

TURAS PEOPLE

User Guide (HR Board Users) – v2.0 (January 2020)

[Consolidated end to end user guide](#)

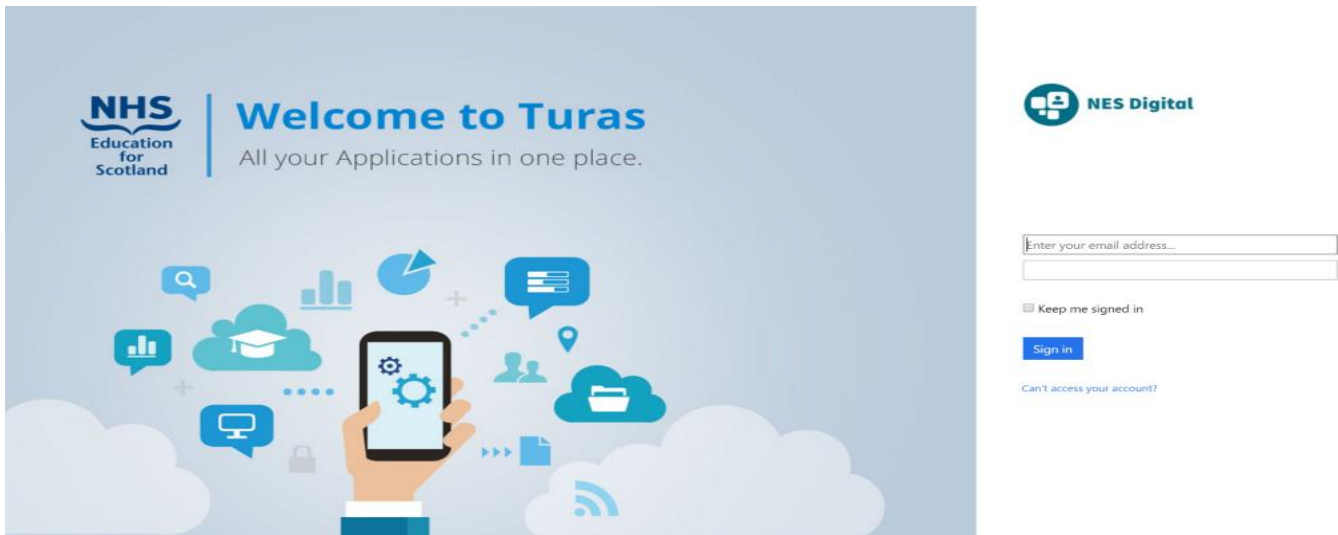
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Turas People was developed to support implementation of the lead employer arrangements across Scotland, enabling information to be easily shared across systems and users via the Turas platform, thus reducing duplication and improving user experience.

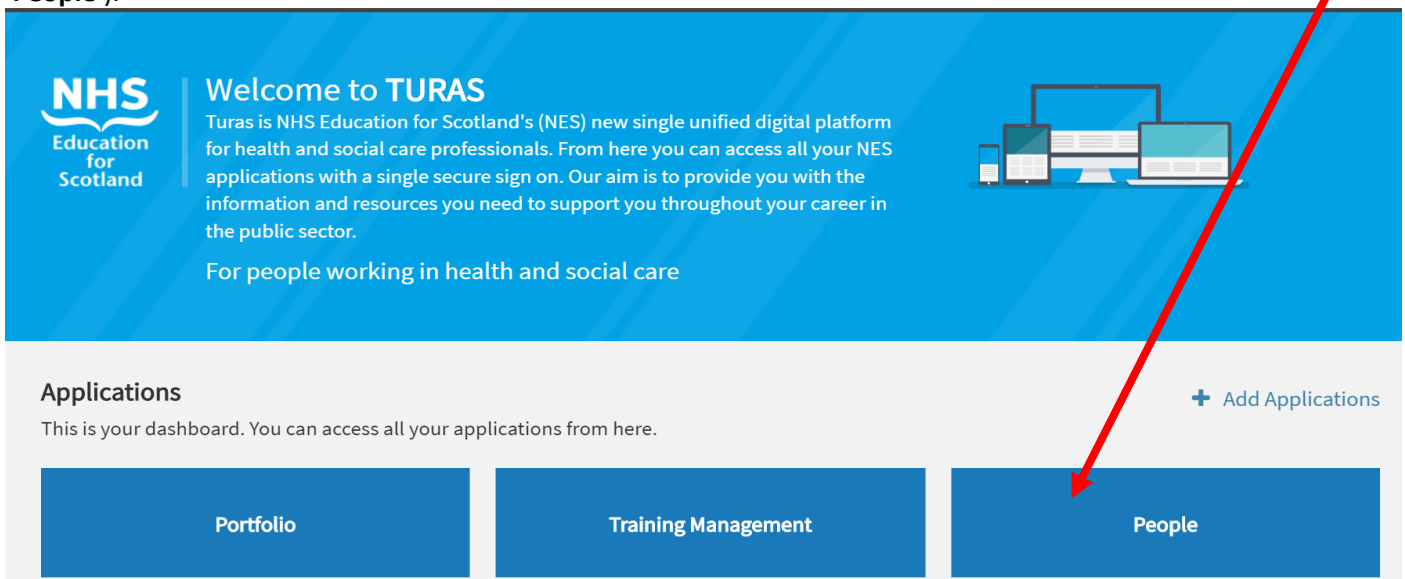
1.0 How do I log in?

1) Turas People is an application on the Turas platform, you can access all apps that you have access to using the same login credentials. Open an internet browser and go <https://turasdashboard.nes.nhs.scot/> You will be presented with the log in screen:

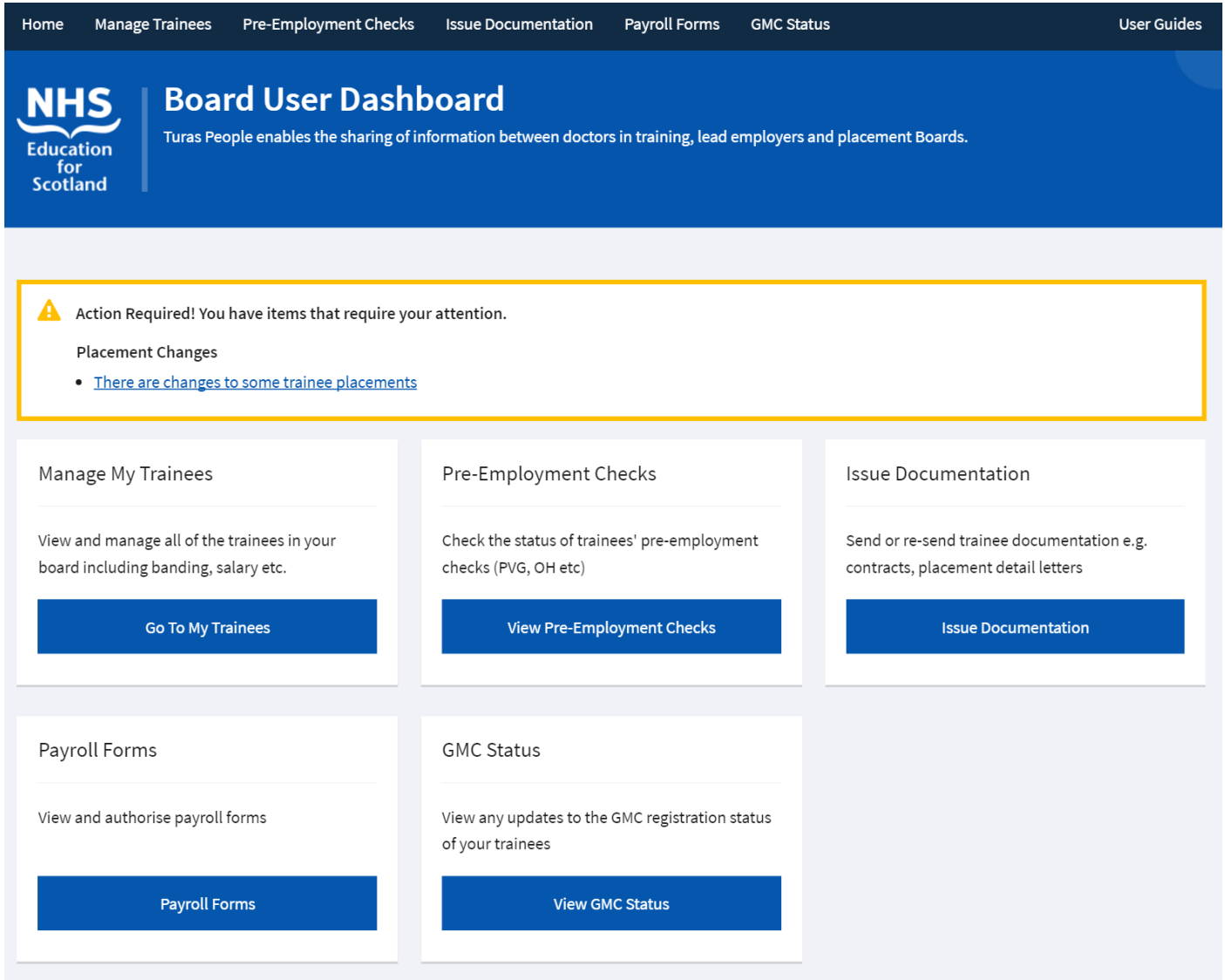


2) Enter your username (this will be your e-mail address) and password. As of 01/04/18 all NHS Scotland, Agenda for Change staff members were issued with a username and password for Turas Appraisal, these are the same credentials that you should use to login to Turas People. If you are having problems logging in to Turas People, please contact TurasPeopleSupport@nes.scot.nhs.uk and a member of the team will be in touch.

3) You will be presented with the Dashboard where you can choose which application you would like to use (click on 'People').



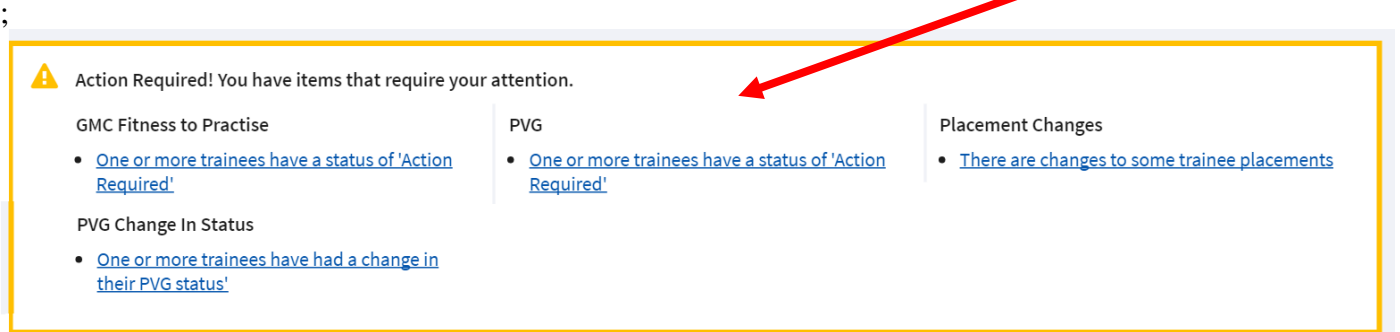
4) You will be presented with the Board User Dashboard. From this page you can perform a variety of actions, just click on the panel of the area you wish to work on.



The screenshot shows the Board User Dashboard interface. At the top is a navigation bar with links: Home, Manage Trainees, Pre-Employment Checks, Issue Documentation, Payroll Forms, GMC Status, and User Guides. Below the navigation bar is a blue header section with the NHS Education for Scotland logo and the title "Board User Dashboard". A sub-header states: "Turas People enables the sharing of information between doctors in training, lead employers and placement Boards." Below the header is a yellow-bordered alert box containing a warning icon and the text: "Action Required! You have items that require your attention." Underneath the alert, it says "Placement Changes" and lists a bullet point: "There are changes to some trainee placements". Below the alert are six white panels, each with a title, a description, and a blue button: "Manage My Trainees" (Go To My Trainees), "Pre-Employment Checks" (View Pre-Employment Checks), "Issue Documentation" (Issue Documentation), "Payroll Forms" (Payroll Forms), and "GMC Status" (View GMC Status). The sixth panel is empty.

2.0 Alerts

You will be presented with alerts, which update throughout the day. The details in these alerts will be available for one week and then they will disappear. To view the details of the alerts, please **click on the blue hyperlink**.



The screenshot shows a detailed view of the alert box. It contains a warning icon and the text: "Action Required! You have items that require your attention." Below this, there are three columns of alerts. The first column is titled "GMC Fitness to Practise" and contains a bullet point: "One or more trainees have a status of 'Action Required'". The second column is titled "PVG" and contains a bullet point: "One or more trainees have a status of 'Action Required'". The third column is titled "Placement Changes" and contains a bullet point: "There are changes to some trainee placements". A red arrow points from the text "click on the blue hyperlink" in the previous section to the blue hyperlink in the "Placement Changes" alert.

2.1 PVG Alerts

There are two types of PVG alerts, one titled 'PVG' which is a pre-employment check and is the initial process of checking a trainee's status with Disclosure Scotland.

The other is titled 'PVG Change in Status' which will show if NES HR are informed of any changes to a trainee's PVG status by Disclosure Scotland, NES HR will then update the trainee's record with these changes.

2.2 GMC Alerts

There is an overnight job which runs automatically and checks the GMC register for any warnings, conditions, undertakings or registration status changes. This alert will show if a trainee's GMC status has been updated.

2.3 Placement Changes

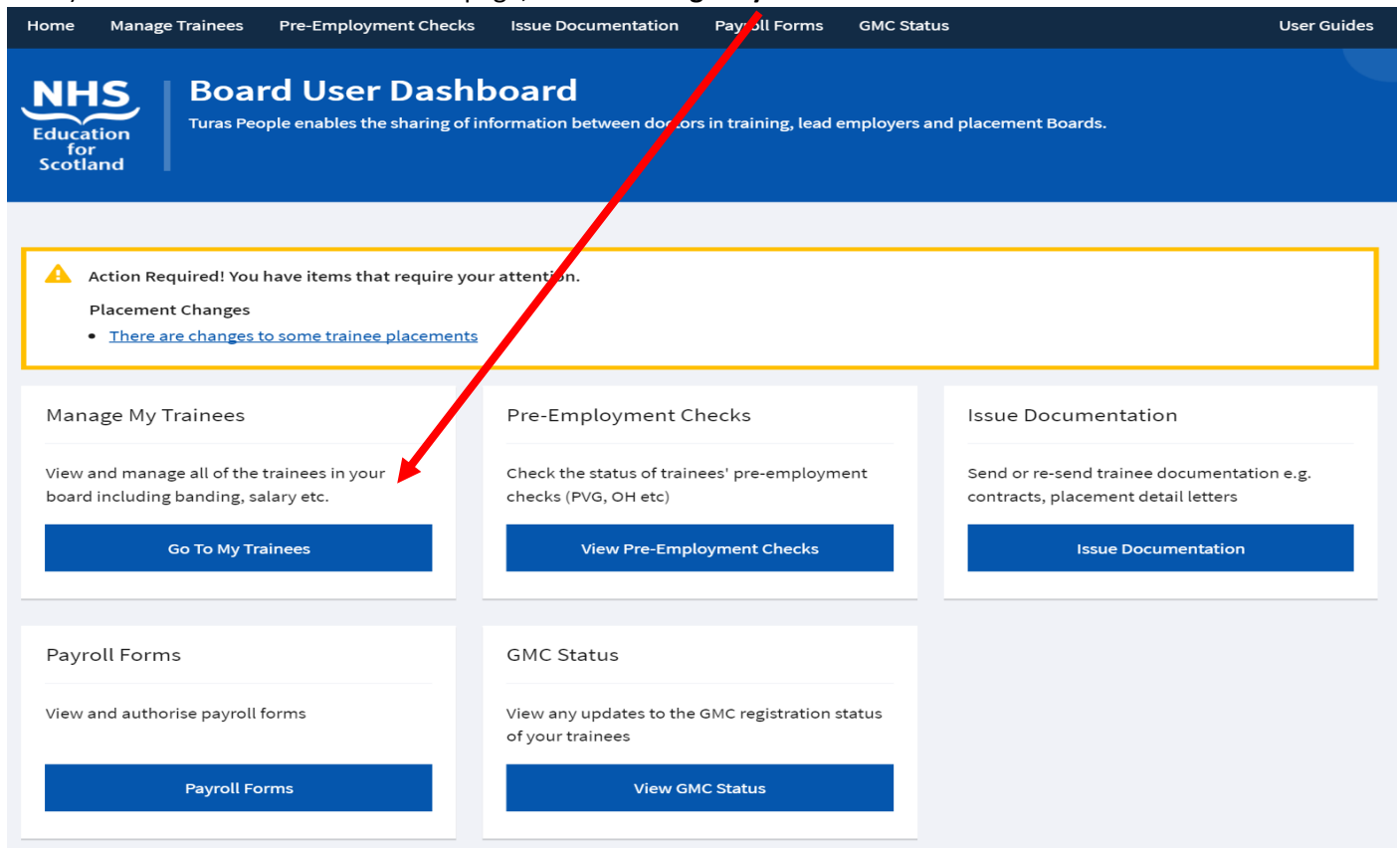
Turas People pulls its information on the trainee placements/posts from Turas Training Programme Management (TPM) as this training data is the responsibility of the Deanery. Should a placement be changed you will see it in this alert and it will often mean that there is the need for a Notification of Change (NOC) to be completed. There are different types of placement changes:

- Post date change – normally needs an NOC
- Post created – normally needs an NOC
- Programme change – less frequent, may need an NOC or SEF depending if it results in a change in employer
- Specialty change – does not normally require an action for payroll

N.B. – Rotation Report/Alerts – (please see page 34 for more details on running a rotation report) the Placement Changes alert should be used in conjunction with the Rotations Report to help determine when NOCs should be done, as the Rotation Report only shows movement over a date range.

3.0 Viewing Trainees

- 1) On the Board User Dashboard page, select '**Manage My Trainees**'.



The screenshot shows the Board User Dashboard interface. At the top, there is a navigation bar with links: Home, Manage Trainees, Pre-Employment Checks, Issue Documentation, Payroll Forms, GMC Status, and User Guides. Below this is the NHS Education for Scotland logo and the title 'Board User Dashboard' with a subtitle: 'Turas People enables the sharing of information between doctors in training, lead employers and placement Boards.'

A yellow-bordered alert box contains the message: 'Action Required! You have items that require your attention.' Below this, it lists 'Placement Changes' with a link: 'There are changes to some trainee placements'.

The dashboard features several interactive cards:

- Manage My Trainees:** View and manage all of the trainees in your board including banding, salary etc. Includes a 'Go To My Trainees' button.
- Pre-Employment Checks:** Check the status of trainees' pre-employment checks (PVG, OH etc). Includes a 'View Pre-Employment Checks' button.
- Issue Documentation:** Send or re-send trainee documentation e.g. contracts, placement detail letters. Includes an 'Issue Documentation' button.
- Payroll Forms:** View and authorise payroll forms. Includes a 'Payroll Forms' button.
- GMC Status:** View any updates to the GMC registration status of your trainees. Includes a 'View GMC Status' button.

A red arrow points from the 'Manage My Trainees' button in the alert box to the 'Go To My Trainees' button in the dashboard card.

2a) If you are an Employing Board user (NHS Grampian, NHS Greater Glasgow & Clyde, NHS Lothian or NHS Education for Scotland) then you will see two tabs on the Manage Trainees page, 'Employing Board' and 'Placement Board'.

Manage Trainees

View trainees in your board and create forms for individual trainees

Download Reports

[Home](#) > Trainee List

Employing Board
Placement Board

Trainees as at:

📅

Search

[Information about dates](#)

Copy Selected Trainees

This total includes all trainees employed in your Board, regardless of who the placement is. This total excludes academic and military trainees who are not NHS employees. It includes any OOP trainees still attached to the training programme.

Showing 1 to 10 of 50 entries Show entries

	Name	GMC	Programme	Education Provider	Specialty	Trainee Grade	Actions
<input type="checkbox"/>	Active, Andrea	5812364	N01 - FY1	Aberdeen Royal Infirmary	General Internal Medicine	FY1	Actions ▼

The Employing Board tab shows ALL trainees who are employed by your board. The Placement Board tab shows all trainees who have a placement in your board as of the date you have selected and for the next 6 months (this will include for example GP trainees who are employed by NES but undertaking a hospital placement in your board). Trainees will appear in the Placement Board tab as soon as a placement/post is attached to them by the Deanery Training Management teams in Turas Training Programme Management (TPM).

2b) If you are a Placement Board user then you will see one tab, 'Placement Board'.

Manage Trainees

View trainees in your board and create forms for individual trainees

Download Reports

[Home](#) > Trainee List

Placement Board

Trainees as at:

📅

Search

[Information about dates](#)

Copy Selected Trainees

	Name	GMC	Programme	Education Provider	Specialty	Trainee Grade	Actions
<input type="checkbox"/>							Actions ▼

The Placement Board tab shows all trainees who have a placement in your board as of the date you have selected and for the next 6 months (this will include for example GP trainees who are employed by NES but undertaking a hospital placement in your board). Trainees will appear in the Placement Board tab as soon as a placement/post is attached to them by the Deanery Training Management teams in Turas Training Programme Management (TPM).

- 3) You can change the date using the **'Trainees as at'** date picker and then clicking **'Search'**. The date will default to the current date. You will be able to see trainees in your Placement board up to 6 months in the future.



N.B. The Trainees as at date picker can be applied on most screens in Turas people and it is important to ensure you have selected the correct date and clicked search before performing any other actions.

- 4) You can filter on one or a combination of the following things: name, GMC number, programme, education provider, specialty, grade by using the boxes at the top of the columns. This will bring you up only the trainees who meet that criteria, e.g. Education provider contains the word 'Royal' and Grade = 'FY2'

Showing 1 to 3 of 3 entries (filtered from 50 total entries)

Show 10 entries

	Name	GMC	Programme	Education Provider	Specialty	Trainee Grade	Actions
	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Royal"/>	<input type="text" value="Search"/>	<input type="text" value="FY2"/>	
<input type="checkbox"/>	Arine, Marg	2342311	N01 - FY2	Aberdeen Royal Infirmary	Foundation	FY2	Actions ▾
<input type="checkbox"/>	Message, Maisie	5435464	N01 - FY2	Royal Aberdeen Children's Hospital	Foundation	FY2	Actions ▾
<input type="checkbox"/>	Rapido, Olenzo	5435432	N01 - FY2	Aberdeen Royal Infirmary	Foundation	FY2	Actions ▾

- 5) Click on the **'Actions'** button on a trainee's row to see their record or to complete a Notification of Change (NOC) form – for more details on what is in a trainee's record and how to complete a NOC, please see page 7 – Trainee Profile & page 30 NOC.

Showing 1 to 3 of 3 entries (filtered from 50 total entries)

Show 10 entries

	Name	GMC	Programme	Education Provider	Specialty	Trainee Grade	Actions
	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Royal"/>	<input type="text" value="Search"/>	<input type="text" value="FY2"/>	
<input type="checkbox"/>	Arine, Marg	2342311	N01 - FY2	Aberdeen Royal Infirmary	Foundation	FY2	Actions ▾
<input type="checkbox"/>	Message, Maisie	5435464	N01 - FY2	Royal Aberdeen Children's Hospital	Foundation	FY2	Actions ▾

4.0 Trainee profile

Each trainee has an individual profile page, from where you can complete a number of actions. You can access **'Emergency Contact details'** from the button at the top right of the screen.

TURAS | People
Dashboard Applications ▾ August King ▾

Home Manage Trainees Pre-Employment Checks Issue Documentation Payroll Forms GMC Status User Guides

Marg Arine

Emergency contact details

Home > Trainee List > Marg Arine

Trainee Details

Email Address	Phone Number	GMC Number
margarine@example.com	0123456789	2342311

Address

123 The Street
The Town
The County
GY 65T

Placement Information
Pre-Employment
Document History
Payroll Authorisation
Right to Work

Trainee Timeline

	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
N01 - FY2	Aberdeen Royal Infirmary		Aberdeen Royal Infirmary			Aberdeen Royal Infirmary						
	1/8				1/12/12				1/4/4			31/7
Out Of Programme								Sick Leave				
								26/2		30/4		
< 01 Aug 2018 - 06 Aug 2019 >												

⌵ Timeline Key ⌵

Current Placement

Programme	Education Provider	Start Date	End Date	Specialties
N01 - FY2 (NOS2234)	Aberdeen Royal Infirmary	02/12/2018	01/04/2019	Foundation

Next Placement

Programme	Education Provider	Start Date	End Date	Specialties
N01 - FY2 (NOS2234)	Aberdeen Royal Infirmary	02/04/2019	31/07/2019	Foundation

There are 5 tabs on the page, each of these contains important information relating to the trainee: Placement Information, Pre-Employment, Document History, Payroll Authorisation, Right to Work.

Placement Information – this displays the trainee’s timeline for the duration of their training; hovering over or clicking on this will display additional information. The current and next placement is displayed in the table on the page.

Pre-Employment – this is the tab that opens by default, please see section 5 for more details on the actions that can/should be performed on this screen.

Document History – (please see section 6 for more information) this shows all documents issued via Turas People to the trainee. You can also upload documents to this section and these will be held against the trainee record and visible for the duration of their employment.

Payroll Authorisation – (please see section 7 for more information) from this screen you can view and complete payroll forms (Staff Engagement and Notification of Change forms).

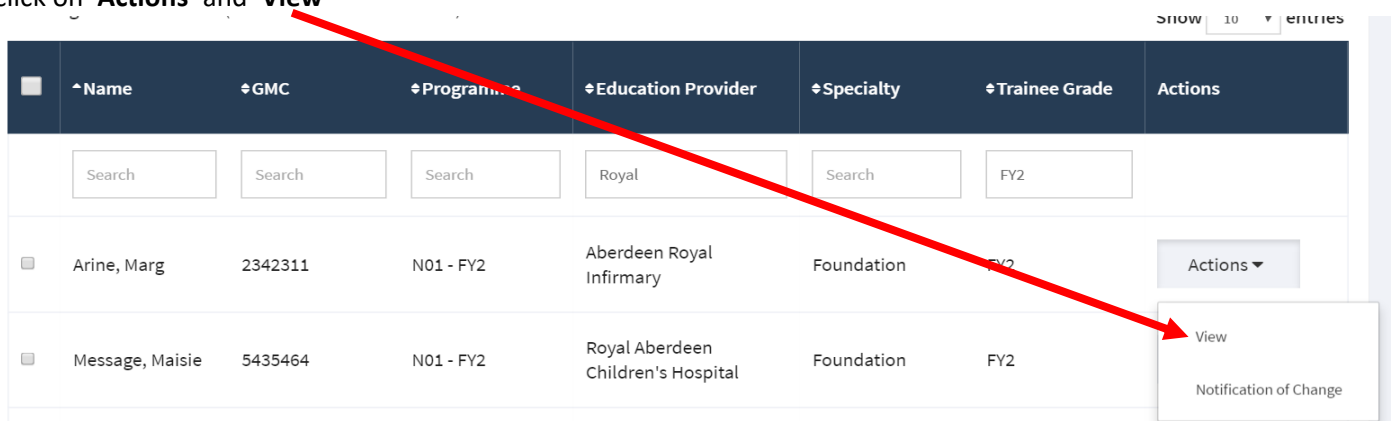
Right to Work - (please see section 5 for more information) this screen will show you a complete history of a trainee’s right to work, not just their pre-employment Right to Work information; unlike other screens on Turas People this records spans the entire duration of a trainee’s time in the Scotland Deanery and is not restricted to one programme/employment.

5.0 Pre-Employment Checks

There are two ways to view pre-employment checks held against a trainee, at an individual trainee level and at a summary level (i.e. all trainees in your Placement Board). Only trainees who require to have pre-employment checks carried out (trainees new to a programme) will show checks against them, others will show the status of 'Not Applicable', you do not require to complete any pre-employee checks in Turas People for these trainees.

5.1 Viewing/editing an individual trainee's pre-employment checks

1) On the Board User Dashboard, click on '**Manage My Trainees**', search for the trainee you want to view and then click on '**Actions**' and '**View**'



Name	GMC	Programme	Education Provider	Specialty	Trainee Grade	Actions
Arine, Marg	2342311	N01 - FY2	Aberdeen Royal Infirmary	Foundation	FY2	Actions ▾ View Notification of Change
Message, Maisie	5435464	N01 - FY2	Royal Aberdeen Children's Hospital	Foundation	FY2	

2) You will be taken to the trainee's record which will open to the Pre-Employment tab where you will see a summary of all of the checks to be completed and their status.

Grace Adler
Emergency contact details

Home > Trainee List > Grace Adler

Trainee Details

Email Address	Phone Number	GMC Number
grace@example.com		5656567

Address

GraceTPMAdd001
 GraceTPMAdd002
 GraceTPMCity
 GraceTPMCounty
 GR01TPM

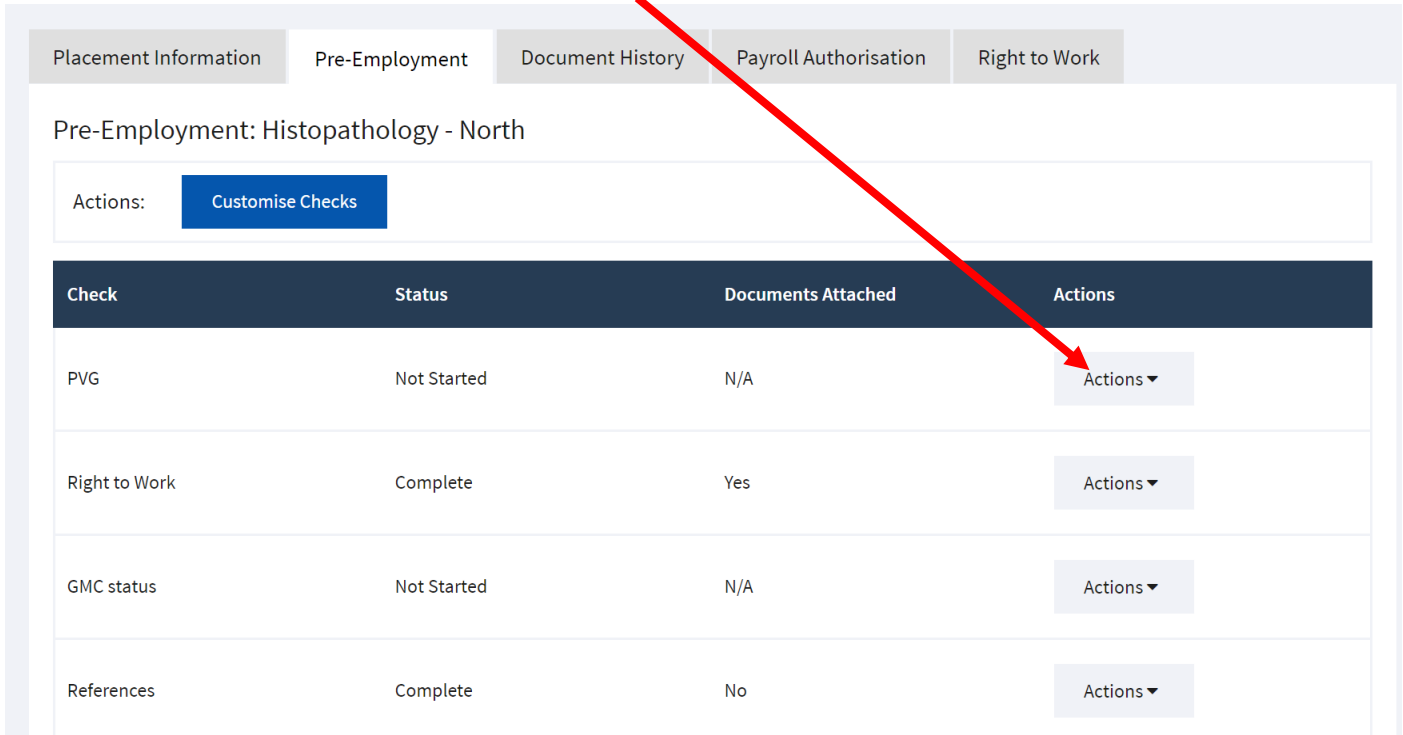
Placement Information Pre-Employment Document History Payroll Authorisation Right to Work

Pre-Employment: Histopathology - North

Actions: Customise Checks

Check	Status	Documents Attached	Actions
PVG	Not Started	N/A	Actions ▾
Right to Work	Complete	Yes	Actions ▾
GMC status	Not Started	N/A	Actions ▾
References	Complete	No	Actions ▾
Competencies	Complete	N/A	Actions ▾

3) To view additional information clicking on the **Actions** button. This will take you to a new page for that check.



Check	Status	Documents Attached	Actions
PVG	Not Started	N/A	Actions ▾
Right to Work	Complete	Yes	Actions ▾
GMC status	Not Started	N/A	Actions ▾
References	Complete	No	Actions ▾

If a trainee has a status of 'Action Required' this means that as a Board user you need to take action. Click on the particular pre-employment check and it will expand, providing you with more information and presenting you with options. If an item has a red asterisk (*) this is a mandatory field and you must complete it before you save the record.

The PVG and GMC Status check is an automated check which draws data from external processes, they will return a status of 'Action Required' if a decision needs to be made by the Board on whether a trainee is suitable to commence placement based on an assessment of the condition noted in either of these checks (as per current business process). You can choose 'Reviewed & OK' or 'Reviewed & Not Cleared', for either option you must enter a reason for your decision. If you choose 'Reviewed & OK' and click save, the trainee's record will change to 'Complete'. If you choose 'Reviewed & Not Cleared' the trainee's record will show 'Action Required' and you should contact the Deanery, as per current process.

There is also an Observations box at the bottom of the page where users can record relevant notes related to the pre-employment checks of a trainee.

3a) PVG – The PVG status is populated by data that the NES HR PVG Team enter into TPM, this will generate a series of statuses which will be displayed to HR/Medical Staffing users, this should remove the need for manual tracking spreadsheets to be sent to the Boards.

The statuses which will be displayed on the Pre-Employment Checks grid in the PVG column are:

- Not started (*this means no form has been sent to trainee/no action yet taken*)
- Issued (*to trainee*)
- Returned (*to NES and being processed*)
- Pending (*at Disclosure Scotland*)
- Complete (*Disclosure report received by NES and logged on TPM, no conditions/notes entered*)
- Action required (*if any notes on the application or any conditions entered*)

N.B. - PVG checks – If there is a Condition then to view the detail of a PVG record, please access the record in TPM to view the Disclosure certificate as you would as per the current business process.

3b) Right to Work – this is populated by the details trainees enter on the Staff Engagement Form (SEF). Here you can review the documentation submitted by the trainees and upload any additional supporting documentation required. (see also page 8 for more details on Right to Work).

N.B. For trainees who require a Tier 2 visa, please ensure that you continue to update the NES Tier 2 app as per standard business process.

If a trainee requires a Tier 2 visa, when you select the ‘Type of Visa’ = Tier 2, then the dates will automatically be populated from the NES Tier 2 application; if no visa is yet confirmed, you will see the word ‘pending’ in the date box.

UK, EU Community, or EEA National?	<input type="checkbox"/>
Nationality *	Sudan
Is Visa Required?	<input checked="" type="checkbox"/>
Type of Visa *	Tier 2
End Date of Visa	21/05/2020
Start Date of Visa	04/02/2019
Trainee Has Right to Work? *	<input checked="" type="radio"/> Yes <input type="radio"/> No
Right to Work Has Been Verified? *	<input checked="" type="radio"/> Yes <input type="radio"/> No
Reason *	Visa confirmed

Once the initial Right to Work check is completed in the Pre-Employment tab you can add any additional information under the separate Right to Work tab; please note for audit purposes you cannot delete or amend a right to work record, you can only add.

Placement Information Pre-Employment Document History Payroll Authorisation Right to Work

Pre-Employment: Histopathology - North

Actions: Customise Checks

Check	Status	Documents Attached	Actions
PVG	Not Started	N/A	Actions ▼
Right to Work	Complete	Yes	Actions ▼

3c) GMC – this is an automated check which draws data from an external process, it will return a status of ‘Action Required’ if a decision needs to be made by the Board on whether a trainee is suitable to commence placement based on an assessment of the condition noted in this check (as per current business process). You can choose ‘Reviewed & OK’ or ‘Reviewed & Not Cleared’, for either option you must enter a reason for your decision. If you choose ‘Reviewed & OK’ and click save, the trainee’s record will change to ‘Complete’. If you choose ‘Reviewed & Not Cleared’ the trainee’s record will show ‘Action Required’ and you should contact the Deanery, as per current process.

3d) References – If trainees have submitted references via Oriel you will see them displayed here. If a trainee has not submitted their references via Oriel then you can manually upload a reference file. In order to mark a reference check as 'Complete' you need to have at least two references which you have marked as satisfactory.

If you need to add a reference file click on **'choose files'** and select the file from your computer, then click on **'Save'**.

References

Upload Reference

Choose Files
No file chosen

Reference Name	Actions	Reference Satisfactory
The check can be marked as complete when at least two satisfactory references are saved.		
<div style="display: flex; justify-content: space-between; align-items: center;"> Save </div>		

Once you upload a file (or there is a file uploaded from Oriel) you will be asked to mark whether the reference is satisfactory or not. Select **'Yes'** or **'No'** and then click **'Save'**.

References saved successfully x

Upload Reference

Choose Files
No file chosen

Reference Name	Actions	Reference Satisfactory
ref test.txt	Download	<div style="display: flex; align-items: center;"> Satisfactory <input type="radio"/> Yes <input type="radio"/> No </div>
The check can be marked as complete when at least two satisfactory references are saved.		
<div style="display: flex; justify-content: space-between; align-items: center;"> Save </div>		

If you mark the reference Satisfactory = no then you must enter a reason before you can save the record.

References saved successfully x

Upload Reference

Choose Files
No file chosen

Reference Name	Actions	Reference Satisfactory
ref test.txt	Download	<div style="display: flex; align-items: center;"> <input type="radio"/> Satisfactory <input type="radio"/> Yes <input checked="" type="radio"/> No </div> <div style="margin-top: 5px;"> Not satisfactory reason * <input style="width: 100%; margin-top: 5px;" type="text"/> </div> <p style="font-size: small; color: red; margin-top: 5px;">Not satisfactory reason is required when 'No' is selected</p>
The check can be marked as complete when at least two satisfactory references are saved.		
<div style="display: flex; justify-content: space-between; align-items: center;"> Save </div>		

Once you have two satisfactory references you will be presented with the option to mark the reference check as Complete (once a check is marked as complete you cannot upload any further reference documents).

References saved successfully x

Upload Reference

Reference Name	Actions	Reference Satisfactory
ref test.txt	Download	Satisfactory <input checked="" type="radio"/> Yes <input type="radio"/> No
ref test2.txt	Download	Satisfactory <input checked="" type="radio"/> Yes <input type="radio"/> No

Complete

[Save](#)

Once you mark the check as complete it changes the status of the Reference check to 'Complete'.

References saved successfully x

Reference Name	Actions	Reference Satisfactory
ref test.txt	Download	Yes
ref test2.txt	Download	Yes

3e) Competencies – The competencies check is switched off for Foundation trainees as it is not required. For CT and ST you can assess the relevant competency information and mark the check as complete and record a reason. Any competency documents uploaded by trainees to their Filing Cabinet, tagged with the document type of competency will show on this screen.

Competencies Not Started N/A

File Name	Actions
4a61c9f.jpg	Download

Competencies Complete * Yes No

Reason *

[Save](#)

Once you have reviewed the documents you can mark the check as complete or not. If you wish to record additional documentation to support this check you can add it under the Document History tab on this screen.

3f) Occupational Health - Only trainees who are new to a programme will be required to complete an Occupational Health form through Turas People (continuing trainees will not have an OH record on Turas People).

The output of the Fit Report from the Occupational Health (OH) department will display under this check. If a trainee is assessed by OH as requiring a reasonable adjustment or unfit for the post, the status will display as 'Action Required'.

If assessed as 'unfit' you will see this message:

Not cleared for placement - please contact your training management team at the deanery to discuss this trainee further

If the trainee is assessed as 'fit with adjustments' you will see the message below. You should follow your standard business practices in relation to reasonable adjustments and then record the outcome on Turas People; if

Trainee is fit for placement requiring adjustments

Exposure Prone Procedures

EPP Cleared

Reviewed and Actioned? *

Yes No

Details *

Note adjustment made

Fit Report Comments

Some other bits of words

If any adjustments are required please email your training programme management team at the deanery

Save

If you mark 'Reviewed and Actioned' = No then the status will stay as Action Required and you should contact the Deanery to discuss that the trainee cannot be accommodated in the proposed placement.

Trainee is fit for placement requiring adjustments

Exposure Prone Procedures

EPP Cleared

Reviewed and Actioned? *

Yes No

Details *

Cannot meet the required adjustments.

Note adjustment made

Fit Report Comments

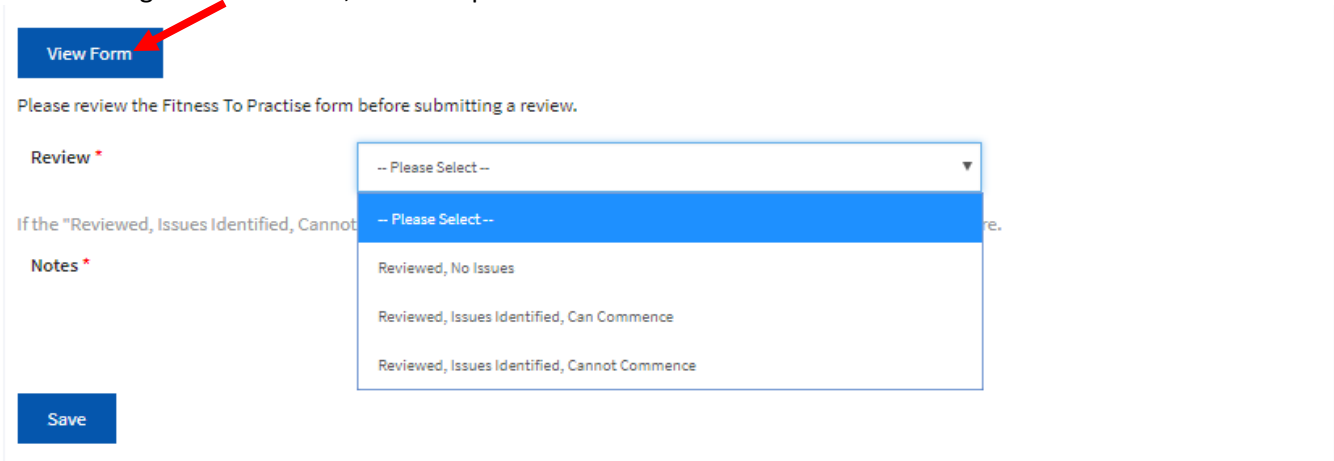
Some other bits of words

If any adjustments are required please email your training programme management team at the deanery

Save

3g) Staff Engagement Form (SEF) – This will display the current status of the SEF, please see section 7 for details on how to complete the required payroll information on a SEF.

3h) Fitness to Practice – Trainees will submit their Fitness to Practice form through Turas People and you can view this by clicking on **'View Form'**, this will open in a new tab



View Form

Please review the Fitness To Practise form before submitting a review.

Review *

If the "Reviewed, Issues Identified, Cannot Commence" option is selected, the form will be marked as reviewed, with issues identified, and cannot commence.

Notes *

Save

Once you have reviewed the form you must pick an option from the **'Review'** drop down list.

3i) Recruitment Documentation – This is for information only, there are no requirements surrounding Recruitment Documentation. If documentation has been uploaded at national recruitment centres for a trainee, this will display in this section; as requirements vary across specialties, there will not be a standard entry in this section.

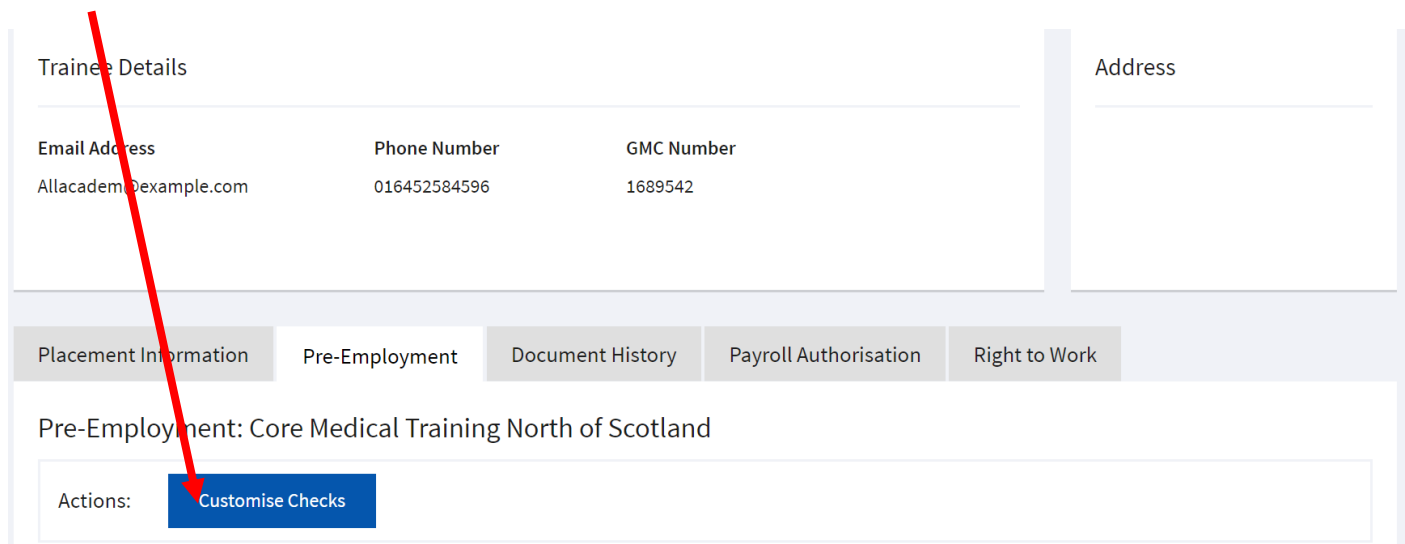
Filename	Actions
A - Random.txt	Download

Documentation No file chosen

Save

5.2 Turning on and off pre-employment checks

Users can turn on and off specific pre-employment checks at an individual trainee level by clicking **'Customise Checks'**.



Trainee Details

Address

Email Address	Phone Number	GMC Number
Allacadem@example.com	016452584596	1689542

Placement Information **Pre-Employment** **Document History** **Payroll Authorisation** **Right to Work**

Pre-Employment: Core Medical Training North of Scotland

Actions: **Customise Checks**

You will be presented with a grid where you can switch on or off the checks by clicking on the toggles.

[< Go back](#)

Angela Academic: Core Medical Training North of Scotland

Check	Status	Available
Competencies	Not Started	<input checked="" type="checkbox"/> On
GMC	Not Started	<input checked="" type="checkbox"/> On
Protecting Vulnerable Groups	Not Started	<input checked="" type="checkbox"/> On
References	Not Started	<input checked="" type="checkbox"/> On
Right to Work	Not Started	<input checked="" type="checkbox"/> On
Occupational Health Form	Not Started	<input checked="" type="checkbox"/> On
Staff Engagement Form	Not Applicable	<input type="checkbox"/> Off
Fitness To Practise Form	Not Applicable	<input type="checkbox"/> Off

Reason

[Go Back](#)

[Save](#)

If you edit it check (switch it on or off you will be required to enter a reason before you can save the change).

Occupational Health Form	Not Started	<input checked="" type="checkbox"/> On
Staff Engagement Form	Not Applicable	<input type="checkbox"/> Off
Fitness To Practise Form	Not Applicable	<input checked="" type="checkbox"/> On *

Reason

Trainee needs to be checked.

[Go Back](#)

[Save](#)

An audit of the changes will be saved to the trainee's main pre-employment check tab.

Recruitment Documentation	Not Applicable	No	Actions ▼
---------------------------	----------------	----	---------------------------

Observations

[Go Back](#)

[Save Observations](#)

History of Process Changes

Date	Name	Change	Reason
10/01/2020 15:21	August King	Fitness To Practise Form enabled	Trainee needs to be checked.
20/11/2019 11:33	August King	Recruitment Documentation = Not Applicable	Change triggered by the board user

Showing 1 to 2 of 2 entries

[Previous](#) **1** [Next](#)

5.3 Opening new/additional forms for trainees

If a trainee has already completed a form but they are required to complete a new one this can be done from the main trainee pre-employment screen (this applies to Occupational Health, Fitness to Practice and Staff Engagement Forms only).

Occupational Health/Fitness to Practice:

A trainee returning from Out of Programme (OOP) may require to complete a new Occupational Health or Fitness to Practice form.

Click on **'Actions'** and choose **'Create New Form'**

Occupational Health	Complete	N/A	Actions ▾
Staff Engagement Form	Not Started	N/A	View Create New Form
Fitness To Practise	Not Applicable	-	

You'll be asked to confirm or cancel

Are you sure you want to create a new Occupational Health Form?

Create **Cancel**

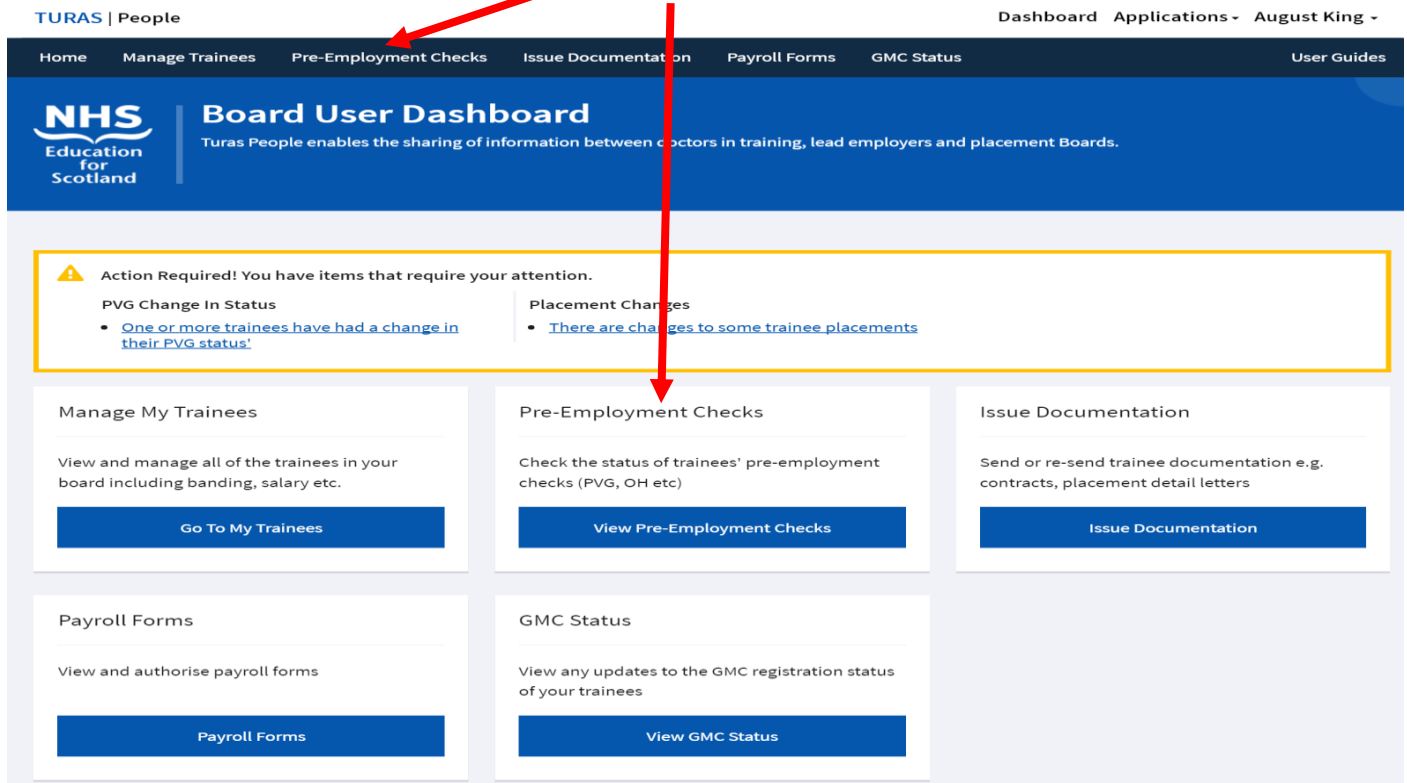
This will then open up a new form for the trainee who can complete it via their Turas People Trainee page (as they would have done for the original). The forms will be prepopulated with the original information supplied by the trainee which they can then edit as appropriate and resubmit.

Staff Engagement Form (SEF)

A trainee who has been OOP may have been terminated from the Payroll, in this case you can open a new SEF for them as per the other forms above. The form will be prepopulated with the original information supplied by the trainee which they can then edit as appropriate and resubmit; this should then go through the normal SEF approval process for payroll (two levels of authorisation).

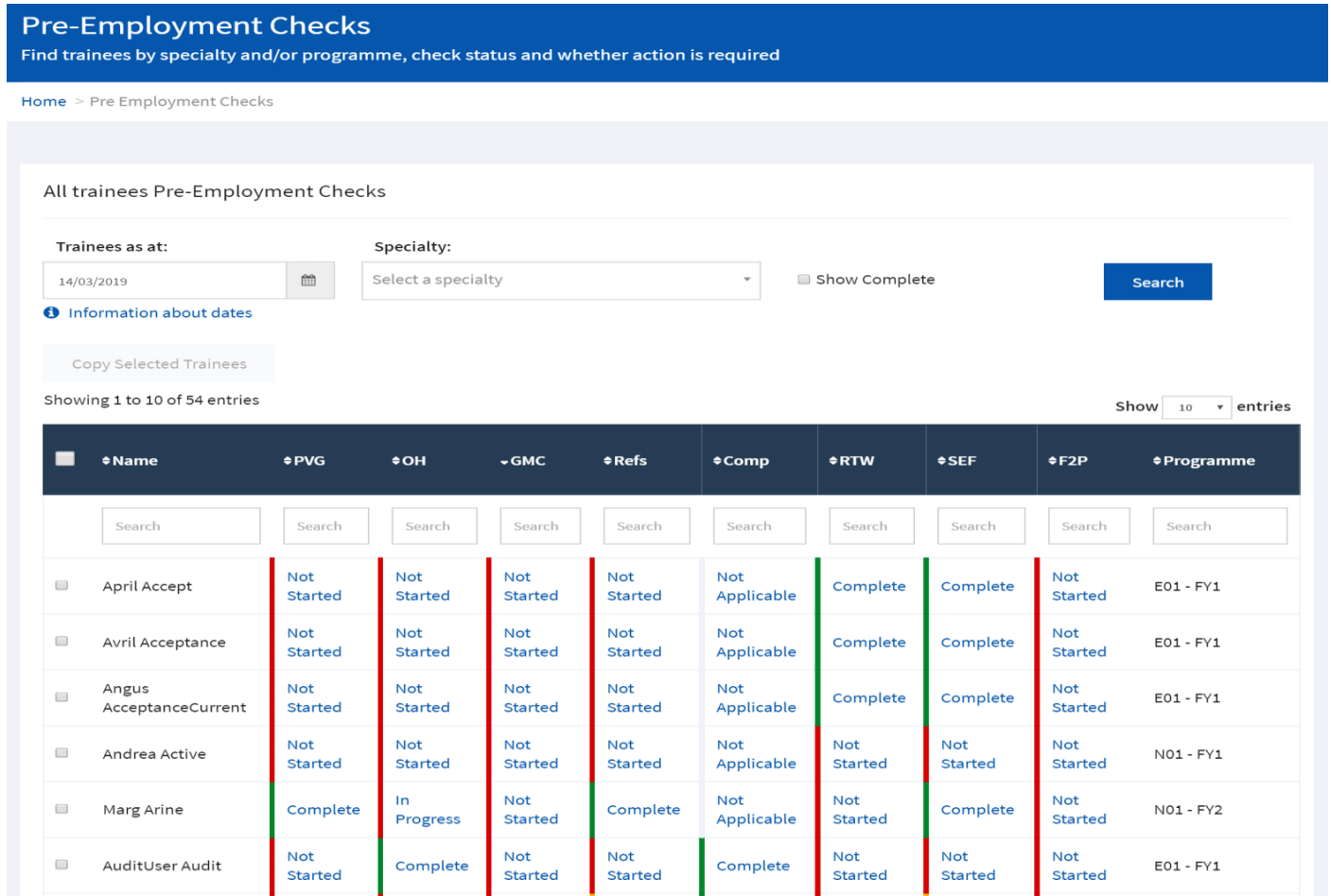
5.4 Viewing/editing trainee pre-employment checks at a group level

1) On the Home screen click on **'Pre-Employment Checks'** – either the button or the top navigation link.



The screenshot shows the 'Board User Dashboard' for 'TURAS | People'. The top navigation bar includes links for Home, Manage Trainees, Pre-Employment Checks, Issue Documentation, Payroll Forms, GMC Status, and User Guides. A red arrow points to the 'Pre-Employment Checks' link in the top navigation. Below the navigation is a blue header with the NHS Education for Scotland logo and the text 'Board User Dashboard'. A yellow alert box contains two messages: 'Action Required! You have items that require your attention.' with a link to 'PVG Change In Status' and 'Placement Changes' with a link to 'There are changes to some trainee placements'. Below the alert are six widget boxes: 'Manage My Trainees', 'Pre-Employment Checks', 'Issue Documentation', 'Payroll Forms', and 'GMC Status'. Each widget has a description and a blue button to access the functionality.

2) You will be taken to the pre-employment grid (this is displayed at a placement board level).



The screenshot shows the 'Pre-Employment Checks' page. The header is blue with the title 'Pre-Employment Checks' and the subtitle 'Find trainees by specialty and/or programme, check status and whether action is required'. Below the header is a navigation breadcrumb 'Home > Pre Employment Checks'. The main content area is titled 'All trainees Pre-Employment Checks'. It features a search filter for 'Trainees as at:' (14/03/2019) and 'Specialty:' (Select a specialty). There is a 'Show Complete' checkbox and a 'Search' button. Below the search filters is a 'Copy Selected Trainees' button and a message 'Showing 1 to 10 of 54 entries'. The table below shows the first 10 entries with columns for Name, PVG, OH, GMC, Refs, Comp, RTW, SEF, F2P, and Programme. Each cell in the table contains a status or 'Not Started'.

Name	PVG	OH	GMC	Refs	Comp	RTW	SEF	F2P	Programme
April Accept	Not Started	Not Started	Not Started	Not Started	Not Applicable	Complete	Complete	Not Started	E01 - FY1
Avril Acceptance	Not Started	Not Started	Not Started	Not Started	Not Applicable	Complete	Complete	Not Started	E01 - FY1
Angus AcceptanceCurrent	Not Started	Not Started	Not Started	Not Started	Not Applicable	Complete	Complete	Not Started	E01 - FY1
Andrea Active	Not Started	Not Started	Not Started	Not Started	Not Applicable	Not Started	Not Started	Not Started	N01 - FY1
Marg Arine	Complete	In Progress	Not Started	Complete	Not Applicable	Not Started	Complete	Not Started	N01 - FY2
AuditUser Audit	Not Started	Complete	Not Started	Not Started	Complete	Not Started	Not Started	Not Started	E01 - FY1

3) The grid can be filtered on each of the columns e.g. if you want to find all the trainees whose PVG is complete, type 'complete' (all or part of the word) into the column header. You can filter on one or many columns at a time.

Showing 1 to 4 of 4 entries (filtered from 54 total entries) Show entries

<input type="checkbox"/>	Name	PVG	OH	GMC	Refs	Comp	RTW	SEF	F2P	Programme
<input type="checkbox"/>	Marg Arine	Complete	In Progress	Not Started	Complete	Not Applicable	Not Started	Complete	Not Started	N01 - FY2
<input type="checkbox"/>	Charles Spaniel	Complete	Complete	Not Started	Complete	Not Applicable	Complete	Not Started	Not Started	E02 - FY2
<input type="checkbox"/>	Raymond RTWFour	Complete	Not Started	Complete	Complete	Not Applicable	Complete	Action Required	Not Started	E01 - FY1
<input type="checkbox"/>	Brian Snail	Complete	Complete	Complete	Complete	Complete	Complete	Not Started	Not Started	Core Psychiatry Training West 2

4) You can also filter by specialty by choosing from the drop down menu and then clicking 'search'.

Trainees as at:

Specialty:

Show Complete

[Information about dates](#)

Showing 1 to 7 of 7 entries Show entries

<input type="checkbox"/>	Name	PVG	OH	GMC	Refs	Comp	RTW	SEF	F2P	Programme
<input type="checkbox"/>	Earth Core	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Action Required	Not Started	Core Medical Training North of Scotland
<input type="checkbox"/>	SEFStatus NewTrainee	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	In Progress	Complete	Core Medical Training North of Scotland
<input type="checkbox"/>	Oscar OccHealth	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Core Medical Training North of Scotland

5) Once all of a trainee's checks are 'complete' they will disappear from the grid but you can view them again by ticking the 'Show all complete' box.

All trainees Pre-Employment Checks

Trainees as at:

Specialty:

Show Complete

[Information about dates](#)

6) To view the details of a check click on the status in the cell e.g. 'Not Started' and this will take you directly to that trainee's personal record and the details of the check.

<input type="checkbox"/>	Oscar OccHealth	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Not Started	Core Medical Training North of Scotland
--------------------------	-----------------	-------------	-------------	-------------	-------------	-------------	-------------	-------------	-------------	---

7) The trainee's record will open with the relevant check expanded.

Placement Information
Pre-Employment
Document History
Payroll Authorisation
Right to Work

Pre-Employment: Core Medical Training North of Scotland

Check	Status	Documents Attached
<input checked="" type="checkbox"/> PVG	Not Started	N/A
<input type="checkbox"/> PVG Check Complete	No	
<input checked="" type="checkbox"/> Right to Work	Not Started	No
<input checked="" type="checkbox"/> GMC status	Not Started	N/A
<input checked="" type="checkbox"/> References	Not Started	No
<input checked="" type="checkbox"/> Competencies	Not Started	N/A
<input checked="" type="checkbox"/> Occupational Health	Not Started	N/A
<input checked="" type="checkbox"/> Staff Engagement Form	Not Started	N/A
<input checked="" type="checkbox"/> Fitness To Practise	Not Started	No
<input checked="" type="checkbox"/> Recruitment Documentation	Action Required	No

Observations

Go Back
Save Observations

To return to the main grid click on the 'Go Back' button.

6.0 Issuing and viewing documents

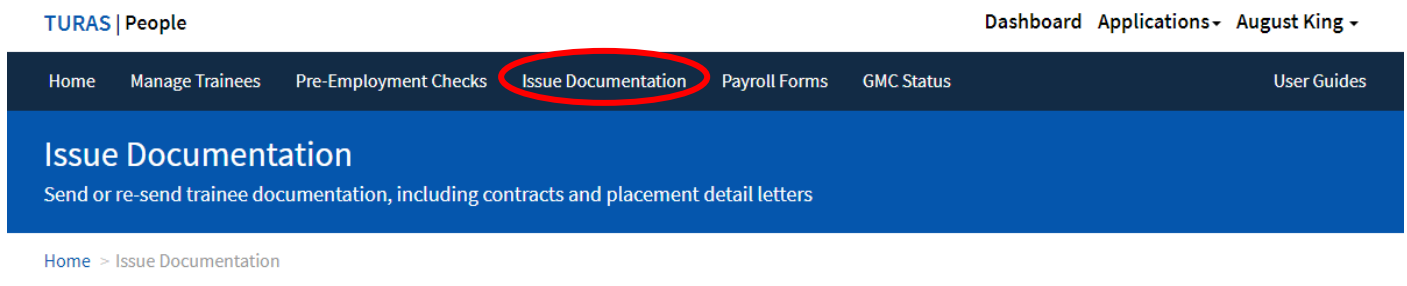
Turas People allows you to send a range of documentation directly to trainees and keeps a record of what has been sent and when. There are nationally agreed templates built into Turas People for:

- Offer letters
- Placement detail letters (issued to first post of a new programme only)
- Contracts (FY, CT, ST, LAT, A4C Public Health trainees – separate contracts for each)
- Amendments to contracts (issued at rotation time)

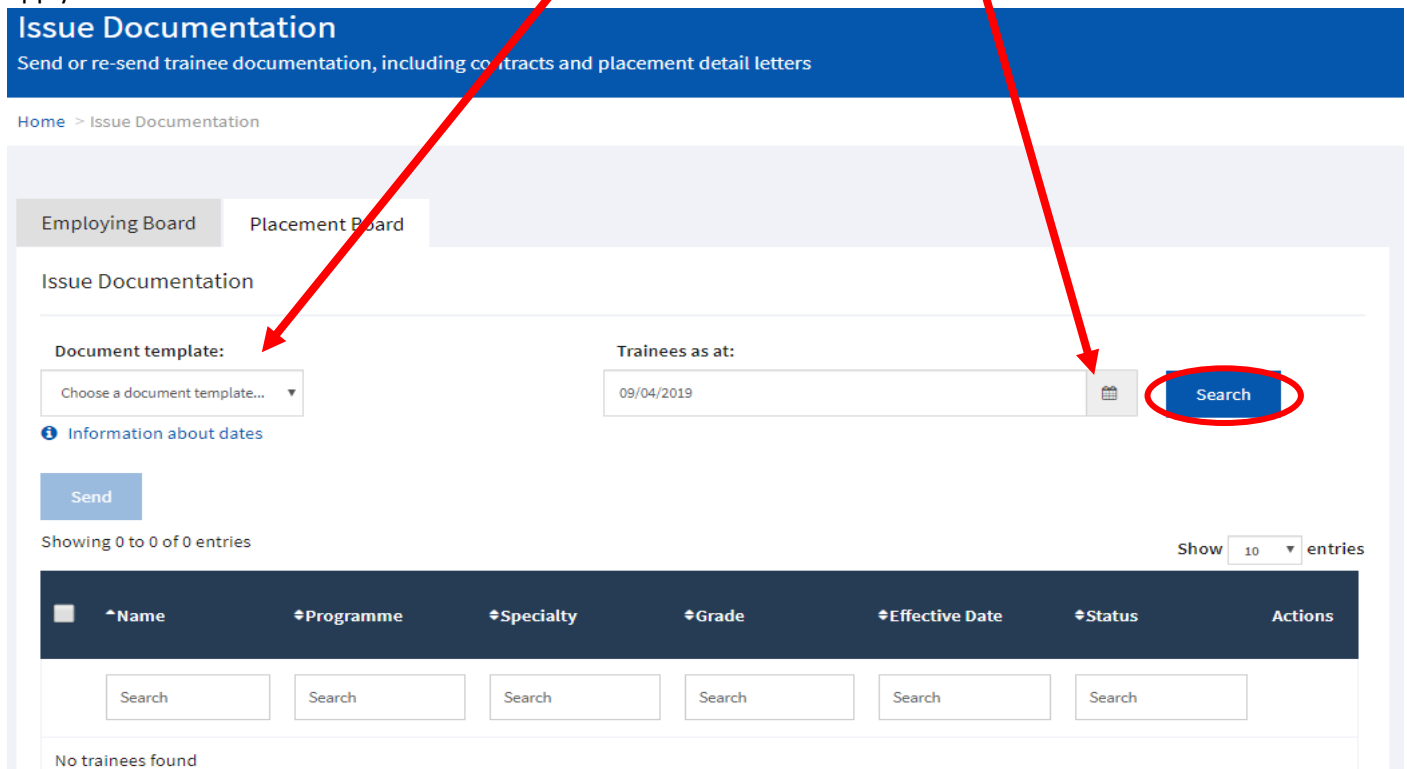
There is logic built into the application which selects the relevant template, based on a trainee’s characteristics. Every programme has an employing board associated with it therefore a trainee on a West programme, where the lead employer is NHS GGC, will have an offer letter where the header, footer and signature is different from the offer letter a trainee on an East programme where the lead employer would be NHS Lothian (the text of the letter would be the same - see appendix 1 for order of letter issue).

6.1 Issuing Documentation

1) You can navigate to the **‘Issue Documentation’** screen either from the home screen or the navigation bar at the top of all the pages in Turas People.



2) When you first navigate to the Issue Documentation screen you will notice that you are not immediately presented with a list of trainees, in order to see a list of trainees you first need to select which document you would like to send. To do this you should click on **‘Choose a document template’** select the **date** you want the letter to apply to and click **‘Search’**.



3) Once you select a template and date you will be presented with a list of trainees who are eligible to receive that template.

Tick the boxes to the left of the trainees you want to send documents to, you will notice next to the Send button the number of **trainees selected** shows. Alternatively, you can select all trainees by ticking the box in the top left of the table.

Issue Documentation

Document template: Standard Offer Trainees as at: 09/04/2019 Search

Information about dates

Send 1 trainee selected

Showing 1 to 10 of 59 entries Show 10 entries

<input type="checkbox"/>	Name	Programme	Specialty	Grade	Effective Date	Status	Actions
<input checked="" type="checkbox"/>	April Accept	E01 - FY1	General Practice	FY1		Not Issued	Actions
<input type="checkbox"/>	Avril Acceptance	E01 - FY1	General Practice	FY1		Not Issued	Actions

Preview Document - You can preview a document before you send it (this opens in a new tab). To do this click on **'Actions'** and select **'Preview Document'**.

<input type="checkbox"/>	April Accept	E01 - FY1	General Practice	FY1		Not Issued	Actions
<input type="checkbox"/>	Avril Acceptance	E01 - FY1	General Practice	FY1		Not Issued	Actions

Core Medical

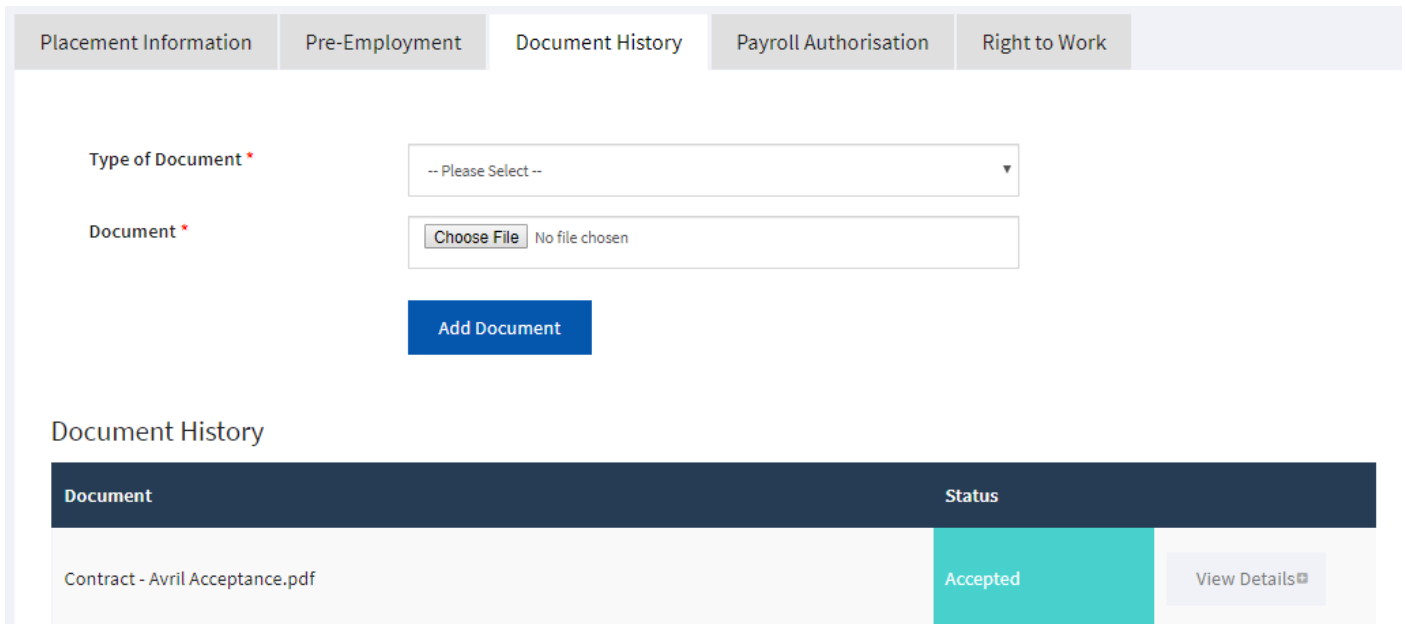
Note: A red arrow points from the 'Actions' dropdown of the first row to the 'Preview Document' option in the expanded menu.

View History – If you would like to see a history of all the documentation sent to a trainee via Turas People you can do that from this screen. To do this click on **'Actions'** and select **'View History'**, this will take you to the trainee's profile Document History tab. On this tab you can see when a document was sent, view a copy of what was sent and see the status of that document. Some documents such as contracts require to be approved, please see section 6.3 for more details on this.

6.2 Uploading documents

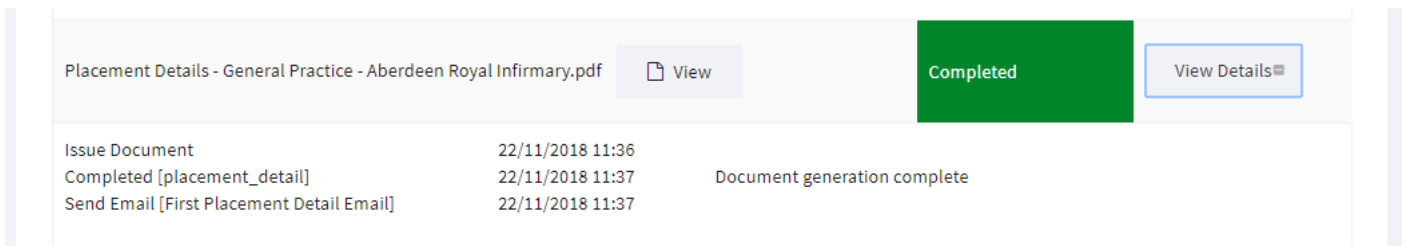
In addition to sending documents through Turas People you can upload documents to a trainee's record and they will be held in the Document History tab on trainee's individual record. As well as providing a history of documents sent via Turas People, it can also be used to hold copies of any letters or forms generated outside of Turas People, against the trainee's employment record.

1) You should select a Type of Document from the drop down list and then click on **'Choose File'** and select the file you want to upload, then click on **'Add Document'**.



Document	Status
Contract - Avril Acceptance.pdf	Accepted

2) You can view the details of a document and when it was sent by clicking **'View Details'**.



Event	Timestamp
Issue Document	22/11/2018 11:36
Completed [placement_detail]	22/11/2018 11:37
Send Email [First Placement Detail Email]	22/11/2018 11:37

6.3 Accepting and Rejecting documents

There are two types of documents which require to be accepted by the trainee – contracts and amendments to contracts. When a trainee is issued with one of these documents they will receive an e-mail which directs them to their Turas People filing cabinet, where they can if they are happy with it, accept the contract.

Automatic acceptance – If a trainee has not accepted their contract within 10 weeks, they will be sent an automated reminder to review and accept their contract. If they have still not accepted the contract after 12 weeks, it will be automatically accepted as the acceptance of the contract will be implied by this stage (this implied acceptance threshold has been nationally agreed).

Rejecting a contract - A trainee has the opportunity to contest their contract if they do not agree with the content, in which case they should contact their current Placement Board to say that they wish to reject the contract issued to the. Guidance has been placed on the trainee's page to advise them on what they should do if they do not wish to accept their contract (see below)

Trainee's view:

TURAS | People Dashboard | Applications ▾ Feathers McGraw ▾

Home Filing Cabinet

Trainee Filing Cabinet

You are here: > Filing Cabinet

This is your Trainee Filing Cabinet
This is where you can add documents that you will need for your employment.

Filter by File Name or Category...

Showing 21 documents

File Name	Category	Actions
Contract - Feathers McGraw.pdf	Contract	<div style="text-align: right;"> Download Delete is unavailable for this document category. Please note if you do not wish to accept your contract of employment, please contact your placement Board who will be able to discuss further with you and record that your contract is rejected and under review. Accept Contract </div>

1) As an HR/Medical Staffing board user, if notified that a trainee wishes to contest their contract you record a **Contract Rejection Reason** and click '**Reject Contract**'– this pauses the timer on the automatic reminder e-mails and implied acceptance process.

Document History

Document	Status
Contract NOC - Nile NOC.pdf View	Completed View Details
Contract NOC - Nile NOC.pdf View	Completed View Details
Contract - Nile NOC.pdf View	Completed View Details
Issue Document Completed [contract] Send Email [Contract]	<div style="font-size: x-small;"> 26/03/2019 18:23 26/03/2019 18:23 26/03/2019 18:23 </div> <div style="text-align: right; font-size: x-small;">Document generation complete</div>

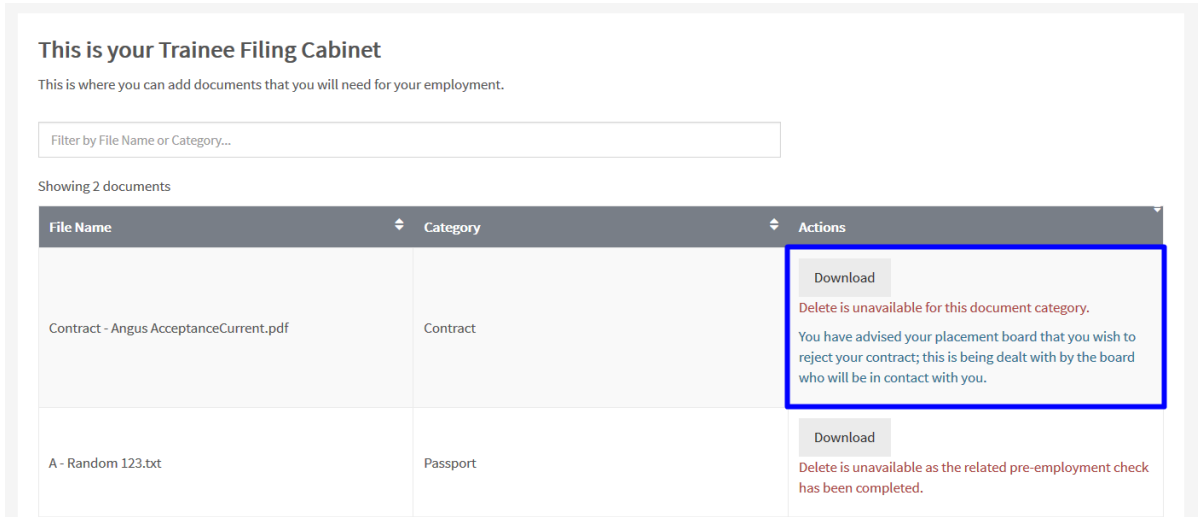
Contract Rejection Reason *

Reject Contract

2) By clicking the Reject Contract option this will pause the automated timer on the contract (10 weeks after a contract is issued trainees will automatically be sent an e-mail reminding them they must accept their contract, if after 12 weeks they have not accepted their contract the status will automatically change as their acceptance has been implied and the trainees will automatically be e-mailed to advise them of this).

3) When you mark the contract as rejected the trainee will see the below message.

Trainee view:



This is your Trainee Filing Cabinet
This is where you can add documents that you will need for your employment.

Filter by File Name or Category...

Showing 2 documents

File Name	Category	Actions
Contract - Angus AcceptanceCurrent.pdf	Contract	Download Delete is unavailable for this document category. You have advised your placement board that you wish to reject your contract; this is being dealt with by the board who will be in contact with you.
A - Random 123.txt	Passport	Download Delete is unavailable as the related pre-employment check has been completed.

4) If the issue with the contract is resolved you can go back into the trainee's record and remove the rejection, this restarts the 12 week timer. You must enter a reason into the **Remove Rejection Reason** box before you click **Remove Reject**.

5) If the issue requires information on the contract to be changed if you do reject a contract the status will show as Rejected and you will need to complete a Notification of Change (NOC_ (see section 7.2 for NOC completion) and choose the NOC type of 'Contract Correction' in order to generate a new version of the contract to issue to the trainee.

N.B. You need to reject a contract before you do a NOC for a issuing a new contract. (see section 6.4 below)

6.4 Issuing an amended contract

If a trainee has rejected their contract and you require to make changes, you will need to complete a Notification of Change form (NOC) before you can issue a new contract; please read section 7.2 for full details on how to complete a NOC then follow the additional steps below. On the NOC form in the **Reason for Change** box choose the option '**Contract Correction**'. Fill in the form as required and **Submit**.

Reason for Change *

Salary Details

Grade *

Designation *

Pay Scale *

Scale Point

Salary

-- Please Select --

-- Please Select --

Rotation

Change in Hours

New Post

Job Title

Fixed Term to Permanent

Extension to Contract

Career Break

Maternity

Change of Grade

Change of banding

OOP

Error/ Correction

Contract Correction

Other

As per the standard NOC process, the form then needs to be authorised for Payroll.

Once the NOC has been approved for payroll, you should go to Issue Documents screen and select **Contracts**, you can then reissue the contract as per the process in section 6.1.

7.0 Payroll Forms

Turas People allows you to complete Staff Engagement Forms (SEF) and Notification of Change forms (NOC), once authorised, these are sent automatically on a nightly basis to the Payroll team of the relevant Lead Employer for the trainees' programme.

You can navigate to the **'Payroll Forms'** screen either from the home screen or the navigation bar at the top of all the pages in Turas People. The Payroll Forms screen shows you the status of any forms created in

You can filter on the following **Payroll Authorisation Stage**:

- All (shows all trainee forms at the selected date)
- Trainee SEF Not Complete (this means the trainee must complete their SEF)
- Awaiting Stage 1 Authorisation (this means the SEF has been completed but needs payroll information)
- Awaiting Payroll Authorisation (this means the form needs final authorisation before it is sent to Payroll)
- Awaiting Send to Payroll (SEFs and NOC are sent to payroll every night – NOC forms will only send if the effective date of the NOC change is within the next 4 weeks, see NOC section 7.2 for more details)
- Sent to Payroll (this shows the date the form was sent to Payroll).

This page will shows SEFs and NOCs but you can filter this down to just one type of form by using the **Form Type** filter.

TURAS | People Dashboard Applications ▾ August King ▾

Home Manage Trainees Pre-Employment Checks Issue Documentation Payroll Forms GMC Status User Guides


Payroll Forms


View and authorise payroll forms

Home > Home > Payroll Authorisation Summary

Payroll Form Authorisation

Type search term to filter by...

Trainees as at: 04/04/2019  Payroll Authorisation Stage: All ▾ Form Type: All ▾ Search

 [Information about payroll records](#)

Copy Selected Trainees

Showing 1 to 10 of 57 entries (filtered from 61 total entries) Show 10 entries

<input type="checkbox"/>	↕ Trainee Name	Form ↕ Type	↕ Status	Authorisation ↕ Stage 1	Authorised for ↕ Payroll	Date Sent to ↕ Payroll	Actions
<input type="checkbox"/>	Chip Olata	SEF	Complete	August King 04/01/2019	August King 08/01/2019	08/01/2019	Actions ▾
<input type="checkbox"/>	Chip Olata	NOC	Authorisation Pending	August King 11/12/2018			Actions ▾

You can complete SEFs or NOCs from the Payroll Forms page or the individual trainee page Payroll Authorisation tab.

7.1 Staff Engagement Forms (SEF)

Trainees complete a SEF, the section of the form HR users require to complete is referred in Turas People as a Payroll Staff Engagement Form (PSEF).

To complete a PSEF from the Payroll Forms page, navigate to the trainee and click on 'Actions' and choose '**Complete Payroll Form**'

Showing 1 to 10 of 57 entries (filtered from 61 total entries)

Show entries

<input type="checkbox"/>	↕Trainee Name	Form ↕Type	↕Status	Authorisation ↕Stage 1	Authorised for ↕Payroll	Date Sent to ↕Payroll	Actions
<input type="checkbox"/>	Chip Olata	SEF	Complete	August King 04/01/2019	August King 08/01/2019	08/01/2019	Actions ▼
<input type="checkbox"/>	IMakeGoodCakes Kipling	SEF	Not Started				Actions ▼
<input type="checkbox"/>	Earth Core	SEF	Action Required				Actions ▼
<input type="checkbox"/>	SEFStatus NewTrainee	SEF	In Progress				Actions ▼ View Trainee Profile Complete Payroll Form Unlock the form
<input type="checkbox"/>	Oscar OccHealth	SEF	Not Started				Actions ▼

7.1.1 Stage 1 Authorisation

1) When you select 'Complete Payroll Form' you will be taken to the screen shown below, where there are a number of fields for you to complete. Any field marked with a red asterisk (*) is mandatory. As there is variation across Boards in terms of process it has been agreed that you should only supply the information that you would normally supply e.g. if you normally enter a salary range and the payroll department would enter the exact salary, then you should continue to do this.

You will notice the screen has two tabs 'Payroll Information' (this is where a Board User can enter data) and 'Staff Engagement Form' (this is a read-only view of the SEF the trainee submitted).

The Payroll Staff Engagement Form (PSEF) screen is shown below in its entirety, at the end of the screenshots there are further details on the specific fields which you require to complete in each section.

Payroll Staff Engagement Form

Home > Payroll Authorisation Summary > Payroll Staff Engagement Form

Payroll Information

Staff Engagement Form

Payroll

Trainee Details

Title	Dr
Forename	Earth
Middle Name(s)	
Surname	Core
Employing Board	Grampian
Placement Board	Grampian

Employment Details

Programme Name	Core Medical Training North of Scotland
----------------	---

Please note, start and end date of programme will populate the contract.

Programme Start Date	01/03/2019
----------------------	------------

Adjusted Start Date

01/03/2019



Please provide the start date adjusted to include shadowing/ other circumstances

Programme End Date	31/07/2019
--------------------	------------

Placement Start Date	01/03/2019
----------------------	------------

Placement End Date	31/07/2019
--------------------	------------

Main Location For Placement	Aberdeen Royal Infirmary
-----------------------------	--------------------------

Specialty	Core Medical Training
-----------	-----------------------

Designation *	-- Please Select --
---------------	---------------------

Grade *	-- Please Select --
---------	---------------------

National Insurance Number *	NC123456A
-----------------------------	-----------


Salary Details

Pay Scale *

Salary
If Payroll complete this for your board, please leave blank

Scale Point

If Payroll complete this for your board, please leave blank

Incremental Date 
If Payroll complete this for your board, please leave blank

Placement Details

Banding Supplement *

Practitioner Allowance

Island Allowance

Roster Location *

Shift Pattern *

Conditioned Hours

Whole Time Equivalent

Contractual Hours

Previous Postholder

Additional Information

Any information added to this box will be visible to the Payroll Teams.

Placement and Contract Information

Information entered in this section will be displayed to the trainee in their placement detail letter and their contract.

Annual Leave Entitlement

Staff Contact Details

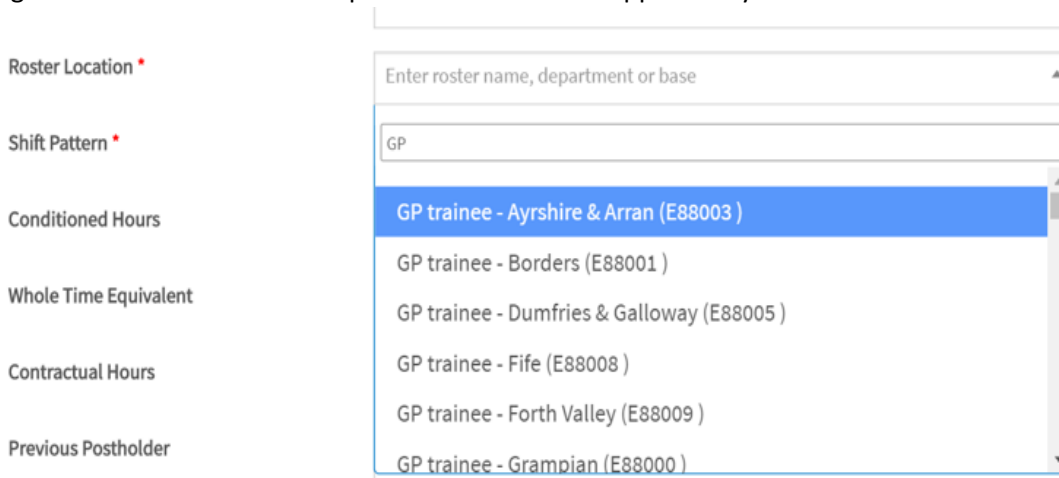
Rota Contact Details

Contract Duration (months) *

This duration will be displayed on the trainee's contract and should reflect the length of their period of employment with their Employing Board.

2) Guidance on each section of the PSEF, please be aware that many of the fields you populate in this section will display in trainee contracts and letters (these are detailed below):

- a) Trainee Details – this is for information only, this is pulled through from Turas Training Management (TPM) you cannot edit this section.
- b) Employment Details – There are 4 fields which you can edit here, **Adjusted Start Date, Designation, Grade, NI number**. Where fields have controlled values these are drop downs, other fields will allow you to type in a value. Please note the default start date is the programme start date, so you must review this and where this is different to the single contract start date you can update this in the ‘Adjusted Start Date’ field. The programme start and end dates are pulled directly from Turas TPM, if you believe these dates are incorrect, you should contact the relevant member of Deanery staff to discuss this.
- c) Salary Details – You can enter a value in all 4 fields within this section. You must provide a **Pay Scale** all other fields are non-mandatory and you should complete them as per normal local business process.
- d) Placement Details – You can enter a value in all bar three fields (related to working hours) within this section. The greyed out fields are for information only and cannot be changed (Conditioned Hours, Whole Time Equivalent, Contractual Hours), if you believe these hours are incorrect you should contact the relevant member of Deanery staff to discuss this as any trainee who wishes to work Less Than Full Time (LTFT) must have these hours agreed by the Deanery and recorded in Turas TPM. The field **Roster Location** should be completed using the information provided by the Payroll Departments of the Lead Employers, you can start typing a roster name and a list of possible matches will appear for you to search:



Roster Location *

Shift Pattern *

Conditioned Hours

Whole Time Equivalent

Contractual Hours

Previous Postholder

You will see only the roster codes associated with your board if you are a Placement Board and if you are an Employing Board you will see the codes for your board and all of the associated Placement Boards.


- e) Placement and Contract Information – All fields in this section can be edited. The information that you type into this section will be displayed in the trainee Placement Detail Letter, along with key pay related information from the other sections in the form.

3) Once you have entered information into the SEF you can choose to **‘Save as draft’** and return to the form later to complete outstanding information or if you are happy with the form you can click **‘Submit’** and the form will be marked as having received Stage 1 Authorisation.

4) When you return to the main Payroll screen you will see the updated status of the forms you have worked on.

Payroll Form Authorisation

Type search term to filter by...

Trainees as at: 11/04/2019 
Payroll Authorisation Stage: All **Form Type:** Staff Engagement Form **Search**

[Information about payroll records](#)

Copy Selected Trainees

Showing 1 to 10 of 57 entries (filtered from 61 total entries) Show 10 entries


<input type="checkbox"/>	↕ Trainee Name	Form Type	↕ Status	↕ Authorisation Stage 1	Authorised for Payroll	Date Sent to Payroll	Actions
<input type="checkbox"/>	Chip Olata	SEF	Complete	August King 04/01/2019	August King 08/01/2019	08/01/2019	Actions ▼
<input type="checkbox"/>	IMakeGoodCakes Kipling	SEF	Not Started				Actions ▼
<input type="checkbox"/>	Earth Core	SEF	Action Required	In Progress - Use the Actions button to resume			Actions ▼

7.1.2 Authorise for Payroll (Stage 2 Authorisation)

1) Once a PSEF has been Authorised at Stage 1, a member of staff with Level 1 user permissions can authorise the SEF for Payroll. Go to the SEF authorisation screen and select the menu option **'Awaiting Payroll Authorisation'** and click **'Search'**.

Payroll Form Authorisation

Type search term to filter by...

Trainees as at: 11/04/2019 
Payroll Authorisation Stage: Awaiting Payroll Authorisation **Form Type:** Staff Engagement Form **Search**

[Information about payroll records](#)

2) You will be presented with a summary view of the key PSEF information which will allow you to scan for anomalies, if you are happy with the information shown here you can click **'Actions'** and **'Immediate Authorise'**; if you would like to view an individual trainee's SEF before authorise click **'Actions'** and **'Authorise for Payroll'**.

Showing 1 to 4 of 4 entries (filtered from 61 total entries) Show 10 entries

<input type="checkbox"/>	↕ Trainee Name	Placement Health Board	Grade	Salary	Contractual Hours	Banding Supplement	Annual Leave	Actions
<input type="checkbox"/>	Sarah Scott	NHS Grampian	FY1	35432	40	1A	30	Actions ▼
<input type="checkbox"/>	SEFCHECK SEFCHECK	NHS Grampian	FY1	35432	40	1C	30	Actions ▼
<input type="checkbox"/>	Terry TierTwo	NHS Grampian	FY1	35432	40	1A		Actions ▼

- View Trainee Profile
- Authorise for Payroll
- Immediate Authorise

3) In the Payroll Authorisation tab if you are happy with the contents you can click **Yes** and **Submit** and this will lock the record for transfer to payroll. **N.B. Once a PSEF is authorised for Payroll the records will be automatically transferred to the relevant Lead Employer's Payroll Department and you will see on the PSEF grid the date that the file is sent.**

Payroll Information Staff Engagement Form

Payroll Information

Trainee Details

Title	Ms
Given Name	Sarah
Middle Name(s)	
Surname	Scott
Employing Board	NHS Lothian
Placement Board	NHS Grampian

Employment Details

Programme Name	E01 - FY1
Start Date	01/08/2018
End Date	01/08/2019
Main Location For Placement	Aberdeen Royal Infirmary

Payroll Authorisation

Contractual Hours	40
Banding Supplement	1A
Annual Leave Entitlement	30
Grade	FY1
Starting Salary	35432
Authorise for Payroll	<input type="radio"/> Yes <input type="radio"/> No
Notes	<div style="border: 1px solid #ccc; height: 50px;"></div>

Submit Cancel

4) If you are not happy with the contents you can click **'No'** and you will be asked to enter a reason for the refusal in the **Notes** box. You should then click **'Submit'** and this will set the status back to *Awaiting Stage 1 Authorisation*.

Payroll Authorisation

Contractual Hours	40
Banding Supplement	1A
Annual Leave Entitlement	30
Grade	FY1
Starting Salary	35432
Authorise for Payroll	<input type="radio"/> Yes <input checked="" type="radio"/> No
Notes *	<div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;"> Please check annual leave entitlement, seems high. </div>
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

5) The refused form will show on the grid as 'Failed Stage 2'. The Stage 1 Authoriser can go back in and fix the issues noted in the form.

Payroll Form Authorisation

scott

Trainees as at:

Payroll Authorisation Stage:

Form Type:

i Information about payroll records

Copy Selected Trainees

Showing 1 to 1 of 1 entries (filtered from 62 total entries) Show entries

☐	↕ Trainee Name	Form ↕ Type	↕ Status	↕ Authorisation Stage 1	Authorised for ↕ Payroll	Date Sent to ↕ Payroll	Actions
☐	Sarah Scott	SEF	Action Required	Failed Stage 2 Authorisation - needs revision			Actions ▼

6) The refused form will show on the grid as 'Failed Stage 2'. The Stage 1 Authoriser can go back in and fix the issues noted in the form.

Payroll Information
Staff Engagement Form

Payroll

This form was rejected at Stage 2 Authorisation for the following reason:

Please check annual leave entitlement, seems high.

Please amend and resubmit.

Trainee Details

Title	Ms
Forename	Sarah

7.2 Notification of Change forms (NOC)

N.B. As trainees will be remaining on one payroll for the duration of their training, at the time of rotation it will be necessary to complete a Notification of Change (NOC) form if the trainee is rotating into your board. The online form is based on the existing NHS Scotland NOC form, an additional reason of 'rotation' has been added to the Reason for Change dropdown. Please see the process map at the end of this document for more detail. It would be useful to read this user guide along with the Rotation Report section of this user guide (Section 9).

1) When you navigate to the Manage My Trainees screen and click on **Actions**, you will see an option of '**Notification of Change**'.

Manage Trainees
Download Reports

View trainees in your board and create forms for individual trainees

Home > Trainee List

Employing Board
Placement Board

Trainees as at:

📅
Search

📘 Information about dates

Copy Selected Trainees

Showing 1 to 10 of 61 entries Show entries

☐	↕ Name	↕ GMC	↕ Programme	Education ↕ Provider	↕ Specialty	↕ Trainee Grade	Actions
<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	
☐	Accept , April	1463259	E01 - FY1	Aberdeen Royal Infirmary	General Practice	FY1	Actions ▾
☐	Acceptance, Avril	7645982	E01 - FY1	Aberdeen Royal Infirmary	General Practice	FY1	View Notification of Change

2) Click on **'Notification of Change'** and it will take you to a screen asking you to pick which post the NOC applies to. For trainees rotating into your board or changing post within your board, you should click **'Next Post'**; you should complete the NOC in advance of the trainee starting the rotation.

Create Notification of Change

Home > Trainee List > Select Notification of Change Post

Andrea Active

What post does it apply to?

Next Post (FY2, 01/08/2019 - 01/08/2020, Geriatric Medicine, Aberdeen Maternity Hospital)	Select
Next Post (FY2, 01/08/2019 - 01/08/2020, Geriatric Medicine, Aberdeen Maternity Hospital)	
Current Post (FY1, 01/08/2018 - 30/07/2019, General Internal Medicine, Aberdeen Royal Infirmary) the Deanery.	

Current post = This is the post the trainee is currently in.
Next post = Where a trainee is in your Board and will remain in your Board or is moving to your Board for the next placement as a result of rotation.

3) The NOC screen will open and is pre-populated with some data; fields with a red asterisk (*) are mandatory fields.



Notification Of Change Form

Home > Trainee List > Select Notification of Change Post > Notification of Change

01/08/2019 - 01/12/2019, Foundation, Woodend General Hospital

Details

Any changes made below are submitted for stage 2 authorisation and will only apply to the post above

Forename	Hilda
Surname	Highland
Main Location	Woodend General Hospital
Employing Board	Grampian
Placement Board	Grampian
Pay Number	
Post Number	
Date Effective *	<input type="text"/> 
Effective date to	<input type="text"/> 
Reason for Change *	-- Please Select --

Salary Details

Grade *	FY1
Designation *	Foundation House Officer 1
Pay Scale *	FHO1 - J060A
Scale Point	-- Please select --
Salary	

Under **'Reason for Change'** you should select **'Rotation'** if this NOC applies to a change being made at rotation time e.g. roster location or banding.

4) If you edit a pre-populated field, an option to 'revert' to the previous value is made available.

Grade *

Revert to 'FY1'

Designation *

Once you have filled in the form you can **Submit** or **Save as Draft** if you need to return to it later.

5) The NOC will populate the Amendment to Contract letter which is sent to the trainees, it is important therefore that any information you wish to communicate to the trainees, is included in the **Placement Details** section.

Placement Details

Banding Supplement *

Rota Contact Details

required for amendment to contract letters issued at rotation

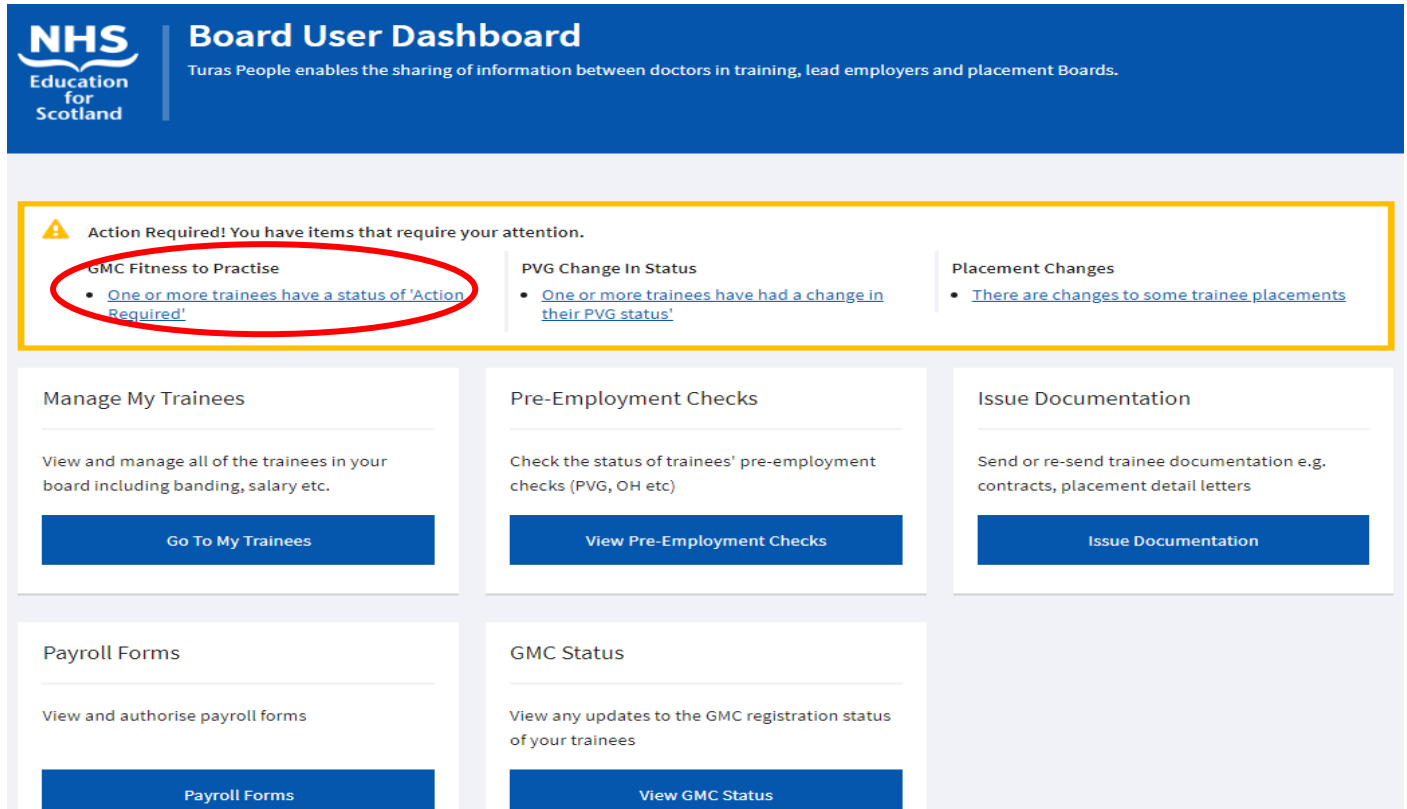
Staff Contact Details

required for amendment to contract letters issued at rotation

N.B. At rotations, following the completion of a NOC you must issue an Amendment to Contract letter to the trainee; the Placement Detail letter is only issued at the start of a trainee's programme.

8.0 GMC status

1) The registration status of all trainees is checked every night against the GMC register; you will see an alert and the status of 'Action Required' if there is a condition, warning or undertaking against a trainee or if they are unlicensed. You can also access this information by clicking on the GMC Status button on the home page.



NHS Education for Scotland | **Board User Dashboard**
Turas People enables the sharing of information between doctors in training, lead employers and placement Boards.

⚠ Action Required! You have items that require your attention.

- GMC Fitness to Practise**
 - [One or more trainees have a status of 'Action Required'](#)
- PVG Change In Status**
 - [One or more trainees have had a change in their PVG status!](#)
- Placement Changes**
 - [There are changes to some trainee placements](#)

Manage My Trainees
View and manage all of the trainees in your board including banding, salary etc.
[Go To My Trainees](#)

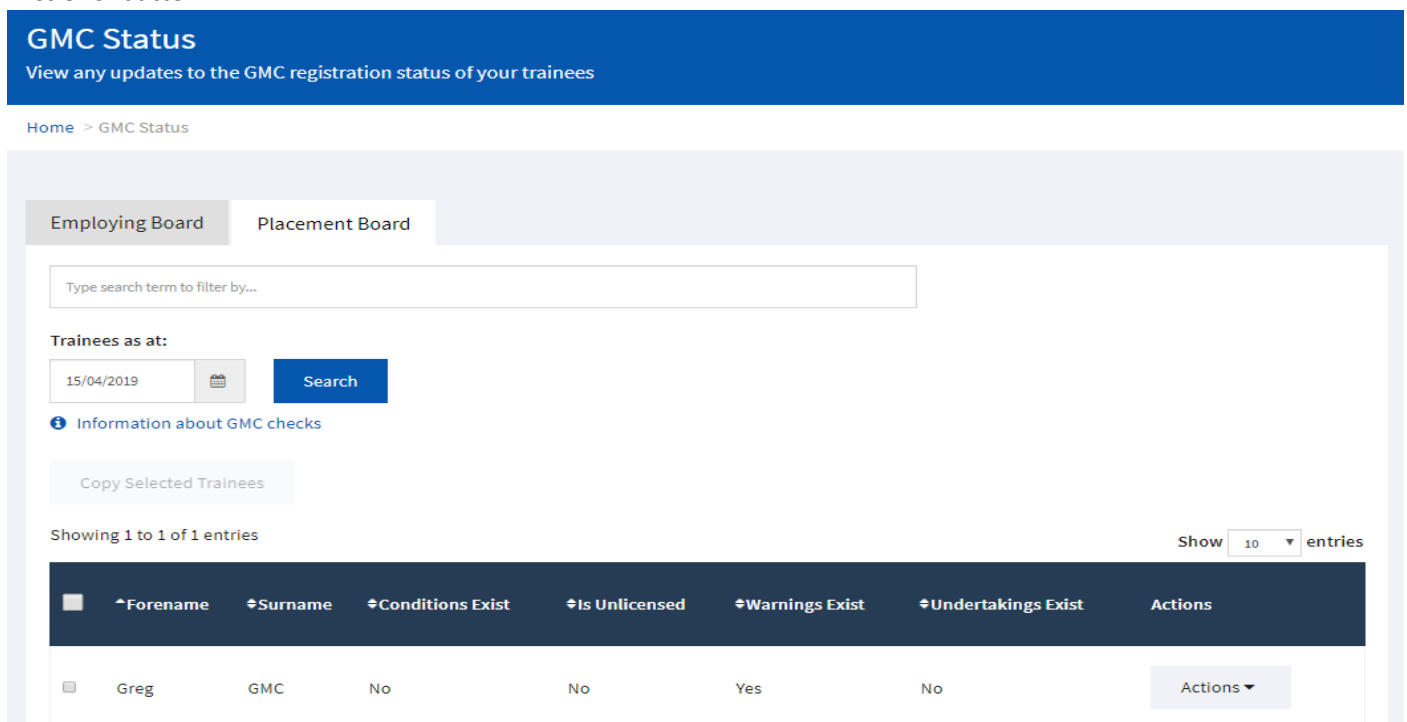
Pre-Employment Checks
Check the status of trainees' pre-employment checks (PVG, OH etc)
[View Pre-Employment Checks](#)

Issue Documentation
Send or re-send trainee documentation e.g. contracts, placement detail letters
[Issue Documentation](#)

Payroll Forms
View and authorise payroll forms
[Payroll Forms](#)

GMC Status
View any updates to the GMC registration status of your trainees
[View GMC Status](#)

2) You will be taken to this page and from here you can navigate to the trainee's individual record by clicking on the 'Actions' button.



GMC Status
View any updates to the GMC registration status of your trainees

Home > GMC Status

Employing Board | Placement Board

Type search term to filter by...

Trainees as at: 15/04/2019 [Search](#)

i Information about GMC checks

[Copy Selected Trainees](#)

Showing 1 to 1 of 1 entries Show 10 entries

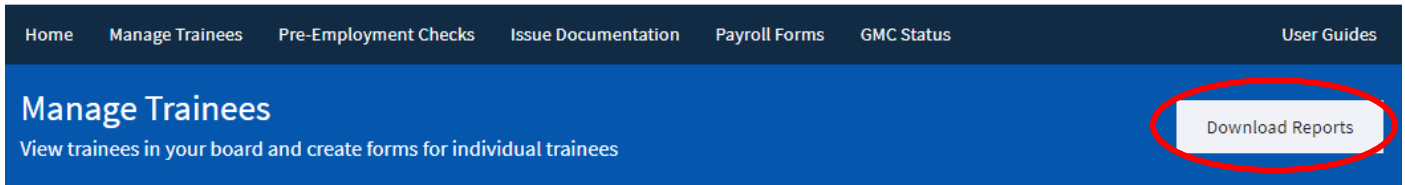
<input type="checkbox"/>	Forename	Surname	Conditions Exist	Is Unlicensed	Warnings Exist	Undertakings Exist	Actions
<input type="checkbox"/>	Greg	GMC	No	No	Yes	No	Actions

9.0 Reports

1) There are a number of reports that you can run from Turas People and you access these from the **'Manage Trainees'** screen; click on **'Download Reports'**.

TURAS | People

Dashboard Applications ▾ August King ▾



Home Manage Trainees Pre-Employment Checks Issue Documentation Payroll Forms GMC Status User Guides

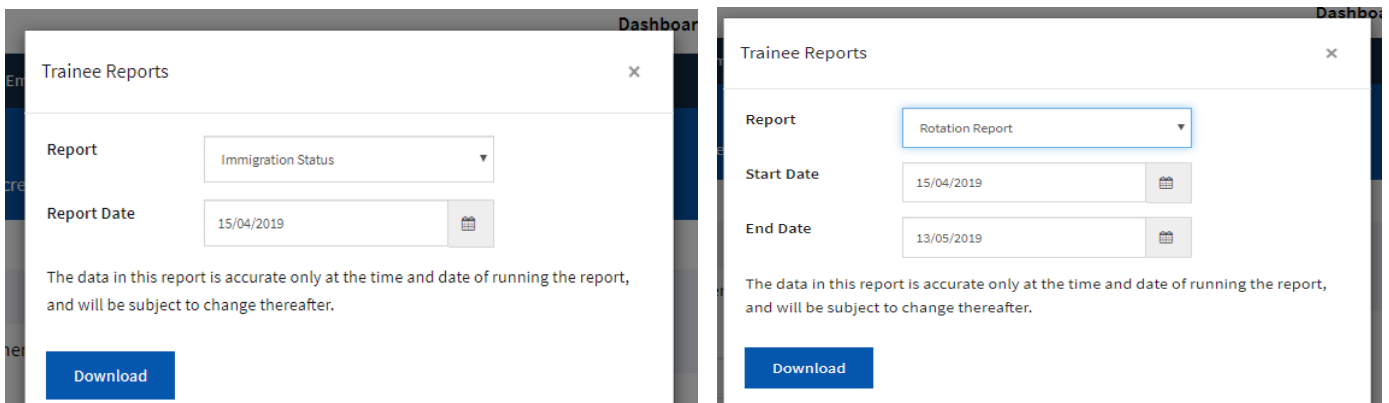
Manage Trainees

View trainees in your board and create forms for individual trainees

Download Reports

Home > Trainee List

2) This will open a new window where you can choose the report you wish to run (see below for more detail on what each report contains). Some of the reports just require a single date, some require a start and end date. All reports will download in an Excel format.



Trainee Reports

Report: Immigration Status

Report Date: 15/04/2019

The data in this report is accurate only at the time and date of running the report, and will be subject to change thereafter.

Download

Trainee Reports

Report: Rotation Report

Start Date: 15/04/2019

End Date: 13/05/2019

The data in this report is accurate only at the time and date of running the report, and will be subject to change thereafter.

Download

Reports available:

- Immigration Status – this will give a list of all trainees in your placement board and their Immigration/Right to Work status.
- Disclosure (PVG) – this report can be run by Employing Board (if you have permissions) or Placement Board and will show you the PVG status of all your trainees.
- Trainee Employee Data – this allows you to view a range of trainee data and is useful for Employing Boards who need to update HR systems.
- Rotation Report – this report should be used in conjunction with NOCs (see section 7.2 for more detail) as this will show you trainees who are rotating in and out of your board or are rotating between posts in your board. The Direction column will show whether the trainee is moving into your board or out of your board, normally you only need to action trainees who rotating 'In' to your board but please be aware that for trainees rotating 'out' you should check the CCT date column to ensure that it is not a trainee's final post and therefore will require a Termination form (it is nationally agreed that Termination forms will not be done in Turas People).

Please note that trainees moving to a post within your board will show as a rotation of both out and in as they are moving department.

10.0 General Practice Trainees

There are specific rules around trainees in General Practice posts which differ slightly from other training posts.

Foundation (FY) trainees – these trainees will be employed by either NHS Grampian, Greater Glasgow & Clyde or Lothian. When they are in a General Practice post (e.g. health centre or GP surgery) they are the responsibility of the placement board in which that practice/health centre is based e.g. if an FY trainee was based in Lerwick Health Centre then NHS Shetland would be responsible for completing any documentation for that trainee.

Specialty (GPST) trainees – all GPSTs are employed by NHS Education for Scotland (NES). When they are in a General Practice posts (e.g. health centre or GP surgery) NES is their placement board and will complete and necessary documentation. When they are in a hospital based post then the board in which that hospital is in will complete the documentation e.g. if in Glasgow Royal Infirmary then NHS Greater Glasgow & Clyde would complete the documentation.

11.0 Non-NHS Employed Trainees

For trainees that are not employed by the NHS (Academic, Military and Industry trainees) it will not be necessary to complete all of the checks, forms and documents through Turas People. These trainees do not require payroll forms (SEF/PSEF) or contracts from Turas People, and as such their paperwork cannot be done through Turas People and should be done offline.

Please note that Foundation (FY) Academic trainees are employed by NHS Boards therefore these trainees should complete all pre-employment checks and receive all paperwork through Turas People.

Help and Support

N.B. If you have problems in Turas People at any point (e.g. some functionality is not working or some information appears unavailable) you can click on the green vertical Helpdesk widget on the right of the screen and log a Helpdesk ticket from there and a member of the team will get back to you ASAP. Alternatively you can send an e-mail directly to turaspeoplesupport@nes.scot.nhs.uk.

Appendices

Appendix 1 - End to end employment journey

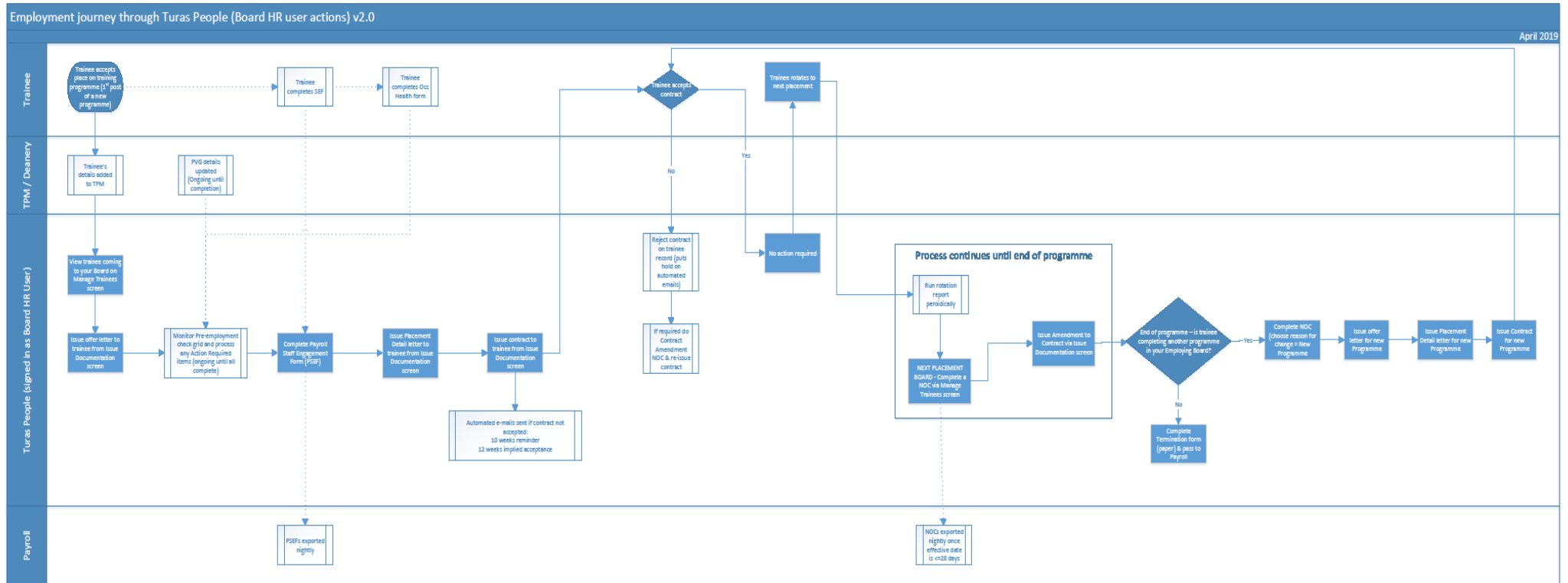
Appendix 2 – Trainee view of Turas People

Appendix 1 - End to end employment journey

To view the process map you can zoom in on this page or download the embedded PDF



Employment journey
v2 (1).pdf



Appendix 2 – Trainee view of Turas People

This is the view the trainees will have when they log in to Turas People; where they are on their training journey will inform which forms they are required to complete.

Home Filing Cabinet

NHS
Education
for
Scotland

Trainee Dashboard

Turas People enables the sharing of information between doctors in training, lead employers and placement Boards.

Update My Address Details

What would you like to do today?

i Please ensure you have updated your Address Details and Telephone Number before commencing the Staff Engagement or Occupational health Forms.

<p>Current Programme Start Date: 01/08/2018 End Date: 31/07/2019</p> <hr/> <p>Programme Name: Employing Board: NHS Lothian</p>	<p>Staff Engagement Form Form complete</p> <hr/> <p>Occupational Health Form Resume</p> <hr/> <p>Fitness to Practise Form This form is not required.</p>
<p>Next Programme Start Date: 01/08/2021 End Date: 31/07/2026</p> <hr/> <p>Programme Name: Employing Board: NHS Grampian</p>	<p>Staff Engagement Form Resume</p> <hr/> <p>Occupational Health Form Create</p> <hr/> <p>Fitness To Practise Form Create</p>

Filing cabinet

In your filing cabinet you are able to view previously uploaded documentation as well as upload additional documentation relevant for your onboarding.

[View my filing cabinet](#)

Visit the Turas Hub

Turas Hub is the intranet for doctors in training. This is a one-stop-shop for trainee information offering information on Pre-Employment checks, expenses, payroll, policies and much more.

[Go to The Hub](#)

<p>Current Placement Start Date: 01/08/2018 End Date: 31/07/2019</p> <hr/> <p>Location: Ninewells Hospital Post Specialty: Core Medical Training</p>	<p>Next Placement Start Date: 01/08/2019 End Date: 31/07/2020</p> <hr/> <p>Location: Ninewells Hospital Post Specialty: Core Medical Training</p>
---	--

Trainee Filing Cabinet – this is where trainees can view documents sent to them and can upload documents as required.

TURAS | People

Dashboard Applications ▾ Daffy O'Dill ▾

Home Filing Cabinet

Filing Cabinet

This is where you can add documents that you will need for your employment.

Home > Filing Cabinet

My Filing Cabinet

Filter by File Name or Category...

Showing 4 documents

File Name	Category	Actions
Board User Access.pdf	Immunisation and Immunity Result	Download Delete
Offer Letter - Core Medical Training - East - Daffy O'Dill.pdf	Offer Letter	Download Delete is unavailable for this document category.
feathers.png	Passport	Download Delete is unavailable as the related pre-employment check has been completed.
Placement Details - Core Medical Training - Ninewells Hospital.pdf	Placement Details	Download Delete is unavailable for this document category.

Add New Document

Type of Document *

-- Please Select --

Document *

Choose File No file chosen

Add Document