Transferring mandatory and statutory training records and tailoring the new starters induction
Barnsley Hospital NHS Foundation Trust

Barnsley Hospital NHS Foundation Trust introduced a process to accept new starter training records that were either transferred through the Electronic Staff Record (ESR) Inter Authority Transfer process (IAT) or by reviewing evidence provided. This new process is now saving the trust thousands of hours of staff time.

The case for change

The trust found a number of new joiners were attending inductions and stating they had already completed the same training in their previous organisations. The new joiners were able to provide evidence of their previous training, this only came to light on the day of their induction.

This feedback triggered an internal review, with the aim to remove the amount of unnecessary repeated training hours and return the staff time back to ward areas and departments.

The solution

The trust brought together different departments including the mandatory training and education centre manager, training administration team, HR and medical staffing teams to work on reducing unnecessary training hours.

Through the South Yorkshire Working Together Streamlining Mandatory Training group, a review of other trusts’ training took place. This helped ensure a minimum standard of what training evidence should be accepted. They agreed that evidence of learning could be provided or the transfer of competencies through the IAT would take place across the trusts. This exercise was also beneficial for staff who have more than one role in a trust as it prevents repetition of refresher training.

The transfer of prior training also applies to new starters from universities. The trust found new joiners straight from university took up large numbers of places on induction courses, but had already completed the mandatory and statutory training. A matrix is now held within the training team which shows the training provided by local universities and makes it clear which previously completed training could be accepted.
“Since 2015, this process has led to massive efficiency savings for our trust, preventing up to 1,300 hours of training every year. This has provided free time on induction for staff to work back in their departments, clinics or to undertake other duties that support their induction to the trust.”

Michael Wright, Director of Finance
Barnsley Hospital NHS Foundation Trust

The mandatory training and education centre manager is responsible for:

- reviewing all evidence provided due to the variation of evidence via the non-IAT route, an assessment often needs to be made as to whether it is the equivalent to some courses and can be accepted. IAT competencies that can transfer are more straightforward.

- explaining to any new starters that have a tailored induction what this means and the additional things they can complete during any free slots in their induction. This takes on average two hours per week.
The team records on a spreadsheet the hours saved to enable the continuous monitoring and evaluation of the process. This takes approximately four hours per week. While this time may be significant, it is far outweighed by the hours saved in unnecessary repeated training each year.

Although the senior team at the trust are aware of the process, it did not require formal approval.

The nurse bank sends regular letters out to staff to review if they wish to remain on the nurse bank, but also reminds them that evidence of training could be transferred to ensure their mandatory and statutory training is up to date. This had a cost saving impact as any bank-only nursing staff attending mandatory training are paid for their time.

The ability to transfer training is promoted at two points during recruitment, via email and offer letter. Internal communications are sent regularly to inform internal staff that any training they have completed at other NHS organisaitons may be transferred across.

**Challenges**

One issue the trust faced was that the main neighbouring organisation which staff transfer from is a non-Oracle Learning Management (OLM) site and they do not record competencies in ESR. Barnsley encouraged new joiners to provide any evidence of prior training via email or in person when they attended their pre-hire HR appointment.

**Outcomes and next steps**

Since the introduction of this process in 2015 and up to May 2018, a total of 3,652 hours of training have been saved by accepting competencies transferring, assessing evidence and tailoring the induction to match the individual’s requirements.

As more organisations sign up to the core skills training framework and record competencies in ESR this number will increase and reduce the admin burden of assessing evidence received.

Currently it’s a 50/50 split between prior training transferring via the IAT and physical evidence. If the IAT increased, the assessment time would be significantly reduced.

“...The feedback the trust has received is really positive. The process may seem daunting at first but it becomes quicker and easier...”
To measure the success, the trust maintain a spreadsheet to record the actual hours of training and gather regular induction feedback. They also capture outcomes as quantitative metrics such as sickness absence reductions. When this is not possible qualitative metrics are used and backed up by evidence such as quotes.

Next steps:

- The Working Together Streamlining group is currently seeking to formally align and declare to the core skills training framework which will enable other organisations outside of the group to be assured that the same minimum learning outcomes are met. Where subject alignment is not available, it is ensuring that the use of mandated competencies is maximised as these are transferable through the IAT process.

- The trust has requested a change to the IAT competencies notification to be alphabetical, this will make reviewing them quicker and easier.

Top Tips

- It is vital any evidence is received pre-hire to enable the induction to be individually tailored and managers to make appropriate shift planning.

- Ensure evidence is obtained as early as possible, this allows for forward planning and time to notify the relevant people. Pre-hire IAT is key to this early notification along with notifying HR.

- Review the training your local universities and other trusts provide, so you can easily establish which training can be transferred across.

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“Staff were able to come into the trust compliant in most subjects, this allowed them to spend more time in their roles rather than wasting time repeating training.”