

TPD Collation Workbook – TPD Guide

For the TPD Collation Workbook v2.0 (companion to the National Logbook v2.0)

1. What it does

The collation workbook gathers the Annual Return rows produced by your trainees' national logbooks and builds unit-level comparisons: an Overview of every key total by unit, a Trainee Progress view of each trainee's accumulated totals across the whole of training, and an Explorer that can compare any individual return metric — every diagnosis, treatment, medical group, modality, clinic type, setting, supervision level, age band and ASA grade — between units and training stages. For example, selecting "Med: Cardiac (period)" shows at a glance how much cardiac exposure trainees are getting at each unit.

Comparisons are fair to less-than-full-time trainees and to absence: alongside the mean per return, every figure is shown as a rate per WTE-year — the total divided by the total active full-time-equivalent years contributed (active weeks × WTE ÷ 52). All figures are activity counts (contacts and recorded diagnoses/treatments), not counts of individual patients.

2. Setting up

- On Setup, name your units (up to 8) in the yellow cells. These labels drive every comparison and the unit dropdown on the Data sheet.
- Optionally set a training-year filter (e.g. 2027) to restrict every table to returns whose training year ends in that calendar year. The Overview banner always states what is showing.

3. Collecting and entering returns

- Trainees are instructed to upload their logbook to ISCP before the pre-RCP ES meeting and to send you a copy. From that workbook, take the Annual Return value row — the row labelled "THIS RCP PERIOD" (row 8, from column B onwards). This is the same row they paste into their own RCP Snapshots. Do NOT take the "Cumulative to date" row beneath it: that is career-to-date and would overstate a single year (the Overview's period-length check will not catch this, so it is worth a glance at the figures).
- Take ANNUAL returns only. Trainees also record interim RCPs in their own logbook, but an interim period sits inside the same training year and would double-count here (the period-length check would flag it as an unusually short period).
- On Data: one row per trainee-year. Select the Unit in column B, then paste the return into the same row starting at column C, using Paste Special > Values.
- The grey columns at the far right calculate period weeks, active weeks, WTE and WTE-years automatically. Where a return's WTE is blank it is treated as 1.0 for rate purposes.
- A trainee appears once per training year; over time the sheet accumulates a longitudinal record you can slice with the year filter. Multi-year accumulation is safe by design: each Annual Return contains only that RCP period's activity, so a trainee's ST1–ST4 returns sum to their four-year total with no overlap, and rates pool correctly across years.

4. Reading the Overview

- Data quality: returns in scope; rows pasted without a unit (excluded from every table until a unit is selected); the mean of the trainees' "% of entries with data completeness flags"; rows involved in possible duplicate returns (same NTN, start date of training and training year — usually a double paste); and returns with an unusual period length. All five should read 0 / clean before figures are quoted.
- Cohort composition is split into two banded groups, because they answer different questions. CURRENT STAFFING (Trainees, Total WTE) counts each individual once — identified by NTN plus start date of training — using their most recent return: who is at the unit and at what whole-time equivalent. ALL RETURNS IN SCOPE (Returns, Mean WTE, ST1–ST4 mix) counts trainee-years across every return held, so a trainee with three training years contributes three. Setting the training-year filter on Setup makes the two views coincide. Read this table first, since case-mix differences between units often reflect stage mix.

- Key totals by unit: all 34 headline metrics in five domains, each as Mean per return and Rate per WTE-year. Use the rate when units differ in LTFT mix or absence; use the mean when you want the typical trainee-year experience. The “Show figures for” selector above the table restricts every figure to a single stage (ST1–ST4) or shows all trainees — useful for asking whether, say, ST3s at one unit are getting the GA exposure ST3s get elsewhere.

5. Trainee Progress – the whole of training

- Enter each trainee’s NTN once (yellow cells). Each row then sums that trainee’s returns across every training year held in the workbook: career totals for the progression-critical metrics (all GA, sedation, acute trauma, MDT, new patients, medical complexity, safeguarding, independence, supervising juniors) plus two custom columns that can career-sum any return metric. The Setup training-year filter deliberately does not apply here.
- Identifying a trainee: deaneries recycle NTNs as trainees leave and join, so a trainee is identified by NTN AND start date of training. Leave the start date blank to include every return carrying that NTN; if those returns contain more than one start date the Check column warns you (“>1 start date – enter start date”), and entering the start date separates the two trainees cleanly.
- Unit filter: set a unit at the top of the sheet to restrict career totals to returns from that unit (useful where a trainee has rotated between units), or leave it blank for all units. Trainees with no returns from the selected unit remain listed but are greyed out with blank figures and a Check reading “not in selected unit” — rows cannot hide themselves without macros, which are not permitted on NHS IT.
- This is the early-warning view: a trainee reaching ST3–ST4 with a low accumulated GA count or no acute trauma exposure stands out immediately, while their within-year figures remain in the Overview and Explorer.
- Caution: career totals cover only the returns pasted here. Trainees use one logbook from the start of training, so a low figure here usually means returns are missing rather than experience — check the trainee has submitted every annual return before acting on it.

6. Using the Explorer

- Pick any metric from the dropdown — the by-unit table, by-ST-year table and per-return detail all update. The detail table shows each trainee-year’s raw value and individual rate, so an outlying unit figure can be traced to the returns behind it. The by-ST-year table has its own unit filter: leave it blank to see every unit pooled, or select a unit to see that unit’s stage-by-stage profile alone.
- Interpretation caution: small numbers dominate specialty training data. A unit difference based on two or three returns is a prompt for a conversation, not a conclusion — and diagnosis composites count diagnoses recorded, so one contact can legitimately contribute twice (e.g. caries in both dentitions).

7. One logbook per trainee

Trainees keep one logbook for the whole of training. It holds 5,000 contacts, likely to be well beyond a full programme, so you should not encounter split records; there is no facility for carrying totals between logbooks. If a trainee ever approaches the limit they are told to contact the SAC through you.

Each Annual Return covers only its own RCP period, so a trainee’s returns across several training years sum correctly here and Trainee Progress career totals remain accurate.

8. Governance

The workbook sheets are protected with the password dental_sac; you do not need it for normal use. Returns contain the trainee’s NTN. Store the collation workbook, and any trainee logbooks appropriately. No patient data is present anywhere.

Queries and suggested improvements to the national lists reach the SAC through TPDs: trainees raise them with you, and you bring them to the SAC.

9. If something goes wrong

What you see	Why it happens	How to fix it
A pasted row is ignored by every table	No unit selected in column B (the Overview counts these)	Select the unit; the row joins every table immediately
Rates show blank for a row or unit	The return's period dates are missing/invalid, so WTE-years cannot be computed	Check the pasted Training year end and Period start cells are real dates; ask the trainee to re-copy the row if not
Numbers change by themselves after pasting	Formulas were pasted instead of values	Delete the row (clear contents) and re-paste with Paste Special > Values
A Trainee Progress row is blank or shows "no returns"	The NTN does not exactly match the pasted returns (spacing/case), or the unit filter excludes them	Copy the NTN directly from a pasted Data row; check the unit filter at the top of the sheet
A Trainee Progress row is greyed with "not in selected unit"	The unit filter at the top of the sheet excludes that trainee's returns	Expected behaviour, not an error — clear the unit filter to see all units. The greyed rows are kept so your trainee list stays stable as you change filters
Trainee Progress Check column shows "△ >1 start date"	Two different trainees share a recycled NTN, so their careers would otherwise be merged	Enter the start date of training in the yellow cell beside the NTN, and add a second row for the other trainee with their own start date
A trainee's figures look implausibly high for one year	The "Cumulative to date" row was sent instead of the "THIS RCP PERIOD" row	Clear the row and request row 8 (labelled THIS RCP PERIOD) from the trainee's Annual Return sheet
A pasted row looks misaligned (text where numbers should be)	The trainee copied the wrong row/range, or used a different logbook version	Only row 8 of the v2.0 Annual Return, from column B, aligns with this workbook. Clear the row and request a fresh copy; check the trainee's logbook version on its Instructions sheet
Everything shows zero	The year filter on Setup excludes all pasted returns	Clear or correct the filter; the Overview banner confirms what is showing
Overview shows rows involved in possible duplicates	The same trainee's return for the same training year was pasted twice	Clear the contents of one duplicate row (select B to the last pasted column and press Delete — row deletion is blocked by design)
Overview flags an unusual period length	The trainee did not reset their RCP period start for the new year (a >54-week "annual" return is cumulative and would double-count across years), or the return is an interim rather than annual one, or dates are unreadable	Ask the trainee to set the correct period on their Dashboard and send a fresh return row; replace the flagged row
A unit renamed on Setup shows old rows as excluded	Data rows still carry the old unit name	Re-select the new unit name in column B for the affected rows
Protected-sheet message when typing	Typing outside an input area	Inputs are: Setup yellow cells, Data column B and the paste area, and the Explorer metric cell

The workbook is version-locked to the v2.0 Annual Return layout. When the SAC issues a new logbook version, a matching collation workbook is released with it — do not mix versions.