

NHS ESR ELECTRONIC STAFF RECORD

ESR-NHS0221 - GUIDE TO ESRBI CARE CERTIFICATE DASHBOARD

Information Classification: PUBLIC

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DOCUMENT CONTROL

CHANGE RECORD

Date	Author	Version	Change Reference
09/05/2016	Matt Madya	1.0	Initial Release
16/08/2016	Matt Madya	2.0	Updated following new ESRBI developments
02/12/2019	Matt Madya	3.0	Updated following new ESRBI developments
04/02/2020	Matt Madya	4.0	Updated following new ESRBI developments
22/03/2021	Matt Madya	5.0	Annual Review
01/04/2022	Matt Madya	6.0	Annual Review
27/10/2023	Matt Madya	7.0	Annual Review
01/03/2025	Matt Madya	8.0	Annual Review

REVIEWERS

Name	Position
Charlotte Barnett	Assistant Development Advisor - BI
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DISTRIBUTION

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CONTENTS

DOCUMENT CONTROL	2
CHANGE RECORD	2
REVIEWERS	2
DISTRIBUTION	2
CONTENTS	3
Design Assumptions.....	4
Examples	4
Care Certificate Dashboard.....	5
Summary Tab	5
Care Certificate Summary	7
By Person Tab.....	7
Care Certificate by Person	9
Detail Tab	9
Care Certificate Detail	10

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.

Care Certificate Dashboard

Description

This dashboard is designed to provide information based on the Care Certificate Framework and associated Competencies (although other frameworks can be selected). It provides Summary and Detail figures based on the number of assignments to begin (have at least one competency associated with the framework) certificate achievement and the number of assignments that have completed the certificate (achieve all competencies associated with the framework). Users can choose whether to base the analysis results on Position Competency Requirements or not (assignments require all competencies when not based on requirements).

This includes the following Dashboard Pages:

- Summary
- By Person
- Detail

Allocation

This dashboard is available to the following URPs:

XXX BI Administration
XXX HR Administration
XXX HR Administration (With RA)
XXX HR Management
XXX Career Management
XXX Learning Administration

Prompts

Organisation
Staff Group
Assignment Category
Person Type
Employee Person Type
Assignment Status
Occupation Code
Job Role
Primary Assignments Only
Assignment Number
Exclude Open-Ended Absence – Start Date <=
Hire Date >=
Effective Date

Summary Tab

Prompts

Framework (default: CCF)
Competencies (default: none)

Days From Hire Date to Achieve Competency

Include Competency Requirements (Yes/No)

Amber From (default: 60)

Green From (default: 80)

Care Certificate Summary

Description

This analysis details the number of assignments that have completed all of the competencies they require (Asgs Completed) and those that have **achieved at least one** of the competencies they require (Asgs Started) grouped by staff group and/or any organisation level.

Data Items

Organisation Level (1-13)	Assignment Count
Assignments Started	Assignments Completed
Assignments Completed %	

View Selectors

Graph (default)

Table

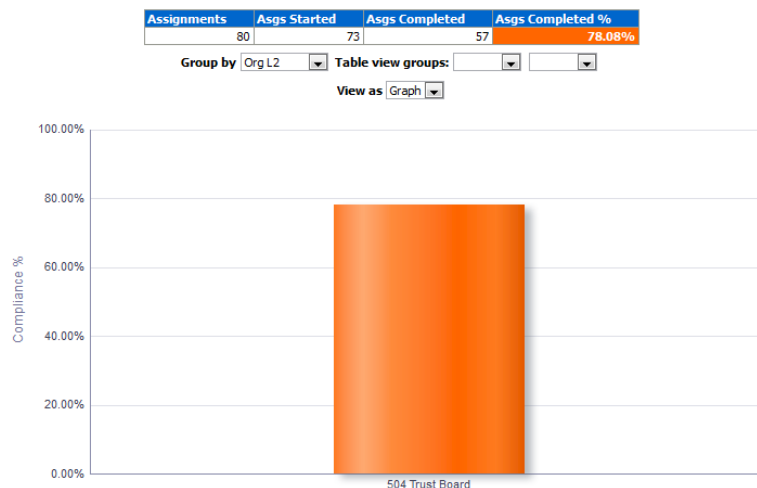
Column Selectors

Group by (Org Level 1-13, Staff Group)

Table Groupings (Org Levels 1-13)

Example Screenshot

Framework: CSTF Competencies: NHS|CSTF|Fire Safety Days from Hire Date to achieve competency: Include Competency Requirements? ☐ Yes ☒ No
Amber From: 60.0 Green From: 80.0
Apply Reset



By Person Tab

Prompts

Framework (default: CCF)

Competencies (default: none)

Days From Hire Date to Achieve Competency

Include Competency Requirements (Yes/No)

Amber From (default: 60)

Green From (default: 80)

Care Certificate by Person

Description

This analysis shows the number of competencies each person has achieved against those they require grouped by assignment/person.

Data Items

Organisation Level (1-13)	Assignment Number
Employee	Position Title
Hire Date	Required
Achieved	Completed %

View Selectors

None

Column Selectors

Org Level 1-13 (X4)

Example Screenshot

Framework Competencies Days from Hire Date to achieve competency Include Competency Requirements? ☐ Yes ☒ No

Amber From Green From

Group by

Org L2	Assignment Number	Employee	Position Title	Hire Date	Required	Achieved	Completed %
504 Trust Board	20101323	Bradley01, Mr. Derek	Speciality Registrar Core Training	01/04/2014	2	2	100.00%
504 Trust Board	20101324	Bradley02, Mr. Derek	Speciality Registrar Core Training	01/05/2014	2	2	100.00%
504 Trust Board	20101325	Bradley03, Mr. Derek	Speciality Registrar	01/06/2014	2	2	100.00%
504 Trust Board	20101326	Bradley04, Mr. Derek	Speciality Registrar	01/07/2014	2	2	100.00%
504 Trust Board	20101327	Bradley05, Mr. Derek	Speciality Registrar	01/08/2014	2	2	100.00%
504 Trust Board	20101329	Bradley07, Mr. Derek	Speciality Registrar	01/01/2014	2	2	100.00%
504 Trust Board	20101330	Bradley08, Mr. Derek	Speciality Registrar	01/02/2014	2	1	50.00%
504 Trust Board	20101331	Bradley09, Mr. Derek	Speciality Registrar	01/03/2014	2	0	0.00%
504 Trust Board	20101332	Bradley10, Mr. Derek	Speciality Registrar	01/04/2014	2	1	50.00%
504 Trust Board	20101333	Bradley11, Mr. Derek	Speciality Registrar	01/05/2014	2	2	100.00%
504 Trust Board	20101334	Bradley12, Mr. Derek	Speciality Registrar	01/06/2014	2	2	100.00%
504 Trust Board	20101335	Bradley13, Mr. Derek	Speciality Registrar	01/07/2014	2	2	100.00%
504 Trust Board	20101336	Bradley14, Mr. Derek	Speciality Registrar	01/08/2014	2	2	100.00%
504 Trust Board	20101338	Bradley16, Mr. Derek	Speciality Registrar	01/01/2014	2	2	100.00%
504 Trust Board	20101339	Bradley17, Mr. Derek	Speciality Registrar	01/02/2014	2	2	100.00%
504 Trust Board	20101340	Bradley18, Mr. Derek	Speciality Registrar	01/03/2014	2	1	50.00%

Detail Tab

Prompts

Framework (default: CCF)

Competencies (default: none)

Days From Hire Date to Achieve Competency

Include Competency Requirements (Yes/No)

Amber From (default: 60)

Green From (default: 80)

Care Certificate Detail

Description

This analysis details the competencies that each person requires and indicates whether they have achieved them or not. This analysis is normally run for a single assignment.

Data Items

Employee Number	Assignment Number
Employee Name	Organisation Level (1-13)
Competency	Level Required
Competency Match	Date Last Awarded
Expiry Date	Level Achieved
Future Enrolment Date	Req. Inherited From
Awarded By	Title

View Selectors

None

Column Selectors

Org Level 1-13 (X4)

Example Screenshot

Framework: CSTF Competencies: NHS (CSTF) Fire Safety Days from Hire Date to achieve competency: Include Competency Requirements? ☐ Yes ☒ No

Amber From 60.0 Green From 80.0

Apply Reset

Group by Organisation and and

Employee	Assignment	Employee Name	Organisation	Competency	Level Required	Competency Match	Date Last Awarded	Expiry Date	Level Achieved	Future Enrolment Date	Req. Inherited From	Awarded By	Title
20101323	20101323	Bradley01, Mr. Derek	504 Anaesthetics	NHS (CSTF) Fire Safety - 1 Year		Match		31/03/2015	1 - Assessed			USR	
20101323	20101323	Bradley01, Mr. Derek	504 Anaesthetics	NHS (CSTF) Information Governance - 1 Year		Match		31/12/2014	1 - Assessed			USR	
20101324	20101324	Bradley02, Mr. Derek	504 Anaesthetics	NHS (CSTF) Fire Safety - 1 Year		Match		28/02/2015	0 - Not Assessed			USR	
20101324	20101324	Bradley02, Mr. Derek	504 Anaesthetics	NHS (CSTF) Information Governance - 1 Year		Match		31/03/2015	1 - Assessed			USR	
20101325	20101325	Bradley03, Mr. Derek	504 Anaesthetics	NHS (CSTF) Fire Safety - 1 Year		Match		31/03/2015	1 - Assessed			USR	
20101325	20101325	Bradley03, Mr. Derek	504 Anaesthetics	NHS (CSTF) Information Governance - 1 Year		Match		28/02/2015	1 - Assessed			USR	
20101326	20101326	Bradley04, Mr. Derek	504 Anaesthetics	NHS (CSTF) Fire Safety - 1 Year		Match		30/04/2015	1 - Assessed			USR	
20101326	20101326	Bradley04, Mr. Derek	504 Anaesthetics	NHS (CSTF) Information Governance - 1 Year		Match		31/03/2015	1 - Assessed			USR	