

NHS ELECTRONIC STAFF RECORD

ESR-NHS0218 - GUIDE TO ESRBI ABSENCE DASHBOARD

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DOCUMENT CONTROL

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DISTRIBUTION

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Design Assumptions

The following design assumptions have been made and can be applied to all analyses and dashboards:

1. All analyses have an export button to enable the user to export to their format of choice.
2. All analyses have an 'Add to Briefing Book' button enabled to allow the user to group national analyses together into a board-report type document.
3. All dashboards are designed on a screen resolution of 1024 x 768 pixels to prevent horizontal scroll bars being displayed (except where wide tables of data are required).

Examples

Where applicable, the examples included in this document contain fictional data only. The names and other personal details are fictional although look realistic enough to provide a useful example.

Absence Dashboard

Description

This dashboard is designed to contain analyses relating to all types of absence. Please note that on this dashboard organisation prompts will return all organisations that existed within the period to enable users to select organisations that were used in the past to enable retrospective reporting.

Prompt Guidance

A number of key prompts are available which are relevant to all the analyses shown in the Absence Dashboard. Absence Type, Absence Category and Absence Reason allow the user to specify exactly the type of absence to report on. The Date Between prompt allows the user to include only absence occurrences that fall between the two specified dates and again, is relevant to all analyses available on the Dashboard. The Absence Target prompt is only relevant to the Absence Timeline / Rolling Absence Timeline analyses and it allows the user to set a target line across each analysis depending on the figure entered into the prompt. The Long Term Absence > (days) prompt is only relevant to the Absence Long Term / Short Term analysis and allows the user to define a Long Term Absence.

Allocation

This dashboard is available to the following URPs:

XXX Absence Administration
XXX Absence Management (Read Only)
XXX Administrator Self Service (Payroll Approvals Not Required)
XXX Administrator Self Service (Payroll Approvals Required)
XXX BI Administration
XXX Finance Reporting
XXX Finance Reporting and Hub Mapping
XXX HR Administration
XXX HR Administration (With RA)
XXX HR Management
XXX Manager Self Service (Payroll Approvals Not Required)
XXX Manager Self Service (Payroll Approvals Required)
XXX Payroll Administration
XXX Payroll Audit
XXX Payroll Super Administration
XXX Supervisor Self Service
XXX Supervisor Self Service (Limited Access)

Index

Description

Absence reports are available in four different categories below:

- Summary
- Absence Listing
- Absence Analysis
- Leave Management

From this tab users can click on links provided to navigate to reports.

Example Screenshot

The screenshot displays the NHS Absence Dashboard interface. At the top, there is a navigation bar with the title 'NHS Absence Dashboard' and several menu items: Home, Catalog, Favorites, Dashboards, New, Open, and Signed In As. Below the navigation bar is a tabbed interface with the following tabs: Index, Summary, Summary II, Summary III, Detail, Absence Triggers, Employee Absence, Absence Timeline Detail, Organisation Absence, LT/ST, Days Lost in Period, and Individual Abs. The 'Summary' tab is currently selected. The main content area is titled 'NHS Electronic Staff Record - Business Intelligence'. It contains a message: 'Absence Reports are available in the below categories. Click a link to navigate to a each tab.' Below this message are two columns of content. The left column is titled 'Summary' and contains a sub-section 'Summary' with the text: 'High level summary analyses designed to support the user in identifying and managing potential issues. Analyses in this tab include:'. Below this text is a table with two columns: 'FTE Days Lost' and 'Absence Occurrences'. The first row of the table contains 'Absence Long Term / Short Term' and 'Absence Occurrences by Length'. The second row contains 'Absence Timeline' and 'Absence Estimated Cost'. Below the table is a sub-section 'Summary II' with the text: 'Further summary analyses including:'. The right column is titled 'Absence Listing' and contains a sub-section 'Detail Analysis' with the text: 'List of all absence records within the period. Assignment details are as at the absence date. If assignment details change within the period, multiple rows will be returned. For a list of current assignments with absence details, use the Individual Absence Record tab.' Below this text is a sub-section 'Individual Absence Record' with the text: 'List of absence records for assignments as at the effective date. All assignment details are returned as at the effective date.' At the bottom of the right column is a sub-section 'Absence Analysis'.

Summary Tab

Description

This tab of the absence dashboard is designed to display a number of absence-related overview analyses to support the user in identifying and managing potential issues.

Prompts

Organisation

Organisation

Absence Category

Absence Type (default value of 'Sickness')

Absence Reason

Date From (default value of first day of month from 12 months ago)

Date To (default value of last day of Last Month)

Person Type(s) (default values 'Employee', 'Employee and Applicant')

Employee Person Type(s)

Assignment Category

Staff Group

Primary Assignments Only

Absence Target

Long Term Absence > (days)

Job Role

Organisation Level 1-13

Occupation Code

Long Term Period End Date (default: Period To Date)

Location

Pay Grade(s)

Employee Number

Assignment Status

Level 2 Reason

Related Reason

Absence Timeline

Description

This analysis provides a view of the absence rate for employees (restricted by Prompts) during the period selected. On the management overview dashboard, this is restricted to a rolling 12 month period, though this can be changed using the absence dashboard version. Overall Absence % (FTE), Absence Days, Absence (FTE), and Available (FTE) figures are also provided above the timeline to show an average Absence % (FTE), a total of Absence Days, the total Absence FTE and the total Available FTE for the period selected.

Data Items

Title	Description
Absence Days	Total of calendar days for all absences for assignments included.
Absence FTE %	$(\text{FTE} * \text{Calendar Absence Days Lost}) / (\text{FTE} * \text{Calendar Days in Period}) * 100$
Cumulative Absence FTE %	Running sum of $(\text{FTE} * \text{Calendar Absence Days Lost}) / (\text{FTE} * \text{Calendar Days in Period}) * 100$
Month	Month / Year
Quarter	Quarter / Year
Absence Target	Driven by parameter. This should display a flat line on the chart. Numeric value.
Absence (FTE)	Total Absence FTE for the period selected
Available (FTE)	Total FTE available for the period selected

Column Selectors

Show Absence Days, Absence % (FTE) or Cumulative Absence % (FTE), Absence (FTE) or Available (FTE). Default Absence % (FTE).

View Selector

Line Graph (Default)

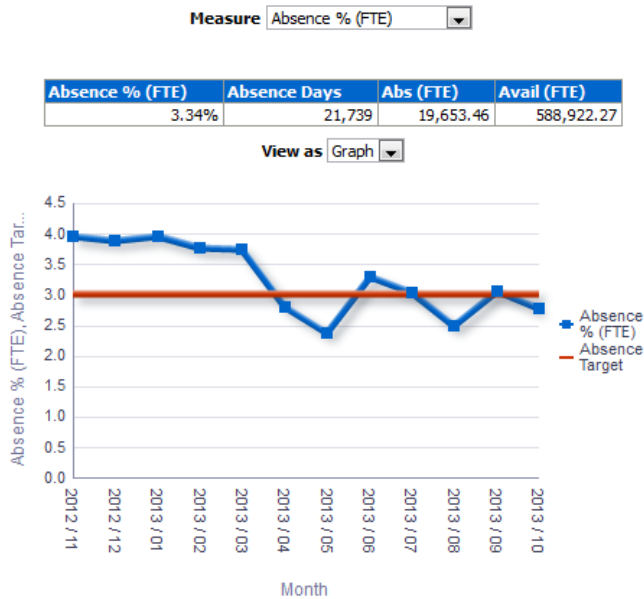
Line Graph (without Target)

Table

Gauge

Example Screenshot

Absence Timeline



Filters

This analysis will be restricted by the date set in the prompts rather than for example, a fixed 12 month period.

Actions

Click -> Detail Tab

Absence Timeline Calculation Example

The Absence Timeline Analysis allows the user to show absence data across a time period (as defined by the Date Between prompt) and either plot it on a timeline graph or show it as a table. By default the analysis will show Absence % (FTE) data as a snapshot of each month. By changing the measure option, a user is also able to show various Absence Measures including a Cumulative Abs %. This is calculated by adding up each month of the period selected cumulatively i.e. Month 1 for Month 1, Months 1+2 for Month 2, Months 1+2+3 for Month 3 etc.

FTE Lost

Description

This analysis is designed to show the Full Time Equivalent (FTE) lost due to absence grouped by Staff Group or Org Level 1-4.

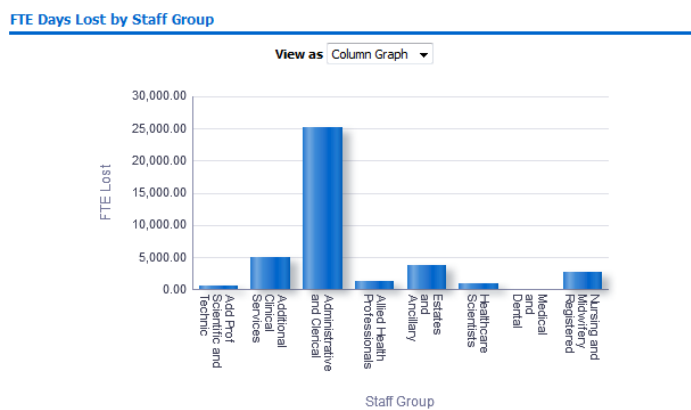
Data Items

Title	Description
Staff Group	Staff group associated with Job Role from Position
FTE Days Lost	Total of assignment calendar days lost * assignment FTE value
Org Level 1-13	
Cost Centre	
Cost Centre Org Level 1-12	

View Selectors

View as Pie Graph, Column Graph or Table (Default Column Graph)

Example Screenshot



Actions

Click -> Detail Tab (Restricted to region selected)

Number of Absence Occurrences

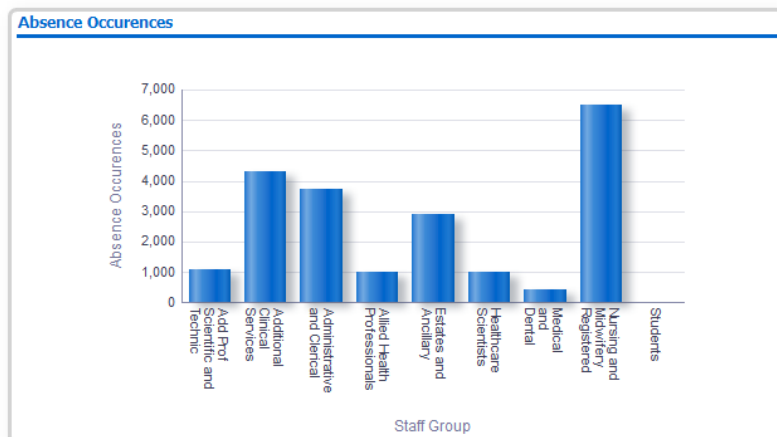
Description

This analysis is designed to show the number of absence occurrences during the time period selected in the Prompts, grouped by Staff Group or Org Level1-4.

Data Items

Title	Description
Number of Absences	Each absence occurrence within/overlapping the date range.
Staff Group	Staff Group associated with the Job Role in Position
Org Level 1-13	
Cost Centre	
Cost Centre Org Level 1-12	
Month	
LT Absence Occurrences	End Date of Open Ended Occurrences can be defined using available prompt (End Date of Period/Current Date)
ST Absence Occurrences	End Date of Open Ended Occurrences can be defined using available prompt (End Date of Period/Current Date)

Example Screenshot



View Selector

View as column graph or table. Default column graph.

Column Selector

Group By (default: Staff Group)

Actions

Click -> Absence Occurrences Tab (Restricted to Staff Group selected)

Absence Occurrences by Length

Description

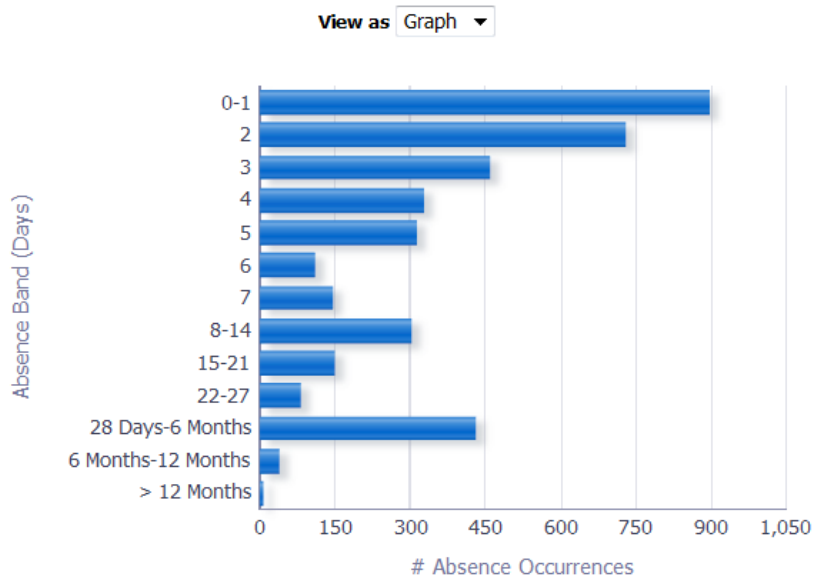
This analysis shows the number of absences grouped by the length of the absence. Absences with a period within the period selected in the prompts will be included, even if the start/end dates are outside of the period.

Data Items

Title	Description
Absence Length	Number of calendar days between absence start date and absence end date. Grouped into bands.
Absence Occurrences	Number of absences.

Example Screenshot

Absence Occurrences by Length



Monthly Estimated Cost

Description

This analysis shows the Estimate Absence Costs grouped by Staff Group, Job Role, Pay Scale, Assignment Category, Employee Category or Org Level 1-4.

Data Items

Title	Description
Absence Estimated Cost	Calculation (see below)
Staff Group	
Role	
Pay Scale	
Assignment Category	
Employee Category	
Org Level 1-13	
Cost Centre	
Cost Centre Org Level 1-12	

Absence Estimated Cost Calculation

Salary Based Estimated Cost = {Salary * FTE * Absence Days}

Employer's Cost = {Salary Based Absence Cost * Employer Cost Factor}

Both then need to be adjusted for OSP and OMP.

Salary Based Absence Cost OSP OMP Adjusted = {Salary * FTE * Absence Days OSP OMP Adjusted}

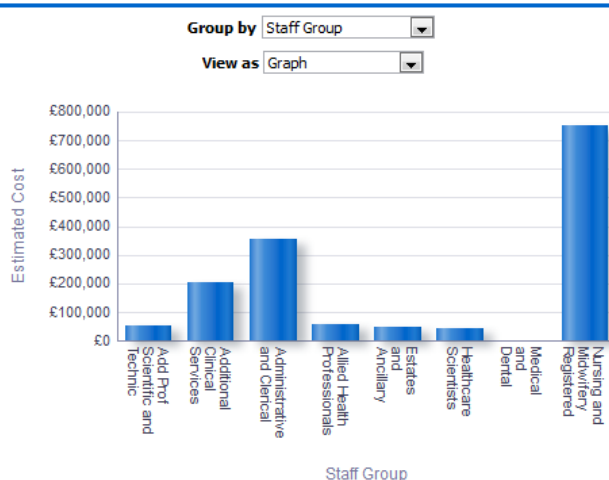
Employers Cost OSP OMP Adjusted = { Salary Based Absence Cost OSP OMP Adjusted * Employer Cost Factor}

Finally the total estimated cost = Salary Based Absence Cost OSP OMP Adjusted + Employers Cost OSP OMP Adjusted.

Please note, because ESR does not record shift patterns, this is only an estimate using the assignment FTE and calendar days.

Example Screenshots

Absence Estimated Cost



Absence Occurrences by Interface

Description

This analysis shows the number of Absence Occurrences by Interface grouped by Staff Group, Absence Type, Absence Category, Cost Centre or Org Level 1-13.

Data Items

Title	Description
Staff Group	
Absence Type	
Absence Category	
Month	
Occurrences (Interface)	Number of Interface absence occurrences
Occurrences (non-Interface)	Number of non-Interface absence occurrences
Percentage	Occurrences (Interface) / Occurrences (All) * 100
Org Level 1-13	
Cost Centre	
Cost Centre Org Level 1-12	

Example Screenshots

Absence Occurrences by Interface

Group By: Staff Group

View as Table

Staff Group	Occurrences (Interface)	Occurrences (Non-Interface)	Percentage <input type="button" value="▲"/>
Students	3	4	42.86%
Nursing and Midwifery Registered	65	337	16.17%
Additional Clinical Services	29	548	5.03%
Administrative and Clerical	13	673	1.90%
Add Prof Scientific and Technic	0	85	0.00%
Allied Health Professionals	0	395	0.00%
Estates and Ancillary	0	94	0.00%
Healthcare Scientists	0	203	0.00%
Medical and Dental	0	30	0.00%

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Absence Long Term / Short Term

Description

This analysis shows the Long Term and Short Term Absence by Absence % (FTE), Absence (FTE), Absence Days or Number of Absence Occurrences. The criteria for Long Term / Short Absence can be defined using the available prompt. For Open-Ended Absences only, the end date used in defining Long Term and Short Term absences can be switched between Current Date and Period End Date using the available prompt.

Data Items

Month	Absence (FTE)
Long Term FTE Lost	Absence % (FTE)
Short Term FTE Lost	Long Term Days Lost
Total FTE Lost	Short Term Days Lost
Long Term Absence %	Long Term Absence Occurrences
Short Term Absence %	Short Term Absence Occurrences
Total Absence Occurrences (Long Term Absence Occurrences + Short Term Absence Occurrences)	

View Selector

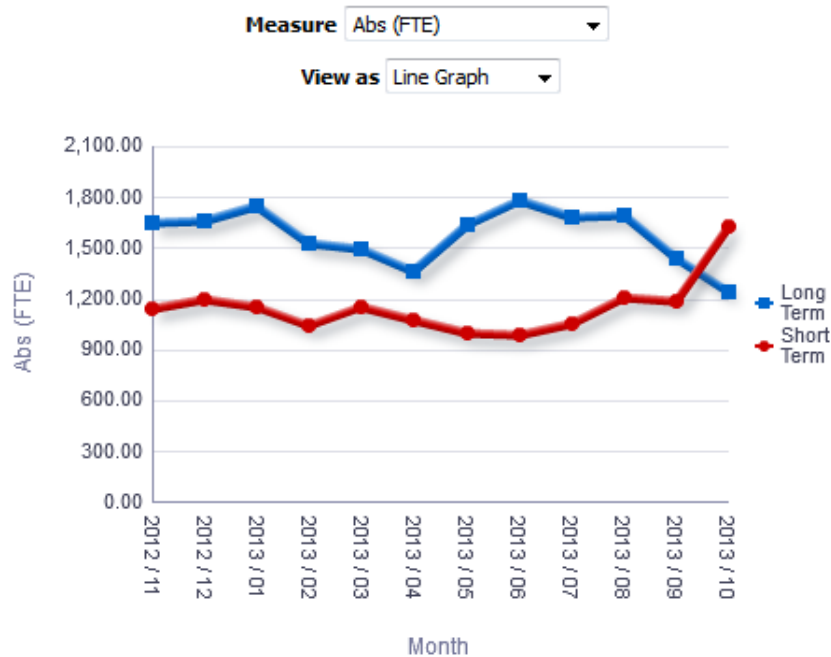
Timeline (default)

Column Graph

Table

Example Screenshots

Absence Long Term / Short Term



Actions

None

Absence Long Term / Short Term Calculation Example

The Absence Long Term / Short Term analysis allows a user to define a long term and short term analysis (using the prompt) and plot the two sets of values on a timeline or show them in a table.

The Abs FTE %, Abs (FTE) and Absence Days measures are based on the (FTE Lost / Total Available FTE) * 100, FTE Lost and Calendar Days lost during the period selected in the prompts, however the split between Long Term and Short Term is based on the total absence length. An example is provided below:

Parameters: Date Between 01-FEB-2014 and 28-FEB-2014

Employee	FTE	Absence Start Date	Absence End Date
12345	1	01-JAN-2014	04-MAR-2014

The above employee will be returned in the analysis because their absence crosses the period we are reporting on. Their FTE lost and calendar days lost will be calculated as 28 because there are 28 days in the period we are reporting on and they were absent for the entire period. However the absence will be classified as 'Long Term' because the total absence duration (i.e. the time between the start and end date of the absence) is 62 days. Users can also change the Absence End Date to use in the calculation as required using the Long Term Period End Date prompt. Current Date or Absence End Date can be selected.

Abs FTE %, Abs (FTE), Absence Days and Number of Absence Occurrences are the available measures and can be show in either a Line Graph or Table using the prompt above the analysis.

Summary II Tab

Description

This tab of the absence dashboard is designed to display a number of absence-related overview analyses to support the user in identifying and managing potential issues.

Prompts

Organisation

Absence Category

Absence Type (default value of 'Sickness')

Absence Reason

Date From (default value of first day of month from 12 months ago)

Date To (default value of last day of Last Month)

Person Type(s) (default values 'Employee', 'Employee and Applicant')

Employee Person Type(s)

Assignment Category

Staff Group
Primary Assignments Only
Job Role
Organisation Level 1-13
Pay Grade(s)
Employee Number
Assignment Status
Level 2 Reason
Related Reason

Top 10 Absence Reasons by Absence Days

Description

This analysis is designed to show the top '10' absence reasons in the period selected by the dashboard prompts ordered by absence days.

Data Items

Title	Description
Absence Reason	Reason associated with the absence
Absence Days	Number of days associated with each absence
%	The percentage of days lost per reason compared to all days lost
Absence Occurrences	
Headcount	
Absence Estimated Cost	

Example Screenshot

Top 10 Absence Reasons by Absence Days

View: Without Estimated Cost ▼

Absence Reason	Headcount	Abs Occurrences	Abs Days	%
S10 Anxiety/stress/depression/other psychiatric illnesses	1113	1,396	51,332	20.1
S12 Other musculoskeletal problems	1247	1,461	32,693	12.8
S25 Gastrointestinal problems	4717	5,955	24,249	9.5
S99 Unknown causes / Not specified	1803	2,311	20,974	8.2
S98 Other known causes - not elsewhere classified	1139	1,270	20,210	7.9
S28 Injury, fracture	607	652	16,364	6.4
S13 Cold, Cough, Flu - Influenza	3762	4,538	16,035	6.3
S11 Back Problems	786	919	15,126	5.9
S26 Genitourinary & gynaecological disorders	623	743	8,641	3.4
S17 Benign and malignant tumours, cancers	81	108	7,813	3.1

Rows 1 - 10

[Refresh](#) - [Print](#) - [Export](#) - [Add to Briefing Book](#)

Actions

Click -> Detail Tab (Restricted to reason selected).

Top 10 Absence Reasons by FTE Lost

Description

This analysis is designed to show the top '10' absence reasons in the period selected by the dashboard prompts ordered by FTE lost.

Data Items

Title	Description
Absence Reason	Reason associated with the absence
FTE Days Lost	FTE Lost associated with each absence
%	The percentage of FTE lost per reason compared to all FTE lost
Absence Occurrences	
Headcount	
Absence Esitimated Cost	

Example Screenshot

Top 10 Absence Reasons by FTE Days Lost

View: Without Estimated Cost ▼

Absence Reason	Headcount	Abs Occurrences	FTE Days Lost	%
S10 Anxiety/stress/depression/other psychiatric illnesses	1113	1,396	43,099.47	19.8
S12 Other musculoskeletal problems	1247	1,461	28,017.13	12.9
S25 Gastrointestinal problems	4717	5,955	21,132.80	9.7
S99 Unknown causes / Not specified	1803	2,311	18,542.25	8.5
S98 Other known causes - not elsewhere classified	1139	1,270	16,321.30	7.5
S13 Cold, Cough, Flu - Influenza	3762	4,538	14,315.71	6.6
S28 Injury, fracture	607	652	13,633.92	6.3
S11 Back Problems	786	919	12,625.47	5.8
S26 Genitourinary & gynaecological disorders	623	743	7,138.84	3.3
S15 Chest & respiratory problems	721	790	6,501.87	3.0

Rows 1 - 10

[Refresh](#) - [Print](#) - [Export](#) - [Add to Briefing Book](#)

Actions

Click -> Detail Tab (Restricted to reason selected).

Absences by First Day of Absence

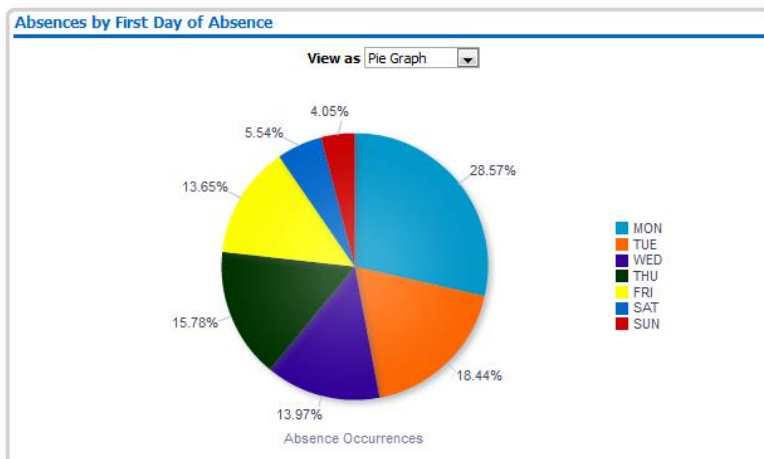
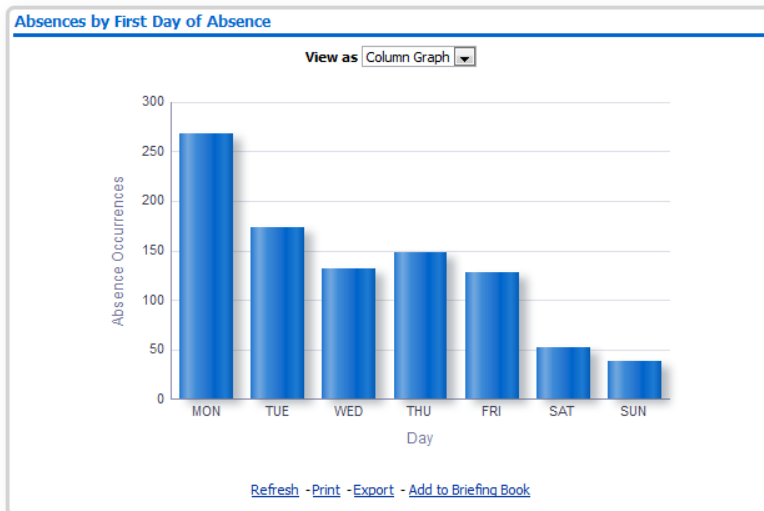
Description

This analysis shows the number of absences grouped by the day of the week the absence started on.

Data Items

Title	Description
Day of Week	Day of the week the absence started on
Absence Occurrences	Number of absences.

Example Screenshots



Return to Work Discussions %

Description

This analysis shows the percentage of absence occurrences where return to work discussions have taken place.

Data Items

Title	Description
RTW %	% of Absence Occurrences where RTW Flag = 'Yes'

Prompts

RTW Gauge Low Value

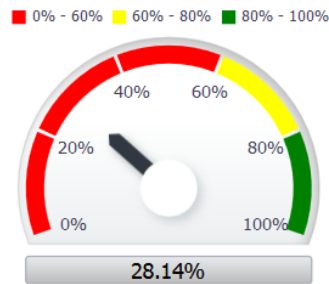
RTW Gauge High Value

Remove Current Abs from RTW (default: Yes)

Example Screenshots

Return to Work Discussions %

RTW Gauge Low Value RTW Gauge High Value
Remove Current Abs from RTW Yes



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Average Time to Enter Absence

Description

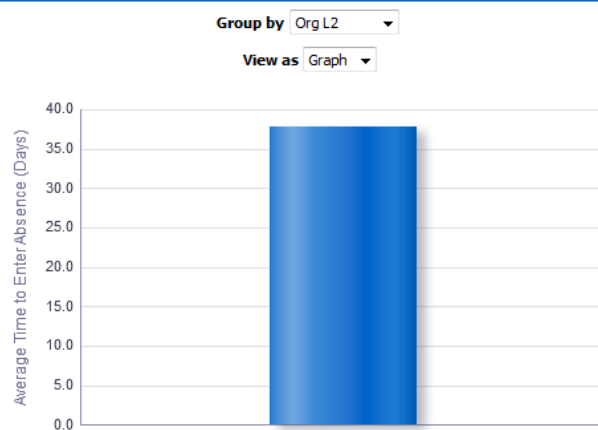
This analysis is designed to show the average time taken from when an absence occurred to when the absence was entered.

Data Items

Title	Description
Time to Enter Absence	"Absence Attributes"."Absence Time to Enter"
Org Level 1-13	
Cost Centre	
Cost Centre Org Level 1-12	
Staff Group	

Example Screenshot

Average Time to Enter Absence



Actions

Click -> Detail Tab.

Average # Days Lost per FTE

Description

This analysis is designed to show the Average Number of Days Lost per FTE. The Average Number of Days Lost per FTE has been estimated by dividing the Number of FTE Days lost by the Average FTE. Analysis results can be grouped by Org Levels 1-13. Please note that within the FTE Days Lost calculation, users can define the number of working days to use using the prompt above the analysis. The calculation can be found below.

Data Items

Average # Days Lost per FTE	Month
Cost Centre	Cost Centre Org Level 1-12
Org Levels 1-13	

Calculation

$(\text{Days Lost (FTE)} * (\text{Working Days} / 365 (\text{User Defined}))) / \text{Average FTE Available}$

Prompts

Working Days to use in Calculation (default: 365)

View Selectors

Line Graph (default)

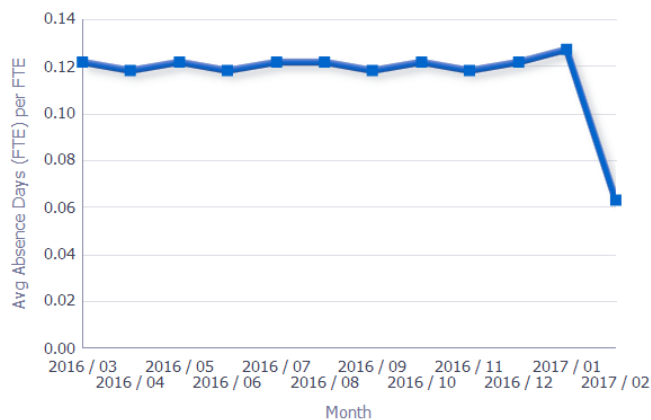
Table

Example Screenshot

Working Days to use in Calculation * Group by

	Absence Days (FTE)	Avg Days Available (FTE)	Avg Absence Days (FTE) per FTE
504 ESR Hospitals NHS Trust	1,063.00	761.71	1.40

View As



Summary III Tab

Description

This tab of the absence dashboard is designed to display a number of absence-related overview analyses to support the user in identifying and managing potential issues.

Prompts

Organisation

Absence Type (default value of 'Sickness')

Absence Category

Absence Reason

Date From (default value of first day of month from 12 months ago)

Date To (default value of last day of Last Month)

Person Type(s) (default values 'Employee', 'Employee and Applicant')

Employee Person Type(s)

Assignment Category

Staff Group

Occupation Code

Job Role

Employee Location

Pay Grade(s)

Primary Assignments Only

Absence Target

Organisation Level 1-13

Employee Number

Assignment Status

Level 2 Reason

Related Reason

Rolling Absence Timeline

Description

This analysis provides a view of the Absence Rate and Rolling Absence Rate for employees (restricted by Prompts) during the period selected.

Data Items

Title	Description
Absence FTE %	
Rolling Absence FTE %	A Moving Sum of (FTE * Calendar Absence Days Lost) / (FTE * Calendar Days in Period) * 100.

Prompts

Months to use in Rolling Calculation (default: 12)

This prompt defines the 'Rolling' period of the analysis. If 12 is selected, 12 previous months will be used to calculate the Rolling figure for each month shown on the timeline.

View Selector

Timeline (default)

Column Graph

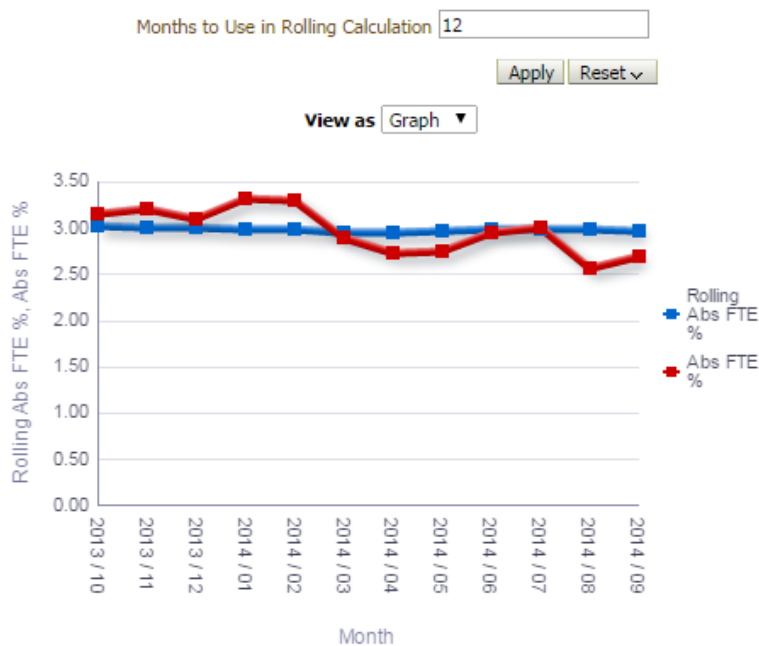
Table

Actions

None

Example Screenshots

Rolling Absence Timeline



Absence Rate

Description

This analysis is designed to show the Absence % (FTE) grouped by Staff Group, Age Band (Core Users only) or Org Level 1-4.

Data Items

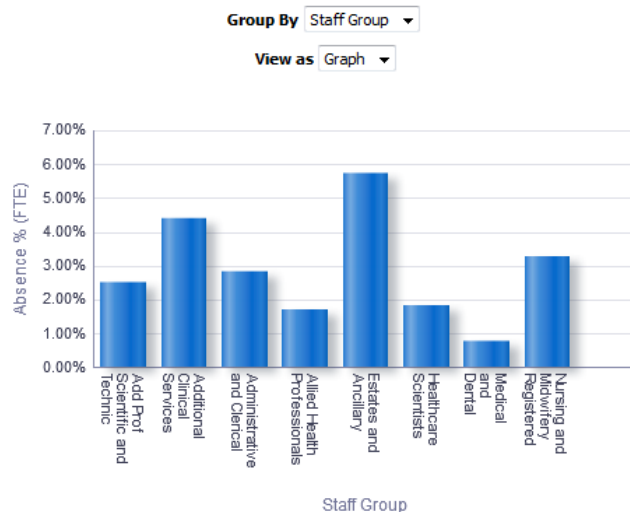
Title	Description
Staff Group	Staff group associated with Job Role from Position
Absence FTE %	
Age Band	Core Users Only
Pay Grade	Core Users Only
Length of Service	Core Users Only
Gender	Core Users Only
Ethnic Origin	Core Users Only
Ethnic Group	Core Users Only
Absence FTE	Table view only
Available FTE	Table view only
Org Level 1-13	
Cost Centre	
Cost Centre Org Level 1-12	

View Selectors

View as Column Graph or Table (Default: Column Graph)

Example Screenshot

Absence Rate



Actions

Click -> Detail Tab (Restricted to region selected)

Absence Rate by Occupation Code

Description

This analysis is designed to show a range of Absence measures grouped by the first letter of the Occupation Code.

Data Items

Occupation Code (First Letter)	Absence FTE %
Absence FTE	Absence Days
Available FTE	

Example Screenshot

Absence by Occupation Code

Occupation Code	Absence % (FTE)	Absence (FTE)	Absence Days	Avail FTE
0	0.34	145.80	219	42,737.63
1	0.00	0.00	0	705.40
8	0.34	1.00	1	294.00
G	3.58	26,159.90	28,348	729,798.05
H	8.38	5,470.73	6,132	65,278.52
N	6.87	8,178.23	9,468	119,110.31
S	2.15	1,174.65	1,404	54,669.96
U	3.17	1,964.65	2,379	61,912.72
Z	0.00	0.00	0	2,582.11
Grand Total	4.00	43,094.96	47,951	1,077,088.70

[Refresh](#) - [Print](#) - [Export](#) - [Add to Briefing Book](#)

Actions

None

Detail Tab

Description

This tab is designed to give the details of absences to the user who will be able to export to their preferred format from this page. Data is sorted by FTE Days lost - descending, followed by Last Name, First Name. For Open-Ended Absences only, the end date used in defining Long Term and Short Term absences can be switched between Current Date and Period End Date using the available prompt.

Prompts

Include Absences (All or Open-Ended Only. Default All)

Long Term Period End Date (default: Period To Date)

Assignment Number

Employee Number

Level 2 Reason

Related Reason

Column Selectors

Org Level 1-13

Cost Centre Org Level 1-12

Actions

Navigate to ESR Self Service (available to self-service users only)

Data Items

Assignment Number	Work at Home Flag (Y/N)
Last Name	Actual Termination Date
Middle Name	Days to Nil Pay
First Name	Calendar Days Lost
Title	Working Days Lost
Organisation	Hours Lost
Staff Group	FTE
Occupation Code	FTE Days Lost
Role	No of Episodes
Position Title	Predicted Fitness Date
Assignment Category	Work Related
Assignment Status	Third Party
Absence Reason	Return to Work Discussion Date
Level 2 Absence Reason	Occupational Health Referral Date
Surgery Related	DH Monitoring
Absence Type	Classification
Absence Start Date	Absence Estimated Cost
Absence End Date	Org Level 1-13
Total Duration (Days)	Cost Centre Org Level 1-12
Total Absence Duration (Hours)	Sickness Absence Nil Pay Start Date
Total Absence Duration (Days)	Sickness Absence Half Pay Start Date
Total FTE Calendar Days	Assessment Date
Days to Enter	Days to Half Pay
Cost Centre	Half Pay / Nil Pay
Supervisor	Notifiable Disease
Certification Type	Violence Related
Disability Related	OSP Scheme Name
Interface Flag	Days to End

Conditional Formatting

Where absence is open-ended the cell is highlighted in red.

Absence Triggers Tab

Description

This tab is designed to give the details of the number of absence occurrences per assignment to the user who will be able to export to their preferred format from this page. There are five triggers provided for the user to set as required (details below). Where the trigger criteria are met, the corresponding cell within the analysis turns red. A prompt is also included to allow the user to restrict the analysis to show employees with open absences only (by default the analysis is not restricted to employees with open absences).

Prompts:

Restrict to Records with Open Absences
Restrict to Employees Only at Period End Date
Restrict to Emps meeting at least one Trigger
Employee Number

Trigger Prompts:

Trigger 1: Assignments with X or more absences
Trigger 2: Assignments with X or more absences totalling Y days or more
Trigger 3: Bradford Factor Cal Days >= (default: 100)
Trigger 4: Bradford Factor FTE >= (default: 100)
Trigger 5: Assignments with X or more absences within Y months from latest absence start date

Data Items

Title	Description
Last Name	
First Name	
Title	
Assignment Number	
FTE	FTE associated with the assignment
Organisation	The organisation associated with the assignment
Staff Group	
Calendar Days Lost	
FTE Days Lost	
Latest Absence End Date	
Occupation Code	
Pay Grade	
#Absence Occurrences	COUNT (DISTINCT RANK("Absence Facts"."ABSENCE_EVENT_WID") BY "Assignment"."Assignment Number")
Bradford Factor (Calendar Days)	Absence Occurrences ² * Calendar Days Lost
Bradford Factor (FTE Days)	Absence Occurrences ² * FTE Days Lost
Trigger 1	Cell colour is Red where trigger 1 prompt criteria is met
Trigger 2	Cell colour is Red where trigger 2 prompt criteria is met
Trigger 3	Cell colour is Red where trigger 3 prompt criteria is met
Trigger 4	Cell colour is Red where trigger 4 prompt criteria is met
Trigger 5	Cell colour is Red where trigger 5 prompt criteria is met
Org Level 1-13	
Cost Centre	
Cost Centre Org Level 1-12	
Position Title	
# Occurrences with RTW Discussions	Absences where the RTW discussion date has been entered.
# Occurrences with OH Referral	Absences where the Refer to OH field has been populated.

Calculations

Bradford Factor (Calendar Days)

POWER(COUNT (DISTINCT RANK("Absence Facts"."ABSENCE_EVENT_WID") BY "Assignment"."Assignment Number"), 2) * SUM("Absence Facts"."Absence Days" BY "Assignment"."Assignment Number")

Bradford Factor (FTE Days)

IFNULL(POWER(COUNT(DISTINCT RANK("Absence Facts"."ABSENCE_EVENT_WID") BY "Assignment"."Assignment Number"), 2) * SUM("Absence Facts"."Absence FTE" BY "Assignment"."Assignment Number"),0)

Example Screenshot

Trigger 1: Assignments with x or more absences where x =

Trigger 2: Assignments with x or more absences totalling y calendar days or more where x = and y =

Trigger 3: Bradford Factor Cal Days >= Trigger 4: Bradford Factor FTE >=

Trigger 5: Assignments with x or more absences within y months from latest absence start date where x = and y =

Occupation Code	Pay Grade	Latest Absence End Date	Calendar Days Lost	FTE Days Lost	# Absence Occurrences	Bradford Factor (Calendar Days Lost)	Bradford Factor (FTE Days Lost)	Trigger 1
G2A	XR03	27/09/2018	3	3.00	2	12	12.00	
H2P	XR02	17/08/2018	177	177.00	2	708	708.00	
U2H	XR07	13/07/2018	18	18.00	2	72	72.00	
N9A	XR03	10/09/2018	7	3.36	1	7	3.36	
800	MT59	12/09/2018	2	1.00	1	2	1.00	
G2A	XN05	19/10/2018	41	41.00	2	164	164.00	
800	MN37	10/02/2018	5	5.00	2	20	20.00	
SSX	XR04	09/10/2018	44	4.69	3	396	42.24	
G2A	XR03	05/11/2018	37	37.00	3	333	333.00	
800	MT59	04/07/2018	208	104.00	1	208	104.00	

Absence Triggers Detail Tab

Description

This analysis is similar to the Absence Triggers analysis above but includes the absence detail behind the summary figures provided. This version includes Absence Type, Category and Reason, Absence Start and End Date as extra fields.

Prompts:

Same as the Absence Triggers analysis above.

Trigger Prompts:

Same as the Absence Triggers analysis above.

Data Items

Title	Description
Last Name	
First Name	
Title	

Assignment Number	
FTE	FTE associated with the assignment
Organisation	The organisation associated with the assignment
Staff Group	
Calendar Days Lost	
FTE Days Lost	
Latest Absence End Date	
Occupation Code	
Pay Grade	
Absence Type	
Absence Category	
Absence Reason	
Absence Start Date	
Absence End Date	
Related Reason	
#Absence Occurrences	COUNT (DISTINCT RANK("Absence Facts"."ABSENCE_EVENT_WID") BY "Assignment"."Assignment Number")
Bradford Factor (Calendar Days)	Absence Occurrences ² * Calendar Days Lost
Bradford Factor (FTE Days)	Absence Occurrences ² * FTE Days Lost
Trigger 1	Cell colour is Red where trigger 1 prompt criteria is met
Trigger 2	Cell colour is Red where trigger 2 prompt criteria is met
Trigger 3	Cell colour is Red where trigger 3 prompt criteria is met
Trigger 4	Cell colour is Red where trigger 4 prompt criteria is met
Trigger 5	Cell colour is Red where trigger 5 prompt criteria is met
Org Level 1-13	
Cost Centre	
Cost Centre Org Level 1-12	
Position Title	
# Occurrences with RTW Discussions	Absences where the RTW discussion date has been entered.
# Occurrences with OH Referral	Absences where the Refer to OH field has been populated.

Calculations

Same as the Absence Triggers analysis above.

Example Screenshot

Trigger 1: Assignments with x or more absences where x =

Trigger 2: Assignments with x or more absences totalling y calendar days or more where x = and y =

Trigger 3: Bradford Factor Cal Days >= Trigger 4: Bradford Factor FTE >=

Trigger 5: Assignments with x or more absences within y months from latest absence start date where x = and y =

Absence Type	Absence Category	Absence Reason	Absence Start Date	Absence End Date	Latest End Date	Calendar Days Lost	FTE Days Lost	# Absence Occurrences
Sickness	Sickness	S11 Back Problems	18/06/2018	19/06/2018	27/09/2018	2	2.00	1
Sickness	Sickness	S13 Cold, Cough, Flu - Influenza	27/09/2018	27/09/2018	27/09/2018	1	1.00	1
Sickness	Sickness	S28 Injury, fracture	28/11/2017	27/04/2018	17/08/2018	151	151.00	1
Sickness	Sickness	S29 Nervous system disorders	23/07/2018	17/08/2018	17/08/2018	26	26.00	1
Sickness	Sickness	S10 Anxiety/stress/depression/other psychiatric illnesses	26/02/2018	26/02/2018	13/07/2018	1	1.00	1
Sickness	Sickness	S17 Benign and malignant tumours, cancers	27/06/2018	13/07/2018	13/07/2018	17	17.00	1
Sickness	Sickness	S26 Genitourinary & gynaecological disorders	04/09/2018	10/09/2018	10/09/2018	7	3.36	1
Sickness	Sickness	S11 Back Problems	11/09/2018	12/09/2018	12/09/2018	2	1.00	1
Sickness	Sickness	S10 Anxiety/stress/depression/other psychiatric illnesses	10/09/2018	19/10/2018	19/10/2018	40	40.00	1
Sickness	Sickness	S21 Ear, nose, throat (ENT)	21/02/2018	21/02/2018	19/10/2018	1	1.00	1

Employee Absence Tab

Description

This tab is designed to give individual employee absence details. Absence % (FTE) and Absence (FTE) are shown at an individual level and the use of an effective date is also incorporated.

Prompts:

Effective Date (Default: Current Date)

Only Include Absences (Yes/No)

Employee Number

Related Reason

Column Selectors

Org Level 1-13

Cost Centre Org Level 1-12

Trigger Prompts:

Trigger 1: Assignments with greater than X Abs % (FTE)

Data Items

Title	Description
Last Name	
First Name	
Title	
Assignment Number	
FTE	FTE associated with the assignment
Organisation	The organisation associated with the assignment
Staff Group	
Role	
Number of Absence Occurences	
Absence Estimated Cost	
Absence FTE	Absence FTE for the Period
Absence FTE %	

Available FTE	
Bradford Factor (Calendar Days Lost)	
Bradford Factor (FTE Days Lost)	
Trigger 1	Cell colour is Red where trigger 1 prompt criteria is met
Org Level 1-13	
Cost Centre	
Cost Centre Org Level 1-12	

Example Screenshot

Trigger 1: Assignments with greater than X Abs % (FTE) where X = 5.00

Apply Reset v

[Dashboard Help](#)

Assignment Number	Last Name	First Name	Title	FTE	Organisation	Staff Group	Role	Latest Start Date	Trigger 1	Absence FTE	Absence FTE %	Available FTE	Bradford Factor (Calendar Days Lost)	Bradford Factor (FTE Days Lost)
20055144	Jackson05	Sam	Mr.	1.0	504 Psychology	Add Prof Scientific and Technic	Clinical Psychologist	01/01/2000		0.00	0.00	366.00		
20055145	Edwards05	Samuel	Mr.	0.2	504 Human Resources	Administrative and Clerical	Senior Manager	07/04/2014		0.00	0.00	84.23		
20055146	Singh05	Sinita	Mrs.	1.0	504 ESR Hospitals NHS Trust	Nursing and Midwifery Registered	Sister/Charge Nurse	01/10/2003		0.00	0.00			
20055147	Khan14	Sinita	Mrs.	1.0	504 Psychology	Add Prof Scientific and Technic	Clinical Psychologist	30/09/2003		0.00	0.00	366.00		
20055148	Dixon03	Simon	Mr.	1.0	504 Ward 10	Nursing and Midwifery Registered	Sister/Charge Nurse	01/01/2000		0.00	0.00	366.00		
20055149	Dalziel15	Maureen	Dr	0.2	504 Trust Board	Administrative and Clerical	Finance Director	01/01/1995		0.00	0.00	84.23		
20055150	Leese12	Vivian	Mrs.	1.0	504 Trust Board	Nursing and Midwifery Registered	Director of Nursing	07/11/1995		122.00	33.33	366.00	122.00	122.00
20055151	Tuller04	Lily	Mrs.	1.0	504 Ward 2	Nursing and Midwifery Registered	Staff Nurse	01/09/2003		0.00	0.00	366.00		
20055152	Ayres14	Pamela	Mrs.	1.0	504 Ward 7	Nursing and Midwifery Registered	Staff Nurse	01/01/2000		0.00	0.00	366.00		

Absence Timeline Detail Tab

Description

This analysis provides a view of the absence rate for employees (restricted by Prompts) during the period selected. Overall Absence % (FTE), Absence (FTE) and Available (FTE) figures are provided. Users are able to group the analysis by up to three Organisation Levels (Org Levels 1-13).

Data Items

Title	Description
Absence FTE	Absence FTE for the Period
Absence FTE %	$(\text{FTE} * \text{Calendar Absence Days Lost}) / (\text{FTE} * \text{Calendar Days in Period}) * 100$
Available FTE	Total FTE available for the period selected
# Absence Occurrences	
Estimated Cost	
Month	
Quarter	
Job Role	
Staff Group	
Area of Work	
Org Level 1-13	
Cost Centre Org Level 1-12	
Cost Centre	
Occupation Code	
Assignment Number	

Column Selectors

Org Level 1-13

Cost Centre Org L1-12

Example Screenshot

Organisation(s) Absence Type Absence Category Absence Reason

Date Between - Person Type(s) Assignment Category

Employee Person Type(s) Staff Group(s) Primary Assignments Only Job Role

Occupation Code Employee Location Pay Grade(s)

[Dashboard Help](#)



Absence Timeline Detail

Aggregate by

Group By and and and

		2016 / 04				2016 / 05				2016 / 06				2016 / 07			
		Abs (FTE)	Avail (FTE)	Absence % (FTE)	Absence Estimated Cost	Abs (FTE)	Avail (FTE)	Absence % (FTE)	Absence Estimated Cost	Abs (FTE)	Avail (FTE)	Absence % (FTE)	Absence Estimated Cost	Abs (FTE)	Avail (FTE)	Absence % (FTE)	Absence Estimated Cost
104 Trust Board	104 Womens & Childrens Directorate	0.00	6,000.00	0.00%	0.00	0.00	6,200.00	0.00%	0.00	0.00	6,000.00	0.00%	0.00	0.00	6,200.00	0.00%	0.00
504 Trust Board	504 Diagnostic & Therapeutic Directorate	0.00	810.00	0.00%	0.00	0.00	822.53	0.00%	0.00	0.00	796.00	0.00%	0.00	0.00	822.53	0.00%	0.00
504 Trust Board	504 Directorate of Medicine	0.00	720.00	0.00%	0.00	0.00	744.00	0.00%	0.00	0.00	720.00	0.00%	0.00	0.00	744.00	0.00%	0.00
504 Trust Board	504 Directorate of Surgery	60.00	11,986.57	0.50%	0.00	62.00	12,417.13	0.50%	0.00	60.00	12,016.57	0.50%	0.00	62.00	12,417.13	0.50%	0.00
504 Trust Board	504 Human Resources	0.00	103.56	0.00%	0.00	0.00	107.02	0.00%	0.00	0.00	103.56	0.00%	0.00	0.00	107.02	0.00%	0.00
504 Trust Board	504 Trust Board	0.00	1,640.47	0.00%	0.00	0.00	1,695.15	0.00%	0.00	0.00	1,640.47	0.00%	0.00	0.00	1,695.15	0.00%	0.00
504 Trust Board	504 Women & Children's Directorate	30.00	1,576.00	1.90%	0.00	31.00	1,628.53	1.90%	0.00	30.00	1,576.00	1.90%	0.00	31.00	1,628.53	1.90%	0.00
Grand Total		90.00	22,836.60	0.39%	0.00	93.00	23,614.36	0.39%	0.00	90.00	22,852.60	0.39%	0.00	93.00	23,614.36	0.39%	0.00

Organisation Absence Tab

Description

This tab is designed to give the details of Absence Estimated Cost and Absence % (FTE) by organisation. A prompt is provided to show data at organisation level 1-13.

Prompts:

Organisation Level

Measure: Estimated Cost, Absence % (FTE)

Level 2 Reason

Related Reason

Data Items

Title	Description
Organisation	
Employee Count	
Estimated Cost	Calculation (see below)
Absence FTE %	
Absence Occurrences	
Abs FTE Days Lost	
Abs FTE Lost	
Pay Scale	
Occupation Code	
Staff Group	
Org Level 1-13	
Cost Centre Org Level 1-12	
Cost Centre	

Absence Estimated Cost Calculation

Salary Based Estimated Cost = {Salary * FTE * Absence Days}

Employer's Cost = {Salary Based Absence Cost * Employer Cost Factor}

Both then need to be adjusted for OSP and OMP.

Salary Based Absence Cost OSP OMP Adjusted = {Salary * FTE * Absence Days OSP OMP Adjusted}

Employers Cost OSP OMP Adjusted = { Salary Based Absence Cost OSP OMP Adjusted * Employer Cost Factor}

Finally the total estimated cost = Salary Based Absence Cost OSP OMP Adjusted + Employers Cost OSP OMP Adjusted.

Please note, because ESR does not record shift patterns, this is only an estimate using the assignment FTE.

Example Screenshot

Group by Organisation and and and Measure 1 Absence FTE % Measure 2 Estimated Cost OK

Organisation	Employee Count	Absence FTE %	Estimated Cost
000 NHS Organisation	11	2.93%	£14,851.07
000 NHS Organisation	66	3.09%	£83,871.03
000 NHS Organisation	4	1.97%	£3,044.31
000 NHS Organisation	9	1.51%	£10,670.84
000 NHS Organisation	6	0.44%	£940.36
000 NHS Organisation	23	0.93%	£7,483.39
000 NHS Organisation	20	0.49%	£3,888.94
000 NHS Organisation	140	7.79%	£364,223.00
000 NHS Organisation	11	2.11%	£5,579.72
000 NHS Organisation	84	7.05%	£125,790.49

Rows 1 - 10

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Organisation Absence Timeline

Description

This analysis is similar to the Absence Timeline analysis however, it allows users to compare the absence rate of different organisations or organisation levels. The default is Org L2

Data Items

Title	Description
Absence Days	Total of calendar days for all absences for assignments included.
Absence FTE %	$(\text{FTE} * \text{Calendar Absence Days Lost}) / (\text{FTE} * \text{Calendar Days in Period}) * 100$
Estimated Cost	See earlier in document for calculation
Organisation Name	
Organisation Level 1-13	
Org Level 1-13	
Cost Centre Org Level 1-12	
Cost Centre	
Occupation Code	

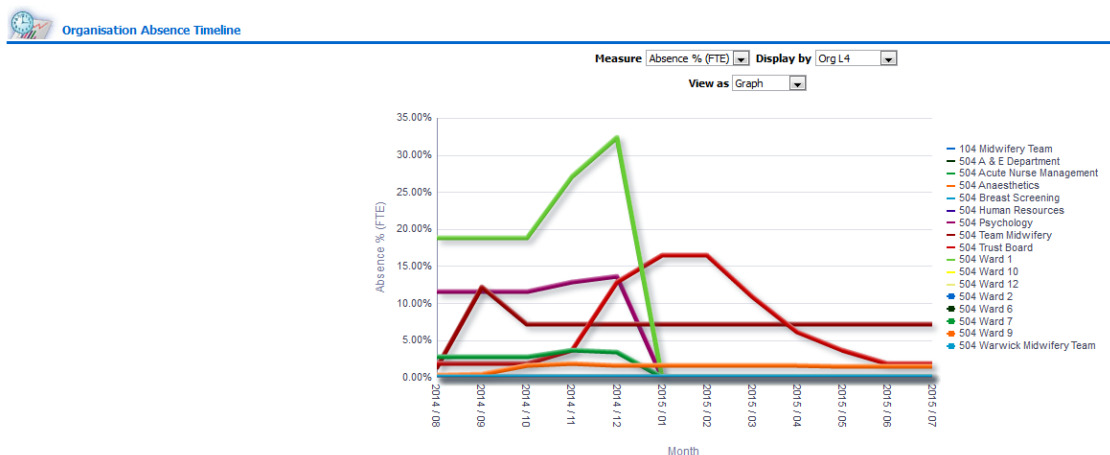
Column Selectors

Measure: Show Absence Days, Absence FTE % or Absence Estimated Cost.

Display by: Organisation Name, Organisation 1-13, No Grouping.

View As: Graph (default), Table.

Example Screenshot



Absence Long Term / Short Term Detail

Description

This analysis shows the Long Term and Short Term Absence grouped by Org Levels 1-13, Organisation Name, Month and Staff Group. Measures available

are: % Compared to Available FTE, % Compared to Total FTE Lost, # Absence Occurrences, FTE Days Lost and Calendar Days Lost.

Prompts:

Long Term Absence >= (days) (default: 28)

Long Term Period End Date (default: Period To Date)

Group by*Measure (Default: % Compared to Available FTE)

Data Items

Long Term	Short Term
Month	Org Levels 1-13
Cost Centre	Cost Centre Org Level 1-12
Staff Group	Role

Example Screenshot

* Group by * Measure

[What does this dashboard show?](#)

	Short Term		Long Term	
Grand Total	1.16		2.55	

Org L2	Short Term		Long Term	
Board	1.16		2.55	

	2015 / 08		2015 / 09		2015 / 10		2015 / 11		2015 / 12		2016 / 01		2016 / 02		2016 / 03		2016 / 04		2016 / 05		2016 / 06		2016 / 07	
	Short Term	Long Term	Short Term	Long Term	Short Term	Long Term	Short Term	Long Term	Short Term	Long Term	Short Term	Long Term	Short Term	Long Term	Short Term	Long Term	Short Term	Long Term	Short Term	Long Term	Short Term	Long Term	Short Term	Long Term
Monthly Total	0.81	3.13	1.12	3.03	1.60	2.61	1.28	2.90	0.88	3.14	1.39	2.89	1.53	2.24	1.41	2.10	0.99	1.98	1.01	1.85	0.92	2.18	1.00	2.54

Org L2	2015 / 08		2015 / 09		2015 / 10		2015 / 11		2015 / 12		2016 / 01		2016 / 02		2016 / 03		2016 / 04		2016 / 05		2016 / 06		2016 / 07	
	Short Term	Long Term	Short Term	Long Term	Short Term	Long Term	Short Term	Long Term	Short Term	Long Term	Short Term	Long Term	Short Term	Long Term	Short Term	Long Term	Short Term	Long Term	Short Term	Long Term	Short Term	Long Term	Short Term	Long Term
Board	0.81	3.13	1.12	3.03	1.60	2.61	1.28	2.90	0.88	3.14	1.39	2.89	1.53	2.24	1.41	2.10	0.99	1.98	1.01	1.85	0.92	2.18	1.00	2.54

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Days Lost in Period

Description

This analysis is designed to enable users to report on employees as at a specific effective date, and then all absences within a user defined absence period.

Prompts:

Report Effective Date

Absence Dates Between

Data Items

Organisation	Assignment Number
Cost Centre	Person Type
Absence Category	Employee Person Type
Absence Type	Staff Group
Absence Reason	Termination Date
Level 2 Sickness Reason	Absence Start Date

Employee Number	Absence End Date
Title	Calendar Days Lost
Last Name	FTE Days Lost
First Name	FTE
Assignment Category	

Example Screenshot

Absence Category (All Column Values) Absence Type Sickness Absence Reason (All Column Values) Assignment Category NULL;Fixed Term Termination
 Person Type Employee;Employee Employee Person Type Employee Primary Assignments --Select-- Staff Group (All Column Values)
 Employee Number(s) --Select Value-- Job Role (All Column Values) Occupation Code (All Column Values)
 Report Effective Date 05/04/2017 Absence Dates Between 01/04/2016 12:00:00 - 31/03/2017 12:00:00
 Apply Reset

Organisation	Cost Centre	Absence Category	Absence Type	Absence Reason	Level 2 Sickness Reason	Employee Number	Title	Last Name	First Name	Assignment Category	Assignment Number	Person Type	Employee Person Type	Staff Group
504 Anaesthetics	504S1180	Sickness	Sickness	S10 Anxiety/stress/depression/other psychiatric illnesses		20101342	Mr.	Bradley20	Derek	Permanent	20101342	Employee	Employee	Medical and Dental
504 Anaesthetics											Assignment Total			
504 Team Midwifery	504W1381	Sickness	Sickness	S19 Heart, cardiac & circulatory problems	S19008 Heart failure	20055377	Miss	Cho05	Jenny	Permanent	20055377	Employee	Employee	Medical and Dental
504 Team Midwifery											Assignment Total			
504 Ward 9	504S1221	Sickness	Sickness	S15 Chest & respiratory problems	S15001 Breathing problems	20055623	Mrs.	Baker03	Yve	Permanent	20055623	Employee	Employee	Medical and Dental
504 Ward 9											Assignment Total			
504 Ward 9	504S1221	Sickness	Sickness	S10 Anxiety/stress/depression/other psychiatric illnesses	S10017 Stress	20055625	Mrs.	Baker07	Yve	Permanent	20055625	Employee	Employee	Medical and Dental
504 Ward 9											Assignment Total			

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Individual Absence Record

Description

This analysis allows users to analyse at an individual level, the reason of absence and length of absence as at the Report Effective Date.

Prompts:

- Report Effective Date
- Absence Date Between
- Employee Number
- Level 2 Reason
- Related Reason

Actions

Navigate to ESR Self Service (available to self-service users only)

Data Items

Organisation Name	Absence End Date
Employee Number	Calendar Days Lost
Assignment Category	Working Days Lost
Absence Reason	Sessions Lost
Level 2 Reason	Hours Lost
Surgery Related	FTE
Absence Type	FTE Days Lost
Last Name	No. of Episodes
First Name	Predicted Fitness Date
Title	Work Related
Assignment Number	Third Party

Primary Assignment Flag	Leave Hours
Staff Group	Leave Date
Occupation Code	RTW Discussion Date
Role	Occ Health Referral Date
Pay Grade	Assessment Date
First Day Absent	DH Monitoring
Absence Start Date	Prorated
Org Level 1-13	

Example Screenshot

Absence Type	Employee Last Name	Employee First Name	Employee Individual Title	Assignment Number	Primary Assignment Flag	Staff Group	Occupation Code	Role	Pay Grade	First Day Absent	Absence Start Date	Absence End Date	Calendar Days Lost	Working Days Lost	Sessions Lost
Sickness	Blogs	Joe	Mr	00000000	Y	Administrative and Clerical	G2B	Officer	XR02	Fri	03/02/2017	05/02/2017	3.00	0.00	0.00
Sickness	Blogs	Joe	Mr	00000000	Y	Administrative and Clerical	G2B	Officer	XR02	Thu	25/05/2017	25/05/2017	1.00	0.00	0.00
Sickness	Blogs	Joe	Mr	00000000	Y	Administrative and Clerical	G2A	Clerical Worker	XR03	Wed	16/11/2016	17/11/2016	2.00	0.00	0.00
Sickness	Blogs	Joe	Mr	00000000	Y	Administrative and Clerical	G2A	Officer	XR02	Mon	04/09/2017	04/09/2017	1.00	0.00	0.00
Sickness	Blogs	Joe	Mr	00000000	Y	Administrative and Clerical	G2D	Medical Secretary	XN04	Wed	14/12/2016	22/12/2016	9.00	0.00	0.00
Sickness	Blogs	Joe	Mr	00000000	Y	Administrative and Clerical	G2A	Officer	XR02	Mon	04/09/2017	04/09/2017	1.00	0.00	0.00
Sickness	Blogs	Joe	Mr	00000000	Y	Administrative and Clerical	G2D	Medical Secretary	XN04	Wed	14/12/2016	22/12/2016	9.00	0.00	0.00
Sickness	Blogs	Joe	Mr	00000000	Y	Healthcare Scientists	U3A	Healthcare Science Practitioner	XR05	Mon	14/11/2016	15/11/2016	2.00	0.00	0.00
Sickness	Blogs	Joe	Mr	00000000	Y	Healthcare Scientists	U3A	Healthcare Science Practitioner	XR05	Tue	28/02/2017	01/03/2017	2.00	0.00	0.00
Sickness	Blogs	Joe	Mr	00000000	Y	Healthcare Scientists	U3A	Healthcare Science Practitioner	XR05	Thu	09/03/2017	09/04/2017	32.00	0.00	0.00
													36.00	0.00	0.00

Annual Leave Balances

Description

This analysis is designed to help managers review Annual Leave entitlements for assignments. The analysis displays a row for each employee assignment matching the selection criteria and also shows who has an Annual Leave Accrual Plan attached to their Assignment.

Prompts:

- * Organisation Hierarchy
- * Organisation
- Staff Group
- Assignment Category
- Employee Name is LIKE (pattern match)
- Units (Default: Hours)
- Effective Date

Data Items

Organisation	Add 2 Statutory Days
Staff Group	Previous Year Carryover
Last Name	Entitlement
First Name	Leave Taken
Title	% Leave Taken
Assignment Number	Leave Booked
Supervisor Name	Total Leave
Supervisor Email	Remaining Leave

Accrual Start Date	Future Projected Leave (Days)
Start Date Overridden	Leave Crosses into Next Accrual Year
Include Bank Holidays	Organisation Level 1-13
Accrual Plan Name	Employee Category
Assignment Category	

Example Screenshot

Organisation	Staff Group	Last Name	First Name	Title	Assignment Number	Accrual Start Date	Start Date Overridden	Include Bank Holidays	Add 2 Statutory Days	Previous Year Carryover	Entitlement	Leave Taken	Leave Booked	Total Leave
000 ESR Organisation	Administrative and Clerical	Blogs	Joe	Mr	00000000	01-Apr-2017	Yes	Yes (As they fall)	No	22.54	1,166.50	660.89	151.05	811.94
000 ESR Organisation	Administrative and Clerical	Blogs	Joe	Mr	00000000	01-Apr-2017		Yes (As they fall)	No	142.50	1,704.50	817.50	262.50	1,080.00
000 ESR Organisation	Administrative and Clerical Total									165.04	2,871.00	1,478.39	413.55	1,891.94
Organisation Total										165.04	2,871.00	1,478.39	413.55	1,891.94

Study Leave

Description

This analysis enables users to analyse employee study leave and provides details of absence due to study decreasing or increasing leave and associated training record history. Depending on the user prompt selection, either the decreasing or increasing analysis will display.

Prompts:

Organisation Name

Staff Group(s)

Employee Name(s)

Employee Number(s)

* Absence Date From

* Absence Date To

* Absence Type (Study Decreasing/Increasing Balance)

Data Items

Employee Name	Employee Number
Staff Group	Absence Type
Absence Reason	Absence Start Date
Absence End Date	Calendar Days Lost
Study Leave Allocation	Number of Days Taken
Number of Days Remaining	Course Name
Successfully Attended	Failure Reason
Competencies Gained	Proficiency Level Name
Course Exam Fee Amount	Course Exam Fee Amount Percentage
Study Allocation Start Date	Course Venue
Course Location	

Staff List

Description

This analysis returns a staff list as at an effective date and includes all absences as at an effective date (current date by default).

Prompts:

Absence Type
Absence Category
Absence Reason
Level 2 Reason
Related Reason
Employee Number
Effective Date
Absence Date
Level 2 Reason
Related Reason

Data Items

Last Name	Occupation Code
First Name	Incremental Date
Title	Primary
Employee Number	FTE
Assignment Number	Age 70+ (Yes / No)
Organisation	Disability Related
Organisation Level 1-13	Absence Type
Cost Centre	Absence Category
Cost Centre Organisation Level 1-12	Absence Reason
Location	Work at Home Flag
Staff Group	Absence Start Date
Role	Absence End Date
Position Title	Total Duration (Days)
Assignment Category	Total FTE Calendar Days
Assignment Status	Days to Enter
Supervisor Name	Related Reason
Supervisor Asg. Number	

Example Screenshot

Absence Type	Absence Category	Absence Reason	Work at Home Flag	Absence Start Date	Absence End Date	Total Duration (Days)	Total FTE Calendar Days	Days to Enter	Related Reason
			N						
			N						
			N						
Maternity	Maternity	Maternity Leave	N	05/02/2020		146	146	1	
			N						
			N						
			N						
			N						
			N						
Annual Leave Hours 1	Annual Leave	Annual Leave		29/06/2020	03/07/2020	5	2	-347	
			N						
			N						
			N						
Annual Leave Hours 1	Annual Leave	Annual Leave		29/06/2020	03/07/2020	5	2	-24	
			N						
			N						
Sickness	Sickness	S10 Anxiety/stress/depression/	N	17/06/2020		13	10	0	

Future Booked Leave

Percentage of Absent Staff by Month/Week

Description

This analysis enables users to report the percentage of staff absent (by month / week) based on a specified threshold.

Prompts:

Highlight When Percentage of Absent Staff >=

Data Items

Title	Description
Organisation	
Month Name	
Week of Year	
% Absence Occurrences	Absence Occurrences / Assignment Count Distinct *100

Example Screenshot

Note: if the percentage of assignments due to be absent exceeds 100%, users may wish to amend the Absence Categories included in the prompt. There is a data quality analysis available within the NHS Data Quality Dashboard Absence page which identifies where an assignment has two or more absences recorded on the same day.

NHS Percentage of Absent Staff by Month/Week

Highlight When Percentage of Absent Staff >=

Organisation	July					August					September				
	27	28	29	30	31	32	33	34	35	36	36	37	38	39	40
Physics Engineering				10.00		10.00	16.00	10.00	45.00						
Physics Radiotherapy	7.61	3.26	6.21	8.33	9.06	6.16	4.35	2.17	3.48	28.26		2.17	2.17	4.35	3.26
Physics Electronics	33.33									100.00					
Radiation Protection	7.14	7.14	7.14	7.14	7.14	7.14	14.29	7.14	12.86	46.43	9.52	7.14	7.14	11.43	
Radiotherapy	4.31	7.14	6.53	4.93	7.02	7.76	8.37	8.13	9.36	12.64	5.82	4.80	3.82	7.64	4.31
Chemotherapy Services	3.39	2.12	2.37	1.69	1.69	2.37	1.69	3.73	4.07	8.47	5.08	2.12	1.69	2.37	3.81
Pharmacy	11.44	6.18	6.18	7.89	9.95	8.96	10.45	9.17	4.05	34.83	11.57	8.46	7.46	7.46	4.48
IM&T Projects		7.69	10.00	18.33	15.28	8.33				66.67					
Homecare Drugs		20.00	16.67	16.67	16.67	16.67		16.67	16.67	58.33		16.67	22.22		
Outpatients	8.70	6.52	15.65	7.83	13.04	12.32	7.25	6.52	6.52	17.39	4.35	5.22	10.43	8.70	5.43

Percentage of Absent Staff

Description

This analysis enables users to report the number of staff absent (by day) based on a specified threshold.

Prompts:

Show Dates Where Percentage of Staff Due to be Absent >=

Data Items

Title	Description
Organisation	
Date	
Assignment Count	
# Absence Occurrences	
% Assignments Absent	Absence Occurrences / Assignment Count Distinct *100

Example Screenshot

NHS Percentage of Absent Staff

Show Dates Where Percentage of Staff Due to be Absent >= 40.0

Apply Reset

Group by and OK

Month Name July Week of Year 27

Organisation	Date	Assignment Count	# Absence Occurrences	Percentage of Assignments Absent
Research & Development Admin	01/07/2021	2	1	50.00%
National Programme Support	02/07/2021	2	1	50.00%

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Benchmarking

Description

This tab returns Absence FTE % benchmarking figures at Trust, Region, Country and National levels, which can be compared against figures at Manager / Team level.

Calculations

Benchmarking Absence FTE %:

Benchmarking Absence FTE / Benchmarking Total Available FTE * 100

Non-Benchmarking Absence FTE %:

Absence FTE / Available FTE * 100

Note: The data returned is effective as at the last day of the previous month in line with Benchmarking data refresh cycle. For example if the report is run in April, the data returned is for between January and March.

Prompts

Absence Type

Absence Category
Absence Reason
Staff Group
Area of Work
Job Role
Occupation Code (Initial)
Employee Person Type
Assignment Category
Assignment Status
Organisation Type
Month Between

Column Selectors (Detail Views only)

Staff Group
Job Role
Area of Work
Employee Category
Assignment Category

Summary

Description

This analysis provides a summary view of Absence FTE % benchmarking figures at Trust, Region, Country and National levels, which can be compared against figures at Manager / Team level.

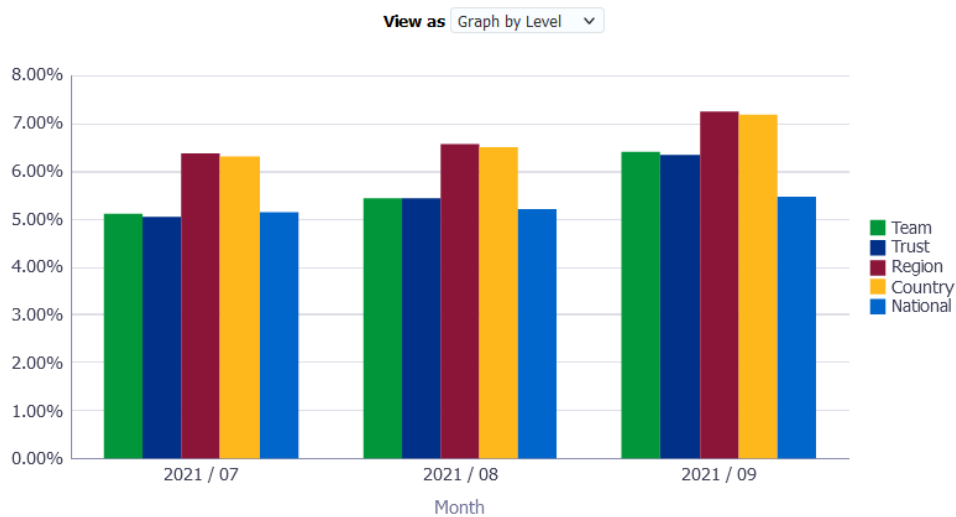
Data Items

Title	Description
Month	
Team	Absence FTE % at Manager / Team level (Supervisor hierarchy apply)
Trust	Absence FTE % at Trust level
Region	Absence FTE % at Region level
Country	Absence FTE % at Country level
National	Absence FTE % at National level

View Selectors

View as Graph by Level, Graph by Month or Table (Default Graph by Level)

Example Screenshot



Benchmarking Detail

Description

This analysis provides a detail view of Absence FTE % benchmarking figures at Trust, Region, Country and National levels, which can be compared against figures at Manager / Team level using the Non-Benchmarking Detail analysis available within the page.

Data Items

Title	Description
Month	
Trust	Absence FTE % at Trust level
Region	Absence FTE % at Region level
Country	Absence FTE % at Country level
National	Absence FTE % at National level

Example Screenshot

Group by

	2021 / 07				2021 / 08				2021 / 09			
	Trust	Region	Country	National	Trust	Region	Country	National	Trust	Region	Country	National
Add Prof Scientific and Technic	6.63%	4.01%	3.97%	3.90%	9.14%	4.03%	4.00%	3.98%	6.91%	4.44%	4.40%	4.15%
Additional Clinical Services	6.66%	9.57%	9.57%	7.91%	9.41%	10.04%	10.04%	8.11%	10.89%	11.05%	11.05%	8.41%
Administrative and Clerical	5.33%	4.61%	4.47%	4.06%	5.47%	4.57%	4.45%	4.08%	6.59%	5.04%	4.88%	4.31%
Allied Health Professionals	2.43%	5.21%	5.21%	4.21%	1.83%	5.28%	5.28%	4.37%	4.43%	6.20%	6.20%	4.68%
Estates and Ancillary	9.83%	9.25%	9.25%	7.49%	11.88%	9.63%	9.63%	7.51%	9.29%	10.30%	10.30%	7.82%
Healthcare Scientists	1.91%	3.43%	3.43%	3.18%	1.65%	3.72%	3.72%	3.22%	2.38%	4.12%	4.12%	3.40%
Medical and Dental	0.98%	1.49%	1.48%	1.57%	0.96%	1.49%	1.49%	1.47%	1.73%	1.70%	1.69%	1.64%
Nursing and Midwifery Registered	7.11%	6.77%	6.77%	5.56%	5.32%	6.99%	6.99%	5.70%	5.99%	7.86%	7.86%	6.02%
Students	0.00%	1.79%	1.79%	2.79%	0.00%	1.72%	1.72%	2.61%	0.00%	1.31%	1.31%	2.67%

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Non-Benchmarking Detail

Description

This analysis provides a detail view of Absence FTE % benchmarking figures at Manager / Team level, which can be compared against figures at Trust, Region, Country and National levels using the Benchmarking Detail analysis available within the page.

Data Items

Title	Description
Month	
Team	Absence FTE % at Manager / Team level (Supervisor hierarchy apply)

Example Screenshot

Group by

	2021 / 07	2021 / 08	2021 / 09
	Team	Team	Team
Add Prof Scientific and Technic	6.63%	9.14%	6.91%
Additional Clinical Services	6.66%	9.45%	11.01%
Administrative and Clerical	5.33%	5.47%	6.58%
Allied Health Professionals	2.43%	1.83%	4.43%
Estates and Ancillary	9.83%	11.88%	9.54%
Healthcare Scientists	1.91%	1.65%	2.38%
Medical and Dental	1.56%	1.03%	1.73%
Nursing and Midwifery Registered	7.11%	5.32%	6.17%
Students	0.00%	0.00%	0.00%

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Absence Set Up

Description

This tab returns a number of analyses which can be used to assess how absence has been set up at both employee / assignment level in ESR.

Prompts

Organisation(s)

Staff Group(s)

Assignment Category

Person Type(s)

Employee Person Type(s)

Assignment Status

Very Senior Manager Roles

OSP Scheme Effective Date

OSP Scheme is not NHS OSP BANK NIL SCHEME

Description

This analysis return bank employees who are not set up on a suggested or recommended OSP scheme.

Data Items

Employee Name	Bank Post Held
Employee Number	NHS OSP Scheme

Example Screenshot

OSP Scheme is not NHS OSP BANK NIL SCHEME

Employee Name	Employee Number	Bank Post Held	NHS OSP Scheme ▲ ▼
Blogs, Mr. Joe	12345678	Bank Only	NHS OSP SCHEME
Blogs, Mr. Joe	12345678	Bank Only	NHS OSP SCHEME
Blogs, Mr. Joe	12345678	Bank Only	NHS OSP SCHEME
Blogs, Mr. Joe	12345678	Bank Only	NHS OSP SCHEME
Blogs, Mr. Joe	12345678	Bank Only	NHS OSP SCHEME
Blogs, Mr. Joe	12345678	Bank Only	NHS OSP SCHEME
Blogs, Mr. Joe	12345678	Bank Only	NHS OSP SCHEME

Filters:

Bank Post Held is equal to / is in Bank Only

Assignment Category is equal to / is in Bank

NHS OSP Scheme is not equal to / is not in NHS OSP BANK NIL SCHEME

Date is equal to / is in Effective Date (Default: Current Date)

Accrual Plan Analyses

Description

This section returns a number of analyses which identify employees who are not set up on a suggested or recommended annual leave Accrual Plan as per the NHS User Manual [here](#).

Prompts

Accrual Plan Effective Date

Exclude Local Accrual Plans (Yes: Optional)

Note: A detailed example is provided below based on the Very Senior Managers analysis and the rest of the analyses are included with minimal detail as they are all similar.

VSM Accrual Plan is not Accrual n NHS

Description

This analysis returns Very Senior Manager employees who are not set up on a suggested or recommended annual leave Accrual Plan.

Data Items

Employee Name	Role
Employee Number	Accrual Plan Name
Assignment Number	

Example Screenshot

VSM Accrual Plan is not Accrual n NHS

Employee Name	Employee Number	Assignment Number	Role	Accrual Plan Name
Blogs, Mr. Joe	12345678	12345678	Board Level Director	Annual Leave Hours 1 NHS
Blogs, Mr. Joe	12345678	12345678	Board Level Director	Annual Leave Hours 1 NHS
Blogs, Mr. Joe	12345678	12345678	Board Level Director	Annual Leave Hours 1 NHS
Blogs, Mr. Joe	12345678	12345678	Board Level Director	Annual Leave Hours 1 NHS
Blogs, Mr. Joe	12345678	12345678	Board Level Director	Annual Leave Hours 1 NHS
Blogs, Mr. Joe	12345678	12345678	Chief Executive	Annual Leave Hours 1 NHS
Blogs, Mr. Joe	12345678	12345678	Director of Nursing	Annual Leave Hours 1 NHS
Blogs, Mr. Joe	12345678	12345678	Finance Director	Annual Leave Hours 1 NHS
Blogs, Mr. Joe	12345678	12345678	Other Executive Director	Annual Leave Hours 1 NHS

Filters:

Date is equal to / is in Effective Date (Default: Current Date)

Job Role is equal to / is in Chief Executive;Finance Director;Other Executive Director;Board Level Director;Clinical Director - Medical;Medical Director;Director of Nursing;Director of Public Health;Chief Operating Officer;Chief People Officer;Chief Information Officer;Estates and Facilities Director;Deputy Chief Executive;Chief Strategy Officer;Chief Sustainability Officer;Improvement Director

Accrual Plan Name is not equal to / is not in Annual Leave Accrual 1 NHS;Annual Leave Accrual 2 NHS;Annual Leave Accrual 3 NHS;Annual Leave Accrual 4 NHS;Annual Leave Accrual 5 NHS

M&D Accrual Plan is not Accrual n NHS

Data Items

Employee Name	Assignment Number
Employee Number	Accrual Plan Name

Screenshot

Please see **Note** within Accrual Plan Analyses tab.

Filters

Date is equal to / is in Effective Date (Default: Current Date)

Staff Group is equal to / is in Medical and Dental

Accrual Plan Name is not equal to / is not in Annual Leave Accrual 1 NHS;Annual Leave Accrual 2 NHS;Annual Leave Accrual 3 NHS;Annual Leave Accrual 4 NHS;Annual Leave Accrual 5 NHS

AfC Accrual Plan is not Annual Leave Hours n NHS

Data Items

Employee Name	Assignment Number
Employee Number	Accrual Plan Name

Screenshot

Please see **Note** within Accrual Plan Analyses tab.

Filters

Date is equal to / is in Effective Date (Default: Current Date)

Assignment Number is equal to Assignment Numbers returned in sub-analysis returning AFC employees on non-Annual Leave Hours n NHS accrual plan

Bank Accrual Plan is not Bank AL Hours n NHS

Data Items

Employee Name	Assignment Category
Employee Number	Accrual Plan Name
Assignment Number	

Screenshot

Please see **Note** within Accrual Plan Analyses tab.

Filters

Date is equal to / is in Effective Date (Default: Current Date)

Assignment Category is equal to / is in Bank
Accrual Plan Name is not equal to / is not in Bank Annual Leave Hours 1 NHS;Bank Annual Leave Hours 2 NHS;Bank Annual Leave Hours 3 NHS;Bank Annual Leave Hours 4 NHS;Bank Annual Leave Hours 5 NHS

Assignments without Annual Leave Accrual Plan

Prompts

Effective Date

Initial Assignment Start Date >=

Data Items

Employee Name	
Employee Number	Accrual Start Date
Assignment Number	

Screenshot

Please see **Note** within Accrual Plan Analyses tab.

Filters

Date is equal to / is in Effective Date (Default: Current Date)

Assignment Number is not equal to Assignment Numbers returned in sub-analysis returning employees with Accrual Plan

Initial Assignment Start Date is greater than or equal to (Default: first day of previous month)