

North West Streamlining Success Stories

- **Workstream:** Core: Recruitment
- **Sub Region:** Greater Manchester



Factual references and successfully implementing the employee relations section of ESR

What was the challenge?

A key North West Streamlining goal is for trusts to replace subjective references with factual ones. Using factual references via the Inter-Authority Transfer process (IAT) also means that data is automatically populated in the Electronic Staff Record (ESR) system's reference template. Only the employee relations data needs to be added manually. Enhancements to the IAT reference template mean that a flag now appears if employee relations information is already recorded in ESR. This removes the need to manually check records for every reference request received in other employee relations case management systems.

The Christie NHS Foundation Trust did not have an employee relations case management system and were researching potential solutions. The cost of external systems was high and either an interface would be needed to feed data across from ESR or they would have to manually input data required for the WRES (Workforce Race Equality Standard) report. As a result, The Christie looked at the possibility of using ESR to record employee relations details instead.

What steps were taken?

The benefits of recording employee relations information in ESR were discussed with the HR Advisory team. There was some initial resistance as it meant doing a cleanse of existing data which involved more work. Some of the team had used ESR before for casework and hadn't found it useful. However, once the benefits were understood around responding to references, increasing visibility of data from improved BI dashboards and removing work from within the Advisory team regarding generating WRES reports, the team agreed to go ahead.

A cleanse of existing employee relations spreadsheets was carried out. The team then worked in pairs to input the data into ESR. Reports were re-run until everyone was confident the data now held in ESR was accurate.

What were the benefits?

- Quicker responses: it now takes less than 5 mins to respond to requests, so trusts receive references faster
- Saves HR Advisory team time: ESR automatically populates the majority of the reference template with key data
- Less risk of error: the new process means staff no longer have to search many spreadsheets for a name
- Reports can be run easily: for WRES and by HR Heads for an up-to-date picture of HR Advisory casework

"In Greater Manchester, the streamlining programme brought workforce and HR colleagues together to increase shared learning and collaboration, particularly around the move to factual references. The team have been really influential for that. They gave us all something to focus on, a common goal and purpose."

- Ric Wilkinson, HR Operational Service Lead, The Christie NHS Foundation Trust

Want to find out more?

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North West Streamlining Team Success Stories

