process

Notes

Go to www.e-ksf.org

Enter your **“Username and Password”** and select **“Login”**

Select **“Create/Customise KSF Post Outline”** from the administrator’s menu

Select **“Create From Scratch”** from the pop-up box

Enter basic post outline details and Select **“Submit”**

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

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

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

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

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

Enter your **“Username and Password”** and select **“Login”**

Select **“Copy & Customise An Approved Outline”** from the pop up window

Select **“Copy and Customise Template”** and then click **“Browse”**

“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 **“Copy & Customise for Editing”** to customise it

Select **“Edit Outline Now”** and create the post outline over the next two pages

When you've finished, select **“Submit Approval”**

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

You can also select **“Create & Customise a Draft Outline”** which allows you to use an unapproved outline as a template.

You can also use the search boxes on this page to narrow the list of post outlines returned, for example, using keywords

Alternatively you can select **“Save Outline for Later”**

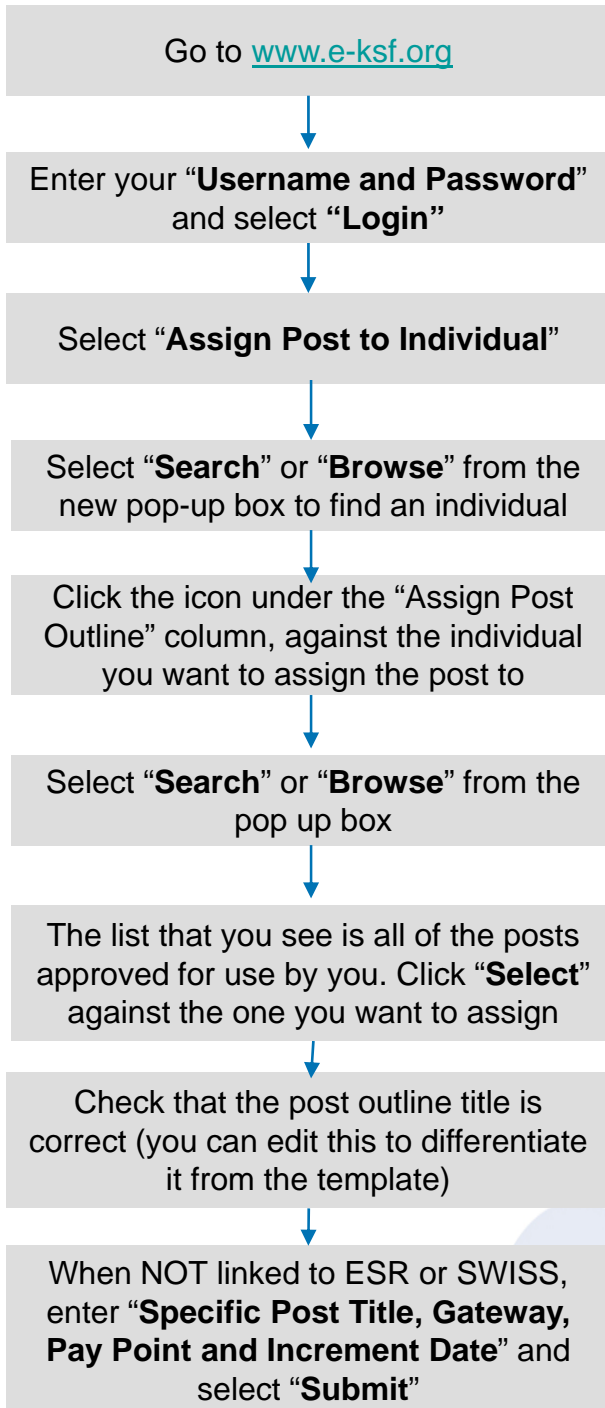
Customised outlines need to be re-approved before use

3. View posts outlines created and assign one to an individual

Used by: MANAGERS

Process

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

You can also click on the individual's name to check details and make sure you've selected the right person

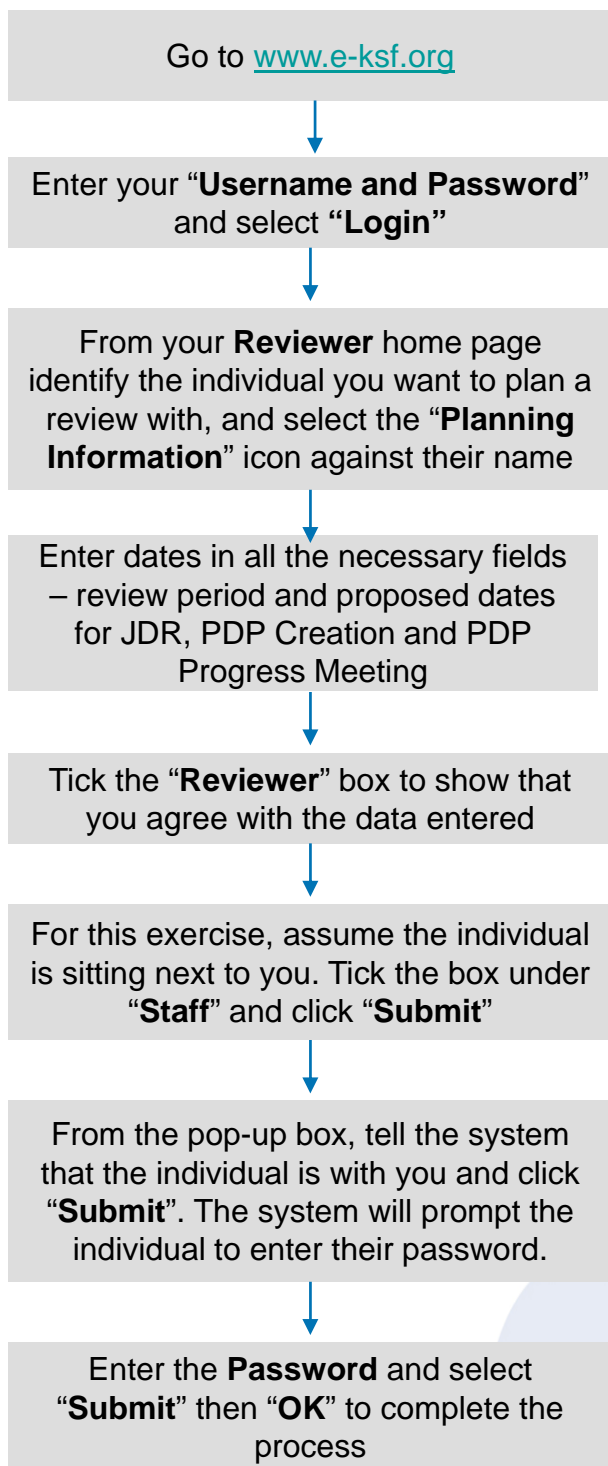
The use of the search boxes provides a narrower search of the list of post outlines

When linked to ESR or SWISS, the assignment number(s)(ESR) or job title(s) (SWISS) will show and these require confirmation

4. Complete review planning for reminders about activities

Used by: REVIEWERS AND INDIVIDUALS

Process



Notes

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

The individual needs to have a post outline assigned before you can select this link

e-KSF will use these dates in the future to remind both reviewer and reviewee about agreed meetings

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.

5. Record the joint development review discussion

Used by: REVIEWERS AND INDIVIDUALS

Process

Go to www.e-ksf.org

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

Click **“Create New KSF Development Review Document”** link. Then select the **“Editable”** link to enter data for the current period

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

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). It will also record that a paper document is available with the individual’s signature

Notes

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

Reviews can only be recorded once a post outline has been assigned to the individual

If you don’t see an editable document, click the **“Create New KSF Development Review Document”** at the bottom of the box first

You can add general comments on the review by selecting the **“Comments on Review”** link at the top of the screen.

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.

Complete on Paper Process functionality will need to be enabled for your organisation to do this.

If the individual does have a password and they are with you, tick the **“Yes”** box and they will be prompted to enter their Password to agree to the review notes.

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



Used by: REVIEWERS AND INDIVIDUALS

Process

Complete the KSF Development Review stage for a gateway year



If you've recorded that the reviewee has not demonstrated their knowledge and skills requirements, then...



Enter the reasons for not passing the gateway, and some comments



You'll be returned to your homepage. Click the "Review" icon again, and then the new "Short Term Action Plan" link



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



You'll be returned to your homepage. You can then use this action plan as a basis for short-term development, and to check what you agreed would happen.



Another joint development review can be created on e-KSF at any time, to record progress after the short-term action plan is completed

Notes

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.

Note that if pay progression is to be deferred, you'll need to inform payroll separately.

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.

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 AND 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"	
From your reviewer's home page select "KSF Development Review" against the individual you want to view	
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	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 plan a review with, and select the "Objectives" icon against their name	Enter the text on the Performance Objective, Constraints and Action Plan and Evaluation Process.
Select the "Create New Objective Document" link from the pop-up box	
Select the "Editable" link and enter the objective information, and enter information in the text boxes.	Once objectives are signed off, user can go back into the objectives page and record progress and comments
To add more than one objective select the "Add Objective" icon. When you have completed entering all the objectives select "Save"	
Click the appropriate tick boxes (Reviewer and / or Staff) to sign off the Objectives Document.	All of this data is also accessible from the individual homepage or individuals can complete this process on paper.
Click "Home" to return to your reviewer's homepage again	

9. Create a Personal Development Plan (PDP)

Used by: REVIEWERS AND INDIVIDUALS

Process

Notes

Go to www.e-ksf.org

Enter your “**Username and Password**” and select “**Login**”

From your reviewer’s home page identify the individual you want to create a PDP for, and select the “**PDP**” icon.

Fill in the text boxes with information about activities to be completed

To use the learning and development database or www.at-Learning.org, select “**Link Activity**” and then “**Browse**” before selecting activities

Select “**More Details**” against an activity to add further information. Select “**Save**” when you’ve finished adding these details

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

Select the “**Save**” button and you will be returned to your homepage.

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

PDPs can only be created once a post outline has been assigned to the individual

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

You can also click “**View Details**” to read more about the activity

Here you can add details such as sources of funding

If the individual is with you they can tick the Staff box and enter their password to confirm they accept the PDP activities.

10. Mark personal development as completed

Used by: 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
Click “View my PDP” from the right-hand side of the Staff home page	This activity will make most sense if you use the details of the individual you were entering data for in activities 4-8
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.	
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”	The status column will change from “Pending” to “Agreed”
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.	Note that your manager / reviewer does not need to approve ad hoc development activities – the individual “owns” their own PDP
This information has now been recorded in your learning and development history	
Click “Home” to return to your home page.	

11. Book Learning Activity

Used by: STAFF

Process

Go to www.e-ksf.org

Enter your **“Username and Password”** and select **“Login”**

Click **“View my PDP”** from the right-hand side of the Staff home page

From the PDP activity, select ‘link activity’

‘Search’ or ‘Browse’ the database for the required training activity

Select by ticking the ‘link activity’ box for the one you wish to book

Click ‘link activity’

From the PDP, click ‘View AT Learning Activity’ details

Select ‘book activity’

Check the dates for the schedule required and select ‘save’

Notes

Specify whether you want to search or browse and enter the appropriate information

This will then populate the PDP

The activity now requires approval from either your manager (process 12) or the BDA

12. Approve Learning Activity

Used by: **MANAGER**

Process	Notes
Go to www.atlearning.org	
Select your SHA and employing organisation	
Enter your username and password and select login	This is the same login information as your e-KSF account
Select the 'Manager User' icon	
Select 'Authorise Activity Bookings'	
Then 'Authorise' or 'Reject' the activity	
Select 'choose' and then 'Authorise Activity'	
Select 'close'	The individual is now booked to attend the learning activity