

NHS ELECTRONIC STAFF RECORD

ESR-NHS0226 - GUIDE TO ESRBI EMPLOYMENT CHECKLIST DASHBOARD

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DOCUMENT CONTROL

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DISTRIBUTION

Copy No.	Name	Location
1	Library Master	Project Library
2		

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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.

Employment Checklist Dashboard

Description

This dashboard is designed to provide information based on the Employment Checklist data held by ESR. It replicates the Employment Checklist Workbook available through Discoverer reporting and returns data for employees and applicants.

This includes the following Dashboard Pages:

- DBS
- Professional Registrations, Qualifications and Illegal Working Checklist
- Medical

Allocation

This dashboard is available to the following URPs:

XXX BI Administration

XXX HR Administration

XXX HR Administration (With RA)

XXX HR Management

XXX Recruitment & Applicant Enrolment Administration

XXX Recruitment & Applicant Enrolment Administration (with RA)

Prompts

Staff Group

Occupation Code

Pay Grade

Job Role

Person type

Employee person type

Assignment category

Assignment status

Organisation

Effective Date

DBS Tab

Prompts

Restrict to Latest DBS Record Only (default: Yes)

Employee Latest Start Date (Employees Only)

* Source Document (Employees Only)

Applicant Status Start Date (Applicants Only)

Status (default: Offer Accepted) (Applicants Only)

DBS Employees/Applicants

Description

These analyses are designed to show a detail view of the DBS information entered into ESR for both Applicants and Employees.

View Selectors

View Type (Summary or Detail)

Data Items

Employee/Applicant Number	Last Name
First Name	Org Level 1-13
Organisation	Cost Centre
Position Required DBS Disclosure Type	Staff Group
Compliant?	Type of DBS Disclosure
DBS Website Check Date	DBS Disclosure Issue Date
DBS Check Outcome	DBS Unique Number
Created Date	DBS Website Match
Pay Scale (Emp Only)	Permission to Check DBS Status
Job Role	Created By
Position Number	Staff Group
Position Title	Date DBS Form Sent to Person
Occupation Code	FTE
Area of Work	DBS Administrator 1
DBS Form Ref Number	CoGS Received From
DBS Requested By	ID Documents Verified
Date DBS Form Returned	DBS Administrator 2
DBS Form Correct	Date DBS/CoGS Received
Date DBS/CoGS Requested	Fast Track POCA Requested
Children's Barred List Check Required	Adults Barred List Check Required
Fast Track POCA Received	Adults First Received
Adults First Requested	Address Line 1
Assignment Status (Emp Only)	Address Line 2
Assignment End Date (Emp Only)	Address Line 3
Employee Latest Start Date (Emp Only)	City
Assignment Start Date (Emp Only)	Region
Assignment Number	Post Code
Assignment Category	Mobile Phone
Bank Post Held	Email

Example Screenshot

Staff Group(s) [Add Prof Scientific an](#) Occupation Code(s) (All Column Values) Pay Grade(s) (All Column Values) Job Role(s) (All Column Values) Effective Date: 19/08/2015 12:01:00 [Apply](#) [Reset](#)

* Restrict to Latest DBS Record Only ☒ [Apply](#) [Reset](#)

Employees

Employee Latest Start Date: >= 01/07/2015 12:00:00 [Apply](#) [Reset](#)

Organisation Level [Org L1](#)

View type: [Summary](#)

Employee	Last Name	First Name	Position Name	Org L1	Organisation	Staff Group	Position Required DBS Disclosure Type	Type of DBS Disclosure	Compliant?	DBS Disclosure Issue Date	DBS Website Check Date	DBS Unique Number	DBS Check Outcome	DBS Website Match	Created Date
20101413	Beardmore	Nigel	84351[Staff Nurse Band 5][N6A][Medicine]	504 ESR Hospitals NHS Trust	504 Ward 2	Nursing and Midwifery Registered	None		Match						
20101412	Love	Tim	84351[Staff Nurse Band 5][N6A][Medicine]	504 ESR Hospitals NHS Trust	504 Ward 2	Nursing and Midwifery Registered	None		Match						

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

Prof Reg, Qual, Illegal Working Tab

Prompts

* Restrict to Latest Employment Checklist Record Only (Employees Only - Default: Yes)

Employee Latest Start Date (Employees only)

* Source Document (Employees only)

Applicant Status Start Date (Applicants only)

Status (Applicants only)

Prof Reg, Qual, Illegal Working Employees/Applicants

Description

These analyses are designed to show a detail view of the Professional Registration, Qualifications and Illegal Working Checklist information entered into ESR for both Applicants and Employees.

Data Items

Employee/Applicant Number	Org Level 1-13
Employee Latest Start Date (Emp Only)	Date of Prof Reg Check – Recruitment
Status Start Date (App Only)	Date of Qualifications Check
Organisation Name	Address Line 1
Date of Prof Reg Check – Hire	Address Line 2
Date of Illegal Working Doc Check	Address Line 3
Visa Type	City
Visa Reference Number	County
Visa Issue Date	Post Code
Visa Expiry Date	Mobile Phone
Sponsorship Required	Email
Employee/Applicant Name	Occupation Code
Applicant Status (App Only)	Position Title
Position Number	Area of Work
Assignment Number (Emp Only)	Assignment Category (Emp Only)
FTE (Emp Only)	Assignment End Date (Emp Only)
Assignment Start Date (Emp Only)	Nationality (Emp Only)
Assignment Status (Emp Only)	Residency Status
Contract Hours	

Example Screenshot

Staff Group(s) Occupation Code(s) Pay Grade(s) Job Role(s) Effective Date 19/08/2015 12:00

Employees

Employee Latest Start Date >= 01/07/2015 12:00:00

Organisation Level

Employee Number	Employee Name	Employee Latest Start Date	Occupation Code	Position Name	Org L1	Organisation	Date of Prof Reg Check - Recruitment	Date of Prof Reg Check - Hire	Date of Qualifications Check	Date of Illegal Work Doc Check	Address Line 1	Address Line 2	Address Line 3	City	County
20101413	Beardmore, Mr. Nigel	01/07/2015	N6A	84351 Staff Nurse Band 5 N6A Medicine	S04 ESR Hospitals NHS Trust	S04 Ward 2									
20101412	Love, Mr. Tim	01/07/2015	N6A	84351 Staff Nurse Band 5 N6A Medicine	S04 ESR Hospitals NHS Trust	S04 Ward 2									

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

Medical Tab

Prompts

* Restrict to Latest Employment Checklist Record Only (Employees Only - Default: Yes)

Employee Latest Start Date (Employees only)

* Source Document (Employees only)

Applicant Status Start Date (Applicants only)

Status (Applicants only)

Medical Employees/Applicants

Description

This analysis is designed to show a detail view of the Medical information entered into ESR for both Employees and Applicants.

Data Items

Employee/Applicant Number	Employee/Applicant Name
Employee Latest Start Date (Emp Only)	Occupation Code
Org Level 1-13	OH Status
Organisation Name	Date of Medical
EPP Clearance	Address Line 1
Date of Medical Clearance	Address Line 2
Position Number	Address Line 3
Position Title	City
Area of Work	County
FTE (Emp Only)	Postal Code
Assignment Number (Emp Only)	Mobile Phone
Assignment Category (Emp Only)	Email
Application Status (App Only)	Assignment Status (Emp Only)
Assignment Start Date (Emp Only)	Assignment End Date (Emp Only)
OH Review Date	OH Record Date
Assessment Type	

Example Screenshot

Staff Group(s) Occupation Code(s) Pay Grade(s) Job Role(s) Effective Date

Employee Latest Start Date

Organisation Level

Employee Number	Employee Name	Employee Latest Start Date	Occupation Code	Position Name	Org L1	Organisation	OH Status	EPP Clearance	Date of Medical	Date of Medical Clearance	Address Line 1	Address Line 2	Address Line 3	City	County	Postal Code
20101413	Beardmore, Mr. Nigel	01/07/2015	N6A	84351[Staff Nurse Band 5][N6A/Medicine]	504 ESR Hospitals NHS Trust	504 Ward 2										
20101412	Love, Mr. Tim	01/07/2015	N6A	84351[Staff Nurse Band 5][N6A/Medicine]	504 ESR Hospitals NHS Trust	504 Ward 2										

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EU Status Tab

Prompts

Employee Latest Start Date (Employees only)

Applicant Status Start Date (Applicants only)

Status (Applicants only)

Number of Days to Expiry Date

Restrict to EU, EEA and Swiss Nationals (excl. Irish)

Employees/Applicants Approaching Expiry

Description

These analyses are designed to show details of EU settlement scheme status approaching expiry for both Employees and Applicants.

Data Items

Employees/Applicant Name	Pre-Settled Status Expiry Date
Employees/Applicant Number	Granted EU Temp Leave To Remain
EU Settlement Scheme Status	EU Leave To Remain Expiry Date

Example Screenshot

Employees Approaching Expiry

Employee Name	Employee Number	EU Settlement Scheme Status	Pre-Settled Status Expiry Date	Granted EU Temp Leave To Remain	EU Leave To Remain Expiry Date
Blogs, Mr. Joe	12345678	Pre-Settled	07/07/2020		

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

Employees/Applicants Without Verification

Description

These analyses are designed to show details of EU settlement scheme status verification for both Employees and Applicants.

Data Items

Employees/Applicant Name	EU Settlement Scheme Status
Employees/Applicant Number	Settlement Status Verified date

Example Screenshot

Employees Without Verification

Employee Name	Employee Number	EU Settlement Scheme Status	Settlement Status Verified Date
Blogs, Mr. Joe	12345678	Settled	
Blogs, Mrs. Jo	23456789	Pre-Settled	

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

Detail

Description

These analyses are designed to show full EU Status details held in ESR for both Employees and Applicants.

Data Items

Employee Number / Applicant Number	Nationality
Employee / Applicant Name	EU, EEA or Swiss National
Assignment Number (Employees only)	EU Settlement Scheme Status
Employee Latest Start Date (Employees only)	Pre-Settled Status Expiry Date
Position Number	Settlement Status Verified Date
Position Title	Granted EU Temp Leave To Remain
Occupation Code	EU Leave To Remain Expiry Date
Area Of Work	Date Settlement Status Issued
Main Staff Group	Created By
Organisation	Created Date
Organisation Level 1-13	Last Updated By
Cost Centre	Last Updated Date

Column Selectors

Organisation Level 1-13 x 4

Example Screenshot

Nationality	EU, EEA or Swiss National	EU Settlement Scheme Status	Pre-Settled Status Expiry Date	Settlement Status Verified Date	Granted EU Temp Leave To Remain	EU Leave To Remain Expiry Date
Libyan	No					
British	No					
Syrian	No					
British	No					
Portuguese	Yes	Pre-Settled	31/12/2030	01/01/2021		
British	No					
Portuguese	Yes	Pre-Settled	31/12/2030	01/01/2021		
British	No					
British	No					
British	No					

Checklist Summary Tab

Description

This page of the dashboard is designed to show details of the Employment Checklist (Employees and Applicants) including dates and statuses of References, Right to Work checks and Disclosure and Barring Service (DBS).

Prompts

* Restrict to Latest Employment Checklist Record Only (Employees Only - Default: Yes)

Employee Latest Start Date (Employees Only)

* Source Document (Employees only)

Applicant Status Start Date (Applicants only)

Status (Applicants Only - Default: Offer Accepted)

Column Selectors

Organisation Level 1-13 x 4

Data Items

Employee Number / Applicant Number	Assignment Number
Employee / Applicant Name	NI Number
Vacancy Number (Applicants Only)	Position Name
Latest Start Date	Organisation
Occupation Code	Staff Group
Job Role	ID Checked Date on Recruitment
Type of DBS Disclosure	References Checked Date
ID Checked Date on Hire	Employment History Checked Date
Date of Qualifications Check	Date DBS Form Sent to Person
Date of Medical Clearance	DBS Disclosure Issue Date
Date Right to Work Checked	DBS Administrator 1
DBS Form Ref Number	CoGS Received From
DBS Requested By	ID Documents Verified
Date DBS Form Returned	DBS Administrator 2
DBS Form Correct	Date DBS/CoGS Received
Date DBS/CoGS Requested	Date of Prof Reg Check - Rec
Registration Membership Body	DBS Disclosure Issue Date
Date of Prof Reg Check - Hire	DBS Website Match
Permission to Check DBS Status	DBS Website Check Date
Pre-employment Checks Complete	Equality and Diversity Information Updated/Verified
Personal Information Updated/Verified	Organisation Level 1-13
IAT Consent	Bank Account Details Reviewed
Latest IAT Consent Update	Date of Birth Verified

Example Screenshot

Staff Group(s) Add Prof Scientific ar Occupation Code(s) (All Column Values) Pay Grade(s) (All Column Values) Job Role(s) (All Column Values) Effective Date 12/02/2016 12:00:00

Employee Latest Start Date >= 01/01/2016 12:00:00

Job Role	Staff Group	ID Checked Date on Recruitment	ID Checked Date on Hire	Date Right To Work Checked	References Checked Date	Date of Qualifications Check	Employment History Checked Date	Date of Medical Clearance	Type of DBS Disclosure	Date DBS Form Sent to Person	DBS Form Ref No	DBS Administrator 1	DBS Requested by	CoGS Received From
Manager	Administrative and Clerical	16/12/2015		16/12/2015	01/01/2015	01/01/2015	01/01/2015	18/12/2015	Enhanced		011XXXXX1234567		ESR NHS Trust	
Manager	Administrative and Clerical	16/12/2015			01/01/2015	01/01/2015	01/01/2015	30/07/2010	Enhanced		011XXXXX1234567		ESR NHS Trust	
Specialty Registrar	Medical and Dental				01/01/2015	01/01/2015	01/01/2015		Enhanced		011XXXXX1234567		ESR NHS Trust	
Specialty Registrar	Medical and Dental				01/01/2015	01/01/2015	01/01/2015		Enhanced		011XXXXX1234567		ESR NHS Trust	
Specialty Registrar	Medical and Dental				01/01/2015	01/01/2015	01/01/2015		Enhanced		011XXXXX1234567		ESR NHS Trust	
Officer	Administrative and Clerical				01/01/2015	01/01/2015	01/01/2015	09/12/2015			011XXXXX1234567		ESR NHS Trust	
Specialty Registrar	Medical and Dental				01/01/2015	01/01/2015	01/01/2015				011XXXXX1234567		ESR NHS Trust	
Specialty Registrar	Medical and Dental				01/01/2015	01/01/2015	01/01/2015		Enhanced		011XXXXX1234567		ESR NHS Trust	
Specialty Registrar	Medical and Dental				01/01/2015	01/01/2015	01/01/2015		Enhanced		011XXXXX1234567		ESR NHS Trust	
Specialty Registrar	Medical and Dental				01/01/2015	01/01/2015	01/01/2015		Enhanced		011XXXXX1234567		ESR NHS Trust	
Specialty Registrar	Medical and Dental				01/01/2015	01/01/2015	01/01/2015				011XXXXX1234567		ESR NHS Trust	
Officer	Administrative and Clerical	08/12/2015		26/11/2015	01/01/2015	01/01/2015	01/01/2015	04/12/2015			011XXXXX1234567		ESR NHS Trust	

Checklist Detail Tab

Description

This page of the dashboard provides a detailed report of the Employment Checklist (Employees and Applicants) including Reference details, Visa details, details of Right to Work checks and The Disclosure and Barring Service (DBS).

Prompts

Employee Latest Start Date (Employees Only)

* Source Document (Employees only)

Applicant Status Start Date (Applicants only)

Status (Applicants Only - Default: Offer Accepted)

Column Selectors

Organisation Level 1-13 x 4

Data Items

Vacancy Name (Applicants Only)	Applicant Name (Applicants Only)
Applicant Number (Applicants Only)	ID Checked Date on Hire
Assignment Number	ID Documents on Hire Recorded By
Last Name (Employees Only)	ID Documents Verified
Middle Name (Employees Only)	Date of Qualifications Check
First Name (Employees Only)	Date of Medical Clearance
Title (Employees Only)	Employment History Checked Date
Nationality	References Checked Date
Email Address	Registration Membership Body
Telephone	Professional Registration Num
NI Number	Registration Expiry Date
Latest Start Date	Revalidation Date
Position Name	Date of Prof Reg Check – Rec
Organisation	Date of Prof Reg Check – Hire
Staff Group	Type of DBS Disclosure
Occupation Code	Date DBS Form Sent to Person
Deanery Post Number	Date DBS Form Sent to Person
Person Type	DBS Administrator 1
Residency Status	DBS Disclosure Issue Date
Visa Type	DBS Requested by
Visa Reference Number	CoGS Received From
Visa Issue Date	Date DBS Form Returned
Visa Expiry Date	DBS Form Correct
Job Role	DBS Administrator 2
Limited Leave to Enter Date	Permission to Check DBS Status
Limited Leave to Remain Expiry Date	Date DBS/CoGS Requested
Date Right To Work Checked	Date DBS/CoGS Received
Right to Work Source Document	DBS Unique Number
Right to Work Reference Number	DBS Website Check Date
Right to Work Valid To Date	DBS Website Match
Date Sponsorship Requested	ID Documents on Recruitment Recorded By

Pre-employment Checks Complete	Equality and Diversity Information Updated/Verified
Personal Information Updated/Verified	Endorsed Passport Photo on Recr (No Photographic ID) (Employees Only)
ID Checked Date on Recruitment	Non-Photo ID 1 on Recr (No Photographic ID) (Employees Only)
Endorsed Passport Photo on Hire (No Photographic ID) (Employees Only)	Non-Photo ID 2 on Recr (No Photographic ID) (Employees Only)
Non-Photo ID 1 on Hire (No Photographic ID) (Employees Only)	Address Doc 1 on Recr (No Photographic ID) (Employees Only)
Non-Photo ID 2 on Hire (No Photographic ID) (Employees Only)	Address Doc 2 on Recr (No Photographic ID) (Employees Only)
Address Doc 1 on Hire (No Photographic ID) (Employees Only)	Photo ID 1 on Recr (One Photographic + Two Address) (Employees Only)
Address Doc 2 on Hire (No Photographic ID) (Employees Only)	Address Doc 1 on Recr (One Photographic + Two Address) (Employees Only)
Photo ID 1 on Hire (One Photographic + Two Address) (Employees Only)	Address Doc 2 on Recr (One Photographic + Two Address) (Employees Only)
Address Doc 1 on Hire (One Photographic + Two Address) (Employees Only)	Photo ID 1 on Recr (Two Photographic + One Address) (Employees Only)
Address Doc 2 on Hire (One Photographic + Two Address) (Employees Only)	Photo ID 2 on Recr (Two Photographic + One Address) (Employees Only)
Photo ID 1 on Hire (Two Photographic + One Address) (Employees Only)	Address Doc 1 on Recr (Two Photographic + One Address) (Employees Only)
Photo ID 2 on Hire (Two Photographic + One Address) (Employees Only)	Endorsed Passport Photo on Recr (No Photographic ID) (Employees Only)
Address Doc 1 on Hire (Two Photographic + One Address) (Employees Only)	Organisation Level 1-13
IAT Consent	Bank Account Details Reviewed
Latest IAT Consent Update	Date of Birth Verified
Supervisor Assignment Number (Applicants Only)	Supervisor Name (Applicants Only)

Example Screenshot

Employee Latest Start Date >= 01/05/2016 12:00:01 

Apply Reset

Person Type	Residency Status	Visa Type	Visa Reference Number	Visa Issue Date	Visa Expiry Date	Limited Leave to Enter Date	Limited Leave to Remain Expiry Date	Date Right To Work Checked	Right to Work Source Document	Right to Work Reference Number	Right to Work Valid To Date	Date Sponsorship Requested	ID Checked Date on Recruitment	ID Documents on Recruitment Recorded By	ID Checked Date on Hire	ID Documents on Hire Recorded By	ID Documents Verified
Employee																	
Employee																	
Employee	Permanent							11/05/2016	List A								Route 1
Employee									List A								Route 1
Employee	Permanent							11/05/2016	List A								Route 1
Employee									List A								Route 1
Employee																	
Employee																	
Employee	Permanent							26/04/2016	List A								
Employee									List A								
Employee	Permanent							28/04/2016	List A								Route 1
Employee									List A								Route 1

Fit and Proper Person Checks Tab

Description

This page of the dashboard provides a detailed report of the Fit and Proper person employment checks for Director and Board members.

Prompts

Staff Group(s)
 Occupation Code(s)
 Pay Grade(s)
 Job Role(s)
 Primary Assignment Only
 Person Type
 Employee Person Type
 Assignment Status
 Assignment Category
 Organisation
 Effective Date

Data Items

Assignment Number	Open/Upheld Disciplinary Case
Employee Number	Open/Upheld Grievance Case
Last Name	Social Media Date Checked
First Name	Not Disqualified as a Charitable Trustee
Title	Not Disqualified from Directors Register
NI Number	No Employment Tribunal Judgements Found
Organisation	DBS Requirements
Staff Group	Date of Medical Clearance
Job Role	Not Found on Insolvency Register
Occupation Code	Date Prof Reg Check
Position	Self Attestation

Employment History	Tests Complete/Chair Sign-off
Date of Qualifications Check	FPP Clearance Exceptions
References Check Date	Settlement Agreements
Annual Performance Appraisal Complete	

Example Screenshot

Assignment Number	Employee Number	Last Name	First Name	Title	NI Number	Organisation	Staff Group	Job Role	Occupation Code	Position	Employment History	Date of Qualifications Check
12345678	12345678	Blogs	Joe	Mr.	NH101010B	000 Organisation	Medical and Dental	Medical Director	026	1810 MD 000 Corporate		
12345678	12345678	Blogs	Joe	Mr.	NH101010B	000 Organisation	Medical and Dental	Medical Director	073	1810 MD 000 Corporate		06/02/2023
12345678	12345678	Blogs	Joe	Mr.	NH101010B	000 Organisation	Medical and Dental	Medical Director	073	1810 MD 000 Corporate		
12345678	12345678	Blogs	Joe	Mr.	NH101010B	000 Organisation	Medical and Dental	Medical Director	G0A	1810 MD 000 Corporate		18/12/2017
12345678	12345678	Blogs	Joe	Mr.	NH101010B	000 Organisation	Medical and Dental	Medical Director	G0A	1810 MD 000 Corporate		18/10/2019
12345678	12345678	Blogs	Joe	Mr.	NH101010B	000 Organisation	Medical and Dental	Medical Director	G0A	1810 MD 000 Corporate		
12345678	12345678	Blogs	Joe	Mr.	NH101010B	000 Organisation	Medical and Dental	Medical Director	G0A	1810 MD 000 Corporate		
12345678	12345678	Blogs	Joe	Mr.	NH101010B	000 Organisation	Medical and Dental	Medical Director	G0A	1810 MD 000 Corporate		
12345678	12345678	Blogs	Joe	Mr.	NH101010B	000 Organisation	Medical and Dental	Medical Director	G0A	1810 MD 000 Corporate		
12345678	12345678	Blogs	Joe	Mr.	NH101010B	000 Organisation	Medical and Dental	Medical Director	G0A	1810 MD 000 Corporate		
12345678	12345678	Blogs	Joe	Mr.	NH101010B	000 Organisation	Medical and Dental	Medical Director	G0A	1810 MD 000 Corporate		
12345678	12345678	Blogs	Joe	Mr.	NH101010B	000 Organisation	Medical and Dental	Medical Director	G0A	1810 MD 000 Corporate		
12345678	12345678	Blogs	Joe	Mr.	NH101010B	000 Organisation	Medical and Dental	Medical Director	G0A	1810 MD 000 Corporate		
12345678	12345678	Blogs	Joe	Mr.	NH101010B	000 Organisation	Medical and Dental	Medical Director	G0A	1810 MD 000 Corporate		

Sponsorship Requirements Tab

Description

This page is designed to help organisations report on the various requirements of sponsored employees. The reports are designed to help organisations identify where they may need to take action in line with the government requirements for sponsor duties and compliance:

Absences Greater than X Days

This report returns continuous absences greater than 10 calendar days.

Data Items

Employee Number
Employee Name
Work Permit/Sship Required
Visa Type
Absence Start Date
Absence End Date
Absence Category
Absence Type
Absence Reason
Absence Days

Filters

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

AND Absence Date between first day of previous month and current date

AND Include latest employee record where Work Permit/Sponsorship Required is equal to
Yes

AND Continuous Absence Days difference between Absence Start Date and Absence End Date is
greater than / equal to 10 in the period

Absence Total Greater than 4 Weeks

This report returns employees where the total number of calendar days absent within a calendar year (from 1 January) exceeds 20 days.

Data Items

Employee Number
Employee Name
Work Permit/Sship Required
Visa Type
Absence Start Date
Absence End Date
Absence Category
Absence Type
Absence Reason
Absence Days (Since Absence Start)
Absence Days (Since 1 January)

Filters

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

AND Employee Number is equal to Employee Number returned in sub-analysis returning employees with Absence Days greater than / equal to 20 in the calendar year

AND Include latest employee record where Work Permit/Sponsorship Required is equal to Yes

AND Primary Assignment Flag is equal to / is in Yes

Terminations

This report returns terminating employees in the period.

Data Items

Organisation Name
Employee Name
Employee Number
Assignment Number
Position Name
Assignment Category
Work Permit/Sship Required
Visa Type
Leaving Reason
Actual Termination Date

Filters

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

AND Actual Termination Date between current date and last day of the third month in the future

AND Include latest employee record where Work Permit/Sponsorship Required is equal to Yes

Workforce Movements

This report returns assignment changes in the period.

Data Items

Assignment Number	Pay Scale From
Employee Name	Pay Scale To
Change Reason	Job Role From
Incremental Date	Job Role To
Change Date	Organisation To
FTE From	Organisation From
FTE To	Location From
Position From	Location To
Position To	Visa Type
Staff Group From	Work Permit/Sship Required
Staff Group To	Last Updated By
Grade Step From	Last Updated Date
Grade Step To	
Assignment Status From	
Assignment Status To	

Filters

Date is less than / is equal to Effective Date / Change Date To (Default: Current Date)

AND Date is greater than / is equal to Change Date From (Default: first day of previous month)

AND Assignment Number is equal to Assignment Number returned in sub-analysis returning latest employee record where Work Permit/Sponsorship Required is equal to Yes

Prompts

Organisation(s)

Staff Group(s)

Assignment Category

Assignment Status

Person Type(s)

Employee Person Type(s)

Primary Assignments Only

Occupation Code

Employee Number(s)

Change Reason(s)

Last Updated Date Between

Last Updated By

Change Date From

Change Date To/Effective Date

Visa Type

Actual Termination Date Between

* Absence Type

Absence Category

Absence Reason

Continuous Absence > X Days (Default: 10)
Show Continuous Absences from X Months (Default: 3)
Total Absence Days in Calendar Year >= (Default: 20)

Note: Both authorised and unauthorised unpaid absences are returned by the Absence Type prompt by default however users can amend values in line with reporting requirements.

Example Screenshot

Absence

Note: the below absence analyses report absences and assignment information as at the current date.

Absences Greater Than 10 Days

Employee Number	Employee Name	Work Permit/Schip Required	Visa Type	Absence Start Date	Absence End Date	Absence Category	Absence Type	Absence Reason	Absence Days
12345678	Blogs, Mr. Joe	No	Residence (Indefinite Leave to remain)	01/05/2024	30/04/2025	Special Leave	Unpaid Authorised Special	Career Break	365
12345678	Blogs, Mr. Joe	No		01/04/2024	30/09/2024	Special Leave	Unpaid Authorised Special	Career Break	183
12345678	Blogs, Mr. Joe	No		01/04/2024	31/03/2025	Special Leave	Unpaid Authorised Special	Career Break	365
12345678	Blogs, Mr. Joe		Residence (Indefinite Leave to remain)	01/05/2024	30/04/2025	Special Leave	Unpaid Authorised Special	Career Break	365

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Absence Total Greater Than 4 Weeks

Employee Number	Employee Name	Work Permit/Schip Required	Visa Type	Absence Start Date	Absence End Date	Absence Category	Absence Type	Absence Reason	Absence Days (Since Absence Start)	Absence Days (Since 1 January)
12345678	Blogs, Mr. Joe	No	Residence (Indefinite Leave to remain)	01/05/2024	30/04/2025	Special Leave	Unpaid Authorised Special	Career Break	365	78
12345678	Blogs, Mr. Joe	No		01/04/2024	30/09/2024	Special Leave	Unpaid Authorised Special	Career Break	183	108
12345678	Blogs, Mr. Joe	No		01/04/2024	31/03/2025	Special Leave	Unpaid Authorised Special	Career Break	365	216
12345678	Blogs, Mr. Joe		Residence (Indefinite Leave to remain)	01/05/2024	30/04/2025	Special Leave	Unpaid Authorised Special	Career Break	365	78

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Employees

Upcoming Terminations

Organisation Name	Employee Name	Employee Number	Assignment Number	Position Name	Assignment Category	Work Permit/Schip Required	Visa Type	Leaving Reason	Actual Termination Date
000 NHS Organisation	Blogs, Mr. Joe	12345678	12345678	000000 Business Analyst A2B Analyst	Permanent	No	Other	Voluntary Resignation - Relocation	26/07/2024
000 NHS Organisation	Blogs, Mr. Joe	12345678	12345678	000000 Business Analyst A2B Analyst	Permanent	No		Voluntary Resignation - Relocation	28/07/2024
000 NHS Organisation	Blogs, Mr. Joe	12345678	12345678	000000 Business Analyst A2B Analyst	Permanent	No		Voluntary Resignation - Relocation	04/08/2024
000 NHS Organisation	Blogs, Mr. Joe	12345678	12345678	000000 Business Analyst A2B Analyst	Permanent			Voluntary Resignation - Relocation	04/08/2024

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