

# NHS ESR ELECTRONIC STAFF RECORD

## ESR-NHS0221 - GUIDE TO ESRBI CARE CERTIFICATE DASHBOARD

Information Classification: PUBLIC

Owner:	Development and Operations Team
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Approvals:

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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

## REVIEWERS

Name	Position
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## DISTRIBUTION

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1	Library Master	Project Library
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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.

## 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)

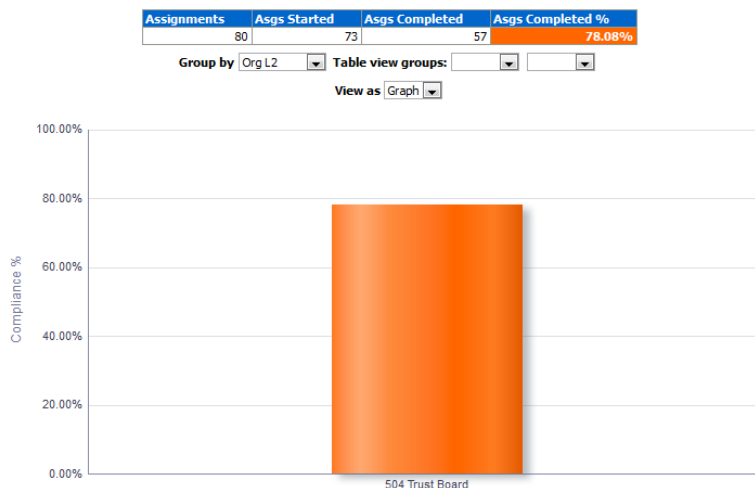
Table Groupings (Org Levels 1-13)

### Example Screenshot

Framework: CSTF | Competencies: NHS|CSTF|Fire Safet | 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 ICSTF [Fire Safety - 1 Year]   Days from Hire Date to achieve competency:   Include Competency Requirements?  Yes  No

Amber From: 60.0   Green From: 80.0  

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 ICSTF [Fire Safety - 1 Year]		Match		31/03/2015	1 - Assessed			USR	
20101323	20101323	Bradley01, Mr. Derek	504 Anaesthetics	NHS ICSTF [Information Governance - 1 Year]		Match		31/12/2014	1 - Assessed			USR	
20101324	20101324	Bradley02, Mr. Derek	504 Anaesthetics	NHS ICSTF [Fire Safety - 1 Year]		Match		28/02/2015	0 - Not Assessed			USR	
20101324	20101324	Bradley02, Mr. Derek	504 Anaesthetics	NHS ICSTF [Information Governance - 1 Year]		Match		31/03/2015	1 - Assessed			USR	
20101325	20101325	Bradley03, Mr. Derek	504 Anaesthetics	NHS ICSTF [Fire Safety - 1 Year]		Match		31/03/2015	1 - Assessed			USR	
20101325	20101325	Bradley03, Mr. Derek	504 Anaesthetics	NHS ICSTF [Information Governance - 1 Year]		Match		28/02/2015	1 - Assessed			USR	
20101326	20101326	Bradley04, Mr. Derek	504 Anaesthetics	NHS ICSTF [Fire Safety - 1 Year]		Match		30/04/2015	1 - Assessed			USR	
20101326	20101326	Bradley04, Mr. Derek	504 Anaesthetics	NHS ICSTF [Information Governance - 1 Year]		Match		31/03/2015	1 - Assessed			USR	