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Linking establishment and worker records

March 2018
Version 3

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Introduction

If your establishment data matches your worker records you will be able to make use of the automatic updating functionality whereby some changes to the worker record will be reflected in the establishment data for you. This is achieved by way of pop up boxes asking you to confirm the changes the system will make on your behalf.

How will I know if my data matches?

It is quite easy to see whether the establishment data and worker data match as the system will display a message at the top of your establishment page if anything is missing.

How do I correct the mismatched data?

We have produced a report to help you see where the data does not match, click the link “Establishment and worker record consistency report” that is in the message displayed on your establishment page (example above).

This will open up the report for you. If you are a parent account you may need to enter the name of the subsidiary that you want to check.

Once the report has opened the first page will tell you where the issues are.

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Establishment Name: Skills for Care
NMDS-SC Number: J306045
Date: 12 March 2018
0 Out of 4 Workers Matched

Current Link Status	Not Linked

Organisation Data	Matched?
Total Staff	5
Total of Permanent and Temporary Staff by Job Role	6

Total Starters	1
Total Number of Starters by Job Role	1

Starters within the last 12 months prior to completion date

Total Leavers	2
Total Number of Leavers by Job Role	2
Total Number of Leavers by Leaver Destination	2
Total Number of Leavers by Leaver Reason	2

Leavers within the last 12 months prior to completion date

Total Vacancies	4
Total Number of Vacancies by Job Role	4

Vacancies at completion date

Organisation Data Matched?	No

Worker Data Matches Job Role Data?	No

To view the details of your job roles click on the second page of the report.

Establishment Name: Skills for Care
NMDS-SC Number: J306045

You can also export to excel by clicking here.

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Establishment and worker record consistency report

Establishment Name: Skills for Care
NMDS-SC Number: J306045
Date: 12 March 2018
0 Out of 4 Workers Matched

Job role	Total		Permanent		Temporary		Pool		Agency		Students		Voluntary		Others		Not Recorded	Matched?
	Job Role Matrix	Workers	Job Role Matrix	Workers	Job Role Matrix	Workers	Job Role Matrix	Workers	Job Role Matrix	Workers	Job Role Matrix	Workers	Job Role Matrix	Workers	Job Role Matrix	Workers	Workers	
Care Worker	3	1	3	0	0	0	0	1	0	0	0	0	0	0	0	0	0	No
First Line Manager	1	1	0	1	1	0	0	0	0	0	0	0	0	0	0	0	0	No
Occupational Therapist	1	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	No
Other job roles not directly involved in providing care	0	1	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	No
Senior Management	1	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	No
Youth Offending Support	0	1	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	No

If we use Care Worker as an example: from this report I can see that I have specified 3 Care Workers on my establishment data but have only added 1 worker record with the main job role Care Worker (highlighted above in the red circle).

I can also see that on the worker record for my Care Worker I have put them as Pool (highlighted in blue above) but on my establishment record I have said my Care Workers are permanent (highlighted in yellow).

To change this I need to determine which information is correct:
- If the worker records are correct I need to update the establishment data to say only 1 Care Worker under the Pool column
- If the establishment data is correct I need to add/change my worker records so that I have 3 permanently employed Care Workers

You would then look at the next job role mentioned in the table above and work through the issues in the same way.

Once all issues have been corrected the blue warning message at the top of your My Establishment page will disappear.

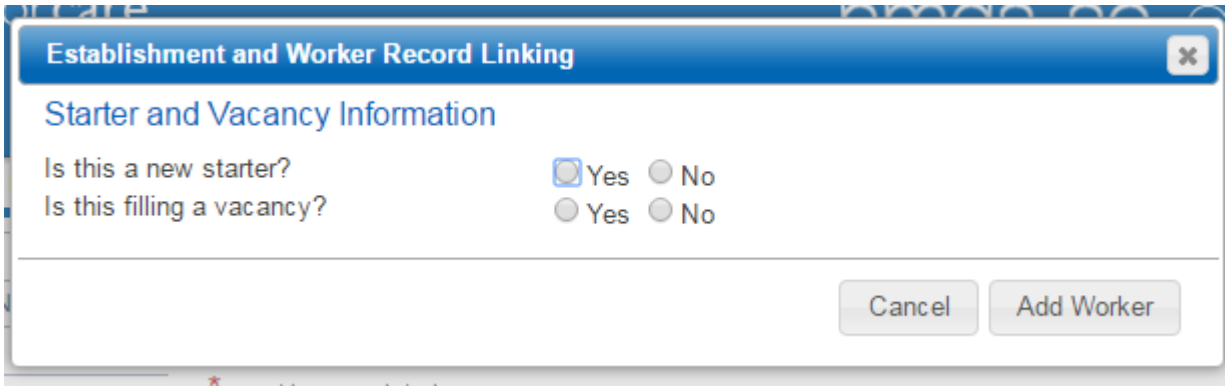
What happens when I have corrected all my issues?

At this point your establishment data and worker records are linked (meaning all information matches). So long as you continue to make the changes on your worker records the link will remain in place.

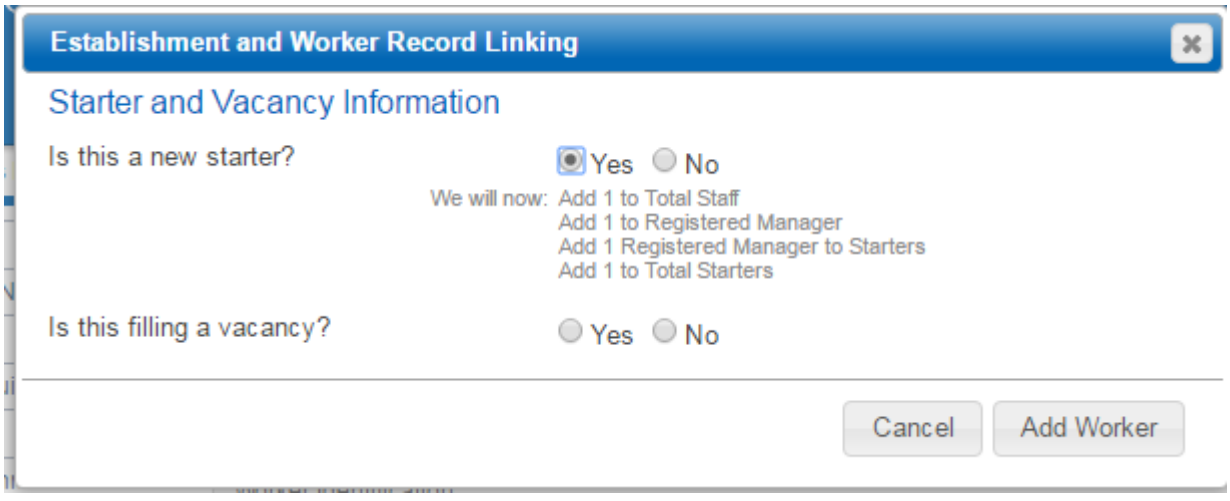
The system will warn you if you are making a change that will break the link (meaning the information would not match).

How do I update using the automatic link?

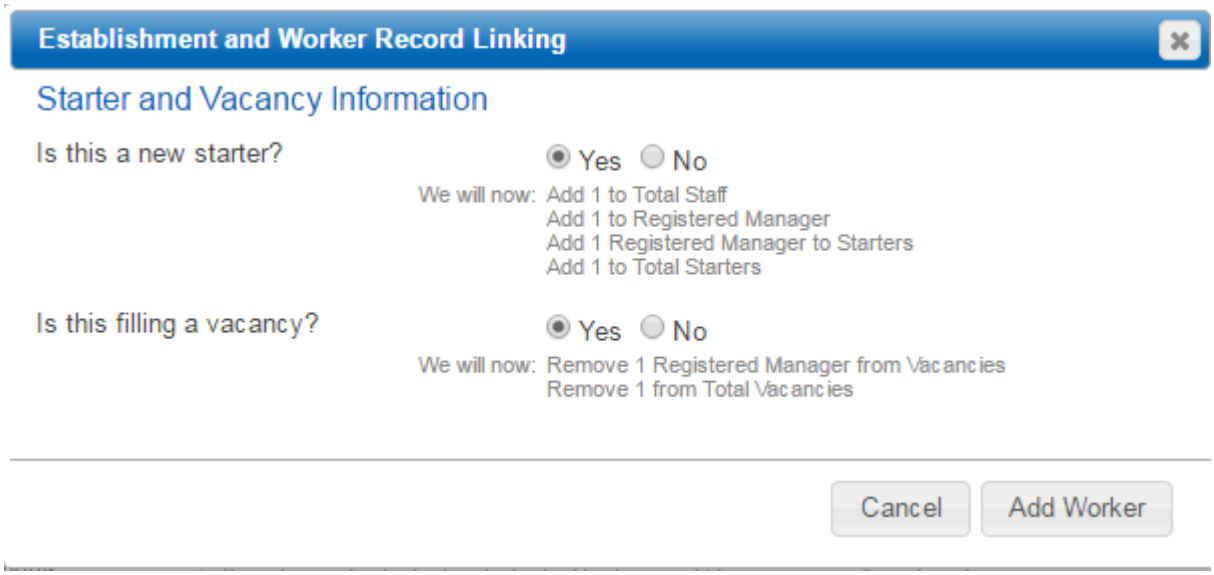
To add a worker simply click add worker on the My Workers page. Fill in all the required details and click save. You will now see a pop up box that has questions inside.



When you click yes in the first box the system will tell you what it is going to do next



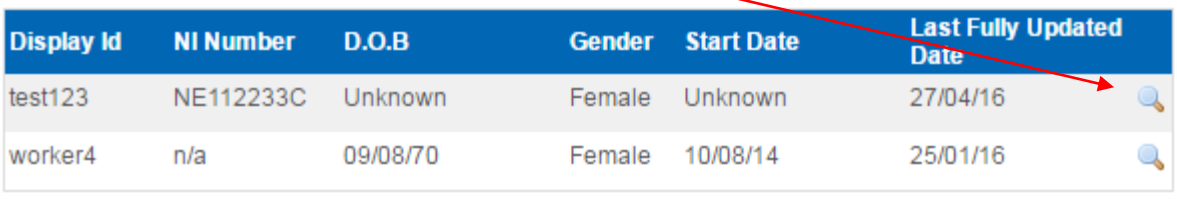
You can see on my example that the system will add a Registered Manager to my Establishment page as I have said it is a new starter. It will also add 1 to starters and total staff. If this is correct, answer the next question about vacancies. In my example I am going to say yes as I have a vacancy recorded on my establishment record for a Registered Manager.



Again the system has told me what it will do next by removing the Registered Manager in the vacancy section on the My Establishment page. If you are happy with everything that is going to happen click add worker.

My worker record is created and my establishment record has been updated.

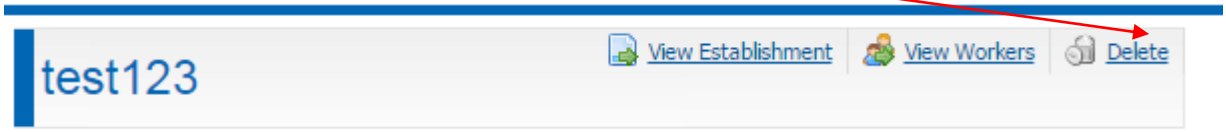
To delete a worker you simply find the worker you wish to delete by clicking on the magnifying glass at the side of their name



Display Id	NI Number	D.O.B	Gender	Start Date	Last Fully Updated Date
test123	NE112233C	Unknown	Female	Unknown	27/04/16
worker4	n/a	09/08/70	Female	10/08/14	25/01/16

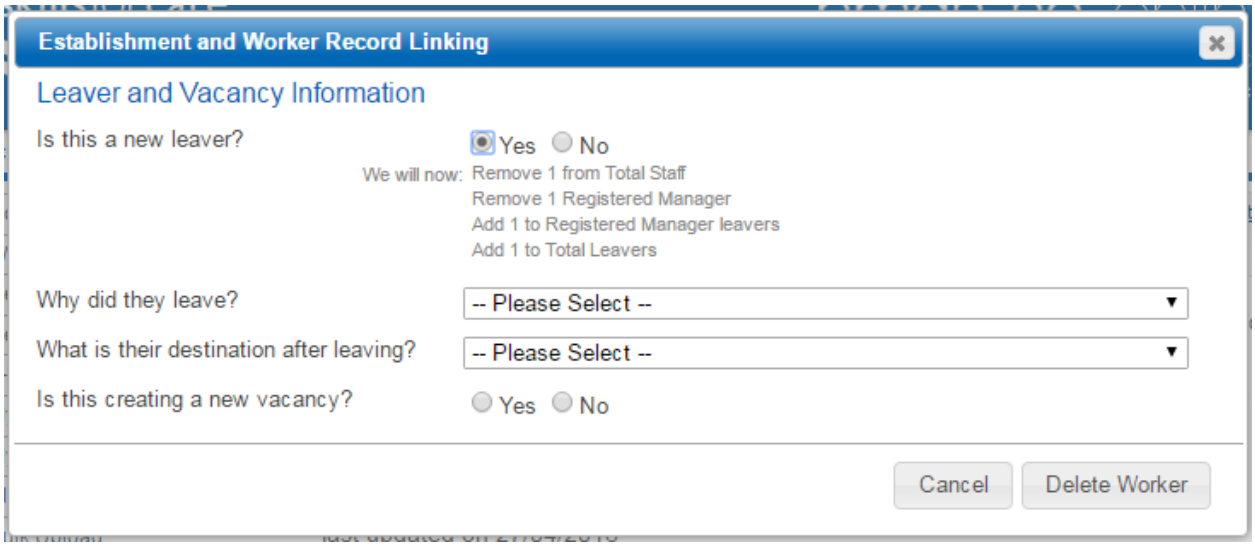
Total Workers - 2

Click delete at the top of the page



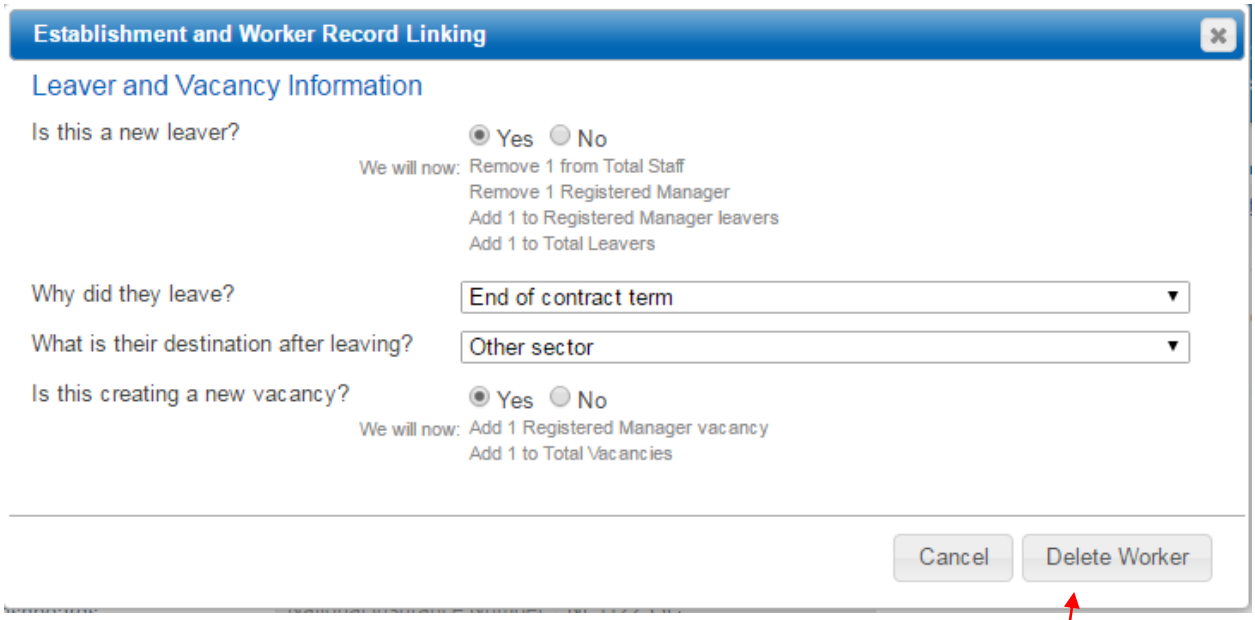
You will then see another pop up box with questions.

If you answer yes to the first question the system will tell you what is about to happen.



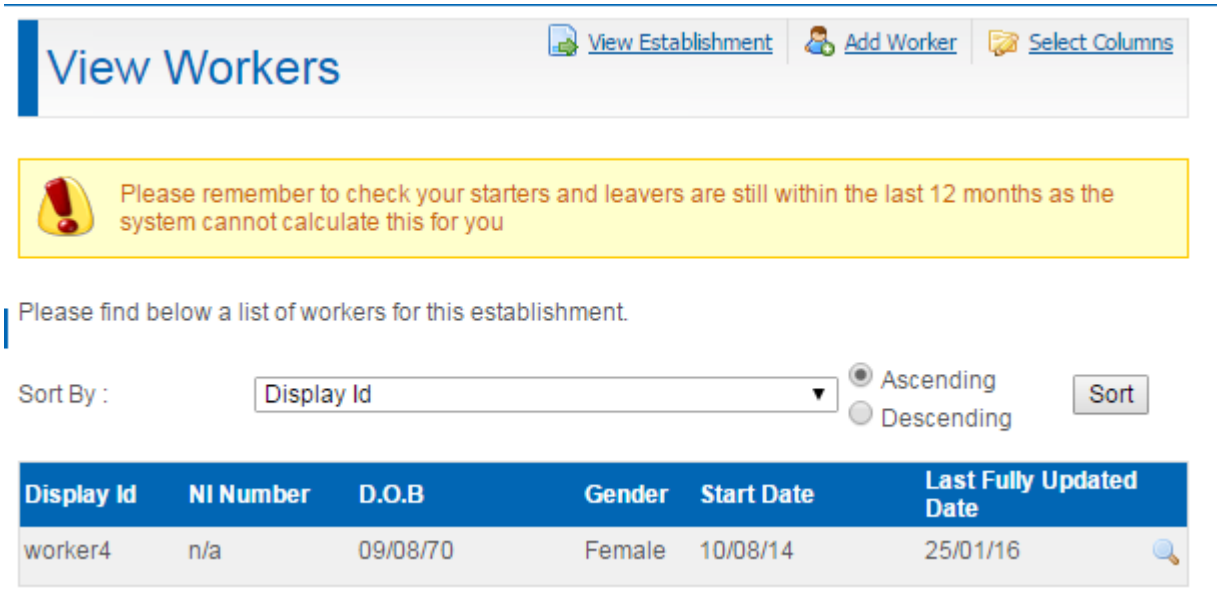
In my example it will remove 1 from total staff, 1 from Registered Manager, add 1 Registered Manager as a leaver and also add 1 to my total leavers box.

It then asks me why they left and destination after leaving and whether I want to create a new vacancy. Filling these sections out will update my establishment's reasons for leaving and destination after leaving.



Once satisfied that all the above is correct I would simply click on delete worker.

My worker record has been removed and my establishment data updated. You will notice another warning box has now appeared.

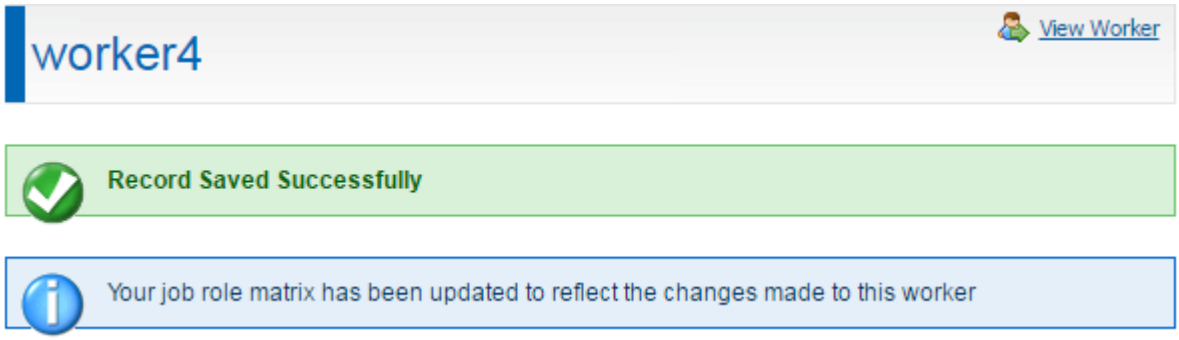


This warning is because the system is only partially linked and cannot tell whether your starters and leavers are within the last 12 months.

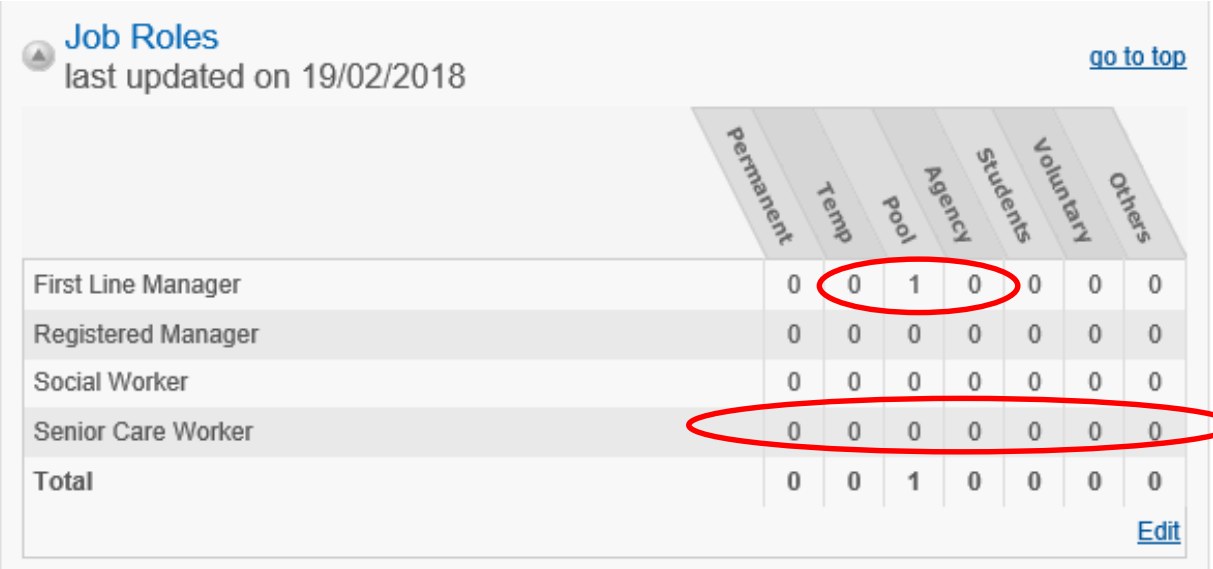
Examples of other changes I can make

If you updated the main job role of one of your workers this will also be reflected in the establishment page.

For example my Senior Care Worker has been promoted therefore I need to reflect this in their job role. Edit the worker record in the same way and update the main job role by selecting the appropriate one from the drop down list and click the save update button at the bottom of the page. The worker record will be saved and a message will appear to say it has updated your job roles on the My Establishment page.



If you check the job roles matrix you can see that the Senior Care Worker role has been removed and the First Line Manager role has been added.



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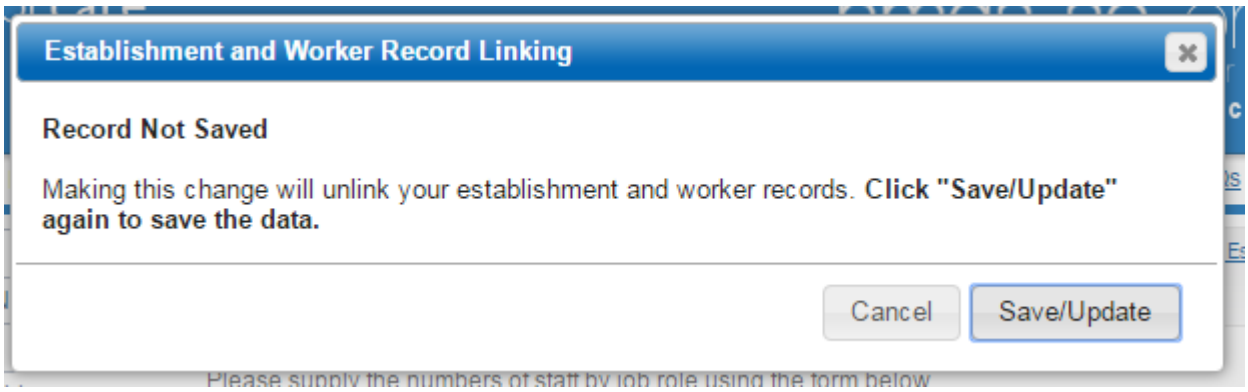
Breaking the link

If at any point I add workers to the My Establishment page before adding the worker record I will be warned I am about to break the link.

For example I add a Senior Care Worker to my job role matrix and click save.

	Permanent	Temp	Pool	Agency	Students	Voluntary	Others	
First Line Manager	0	0	1	0	0	0	0	Delete
Registered Manager	0	0	0	0	0	0	0	Delete
Social Worker	0	0	0	0	0	0	0	Delete
Senior Care Worker	1	0	0	0	0	0	0	Delete
Senior Management								Add

I will see a pop up warning:



This means I have a chance to change what I am doing before continuing to save. If I do not want to break the link I would simply cancel and add the worker record first or continue by clicking the save/update button.

On clicking save/update I now have the message at the top of my establishment page saying that I am no longer linked.

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Typically asked questions around linking the establishment and worker records

Q **How does the linking work?**

a. The link is achieved by pop up question boxes after adding, deleting or updating certain fields in the worker record.

This is a one way link so ensure all updates are carried out on the worker records first and not on the establishment record.

Q **My information has been de-linked, can I re-link my information?**

a. Yes. If you are unsure what needs to be updated to re-link your information click the link in the blue message at the top of “my establishment” page.

Q **How do I know if my worker is a new starter?**

a. If your worker started working for you within the last 12 months and you are adding their worker record to NMDS-SC they will be classed as a new starter.

If you are completing NMDS-SC for the first time but your workers have been working for you longer than 12 months, to retain the link you will have to class all workers as new starters. Once you have added all your worker records you can then manually update the starter information on your establishment page.

Q **How do I know if my worker is a leaver?**

a. If your worker has left your organisation within the last 12 months and you are deleting their record from the NMDS-SC they will be classed as a leaver.

Leaver information is gathered on a 12 months rolling basis, the date is from the date you are updating and should capture information for the previous 12 months.

Q **How do I know if my worker data matches my establishment data?**

a. If the blue message appears at the top of the “My Establishment” page then your worker data does NOT match your establishment data. Run the consistency report and go to page 2 to work out what needs correcting.

Once the blue message has disappeared, your establishment and worker records match.

Q **Do I need to link my job roles matrix with my worker records?**

a. Yes your establishment and worker record information must match for the linking functionality to work.

Q **Once linked can I move a worker record between subsidiaries?**

a. Yes, however this action will not update establishment information for either subsidiary so you will need to manually update this information for both of them. (Total staff and job roles matrix).