

## ESR Interface Options

There are potentially a number of options for Inspire to interface with ESR. There are 3 main options mentioned below and how the information is received from/passed to ESR will depend on the Trust in question. The finer detail of how Inspire will be allowed to connect to ESR is yet to be provided by McKesson.

This document assumes that ESR holds email addresses for all staff and that ESR is up to date, i.e. staff are listed in the correct department and have the correct pay band, etc. The other assumption is that McKesson will allow Inspire to pass information back to ESR and the type of information passed would need to be agreed with each Trust, as requirements may differ. As a minimum, Inspire would need to populate ESR with the date on which an appraisal had been completed, although this information can be pulled directly from Inspire, along with numerous other reports.

### 1. Direct connection (Least resources required by Trust)

NHS England / McKesson will allow Inspire to connect to ESR directly and those permissions will be allocated on a case-by-case basis. This potentially means that we will be able to extract the required information from ESR and use it to populate Inspire. The details of how we are able to interface with ESR is yet to be agreed however it is important to note that this is more about ESR allowing the interface and permitting Trusts to do this than it is about technological complexity.

For Trusts who achieve ESR connectivity, the transfer of data is automated and no staff resources are required to service this process

### 2. Automatic from ESR (Some resource required by Trust)

Thirsty Horses can work with each Trust to either discuss a GO1 extract, or set up discoverer reports that generate automatically at set time periods (each day/week/month), depending on requirements. These reports could be set up to save directly into a cloud storage solution or onto the client's Inspire server, ready for Thirsty Horses staff to upload for the Trust. A number of NHS Trust clients currently use this method.

For Trusts who choose to use this method staff resources required to do this is minimal, i.e. saving the report and emailing it to the Thirsty Horses IT Team.

### 3. Manual ESR export (**Most resource required by Trust**)

If it is not possible for a Trust to set up discoverer reports to automatically generate at set time periods, the reports can be saved and manually run by ESR staff in the Trust.

This would involve the member of staff in question clicking to run the report, then sending it to Thirsty Horses, by which ever means required, i.e. email, SFTP, saved to cloud, etc.

### 4. Other considerations

For the options listed previously, there are a couple of other considerations:

#### 4.1 Potential cost to Trusts

Although McKesson have agreed that Inspire will be allowed to connect to ESR, they may potentially charge for this per Trust. Our understanding at Thirsty Horses is that McKesson may charge £1000 to create the interface for each Trust and then £1500 per annum for the ability to extract the data from ESR.

Thirsty Horses will update Trusts as more information becomes available.

#### 4.2 ESR appraisal hierarchy available

If the appraisal hierarchy is correct within ESR, i.e. the name of the person responsible for completing an appraisal for a member of staff is held and accurate, then Inspire can automatically update, using the details extracted from ESR. This will take care of starters, leavers and staff moves within the Trust.

To ensure the hierarchy is accurate for both ESR (payroll) and Inspire (appraisal), the manager and supervisor fields should be used, with the manager field for ESR purposes and the supervisor field for Inspire purposes.

#### 4.3 ESR appraisal hierarchy not available

In the situation where it is not possible to accurately reflect the appraisal hierarchy in ESR, department managers would be required to ensure the appraisal hierarchy is accurate for their area. Thirsty Horses has successfully delivered this cleansing with many Trusts to-date.

In this situation, ESR would populate Inspire and the starters and leavers would be automatically updated in Inspire. However, staff with different 'appraisers' in ESR, would merely be flagged in Inspire to be checked, as we would not want to automatically update Inspire from ESR information, if the appraisal hierarchy had been corrected in Inspire.

#### 4.4 Benefits and limitations of ESR / Inspire connectivity

The potential benefits to Trusts of having direct connectivity are:

- Less time and resource required by each Trust to update starters, leavers and movers in Inspire.
- Information in Inspire will be kept accurate and up to date (assuming ESR is also accurate and up to date).

The potential limitations to Trusts of having direct connectivity are:

- If the hierarchy in ESR is not a true reflection of the appraisal hierarchy (and had been corrected in Inspire), manual intervention would be required in Inspire to confirm a change of manager, highlighted by an update. This would be true of any 3<sup>rd</sup> party provider linking through to ESR.
- NHS England / McKesson are unlikely to allow Inspire to pass information back into ESR, such as appraisal date, etc. However, we can create a report containing the information each Trust would like to pass into ESR, ready to be uploaded. Again, impact on staff resources are minimal.

## Conclusion

We are aware from other 3<sup>rd</sup> party organisations that ESR connectivity is possible.

For each of the options mentioned above, Thirsty Horses will work with each Trust to ensure that the work required from Trust staff is minimal, to allow the Trust to use Inspire as intended, to engage staff, align activity and measure improvement. ESR direct connectivity, whilst desirable, is not a showstopper to having all the connectivity and rich functionality and reporting Inspire is proven to provide.