NHS ELECTRONIC STAFF RECORD

ESR-NHS0237 - GUIDE TO ESRBI STAFF IN POST DASHBOARD

Information Classification: PUBLIC

Owner:	Development and Operations Team
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Approvals:

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DOCUMENT CONTROL

CHANGE RECORD

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04/02/2020	Matt Madya	17.0	Updated following new ESRBI developments
28/02/2020	Matt Madya	18.0	Updated following new ESRBI developments
24/04/2020	Matt Madya	19.0	Updated following new ESRBI developments
06/07/2020	Matt Madya	20.0	Updated following new ESRBI developments
04/09/2020	Matt Madya	21.0	Updated following new ESRBI developments
12/02/2021	Matt Madya	22.0	Updated following new ESRBI developments
18/06/2021	Matt Madya	23.0	Updated following new ESRBI developments
17/09/2021	Matt Madya	24.0	Updated following new ESRBI developments
30/11/2021	Matt Madya	25.0	Updated following new ESRBI developments
04/02/2022	Matt Madya	26.0	Updated following new ESRBI developments
30/05/2022	Matt Madya	27.0	Updated following new ESRBI developments
19/08/2022	Matt Madya	28.0	Updated following new ESRBI developments
25/10/2022	Matt Madya	29.0	Updated following new ESRBI developments
06/06/2023	Matt Madya	30.0	Updated following new ESRBI developments
25/08/2023	Matt Madya	31.0	Updated following new ESRBI developments
01/02/2024	Matt Madya	32.0	Updated following new ESRBI developments
01/07/2024	Matt Madya	33.0	Updated following new ESRBI developments
12/02/2025	Matt Madya	34.0	Updated following new ESRBI developments
01/09/2025	Matt Madya	35.0	Updated following new ESRBI developments
30/01/2026	Matt Madya	36.0	Updated following new ESRBI developments

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DISTRIBUTION

Copy No.	Name	Location
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.

Staff in Post Dashboard

Description

This dashboard is designed to provide the user with intelligence around the numbers of staff working in the organisation.

Allocation

This dashboard is available to the following URPs:

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 Pensions Administration
XXX Property Management (only Property Register page)
XXX Supervisor Self Service
XXX Supervisor Self Service (Limited Access)

Summary Tab

Prompts

Organisation (Default: None)
Organisation(s)
Staff Group(s) (Multi-select)
Person Type(s) (Multi-select, default: Employee, Employee and Applicant)
Employee Person Type(s) (Multi select)
Assignment Status
Occupation Code
Assignment Category(s) (Multi-select: default: exclude Locum Bank and Honorary)
Primary Assignments Only
Effective Date (Default today)
Organisation Level 1-13
Cost Centre Org Level 1-12
Job Role

For Establishment Section:
Pay Band(s) (Multi-select: default: All AfC)

Staff in Post Summary

Description

This analysis shows the headcount or FTE restricted by the Prompts of the dashboard. The figures included in this analysis are defined in the same way as the 'NHS HR Dashboard – Staff in Post' report available from Discoverer.

Data Items

Title	Description
Staff Group	Staff Group linked to Job in Position
Age Band	Age band of the person records incremented by 5 in each band
Assignment Status	Status from the Assignment Form
Occupation Code	Occupation code associated with the position
Headcount	Number of person records within the dashboard Prompts in each of the above dimensions
Assignment Count	Count of Distinct Assignment Numbers
FTE	Total FTE for each group
Headcount %	Headcount / SUM(Headcount) * 100
Org Level 1-13	

Column Selectors

Group by Staff Group, Age Band, Occupation Code, Pay Grade, Org Level 1-6 or Assignment Status (Default Staff Group)
Measure Headcount, Headcount % or FTE (Default Headcount)

View Selector

View as Column Graph or Table (Default Graph)

Example Screenshot
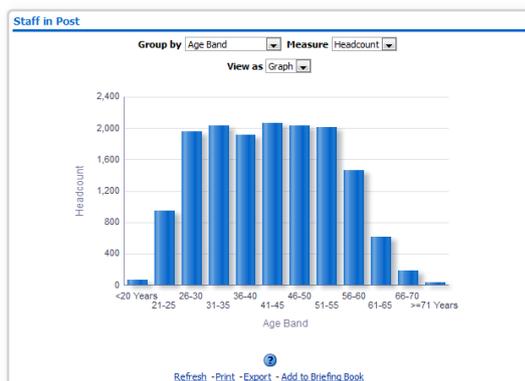
Actions

Click->Staff List Tab (Restricted to region selected)

Pay Band / Gender

Description

This analysis is designed to show Headcount and FTE grouped by Pay Band or Gender.

Data Items

Title	Description
Pay Band	
Gender	
Headcount	Count of employees included in Prompts
FTE	Sum FTE of all employees included in Prompts

View Selectors

View as column graph or table. Default column graph.

Actions

Click->Staff in Post Detail Tab

Example Screenshot
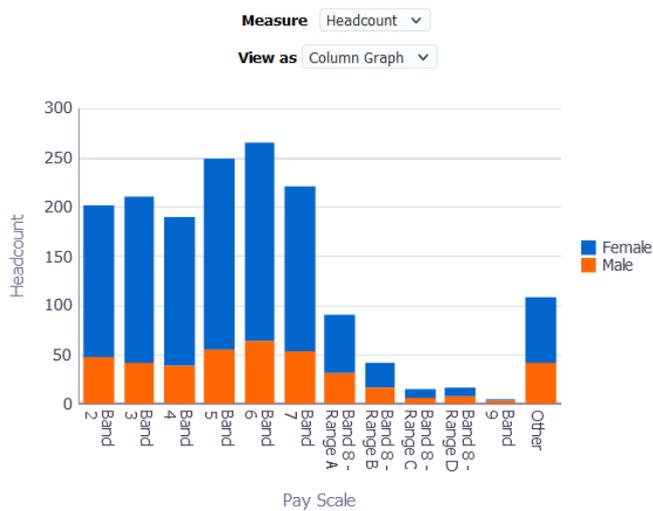
FTE by Assignment Status / Employee Category

Description

This analysis is designed to show the sum of the Full Time Equivalent (FTE) for employees of the organisation, grouped by Employee Category and Assignment Status

Data Items

Title	Description
Employee Category	Full Time / Part Time
Assignment Status	Status of the person's assignment as at the report run date
FTE	Sum of FTE of each person in the above bandings

View Selectors

View as column chart or table. Default column chart.

Example Screenshot
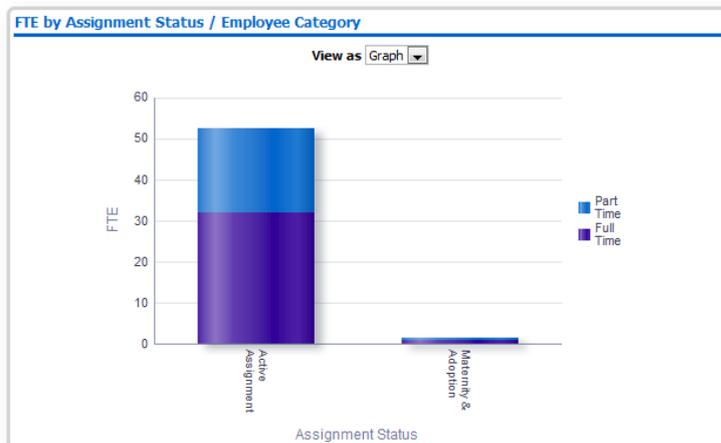
Actions

Click -> Staff List Tab (Restricted to region selected)

FTE vs Establishment

Description

This analysis is designed to show the variance between the position FTE establishment and actual FTE, grouped by AfC Pay Band.

Data Items

Title	Description
Establishment FTE	Sum establishment of all positions included in Prompts
FTE	Sum FTE of all employees included in Prompts
Pay Band	
Staff Group	
Occupation Code	

Column Selectors

Group by Pay Band, Staff Group or Occupation Code (Default: Pay Band)

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

Example Screenshot
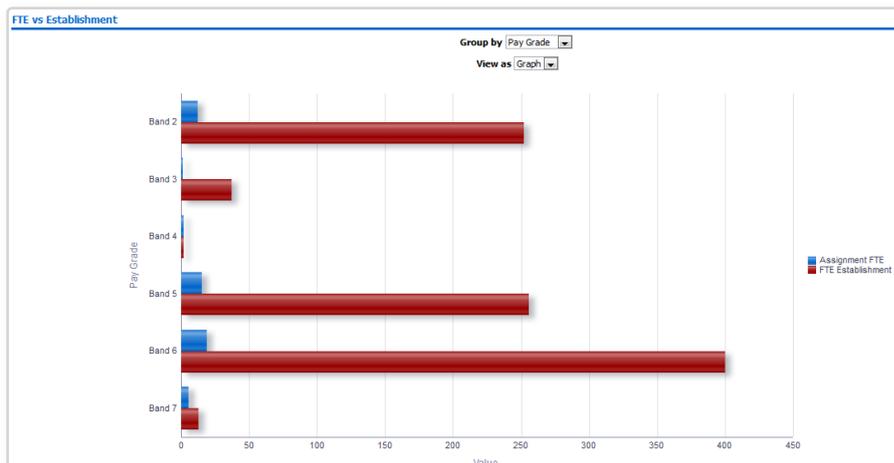
Actions

Click -> Staff List Tab (Restricted to selected region)

Headcount vs Establishment

Description

This analysis is designed to show the variance between the position establishment headcount and actual headcount, grouped by AfC Band.

Data Items

Title	Description
Headcount	Count of employees included in Prompts
Establishment Headcount	Sum of headcount establishment of positions included in Prompts
Pay Band	
Staff Group	
Occupation Code	

Column Selectors

Group by Pay Band, Staff Group or Occupation Code (Default: Pay Band)
View as Bar Graph or Table (Default: Bar Graph)

Example Screenshot
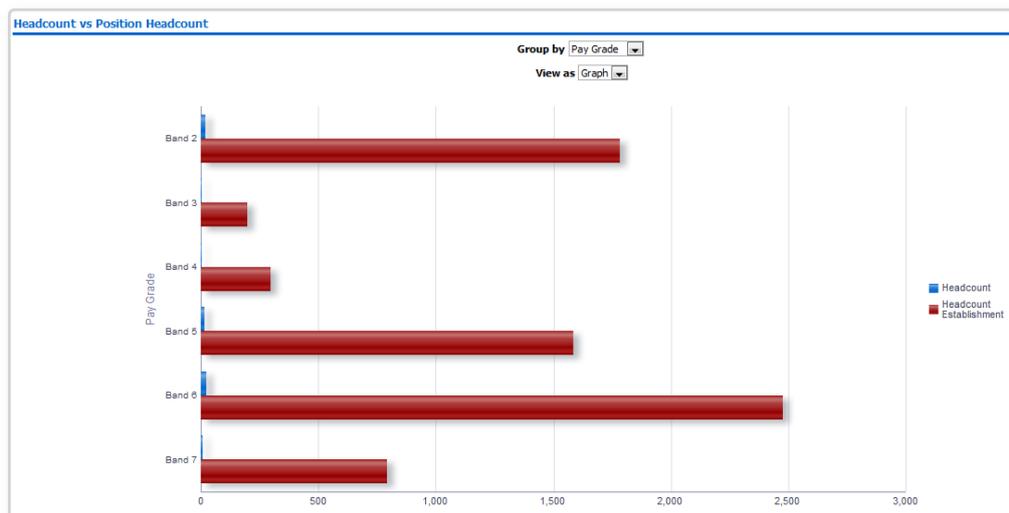
Actions

Click -> Staff List Tab (Restricted to selected region)

Employee Category / Gender

Description

This analysis is designed to show Headcount, % of Headcount and FTE grouped by Employee Category and Gender.

Data Items

Title	Description
Employee Category	Employee Category Data Item against the Assignment
Gender	Gender against the Employee Record
Headcount	
% of Headcount	
FTE	

View Selectors

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

Example Screenshot

Actions

Click -> Diversity Detail Tab

Length of Service in Current Employment

Description

This analysis is designed to show Headcount, % of Headcount and FTE grouped by Length of Service Band.

Data Items

Title	Description
Length of Service Band	Calculated from employee latest start date
Headcount	
% of Headcount	
FTE	

View Selectors

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

Example Screenshot
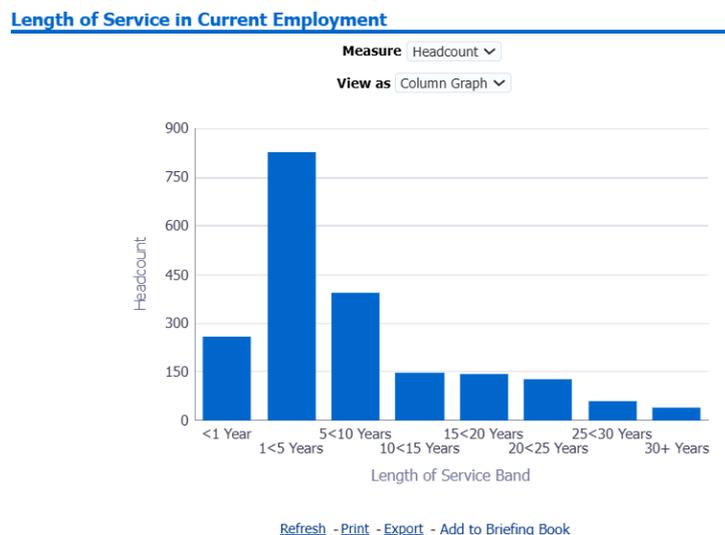
Actions

Click -> Diversity Detail Tab

Staff List Tab

Description

The Staff List tab only include key fields required for reporting a staff list and is designed for users who wish to return a staff list quickly rather than waiting for the full detail page to run.

Prompts

Organisation(s) (Default: None)

Staff Group(s) (Multi-select)

Assignment Category(s) (Multi-select: default: exclude Locum Bank and Honorary)

Person Type(s) (Multi-select, default: Employee, Employee and Applicant)

Employee Person Type(s) (Multi select)

Assignment Status

Occupation Code

Job Role

Pay Grade(s)

Job Sharer

Primary Assignments Only

Effective Date

Organisation Level 1-13

Cost Centre Org Level 1-12

Data Items

Last Name	Assignment Status
First Name	Primary
Title	FTE
Assignment Number	Organisation
Employee Number	Org L1-13 x 4
Position Title	Occupation Code
Role	Pay Step Date
Area of Work	Fixed Term End Date
Staff Group	Fixed Term End Reason
Assignment Category	Position Number
Work at Home Flag	

Example Screenshot

Assignment Category	Assignment Status	Primary	Pay Scale	FTE	Pay Step Date	Fixed Term End Date	Fixed Term End Reason	Work at Home Flag	Actual Salary	Full Time Salary
Permanent	Active Assignment	Y	XR03	1.00	19/04/2021			N	£21,142.00	£21,142.00
Permanent	Active Assignment	Y	XR02	1.00	30/04/2020			N	£19,337.00	£19,337.00
Permanent	Active Assignment	Y	XR07	1.00	02/09/2021			N	£41,723.00	£41,723.00
Permanent	Out on External Secondment - Paid	Y	XN06	1.00	20/01/2022			N	£31,365.00	£31,365.00
Fixed Term Temp	Active Assignment	Y	MN37	1.00	05/08/2021	04/08/2023	Train Cont - Dean App Trainee	N	£32,896.00	£32,896.00
Fixed Term Temp	Maternity & Adoption	Y	MN37	1.00	07/08/2021	04/08/2020	Train Cont - Dean App Trainee	N	£34,908.00	£34,908.00
Fixed Term Temp	Active Assignment	Y	MN37	1.00	05/08/2021	04/08/2023	Train Cont - Dean App Trainee	N	£32,896.00	£32,896.00
Fixed Term Temp	Active Assignment	Y	MN37	1.00	31/07/2021	03/08/2021	Train Cont - Dean App Trainee	N	£45,571.00	£45,571.00
Fixed Term Temp	Active Assignment	Y	XR06	1.00	01/12/2021	31/03/2021	Limited Term Project	N	£31,365.00	£31,365.00
Permanent	Active Assignment	Y	XR05	1.00	12/02/2021			N	£26,970.00	£26,970.00
Fixed Term Temp	Active Assignment	Y	MN37	1.00	01/08/2021	03/08/2021	Train Cont - Dean App Trainee	N	£37,719.00	£37,719.00
Fixed Term Temp	Active Assignment	Y	MN37	1.00	26/09/2021	02/02/2021	Train Cont - Dean App Trainee	N	£39,420.00	£39,420.00
Permanent	Active Assignment	Y	MQ00	1.00				N	£140,808.00	£140,808.00

Detail Tab

Description

This tab is designed to provide detailed data restricted to Prompts set on the overview page, and to items selected when navigating to this tab. Note: The detail tab is a list of staff and is not designed to include only people included in the summary.

Prompts

Organisation(s) (Default: None)

Staff Group(s) (Multi-select)

Assignment Category(s) (Multi-select: default: exclude Locum Bank and Honorary)

Person Type(s) (Multi-select, default: Employee, Employee and Applicant)

Employee Person Type(s) (Multi select)

Assignment Status

Occupation Code

Area of Work

Job Role

Pay Grade(s)

Grade Code

Subjective Code(s)

Job Sharer

Primary Assignments Only

Effective Date

Show Additional Supervisor(s)

Organisation Level 1-13

Cost Centre Org Level 1-12

Data Items

Employee Number	Pay scale Description
Assignment Number	Employee Category
Last Name	Assignment Status
First Name	FTE
Middle Name	Occupation Code
Preferred Name	Person Type
Title	Marital Status
Maiden Name	Age (Not returned in HRSS)
Employee Person Type	Pay Grade
Age Band	Gender
Email Address	Length of Service (Years)
Organisation	Contract Hours
Location	Length of Service (Months)
Staff Group	Supervisor
Position Number	Position Subjective Code
Pay Step Date	Previous Last Name
Actual Salary	Department Manager (Assignment)
Frequency	Pay Point
Fixed Term End Date	Wtr Opt Out Date
Date of Birth (Not returned in SSHR)	CSD 1 Week
National Insurance Number (Not returned in HRSS)	CSD 3 Months
Job Sharer (Yes/No)	CSD 12 Months
Wtr Opt Out	Spinal Point
Bank Posts Held	NHS Entry Date
Grade Step	Time in Grade (Yrs)
Job Role	Area of Work
Organisation Level 1-13	Cost Centre Org Level 1-12
Start Date in Grade	Management Cost
Spinal Value	Start Date in Position

Position Title	Legacy Payroll Number
Assignment Category	Subjective Code
Pension Membership Ref Number	Department Manager
Original Hire Date	Latest Start Date
Primary Assignment (Y/N)	Fixed Term Cont Reason
Supervisor Employee Number	Address Line 1
Supervisor Email Address	Address Line 2
Employee Initials	Address Line 3
Employee Name	Town or City
Telephone Home	County
Telephone Work	Post Code
Telephone Mobile	AfC Spinal Point
Flexible Working Pattern	Probation Period
Supervisor Assignment Number	Probation Units
Additional Supervisor Name	Adjusted Service Date
Additional Supervisor Assignment Number	Maximum Part Time Flag
Assignment Start Date	TUPE Transfer
Asg Cost Centre	Assignment End Date
Proportion	Concatenated Segments
Aggregated Service Years	Aggregated Service Days
Work at Home Flag	Pay scale
Frontline Healthcare Worker Position	Probation Period End Date
Frontline Healthcare Worker Assignment	Main Earner Occupation (Socio-economic data – Not returned in HRSS)
Primary Area of Work	School Type (Socio-economic data – Not returned in HRSS)
Secondary Area of Work	Free School Meals (Socio-economic data – Not returned in HRSS)

Column Selectors

Organisation Cost Centre and Organisation Level x 4

Example Screenshot

Position Detail Tab

Description

This tab is designed to provide a list of populated positions. Filtering is available by Position Number or Subjective Code using the prompts provided.

Prompts

Effective Date
Position Number(s)
Subjective Code(s)

Data Items

Position Number	Position Title
Occupation Code	Area of Work
Organisation	Position FTE
Organisation Level 1-13	Cost Centre Org Level 1-12
Position Headcount	Actual FTE
Assignment Count	FTE Variance
DBS Disclosure Type	Registration and Membership Body
Subjective Code	Pay Grade
Staff Group	

Column Selectors

Cost Centre and Organisation Level x 4

Position Number(s) (All Column Values) ▼   Subjective Code(s) (All Column Values) ▼

Apply   Reset ⌄

Group by Org L2 ▼ and Org L3 ▼ and ▼

Position No.	Position Title	Occupation Code	Subjective Code	Pay Grade	Area of Work	Org L2	Org L3	Registration and Membership Body	DBS Disclosure Type	Position FTE	Position Headcount	Actual FTE	Assignment Count
12345678	Response	001	1000G100	Non Review Body Band 8	General Medicine	000 Trust Organisations	000 Hosted Organisations	General Medical Council	Enhanced	1.00	1.0	31.20	32
12345678	Response	002	1000G100	Non Review Body Band 8	Paediatrics	000 Trust Organisations	000 Hosted Organisations	General Medical Council	Enhanced	1.00	1.0	34.90	39
12345678	Response	005	1000G100	Non Review Body Band 8	Dermatology	000 Trust Organisations	000 Hosted Organisations	General Medical Council	Enhanced	1.00	1.0	2.00	2
12345678	Response	008	1000G100	Non Review Body Band 8	Rheumatology	000 Trust Organisations	000 Hosted Organisations	General Medical Council	Enhanced	1.00	1.0	1.00	1
12345678	Response	011	1000G100	Non Review Body Band 8	Elderly Care Medicine	000 Trust Organisations	000 Hosted Organisations	General Medical Council	Enhanced	1.00	1.0	1.00	1
12345678	Response	012	1000G100	Non Review Body Band 8	Medical Oncology	000 Trust Organisations	000 Hosted Organisations	General Medical Council	Enhanced	1.00	1.0	3.00	3
12345678	Response	012	1000G100	Non Review Body Band 8	Medical Oncology	000 Trust Organisations	000 Hosted Organisations	General Medical Council	Enhanced	1.50	2.0	2.00	2
12345678	Response	023	1000G100	Non Review Body Band 8	Otolaryngology	000 Trust Organisations	000 Hosted Organisations	General Medical Council	Enhanced	1.00	1.0	7.00	7
12345678	Response	025	1000G100	Non Review Body Band 8	Ophthalmology	000 Trust Organisations	000 Hosted Organisations	General Medical Council	Enhanced	1.00	2.0	1.00	1
12345678	Response	026	1000G100	Non Review Body Band 8	Clinical Oncology	000 Trust Organisations	000 Hosted Organisations	General Medical Council	Enhanced	1.00	1.0	17.60	20

Supervisor Hierarchy Tab

Description

This tab is designed to provide a hierarchy graph showing a user those employees that are part of a supervisor hierarchy for a particular organisation. A supervisor hierarchy graph can only be generated for organisations with 200 or fewer assignments. An assignment count is provided for those assignments with and without a supervisor.

Prompts

Effective Date

Group by: Organisation, Organisation Levels 1 - 13

Data Items

Organisation	Assignment Count

Example Screenshot

Group by Organisation ▼

Apply   Reset ⌄

A supervisor hierarchy can be generated for organisations with 200 or fewer assignments. Select the level you would like to group organisations by, then click the organisation name to generate the hierarchy graph.

All Assignments by Organisation

Organisation	Assignments
104 Midwifery Team	198
504 A & E Department	28
504 Acute Nurse Management	1
504 Anaesthetics	60
504 Breast Screening	1
504 Human Resources	16
504 Psychology	26
504 Team Midwifery	14
504 Trust Board	68
504 Ward 1	16
504 Ward 10	124
504 Ward 12	38
504 Ward 2	15
504 Ward 6	1
504 Ward 7	103
504 Ward 9	160
504 Warwick Midwifery Team	17

Refresh - Print - Export - Add to Briefing Book

Assignments without a Supervisor by Organisation

Organisation	Assignments
504 A & E Department	28
504 Breast Screening	1
504 Psychology	1
504 Team Midwifery	14
504 Trust Board	47
504 Ward 1	16
504 Ward 10	10
504 Ward 12	38
504 Ward 2	3
504 Ward 7	72
504 Ward 9	134
504 Warwick Midwifery Team	17

Refresh - Print - Export - Add to Briefing Book

Actions

Organisation > Supervisor Hierarchy Graph

Supervisor Hierarchy Graph

Description

This analysis displays an organisation's supervisor hierarchy as a hierarchy graph. Users are able to select up to three data items to display below each employee name. Details of assignments without a supervisor are also shown as a table.

Data Items

Assignment Number	Employee Number
Assignment Category	Role
Staff Group	Position Title
FTE	Occupation Code
Assignment Status	Pay Step Date
Organisation	Location
Pay Scale	Employee Name
Supervisor Name	

Example Screenshot

Monthly Staff in Post Tab

Description

This analysis is designed to show Headcount or FTE totals over a period of time (as defined using the available prompt), aggregated by Month or Week. Results can be grouped by several different data items including Org Levels 1-13.

Prompts

Organisation(s) (Multi-select)

Staff Group(s) (Multi-select)

Assignment Category(s) (Multi-select: default: exclude Locum Bank and Honorary)

Employee Category (Multi-select)

Person Type(s) (Multi-select, default: Employee, Employee and Applicant)

Employee Person Type(s) (Multi-select, default: Employee, Employee and Applicant)

Assignment Status

Area of Work

Occupation Code(s)

Job Role(s)

Pay Grade(s)

Primary Assignments Only
Employee Location
Date Between (default: Previous three Months)
Organisation Level 1-13
Cost Centre Org Level 1-12

View Selectors
FTE by Month (default)
Headcount by Month
Employee Count by Month
FTE by Week
Headcount by Week
Employee Count by Week
FTE by Year
Headcount by Year
Employee Count by Year

Group By
Job Role
Assignment Category
Staff Group (default)
Org Level 1-13
Area of Work
Employee Category
Pay Band
Assignment Status
Occupation Code

Data Items

Month	FTE
Headcount	Job Role
Area of Work	Assignment Category
Employee Category	Staff Group
Pay Band	Org Level 1-13
Week	Occupation Code
Year	

Example Screenshot

FTE by Month

Staff Group	2023 / 10	2023 / 11	2023 / 12
Add Prof Scientific and Technic	55.21	54.21	55.81
Additional Clinical Services	237.20	233.32	233.00
Administrative and Clerical	538.49	549.49	549.16
Allied Health Professionals	155.50	155.33	156.69
Estates and Ancillary	62.06	62.06	63.64
Healthcare Scientists	169.81	170.04	170.80
Medical and Dental	80.74	82.72	82.72
Nursing and Midwifery Registered	212.37	213.85	214.28
Students	3.07	3.07	3.07
Grand Total	**1,514.44**	**1,524.08**	**1,529.16**

Refresh - Print - Export - Add to Briefing Book

Actions

None

Organisation Hierarchy Tab

Description

This tab is designed to provide a hierarchy graph based on selections made using the prompts available. The Organisation Level, Number of Levels to Show and Starting Level are available to set using the available prompts. A Headcount, Assignment Count and Total FTE are shown by Organisation.

Prompts

Levels 2-7 (default: 2)
Starting Level (default: 1)

Data Items

Organisation	Headcount
Assignment Count	FTE
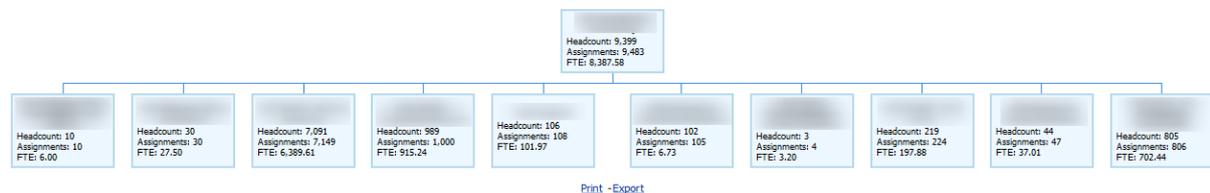
Example Screenshot

Actions

None

Employee Details Tab

Description

This tab provides the user with a range of information relating to a specific employee as defined by the available prompts.

Note: Leavers can be returned up to 2 years prior to current date.

Prompts

Employee Name *
Assignment Number *
Gauge Red From (default: 5%)
Include Extra Years of Absence

Employee Details

Description

This analysis is designed to show various Employee details as part of the Employee Details Dashboard Page.

Data Items

Employee Name	Employee Address Line1
Assignment Number	Employee Address Line2
Organisation	Employee Address Line3
First Name	Employee Address City
Last Name	Employee Address Region1
Email Address	Employee Address Region2
Work Phone	Employee Address Region3
Home Phone	Employee Address Postal Code
Mobile Phone	Employee Address Country
Position Title	
Pay Grade	
Assignment Category	
FTE / Contract Hours	
Supervisor	
Location	
Latest Start Date	
DBS Match	

Example Screenshot

Employee Details

Employee Number	20055417
Assignment Number	20055417
Organisation	504 Ward 9
First Name	Sarah
Last Name	007Lane
Email Address	
Work Phone	
Home Phone	
Mobile Phone	
Position Title	
Pay Grade	NHS|XR05|Review Body Band 5
Assignment Category	Permanent
FTE / Contract Hours	1.00 / 37.50 Week
Supervisor	
Location	504 ESR Hospital
Latest Start Date	01/01/2001
DBS Match	✔

Employee Address Line1	100 ESR Street
Employee Address Line2	
Employee Address Line3	
Employee Address City	Warwick
Employee Address Region1	
Employee Address Region2	
Employee Address Region3	
Employee Address Postal Code	CV1 1AB
Employee Address Country	United Kingdom

Refresh - Print - Export - Add to Briefing Book

Prompts

None

Actions

None

Employee Sickness Absence
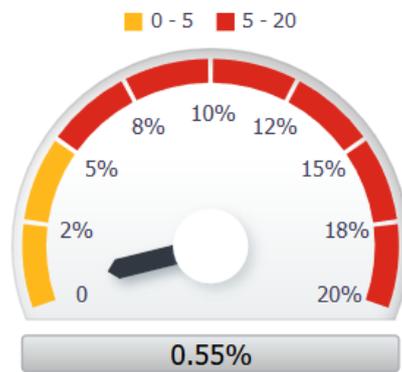
Description

This analysis is designed to show an Employees Absence Sickness %, Available FTE, FTE Lost and Abs Days Lost.

Data Items

Absence Sickness % (FTE)	FTE Lost
Available FTE	Absence Days Lost

Example Screenshot

Prompts

None

Actions

None

Employee Absence Details

Description

This analysis is designed to show the detail of an Employees Absence.

Data Items

Absence Start Date	Absence End Date
Absence Type	Absence Reason
Duration (Days)	Duration (Hours)
Estimated Cost	

Example Screenshot

Absence Details

View Summary ▼

Absence Type	Absence Reason	Duration (Days)	Duration (Hours)	Estimated Cost
Sickness	S13 Cold, Cough, Flu - Influenza	2	0.0	£265.51
Special Increasing Bal	Time Off in Lieu - Overtime/Time Owed	8	0.0	£1,062.05
Study Increasing Bal	Study Leave	19	0.0	£2,505.59

Refresh - Print - Export - Add to Briefing Book

View Selector

View as Summary (default) or Detail (includes Abs Start/End Date)

Actions

None

Appraisal Reviews

Description

This analysis is designed to show an Employees Appraisal Details.

Data Items

Review Type	Appraisal Date
Period End Date	Next Appraisal Date
Passed Through Gateway	Period Start Date

Example Screenshot

Appraisal Reviews

Review Type	Appraisal Date	Period End Date	Next Appraisal Date	Passed Through Gateway	Period Start Date
Performance Appraisal	23/09/2015	23/09/2015	23/09/2016		23/09/2014
Performance Appraisal	27/10/2016	23/09/2016	27/10/2017	Y	23/09/2015
Review	05/02/2013	05/02/2013	05/02/2014	Yes	01/06/2012
Review	23/09/2015	10/03/2015	24/09/2016	yes	01/06/2015
Review	04/07/2017	04/07/2017	04/07/2018	Y	01/06/2012
Review	22/08/2018	23/07/2018	23/07/2019		04/07/2017

Refresh - Print - Export - Add to Briefing Book

Prompts

None

Actions

None

Property Register

Description

This analysis is designed to show an Employees Property Register Details.

Data Items

Asset Number	Item Name

Example Screenshot

Property Register

Item Name	Asset Number
Portable Computer	NHS1ESR00000

Refresh - Print - Export - Add to Briefing Book

Prompts

None

Actions

None

Professional Registration Body

Description

This analysis is designed to show an Employees Professional Registration Details.

Data Items

Professional Registration Body	Match

Example Screenshot

Professional Registrations

Register and Membership Body	Match
General Dental Council	✔

Prompts

None

Actions

None

Absence Calendar

Description

This analysis is designed to show an Employees Absence displayed as a Calendar View.

Data Items

Month Year	Days of Month
Absence Indicator	

Example Screenshot
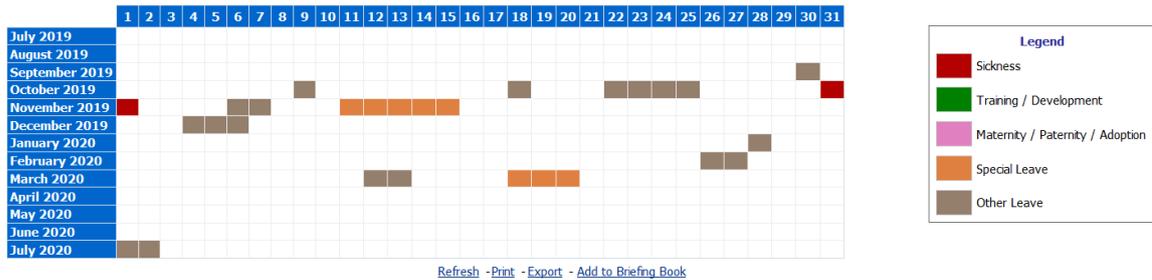
Prompts

None

Actions

None

Compliance Matching

Description

This analysis is designed to show an Employees Compliance Information.

Data Items

Competency	Level Required
Competency Match	Expiry Date
Level Achieved	

Example Screenshot

Compliance Matching

Competency	Level Required	Competency Match	Expiry Date	Level Achieved
NHS|CSTF|Equality, Diversity and Human Rights - 3 Years|	1 - Assessed	Match	27/09/2020	1 - Assessed
NHS|CSTF|Fire Safety - 2 Years|	1 - Assessed	Required		
NHS|CSTF|Health, Safety and Welfare - 3 Years|	1 - Assessed	Match	27/09/2020	1 - Assessed
NHS|CSTF|Infection Prevention and Control - Level 1 - 3 Years|	1 - Assessed	Required		
NHS|CSTF|Information Governance (Wales) - 2 Years|	1 - Assessed	Required		
NHS|CSTF|Moving and Handling - Level 1 - 2 Years|	1 - Assessed	Required		
NHS|CSTF|Resuscitation - Level 1 - 3 Years|	1 - Assessed	Match	27/09/2020	1 - Assessed
NHS|CSTF|Safeguarding Adults - Level 1 - 3 Years|	1 - Assessed	Match	27/09/2020	1 - Assessed
NHS|CSTF|Safeguarding Adults - Level 2 - 3 Years|		Non-Requirement Competency	27/09/2020	1 - Assessed
NHS|CSTF|Safeguarding Children - Level 1 - 3 Years|	1 - Assessed	Match	17/01/2021	1 - Assessed

Rows 1 - 10

Refresh - Print - Export - Add to Briefing Book

Prompts

None

Actions

None

Enrolments

Description

This analysis is designed to show an Employees Enrolment Information.

Data Items

Course	Start Date
Enrolment Status	Completion Date
Delivery Mode	

Example Screenshot

Enrolments

Enrollment Status (All Column Values) ▼

Apply   Reset ▼

Course	Delivery Mode	Enrollment Status	Start Date ▲ ▼	Completion Date
504 Information Governance	Classroom (physical)	Completed	01/03/2018	01/03/2018
504 Information Governance	Classroom (physical)	Completed	01/03/2018	01/03/2018
504 Information Governance	Classroom (physical)	Completed	01/03/2018	01/03/2018
504 Information Governance	Classroom (physical)	Completed	01/03/2018	01/03/2018
504 Information Governance	Classroom (physical)	Completed	01/03/2018	01/03/2018
504 Information Governance	Classroom (physical)	Completed	01/03/2018	01/03/2018
504 Information Governance	Classroom (physical)	Completed	01/03/2018	01/03/2018
504 Information Governance	Classroom (physical)	Completed	01/03/2018	01/03/2018
504 Information Governance	Classroom (physical)	Completed	01/03/2018	01/03/2018
504 Information Governance	Classroom (physical)	Completed	01/03/2018	01/03/2018

⇧ ⇧ ⬇ ⬍ Rows 1 - 10

Refresh - Print - Export - Add to Briefing Book

Prompts

Enrollment Status

Actions

None

Certifications

Description

This analysis is designed to show an Employees Certification Details.

Data Items

Certification Name	Progress of Certification
Certification Status	Target Date

Example Screenshot

Certifications

Certification Name	Certification Status	Progress of Certifications	Target Date
NHS ESR Certification 2018	Subscribed	Expired	31/08/2018
NHS ESR Certification 2018	Subscribed	Expired	31/08/2018
NHS ESR Certification 2018	Subscribed	Expired	31/08/2018

Refresh - Print - Export - Add to Briefing Book

Prompts

None

Actions

None

Learning Paths

Description

This analysis is designed to show an Employees Learning Path Information.

Data Items

Learning Path	Learning Path Completed Courses
Subscription Status	Start Date

Example Screenshot

Learning Path

Learning Path Name	Subscription Status	Learning Path Completed Courses	Start Date
NHS ESR Training	Active	1.0	31-Aug-2018
NHS ESR Training	Active	1.0	31-Aug-2018
NHS ESR Training	Active	1.0	31-Aug-2018

Refresh - Print - Export - Add to Briefing Book

Prompts

None

Actions

None

Qualifications

Description

This analysis is designed to show an Employees Qualifications Details.

Data Items

Qualification Type	Start Date
Qualification Title	Qualification End Date
Establishment	

Example Screenshot

Qualifications

Qual Type	Qual Title	Qual Status	Establishment	Qual Start Date	Qual End Date
Masters Degree	Science	Attained			

Refresh - Print - Export - Add to Briefing Book

Prompts

None

Actions

None

Objectives

Description

This analysis is designed to show an Employees Objectives Information.

Data Items

Objective Name	Target Date
Start Date	Complete (%)

Example Screenshot

Objectives

Objective Name	Start Date	Target Date	Complete (%)
504 Objective 1	01/02/2018	01/02/2024	
504 Objective 2	01/02/2018	01/02/2024	
504 Objective3	01/02/2018	01/02/2024	

Refresh - Print - Export - Add to Briefing Book

Prompts

None

Actions

None

Previous Employment

Description

This analysis is designed to show an Employees Previous Employment Information.

Data Items

Employer Name	End Date
Start Date	

Example Screenshot

Previous Employment

Employer Name	Start Date	End Date
000 ESR Medical Team	01/01/2018	31/12/2018
000 ESR Medical Team	01/01/2018	31/12/2018
000 NHS Medical Team	01/01/2018	31/12/2018
000 NHS Medical Team	01/01/2018	31/12/2018

Refresh - Print - Export - Add to Briefing Book

Prompts

None

Actions

None

Job History

Description

This analysis is designed to show an Employees Job History.

Data Items

Job Role	Change Date

Example Screenshot

Prompts

None

Actions

None

Property Register Tab

Description

This tab provided user with a range of information relating to the Property Register functionality.

Prompts

Organisation (Default: None)
Staff Group(s) (Multi-select)
Person Type(s) (Multi-select, default: Employee, Employee and Applicant)
Employee Person Type(s) (Multi select)
Assignment Status
Occupation Code
Assignment Category(s) (Multi-select: default: exclude Locum Bank and Honorary)
Primary Assignments Only
Effective Date (Default today)
Pay Grade
Organisation Level 1-13
Cost Centre Org Level 1-12
Job Role

Property Register

Description

This analysis is designed to show the number of Property Register entries grouped by Staff Group or Organisation Levels 1-4. An Effective Date Prompt is available for users to set as required.

Data Items

Staff Group	Count of Property Register Items
Organisation Level(s) 1-4	

Group by

Staff Group (default)
Organisation Levels 1-4

View as

Bar Graph (default)
Table

Example Screenshot
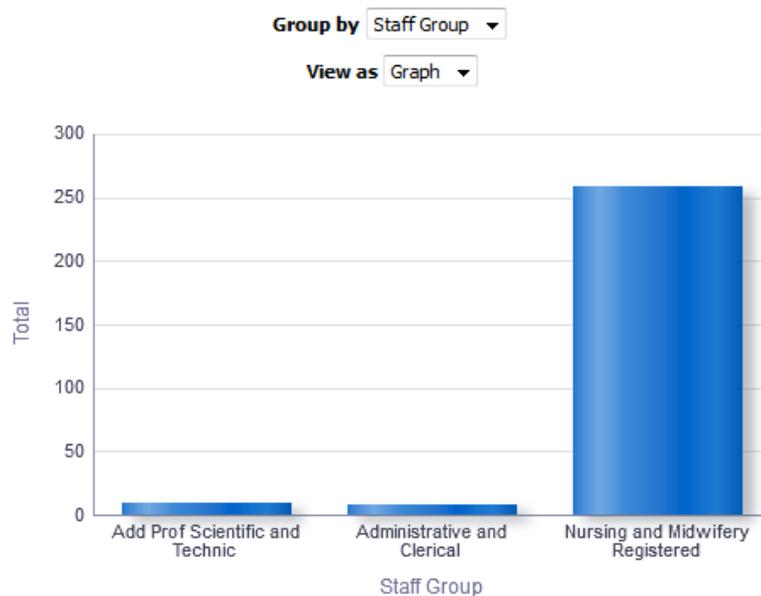
Property Register Timeline

Description

This analysis is designed to show the number of Property Register entries over a period of time (default previous 12 months).

Data Items

Month	Count of Property Register Items

Prompts

Date Between (default: previous 12 months)

Group by

None

View as

Line Graph (default)

Table

Example Screenshot
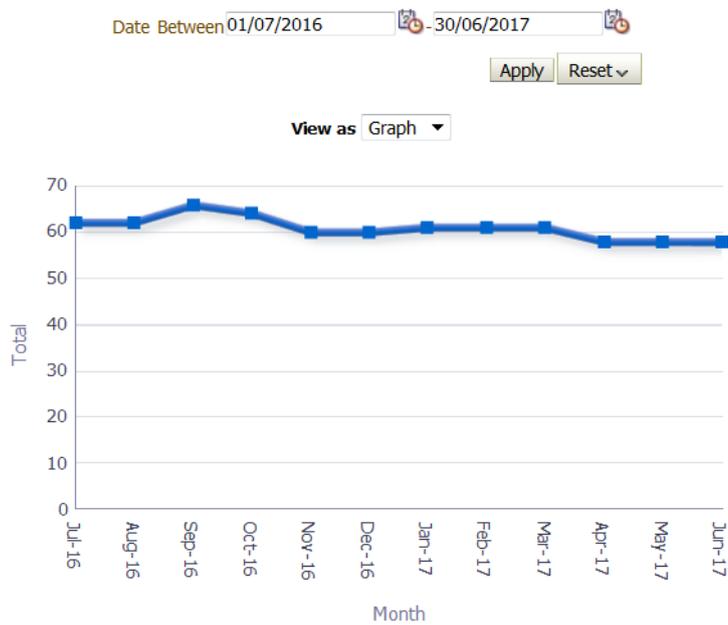
Property Register Detail

Description

This analysis is designed to show the detail of Property Register entries at an effective date (as defined by the user).

Data Items

Last Name	Property End Date
Title	First Name
Email Address	Employee Number
Staff Group	Organisation
Supervisor Name	Item Name
Supervisor Email	Asset Number
Property Start Date	Organisation Level 1-13

Group by

Organisation Level 1-13

Example Screenshot

Benefits Entitlements Tab

Description

This analysis enables organisations to return data regarding an individual's entitlement to occupational and organisation benefits.

Prompts

Organisation

Staff Group(s)

Assignment Category(s)

Person Type(s)

Employee Person Type(s)

Assignment Status

Occupation Code

Job Role

Pay Grade

Job Sharer

Primary Assignments Only

Effective Date

Organisation Level 1-13

Cost Centre Org Level 1-12

Data Items

Organisation	Initial Assignment
Last Name	Start Date
First Name	Assignment Effective Start Date
Initials	Assignment Effective End Date
Title	Assignment Status
Assignment Number	Fixed Term Temp Cont End Date
Primary Assignment	Fixed Term Temp Cont Reason
Staff Group	Bank Post Held
Role	Date of Birth
Person Type	NI Number
Position Title	Latest Hire Date
Pay Scale	Person Effective From Date
Pay Scale Description	NHS Entry Date
Grade Step	CSD 1 Week
Spinal Point	CSD 3 Months
Afc Spinal Point	CSD 12 Months
Pay Step Date	Loss of Office Payment Date
FTE	Loss of Office Rec Serv Date
Contract Hours	NHS Pensioner
Assignment Category	Date NHS Pension Benefits Paid To
Employee Category	

Example Screenshot

Initial Assignment Start Date	Assignment Effective Start Date	Assignment Effective End Date	Assignment Status	Fixed Term Temp Cont End Date	Fixed Term Temp Cont Reason	Bank Post Held	Date of Birth	NI Number	Latest Hire Date	Person Effective From Date	NHS Entry Date	CSD 1 Week	CSD 3 Months	CSD 12 Months	Loss of Office Payment Date	Loss of Office Rec Serv Date	NHS Pensioner	Date NHS Pension Benefits Paid To
01/01/2010	01/01/2010	31/12/4712	Active Assignment			Substantive Only	01-Jan-1970	AB504031A	01/01/2010	01/01/2010							N	01/04/2020
01/01/2010	01/01/2010	31/12/4712	Active Assignment			Substantive Only	01-Jan-1970	AB504032A	01/01/2010	01/01/2010							N	01/04/2020
01/01/2010	01/01/2010	31/12/4712	Active Assignment			Substantive Only	01-Jan-1970	AB504033A	01/01/2010	01/01/2010							N	01/04/2020
01/01/2010	01/01/2010	31/12/4712	Active Assignment			Substantive Only	01-Jan-1970	AB504034A	01/01/2010	01/01/2010							N	01/04/2020
01/01/2010	01/01/2010	31/12/4712	Active Assignment			Substantive Only	01-Jan-1970	AB504035A	01/01/2010	01/01/2010							N	01/04/2020
01/01/2010	01/01/2010	31/12/4712	Active Assignment			Substantive Only	01-Jan-1970	AB504036A	01/01/2010	01/01/2010							N	01/04/2020
01/01/2010	01/01/2010	31/12/4712	Active Assignment			Substantive Only	01-Jan-1970	AB504037A	01/01/2010	01/01/2010							N	01/04/2020
01/01/2010	01/01/2010	31/12/4712	Active Assignment			Substantive Only	01-Jan-1970	AB504038A	01/01/2010	01/01/2010							N	01/04/2020
01/01/2010	01/01/2010	31/12/4712	Active Assignment			Substantive Only	01-Jan-1970	AB504039A	01/01/2010	01/01/2010							N	01/04/2020
01/01/2010	01/01/2010	31/12/4712	Active Assignment			Substantive Only	01-Jan-1970	AB504040A	01/01/2010	01/01/2010							N	01/04/2020
01/01/2010	01/01/2010	31/12/4712	Active Assignment			Substantive Only	01-Jan-1970	AB504041A	01/01/2010	01/01/2010							N	01/04/2020
01/01/2010	01/01/2010	31/12/4712	Active Assignment			Substantive Only	01-Jan-1970	AB504042A	01/01/2010	01/01/2010							N	01/04/2020

Real Time Staff List Tab

Description

This Real-time Staff List analysis is a direct replication of the NHS Organisation Profile>Staff List (Detail) worksheet available in DISCO. Please note that this analysis is real-time and not updated overnight, therefore the report may take longer to run than other BI analyses.

Prompts

Organisation Name
Organisation Hierarchy Name
Staff Group
Role

Person Type

Employee Person Type

Assignment Category

Primary Assignments Only

Data Items

Organisation Name	Primary Assignment
Employee Title	Legacy Payroll Number
First Name	Clinical Second Speciality
Last Name	Area of Work
Preferred Name	Bank Posts Held
Employee Full Name	Maximum Part Time Flag
Employee Number	Wtr Opt Out
Staff Group	Wtr Opt Out Date
Role	Cost Centre
Occupation Code	Position Subjective Code
Position Title	Management Cost
Position Number	CSD 3 Months
Start Date in Position	CSD 12 Months
Pay-scale	NHS Entry Date
Pay-scale Description	Marital Status (Core Users Only)
Spinal Point	Maiden Name (Core Users Only)
AFC Spinal Point	Previous Last Name
Spinal Value	Age (Core Users Only)
Salary Value	Birth Date (Core Users Only)
Pay Step Date	NI Number (Core Users Only)
FTE	Pension Membership Ref Number
Contract Hours	Email Address
Assignment Category	Address Line1
Employee Category	Address Line2
Assignment Number	Address Line3
Assignment Start Date	Town or City
Assignment End Date	County
Assignment Status	NHS CRS Identifier
Payroll Name	NHS CRS Date Authenticated
Paypoint / Payroll Point	e-GIF and NHS CRS Status
Probation Period	Telephone Home
Probation Unit	Telephone Work
Fixed Term End Date	Telephone Mobile
Fixed Term Reason	TUPE Transfer
Department Manager	Adjusted Service Date
Supervisor	Original Hire Date
Job sharer	Latest Start Date
Organisation Level 1-13	Cost Centre Organisation Level 1-12

Organisation Name	Employee Title	Employee First Name	Employee Last Name	Preferred Name	Employee Number	Staff Group	Role	Occupation Code	Position Title	Position Number	Start Date in Position	Payscale	Payscale D...
000 NHS Organisation	Dr	Joe	Blogs	Joe	12345678	Add Prof Scientific and Technic	Clinical Psychologist	S2L	Business Analyst	00001111	01/11/2014	XR08	Review Body
000 NHS Organisation	Dr	Joe	Blogs	Joe	12345678	Add Prof Scientific and Technic	Clinical Psychologist	SAL	Business Analyst	00001111	01/11/2014	XR10	Review Body
000 NHS Organisation	Dr	Joe	Blogs	Joe	12345678	Add Prof Scientific and Technic	Specialist Practitioner	S0X	Business Analyst	00001111	01/10/2016	XR08	Review Body
000 NHS Organisation	Dr	Joe	Blogs	Joe	12345678	Add Prof Scientific and Technic	Specialist Practitioner	S0X	Business Analyst	00001111	01/10/2016	XR09	Review Body
000 NHS Organisation	Dr	Joe	Blogs	Joe	12345678	Add Prof Scientific and Technic	Technician	S4X	Business Analyst	00001111	12/03/2018	XR07	Review Body
000 NHS Organisation	Dr	Joe	Blogs	Joe	12345678	Administrative and Clerical	Analyst	G2A	Business Analyst	00001111	13/11/2017	XN01	Non Review
000 NHS Organisation	Dr	Joe	Blogs	Joe	12345678	Administrative and Clerical	Board Level Director	Z2E	Business Analyst	00001111	01/02/2018	WCAE	Non-Executiv
000 NHS Organisation	Dr	Joe	Blogs	Joe	12345678	Administrative and Clerical	Board Level Director	Z2E	Business Analyst	00001111	01/02/2018	WCAE	Non-Executiv
000 NHS Organisation	Dr	Joe	Blogs	Joe	12345678	Administrative and Clerical	Chair	Z2E	Business Analyst	00001111	05/10/2017	WQ00	Adhoc

Gross Cost Table Tab

Description

This analysis provides users with the necessary information to enable the analysis of employee costs in terms of the basic salary, employer National Insurance contributions and employer pension contributions. This data can be used to estimate the gross cost of an employee at any valid payscale and grade step combination.

Prompts

* Payscale(s)
* Employers Pension Percentage Contribution
* Report Effective Date

Data Items

Payscale Description	Weekly Basic
Payscale	Hourly Basic
Contract Type	Annual Estimated Ers NHI
Grade Step	Annual Estimated Ers Superan
Annual Basic	Gross Cost
Monthly Basic	

Example Screenshot

* Payscale(s) (All Column Values) ▼
* Employers Pension %age Contribution 7.00
* Report Effective Date 01/05/2018 📅

[Apply] [Reset ▼]

Payscale Description	Payscale	Contract Type	Grade Step	Annual Basic	Monthly Basic	Weekly Basic	Hourly Basic	Annual Estimated Ers NHI	Annual Estimated Ers Superan	Gross Cost
Review Body Band 7	XR07	NHSXXXXXX	1	31,696.00	2,641.33	607.87	16.21	3,211.54	2,218.72	37,126.26
Review Body Band 7	XR07	NHSXXXXXX	1	31,697.00	2,641.42	607.89	16.21	3,211.67	2,218.79	37,127.46
Review Body Band 7	XR07	NHSXXXXXX	2	32,731.00	2,727.58	627.72	16.74	3,354.37	2,291.17	38,376.54
Review Body Band 7	XR07	NHSXXXXXX	2	32,732.00	2,727.67	627.74	16.74	3,354.50	2,291.24	38,377.74
Review Body Band 7	XR07	NHSXXXXXX	3	33,895.00	2,824.58	650.04	17.33	3,515.00	2,372.65	39,782.65
Review Body Band 7	XR07	NHSXXXXXX	3	33,896.00	2,824.67	650.06	17.33	3,515.14	2,372.72	39,783.86
Review Body Band 7	XR07	NHSXXXXXX	4	35,577.00	2,964.75	682.30	18.19	3,747.11	2,490.39	41,814.50
Review Body Band 7	XR07	NHSXXXXXX	4	35,578.00	2,964.83	682.32	18.20	3,747.25	2,490.46	41,815.71
Review Body Band 7	XR07	NHSXXXXXX	5	36,612.00	3,051.00	702.15	18.72	3,889.94	2,562.84	43,064.78
Review Body Band 7	XR07	NHSXXXXXX	5	36,613.00	3,051.08	702.17	18.72	3,890.08	2,562.91	43,065.99
Review Body Band 7	XR07	NHSXXXXXX	6	37,777.00	3,148.08	724.49	19.32	4,050.71	2,644.39	44,472.10
Review Body Band 7	XR07	NHSXXXXXX	6	37,778.00	3,148.17	724.51	19.32	4,050.85	2,644.46	44,473.31

Emergency Contacts Tab

Description

This analysis returns a list of Contacts for employees. Contacts with an in-date telephone number or in-date address are returned and those with missing or out of date values are returned as blank.

Prompts

Employee Number
Employee Name is LIKE (pattern match)
Contact Relationship
Organisation
Primary Assignments Only

Data Items

Organisation	Employee Postal Code
Employee Title	Contact Name
Employee First Name	Contact Address Line 1
Employee Last Name	Contact Address Line 2
Employee Number	Contact Address Line 3
Employee Email Address	Contact Town
Supervisor Name	Contact County
Supervisor Email Address	Contact Postal Code
Employee Address Line 1	Contact Mobile Phone
Employee Address Line 2	Contact Home Phone
Employee Address Line 3	Contact Work Phone
Employee City	Additional Phone
Contact Relationship Flag (Yes/No)	

Example Screenshot

Contact Name	Contact Address Line 1	Contact Address Line 2	Contact Town	Contact County	Contact Postal Code	Contact Mobile Phone	Contact Home Phone	Contact Work Phone
Blogs, Mrs. Jo	0 Blogs Drive		London	Greater London	W2 2JB	0712345678	0201234567	0201234567
Blogs, Mrs. Jo	0 Blogs Drive		London	Greater London	W2 2JB	0712345678	0201234567	0201234567
Blogs, Mrs. Jo	0 Blogs Drive		London	Greater London	W2 2JB	0712345678	0201234567	0201234567
Blogs, Mrs. Jo	0 Blogs Drive		London	Greater London	W2 2JB	0712345678	0201234567	0201234567
Blogs, Mrs. Jo	0 Blogs Drive		London	Greater London	W2 2JB	0712345678	0201234567	0201234567
Blogs, Mrs. Jo	0 Blogs Drive		London	Greater London	W2 2JB	0712345678	0201234567	0201234567
Blogs, Mrs. Jo	0 Blogs Drive		London	Greater London	W2 2JB	0712345678	0201234567	0201234567
Blogs, Mrs. Jo	0 Blogs Drive		London	Greater London	W2 2JB	0712345678	0201234567	0201234567
Blogs, Mrs. Jo	0 Blogs Drive		London	Greater London	W2 2JB	0712345678	0201234567	0201234567
Blogs, Mrs. Jo	0 Blogs Drive		London	Greater London	W2 2JB	0712345678	0201234567	0201234567
Blogs, Mrs. Jo	0 Blogs Drive		London	Greater London	W2 2JB	0712345678	0201234567	0201234567
Blogs, Mrs. Jo	0 Blogs Drive		London	Greater London	W2 2JB	0712345678	0201234567	0201234567
Blogs, Mrs. Jo	0 Blogs Drive		London	Greater London	W2 2JB	0712345678	0201234567	0201234567

Assignments with Missing Contact Details

Description

This analysis returns a list of employees with no contacts and those with no contact information recorded in ESR.

Actions

Click -> Employee Email Address or Supervisor Email Address to generate email template

Data Items

Organisation	Supervisor Email Address
Title	Contact Name
First Name	Contact Relationship
Last Name	Contact Date From
Employee Number	Contact Date To
Employee Email Address	Contact Effective Start Date
Supervisor Name	Contact Effective End Date

Apprenticeships Summary

Description

Available on this tab are a number of summary analyses designed to provide users with high level information of employees undertaking Apprenticeship at a specified report effective date or period. The data returned is for employees whose EIT Apprenticeship details are populated in ESR and does not include those on an Apprentice Job Role which is no longer valid. Organisations are therefore advised to record Apprenticeships data using the Assignment EIT Apprenticeship functionality available in ESR to ensure apprenticeships are being reported correctly. Please note that this tab is also available in the NHS Learning and Administration Dashboard.

Prompts

Effective Date
Apprentice Type
Status
Employee Number
Assignment Number
Include Leavers for Previous Two Years (Yes: Optional)

Summary

Description

This analysis is designed to show FTE, Headcount (Default) and Headcount percentage of employees undertaking Apprenticeship at a specified report effective date grouped by Staff Group, Organisation Levels 1-13, Pay Grade, Age Band and a number of EIT Apprenticeship fields.

Data Items

Staff Group	
Organisation Level(s) 1-13	Framework Standard
Staff Group	FTE
Pay Grade	Headcount
Age Band	Headcount %
Apprentice Status	
Apprentice Type	
Main Training Provider	

View Selector

View as Column Graph (Default) or Table

Example Screenshot
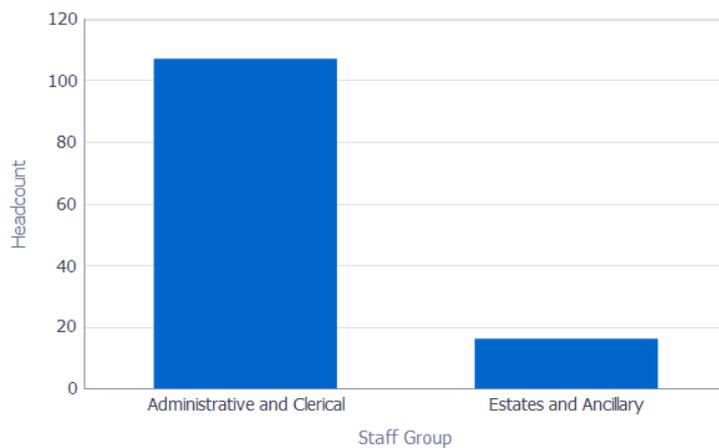
Apprenticeships Trending by Status

Description

This analysis is designed to show the number of Apprenticeships on a monthly basis as at the last day of the month, defaulted to one year ago from the last day of previous month.

Data Items

Apprentice Status	Month
Headcount	

View Selector

View as Line Graph (Default) or Pivot Table

Example Screenshot
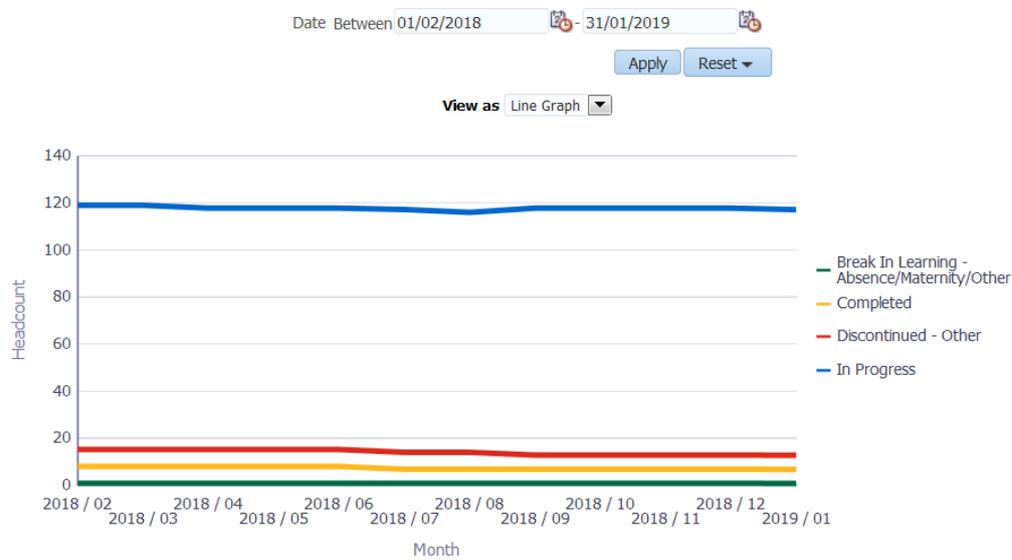
In Progress Apprentices NI Category RAG Status

Description

This analysis is designed to highlight Green where an employee's NI Category is H and age is less than 25 years, and Red where NI Category is Not H (or is NULL) and age is less than 25. By default the analysis returns employees with an apprentice status of 'In Progress' however users can select other statuses using Apprentice Status prompt available on the dashboard.

Data Items

Assignment Number	Actual End Date
Employee Number	Pay Grade
Organisation Name	Age Band
Apprentice Type	Age (Not Available to SSHR)
Apprenticeship Status	Date of Birth (Not Available to SSHR)
Start Date	NI Category is H (Yes/No)
Proposed End Date	

Example Screenshot

Apprentice Status [In Progress ▼]

[Apply] [Reset ▼]

| Assignment Number	Employee Name	Organisation Name	Apprentice Type	Status	Age Band	NI Category is H
12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	Existing Employee - New Role	In Progress	21-25	No
12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	Existing Employee - New Role	In Progress	21-25	No
12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	Existing Employee - New Role	In Progress	21-25	No
12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	Existing Employee - New Role	In Progress	21-25	No
12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	Existing Employee - New Role	In Progress	21-25	No
12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	Existing Employee - New Role	In Progress	21-25	No
12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	Existing Employee - New Role	In Progress	21-25	No
12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	Existing Employee - New Role	In Progress	21-25	No
12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	Existing Employee - New Role	In Progress	21-25	No
12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	Existing Employee - New Role	In Progress	21-25	No

Rows 1 - 10

Apprenticeships Detail

Description

The Apprenticeships detail analysis returns a list of employees undertaking Apprenticeship within the Organisation. Only employees whose EIT Apprenticeship details are populated in ESR are returned and does not include those on an Apprentice Job Role which is no longer valid. Organisations are therefore advised to record Apprenticeships data using the Assignment EIT Apprenticeship functionality available in ESR to ensure apprenticeships are being reported correctly. Please note that this tab is also available in the NHS Learning Administration Dashboard.

Data Items

Employee Number	Position Title
Assignment Number	FTE
Last Name	Contract Hours

First Name	Pay Grade
Gender	Organisation Level 1-13
Email Address	Cost Centre Org L1-12
Assignment Category	Apprentice Type
Assignment Status	Apprenticeship Level
Primary Assignment	Framework Standard
Supervisor Name	Status
Supervisor Email Address	Start Date
Staff Group	Proposed End Date
Role	Actual End Date
Occupation Code	Main Training Provider
Area of Work	EPA Centre
Location Name	Age Band
Position Number	Employee Latest Start Date
Unique Learner Number	

Prompts

Effective Date
Apprentice Type
Status
Employee Number
Assignment Number
Include Leavers for Previous Two Years (Yes: Optional)

Column Selector

Organisation Level 1-13
Cost Centre Org L1-12

Example Screenshot

Apprentice Type	Apprenticeship Level	Framework Standard	Status	Start Date	Proposed End Date	Actual End Date	Main Training Provider	EPA Centre	Unique Learner Number	Age Band	Latest Start Date	Actual Termination Date
Existing Employee - Same Role	Level 4	Management	Completed - Remain In Post	10/05/2016	26/09/2017		10005716			51-55	08/09/2008	
New Employee	Level 4	Associate Ambulance Practitioner	In Progress	30/10/2019	30/04/2021		10042155			46-50	10/03/2024	
Existing Employee - Same Role	Level 3	Business and Administration	In Progress	05/04/2022	30/09/2023		10034450			51-55	06/03/2023	
Existing Employee - Same Role	Level 2	Management	In Progress	17/12/2018	06/03/2018		10024124			51-55	01/02/2007	
Existing Employee - Same Role	Level 2	Health and Social Care	Completed - Remain In Post	24/11/2010	26/04/2012	26/04/2012	10024124			41-45	22/05/2023	
Existing Employee - Same Role	Level 3	Business and Administration	Completed - Remain In Post	12/09/2017	01/02/2019	25/01/2019	10009902			31-35	06/09/2021	
Existing Employee - Same Role	Level 4	Business and Administration	Completed - Remain In Post	07/05/2019	28/02/2021	29/01/2021	10005716			31-35	06/09/2021	
Existing Employee - Same Role	Level 3	Health - Clinical Healthcare Support	Completed - Remain In Post	03/10/2019	01/08/2021	05/10/2021	10024124			31-35	27/02/2022	
Existing Employee - Same Role	Level 4	Management	Completed - Remain In Post	06/02/2020	11/06/2021	09/03/2021	10005716			36-40	02/07/2024	
Existing Employee - Same Role	Level 4	Accounting	Completed - Remain In Post	13/09/2021	02/06/2023	04/11/2022	10009902			36-40	18/10/2023	
Existing Employee - Same Role	Level 5	Management	In Progress	14/03/2018	06/09/2019		10005716			36-40	17/07/2017	
Existing Employee - Same Role	Level 2	IT Application Specialist	In Progress	30/10/2018	22/11/2019		10024124			56-60	26/01/2004	
Existing Employee - Same Role	Level 4	Associate Project Manager	In Progress	20/06/2018	12/06/2020		10005716			31-35	04/09/2017	
Existing Employee - Same Role	Level 3	Management	Completed - Remain In Post	19/10/2017	12/04/2019		10005716			36-40	05/05/2017	

CRS Details Tab

Description

This analysis provides employes CRS Details for core users and is not available to self-service users.

Prompts

Effective Date

Data Items

Employee Number	NHS CRS Preferred Smartcard Display Name
Assignment Number	NHS CRS Registration Authority UUID
Last Name	NHS CRS Authentication Date
First Name	e-GIF and NHS CRS Status
Title	CRS Position Name 1
NI Number	CRS Position Description 1
Email	CRS Position Name 2
Supervisor	CRS Position Description 2
Supervisor Employee Number	CRS Position Name 3
Organisation Name	CRS Position Description 3
Org L1-13	CRS Position Name 4
Org Cost Centre 1-12	CRS Position Description 4
Location	CRS Position Name 5
Position Number	CRS Position Description 5
Position Title	CRS Position Name 6
Assignment Category	CRS Position Description 6
Assignment Status	CRS Position Name 7
FTE	CRS Position Description 7
Staff Group	CRS Position Name 8
Role	CRS Position Description 8
Person Type	Date of Birth (Not returned in SSHR)

Example Screenshot

Role	Person Type	NHS CRS Preferred Smartcard Display Name	NHS CRS Registration Authority UUID	NHS CRS Authentication Date	e-GIF and NHS CRS Status	CRS Position Name 1	CRS Position Description 1	CRS Position Name 2	CRS Position Description 2	CRS Position Name 3	CRS Position Description 3	CRS Position Name 4	CRS Position Description 4
Clerical Worker	Employee				Not Applicable								
Analyst	Employee				Not Applicable								
Support Worker	Employee				Not Applicable	Not Applicable		Not Applicable		Not Applicable		Not Applicable	
Healthcare Scientist	Employee and Applicant				Not Applicable	Not Applicable		Not Applicable		Not Applicable		Not Applicable	
Specialty Registrar	Employee				Not Applicable	Not Applicable		Not Applicable		Not Applicable		Not Applicable	
Healthcare Science Assistant	Employee				Not Applicable	Not Applicable		Not Applicable		Not Applicable		Not Applicable	
Specialty Registrar	Employee				Not Applicable								
Specialty Registrar	Employee				Not Applicable								
Analyst	Employee				Not Applicable								
Specialty Registrar	Employee				Not Applicable	Not Applicable		Not Applicable		Not Applicable		Not Applicable	
Medical Director	Employee				Not Applicable								
Health Care Support Worker	Employee				Not Applicable	Not Applicable		Not Applicable		Not Applicable		Not Applicable	
Officer	Employee				Not Applicable	Not Applicable		Not Applicable		Not Applicable		Not Applicable	
Specialty Registrar	Employee				Not Applicable								
Officer	Employee				Not Applicable	Not Applicable		Not Applicable		Not Applicable		Not Applicable	

Supplementary Role Tab

Description

This tab by default returns a full staff list however a prompt is available to restrict to only employees with Supplementary Role(s).

Prompts

Organisation(s) (Default: None)

Staff Group(s) (Multi-select)

Assignment Category(s) (Multi-select: default: exclude Locum Bank and Honorary)

Person Type(s) (Multi-select, default: Employee, Employee and Applicant)

Employee Person Type(s) (Multi select)

Assignment Status

Occupation Code

Job Role

Pay Grade(s)

Job Sharer

Primary Assignments Only

Effective Date

Supplementary Role Only

Supplementary Role

Organisation Level 1-13

Cost Centre Org Level 1-12

Data Items

Last Name	Organisation
First Name	Org L1-13 x 4
Title	Occupation Code
Assignment Number	Pay Step Date
Employee Number	Fixed Term End Date
Position Title	Fixed Term End Reason
Role	Manager Flag
Staff Group	SSHR Admin Approval Group A
Assignment Category	SSHR Admin Approval Group B
Assignment Status	Employee Action Approved By
Primary	Supplementary Role
Contract Hours	Supplementary Role Start Date
FTE	Supplementary Role End Date
Email Address	

Example Screenshot

Fixed Term End Date	Fixed Term End Reason	Manager Flag	SSHR Admin Approval Group A	SSHR Admin Approval Group B	Employee Action Approved By	Supplementary Role	Supplementary Role Start Date	Supplementary Role End Date
		N				AfC Matching Panel Member	16/08/2018	
						Fire Marshal	12/07/2018	
						Fire Marshal	08/05/2018	
		N				Trade Union Work Place Rep	01/05/2016	
		N				Fire Marshal	25/01/2019	
		N				Fire Marshal	28/09/2018	
		Y				Internal Verifier	16/08/2018	
		N				Internal Verifier	16/08/2018	
		N				Armed Forces Reservist	03/09/2013	
		Y				AfC Matching Panel Member	16/08/2018	
		Y				Fire Marshal	25/01/2019	
		N				First Aider	01/11/2016	
		Y				Internal Verifier	16/08/2018	
		N				First Aider	11/11/2016	
		N		Administrator Actions Manager Approval	First Level Supervisor	AfC Matching Panel Member	16/08/2018	
		Y				Internal Verifier	16/08/2018	
		Y				Fire Marshal	28/11/2018	
		Y				Fire Marshal	12/07/2017	
31/08/2012		Y				Fire Marshal	12/07/1819	

Conflict of Interest Summary Tab

Description

This analysis is designed to provide the user with Conflict of Interest figures grouped by various data items such as Staff Group or Occupation Code.

View Selectors

Bar Graph (default)
Table

Column Selectors(Table View only)
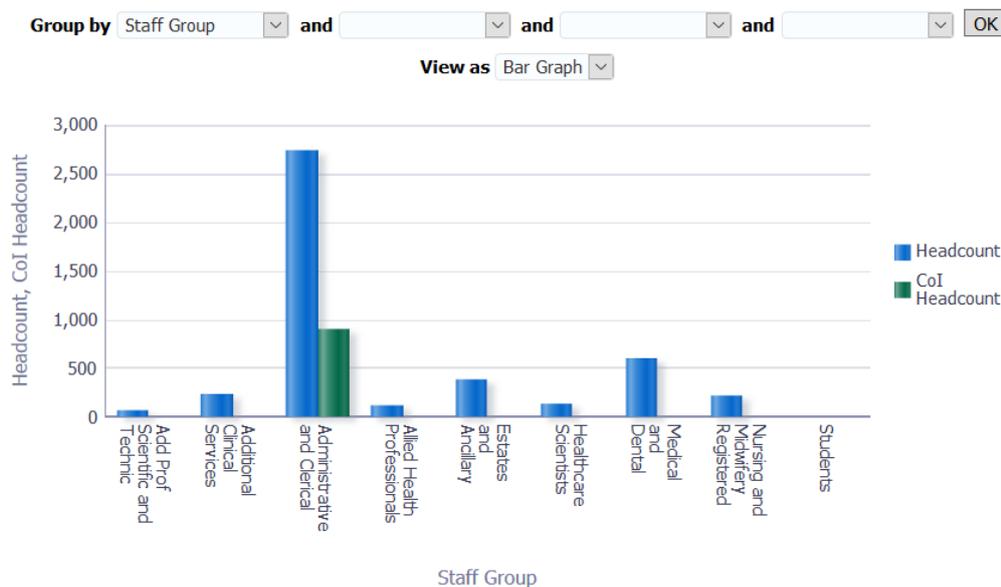
Staff Group
Occupation Code
Job Role
Organisation
Organisation L1-13

Data Items

Headcount	Consented Employees Headcount (% of CoI Headcount)
Conflict of Interest Headcount	In Date CoI Headcount
Conflict of Interest Headcount %	In Date CoI Headcount (% of CoI Headcount)
Consented Employees Headcount	

Example Screenshot

Conflict of Interest Detail Tab

Description

This tab by default returns a full staff list however a prompt is available to restrict the analysis to only employees with Conflict of Interest recorded in ESR.

Prompts

Restrict to Employees with a Conflict of Interest Record (Yes)
Restrict to Employees who have consented to have their CoI data published (Yes)
Restrict to only In Date Conflict of Interest Record (Yes)

Data Items

Employee Name	Action Taken By
Employee Number	Telephone Mobile
Assignment Number	Consent Flag
Person Type	Interest Declared
Organisation	Interest Category
Org L1-13 x 4	Interest Situation
Staff Group	Interest Description
Position Title	Comments
Role	CoI Date From
Pay Scale	CoI Date To
Work at Home Flag	Change Type
Email Address	Creation Date
Telephone Work	Created By
Supervisor Name	Last Updated Date
Supervisor Email Address	Last Updated By
Manager Action	Supplementary Role (Table inc. Supplementary Role view only)
Action Taken	Supplementary Role Start Date (Table inc. Supplementary Role view only)
Action Date	Supplementary Role End Date (Table inc. Supplementary Role view only)

View Selector

Table (Default)

Table (inc. Supplementary Role)

Example Screenshot

Consent Flag	Interest Declared	Interest Category	Interest Situation	Interest Description	Comments	CoI Date From	CoI Date To	Creation Date	Created By	Last Updated Date	Last Updated By
Y	Y	Non-financial personal interests	Hospitality	Gifts	Gifts	02/08/2005	17/06/2020	17/06/2020	000JBLOGS01|Blogs, Mr. Joe	17/06/2020	000JBLOGS01|Blogs, Mr. Joe
Y	N	I have no interests to declare					08/06/2020	08/06/2020	000JBLOGS01|Blogs, Mr. Joe	08/06/2020	000JBLOGS01|Blogs, Mr. Joe
Y	Y	Financial interests	Hospitality	Gifts	Gifts	08/06/2020	08/06/2020	08/06/2020	000JBLOGS01|Blogs, Mr. Joe	08/06/2020	000JBLOGS01|Blogs, Mr. Joe
Y	Y	Indirect interests	Hospitality	Gifts	Gifts	08/06/2020	08/06/2020	08/06/2020	000JBLOGS01|Blogs, Mr. Joe	08/06/2020	000JBLOGS01|Blogs, Mr. Joe
Y	Y	Non-financial personal interests	Hospitality	Gifts	Gifts	08/06/2020	08/06/2020	08/06/2020	000JBLOGS01|Blogs, Mr. Joe	08/06/2020	000JBLOGS01|Blogs, Mr. Joe
Y	Y	Financial interests	Hospitality	Gifts	Gifts	09/06/2020	09/06/2021	09/06/2020	000JBLOGS01|Blogs, Mr. Joe	09/06/2020	000JBLOGS01|Blogs, Mr. Joe
Y	Y	Non-financial professional interest	Hospitality	Gifts	Gifts	17/06/2020	16/06/2021	17/06/2020	000JBLOGS01|Blogs, Mr. Joe	17/06/2020	000JBLOGS01|Blogs, Mr. Joe
Y	N	I have no interests to declare				01/04/2019	31/03/2020	27/05/2020	000JBLOGS01|Blogs, Mr. Joe	08/06/2020	000JBLOGS01|Blogs, Mr. Joe
Y	Y	Non-financial personal interests	Hospitality	Gifts	Gifts	01/04/2020	31/03/2021	08/06/2020	000JBLOGS01|Blogs, Mr. Joe	08/06/2020	000JBLOGS01|Blogs, Mr. Joe
Y	N	I have no interests to declare				08/06/2020		08/06/2020	000JBLOGS01|Blogs, Mr. Joe	08/06/2020	000JBLOGS01|Blogs, Mr. Joe
Y	Y	Indirect interests	Hospitality	Gifts	Gifts	08/06/2020		08/06/2020	000JBLOGS01|Blogs, Mr. Joe	08/06/2020	000JBLOGS01|Blogs, Mr. Joe
Y	N	I have no interests to declare				01/04/2020		23/04/2020	000JBLOGS01|Blogs, Mr. Joe	23/04/2020	000JBLOGS01|Blogs, Mr. Joe
Y	N	I have no interests to declare				16/06/2020	15/06/2021	16/06/2020	000JBLOGS01|Blogs, Mr. Joe	16/06/2020	000JBLOGS01|Blogs, Mr. Joe
Y	N	I have no interests to declare				08/06/2020		08/06/2020	000JBLOGS01|Blogs, Mr. Joe	08/06/2020	000JBLOGS01|Blogs, Mr. Joe
Y	Y	Financial interests	Hospitality	Gifts	Gifts	08/06/2020		08/06/2020	000JBLOGS01|Blogs, Mr. Joe	08/06/2020	000JBLOGS01|Blogs, Mr. Joe

Flexible Working

Description

The Flexible Working page is made up of a number of analyses designed to provide a summary and detail view of the Flexible Working area of Employee Relations in ESR.

Prompts

Date Between

Staff Group

Assignment Status
* Restrict to Open Cases Only?
Primary Assignment Only
Restrict to Requests Starting > X Days Ago
Where X is (Days)

Summary

Available are two analyses designed to enable users to report the number of Flexible Working requests grouped by a number of workforce fields such as Organisation Levels, Organisation, Staff Group and various protected characteristics. Also returned is the number and percentage of those requests that have been accepted. The other summary analysis returns employees where more than one Flexible Working request has been submitted.

Prompts

Organisation(s)
Staff Group(s)
Assignment Category
Person Type(s)
Employee Person Type(s)
Assignment Status
Occupation Code
Job Role(s)
Pay Grade(s)
Job Sharer
Primary Assignment Only
Date Between
* Restrict to Open Cases Only? (Yes/no)

Column Selectors x 1

Organisation Name
Organisation Level 1-13
Staff Group
Flexible Working Type
Various Protected Characteristics (only available to HR and BI Admin users)

Data Items

Org Levels 1-13	No. of Requests (Summary 2)
Organisation Name	Employee Number (Summary 2)
Gender Ethnic	Employee Name (Summary 2)
Disability	Staff Group (Summary 2)
Sexual Orientation	Role (Summary 2)
Religious Belief	
Flexible Working Type (Summary 1)	
Count of Flexible Working Requests (Summary 1)	
Accepted Requests (Summary 1)	
% of Approved Requests (Summary 1)	

Detail

This analysis is designed to provide a detail view of the Flexible Working area of Employee Relations

Column Selectors x 5

Organisation Name

Organisation Level 1-13

Various Protected Characteristics (only available to HR and BI Admin users)

Data Items

Employee Number	Application Complete
Employee Name	Requested Change
Staff Group	Other Applications Made
Role	Meeting 1 Date
Position Name	Within 28 Days
Pay Grade	Represented at Meeting 1 By
Headcount	Meeting 2 Date
FTE	Represented at Meeting 2 By
Type	Decision Required By
Process Start Date	Decision Date
Case Reference Number	Outcome
Position 1	Grounds for Rejection
Position 2	Effective Date of Change
Position 3	Date Decision Letter Sent
HR Contact	Process End Date
Line Manager Contact	Calendar Days Open
Date Application Received	Meeting 1 Date

Example Screenshot

Benchmarking

Description

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

Calculations

Flexible Working Approvals %:

Benchmarking Count of Employees with Flexible Working Request and Flexible Working Outcome of 'Accepted' / Benchmarking Count of Employees with Flexible Request * 100

Non-Benchmarking Flexible Working Approvals %:

Count of Employees with Flexible Working Request and Flexible Working Outcome of 'Accepted' / Count of Employees with Flexible Request * 100

Prompts

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

Summary

Description

This analysis provides a summary view of Flexible Working Approvals % 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	Flexible Working Approvals % at Manager / Team level (Supervisor hierarchy apply)
Trust	Flexible Working Approvals % at Trust level
Region	Flexible Working Approvals % at Region level
Country	Flexible Working Approvals % at Country level
National	Flexible Working Approvals % 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 Flexible Working Approvals % benchmarking figures at Trust, Region, Country and National levels, w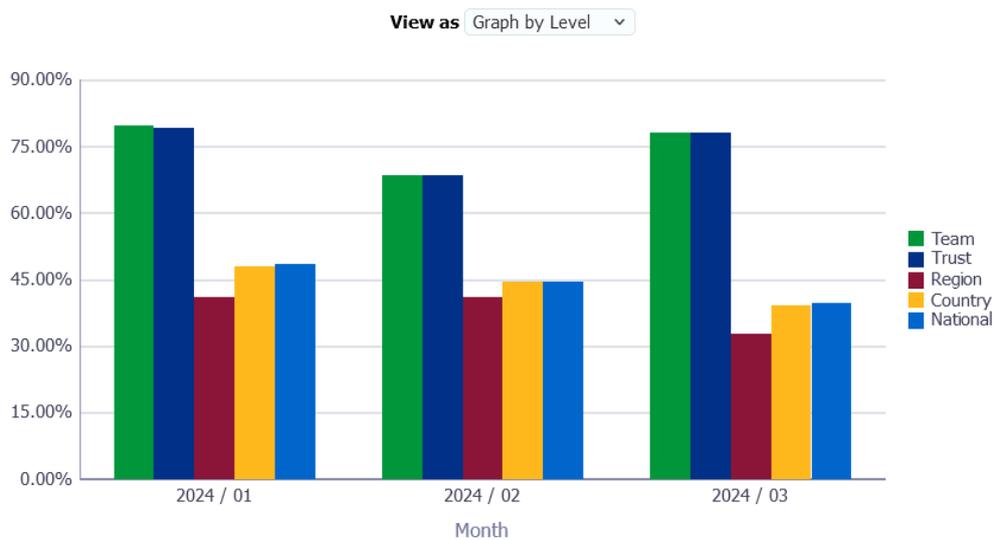hich can be compared against figures at Manager / Team level using the Non-Benchmarking Detail analysis available within the page.

Data Items

Title	Description
Month	
Trust	Flexible Working Approvals % at Trust level
Region	Flexible Working Approvals % at Region level
Country	Flexible Working Approvals % at Country level
National	Flexible Working Approvals % at National level

Example Screenshot

	2023 / 01				2023 / 02				2023 / 03			
	Trust	Region	Country	National	Trust	Region	Country	National	Trust	Region	Country	National
Annualised Hours	0.00%	16.67%	37.04%	37.04%	100.00%	46.67%	60.00%	58.06%		100.00%	61.54%	61.54%
Condensed Working Hours	33.33%	58.82%	65.11%	65.12%	100.00%	51.52%	59.02%	60.16%	100.00%	65.00%	55.98%	56.03%
Flexitime	50.00%	55.22%	47.52%	47.35%	80.00%	56.25%	52.36%	52.36%	100.00%	55.34%	47.33%	47.53%
Home Working		70.00%	46.03%	46.88%		54.17%	57.29%	57.14%		47.62%	59.18%	59.18%
Job Share		66.67%	66.67%	66.67%		100.00%	100.00%	100.00%		100.00%	100.00%	100.00%
Other Flexible Working	78.57%	57.43%	62.05%	61.89%	85.71%	54.35%	59.39%	59.32%	71.43%	50.93%	58.54%	58.58%
Part Time	83.33%	56.58%	63.44%	63.16%	57.14%	54.41%	65.41%	66.43%	75.00%	51.28%	64.06%	65.57%
Phased Retirement		0.00%	62.50%	62.50%	100.00%	100.00%	62.50%	62.50%		75.00%	83.33%	76.92%
Staggered Working Hours	100.00%	66.67%	85.71%	85.71%		100.00%	76.92%	78.57%		60.00%	70.59%	70.59%
Team Self Rostering		0.00%	0.00%	0.00%		0.00%	33.33%	33.33%		0.00%	0.00%	0.00%

⬆⬆⬇⬆ Rows 1 - 10

Refresh - Print - Export - Add to Briefing Book

Non-Benchmarking Detail

Description

This analysis provides a detail view of Flexible Working Approvals % 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	Flexible Working Approvals % at Manager / Team level (Supervisor hierarchy apply)

Example Screenshot

	2023 / 01	2023 / 02	2023 / 03
	Team	Team	Team
Annualised Hours	0.00%	100.00%	
Condensed Working Hours	33.33%	100.00%	100.00%
Flexible Retirement		100.00%	
Flexitime	50.00%	80.00%	100.00%
Other Flexible Working	76.92%	85.71%	71.43%
Part Time	83.33%	57.14%	75.00%
Part-Year Working	100.00%		50.00%
Staggered Working Hours	100.00%		

Refresh - Print - Export - Add to Briefing Book