Electronic Staff Record

Business Intelligence and Retention

ESR Business Intelligence (ESRBI) provides the main reporting solution for ESR. It has the ability to report on hundreds of data items, each sourced from ESR to give the NHS a fully flexible and efficient reporting suite, but it can also include external data.

A number of NHS Standard Dashboards and Analyses (reports) are provided for NHS Organisations to utilise. In addition, ESRBI provides the capability for organisations to either customise NHS Standard Dashboards or create ad-hoc dashboards and analyses from scratch.

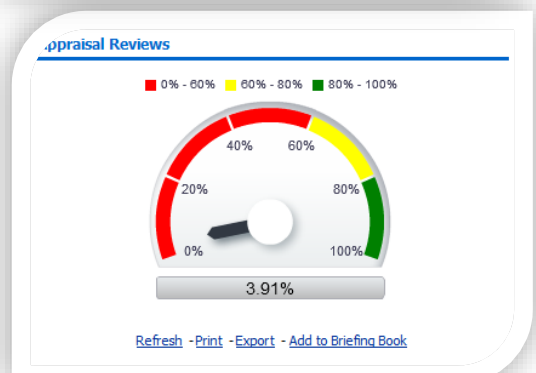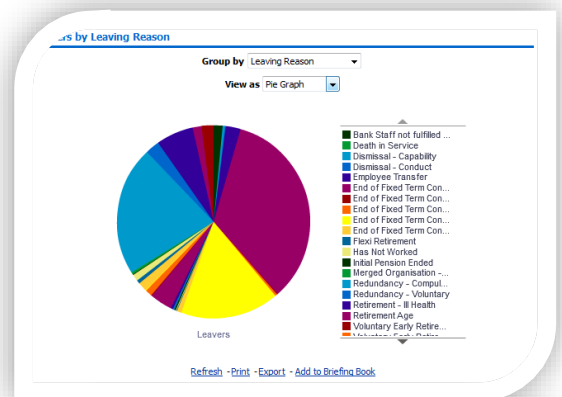### How To Access Business Intelligence

ESRBI provides three levels of access as follows:
- Business Intelligence Administration URP
- Manager Self-Service (MSS) and MSS type URPs, such as professional user dashboards
- Local BI Reports URP

How can BI reporting help with retention?
- View clear figures on Flexible working requests – number of requests by organisation or staff group and a percentage of requests which have been agreed upon by a manager
- Exit questionnaire – view reasons for leaving and identify any local issues
- Report on Absence – sickness, menopause related absences
- Leaving reasons - Report on Turnover and Stability
- Identify Carers – identify staff with the Carers competency attached
- Report on health and wellbeing and Appraisal conversations

All of these data items found in ESR's Business intelligence reporting tool can help organisations get a better understanding of staff movements, reasons for leaving and local retention issues.

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Flexible Working Reporting

You can report on the number of flexible working requests, group by org level, staff group and by protected characteristics. In addition, you can also report on the number and the percentage of those requests which have been agreed.

The analyses are also available for managers to access in the Flexible Working page in the NHS Staff in Post Dashboard.

The Employee Relations dashboard, also includes Flexible Working reports but these are only available to Employee Relations users.
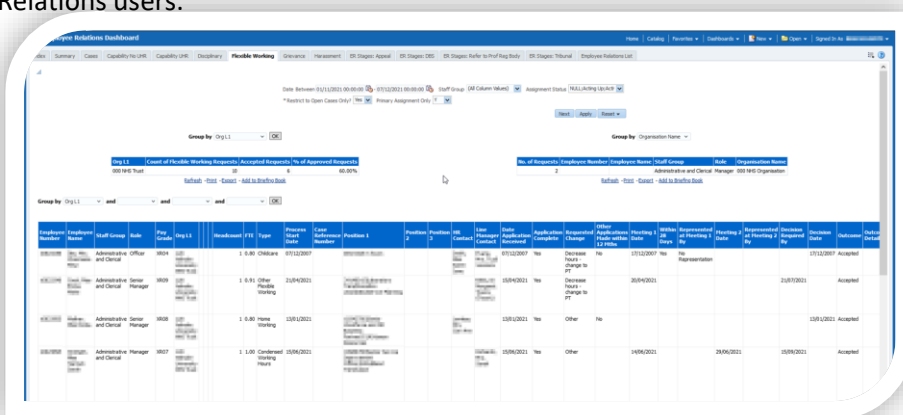
Exit Questionnaires

Recently, the national ESR team worked closely with NHSE&I to agree a number of changes to the Exit Questionnaire in ESR and these changes have been applied to the Staff Movements Monitoring Dashboard under the Exit Questionnaire tab. This includes a summary analysis added to the Exit Questionnaire page which includes % of Exit Questionnaires completed. In addition a range of assignment and employee based fields including protected characteristics and organisation levels is available
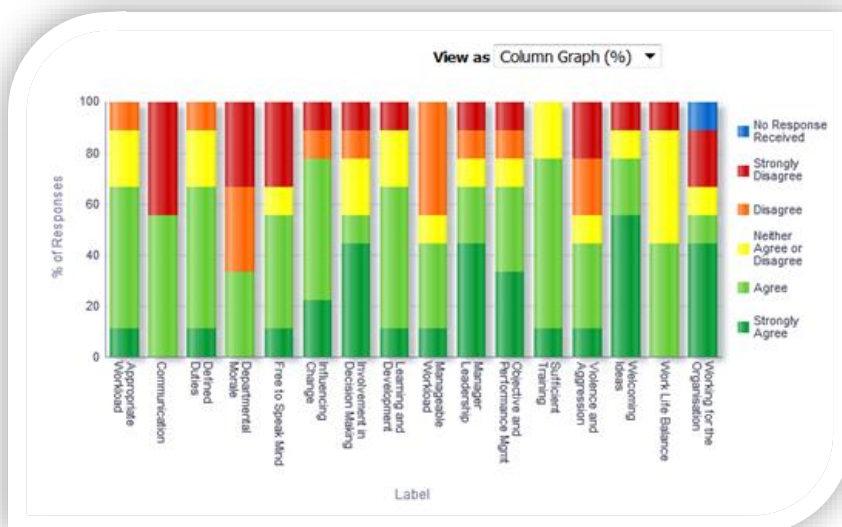
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Business Intelligence and Retention Data

Reporting on Absence – Menopause related reason

In 2020 The Staff Council's Health, Safety and Wellbeing Partnership Group published the Menopause at Work Guidance.

The purpose of the Guidance was to help: organisations support the workforce; line managers support their staff and for employees to look after themselves

The sickness absence reasons used by ESR are part of a Nationally agreed data set. To inform national policy and to identify employees who may need local support, a menopause related reason can be recorded against a sickness absence record. Related Reasons can be recorded in ESR by users with supervisory responsibilities or Absence Administrators.

So, with ESR allowing organisations to monitor sickness due to menopause, organisations can gain a better understanding of the impact menopause is having on their employees and put in place the necessary support.

Standard ESR sickness reports include the related reason and organisations can create their own bespoke graphs to help identify trends in absence.

Reporting Leaving Reasons

The leaving reasons analysis is designed to provide users with an overview of the number of leavers from the organisation grouped by Leaving Reason, Length of Service, Occupation Code, Job Role, Pay Grade or Destination on Leaving
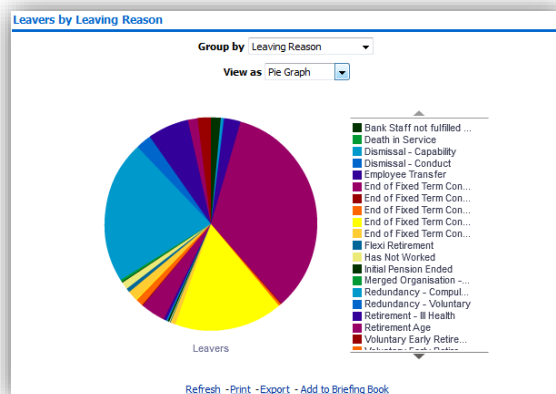
Next Steps

For further support and guidance on BI Reports available refer to the Business Intelligence Guide here or get in touch with your Regional ESR Functional Account Manager. Contact details can be found by clicking the links below:

Midlands and East of England Team   North Team
London Team   South Team