

NHS ELECTRONIC STAFF RECORD

ESR-NHS0240 - GUIDE TO ESRBI WORKFORCE INFORMATION VERIFIER DASHBOARD

Information Classification: PUBLIC

Owner:	Development and Operations Team
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Approvals:

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DOCUMENT CONTROL

CHANGE RECORD

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

REVIEWERS

Name	Position
Charlotte Barnett	Assistant Development Advisor - BI
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DISTRIBUTION

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Design Assumptions

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

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

Examples

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

Workforce Information Verifier Dashboard

Description

The Occupation Code and Job Role Verifier Dashboard has been developed to help identify possible discrepancies between Occupation Code, Staff Group/Job Role and Pay Band that may exist within Assignments and their related Positions held in the ESR.

Allocation

This dashboard is available to the following URPs:

XXX BI Administration
XXX HR Administration
XXX HR Administration (With RA)
XXX HR Management
XXX Local Workstructures Administration

Summary Tab

Prompts

Organisation
Staff Group
Job Role
Occupation Code
Hiring Status
Include Positions with no employees (Yes/No Default: No)

Job Role / Pay Band Combinations

Description

This analysis is designed to show whether a combination of Job Role and Pay Band is likely to be compatible. The combination is given either a Red, Amber or Green status.

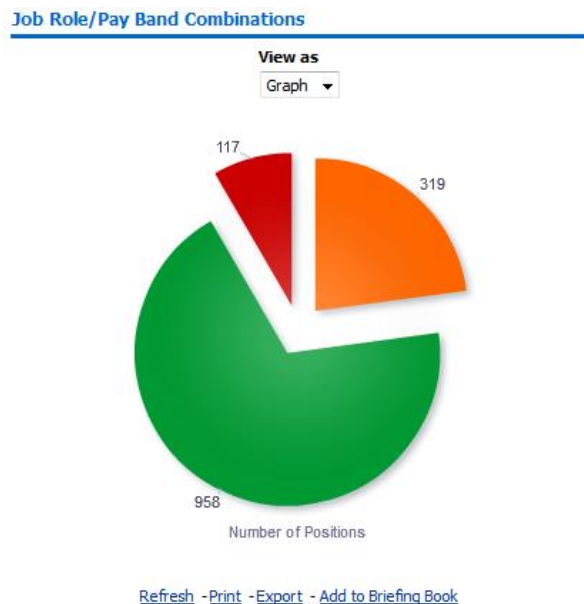
Data Items

Count of Positions	
Job Role and Pay Band Status	

View Selectors

View as Pie Graph (default) or Table

Example Screenshot



Actions

Click -> By Positions Tab

Job Role / Occupation Code Combinations

Description

This analysis is designed to show whether a combination of Job Role and Occupation Code is likely to be compatible. The combination is given either a Red, Amber or Green status.

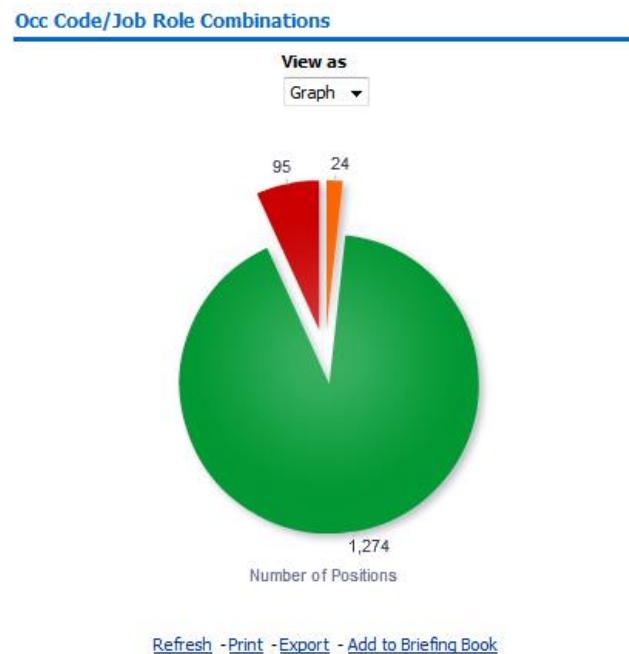
Data Items

Count of Positions	
Job Role and Occupation Code Status	

View Selectors

View as Pie Graph (default) or Table

Example Screenshot



Actions

Click -> By Positions Tab

Pay Band / Occupation Code Combinations

Description

This analysis is designed to show whether a combination of Pay Band and Occupation Code is likely to be compatible. The combination is given either a Red, Amber or Green status.

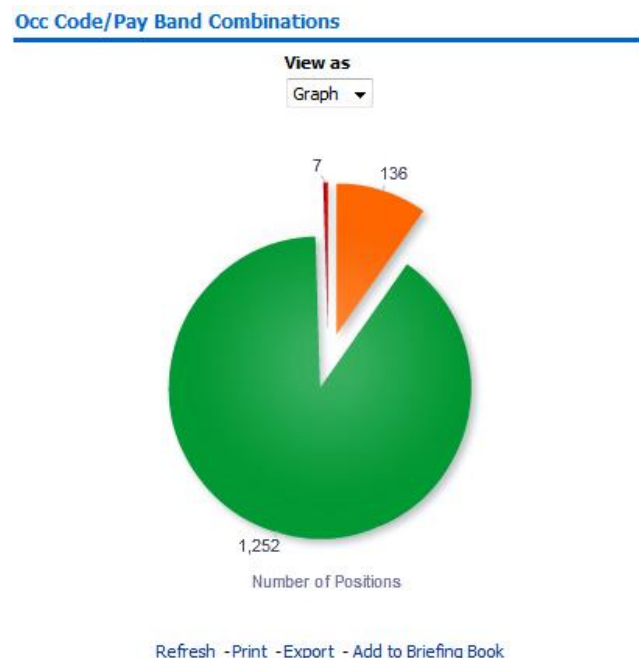
Data Items

Count of Positions	
Pay Band and Occupation Code Status	

View Selectors

View as Pie Graph (default) or Table

Example Screenshot



Actions

Click -> By Positions Tab

By Positions Tab

Description

This tab is designed to provide the user with a list of positions and whether the combination of Job Role, Pay Band and Occupation Code is likely to be compatible. The combination is given either a Red, Amber or Green status

Prompts

Organisation

Staff Group

Job Role

Occupation Code

Hiring Status

Data Items

Number of Assignments	Position Number
Organisation	Position Title
Occupation Code	Staff Group
Role	Pay Grade
Pay Grade Description	Occ Code & Pay Band
Job Role & Occ Code	Job Role and Pay Band

Conditional Formatting

RAG Status set against Occ Code & Pay Band, Job Role & Occ Code and Job Role & Pay Band fields.

Example Screenshot

Organisation(s) (All Column Values) Staff Group(s) (All Column Values) Job Role(s) (All Column Values) Occupation Code(s) (All Column Values) [Next](#) [Apply](#) [Reset](#)

Please note: The number of rows displayed in this table may not equal the number of positions shown in the summary analysis. Additional rows may be shown where an employee's assignment has been altered.

Analysis By Position

Number of Assignments	Position Number	Organisation	Position Title	Occupation Code	Staff Group	Role	Pay Grade	Pay Grade Description	Occ Code & Pay Band	Job Role & Occ Code	Job Role & Pay Band
101	84608	504 Ward 10	Staff Nurse Band 6	N6A	Nursing and Midwifery Registered	Staff Nurse	XR06	Review Body Band 6	Green	Green	Green
98	84278	504 Ward 9	Staff Nurse Band 5	N6A	Nursing and Midwifery Registered	Staff Nurse	XR05	Review Body Band 5	Green	Green	Green
45	84566	504 Ward 9	Health Care Asst Band 3	N7A	Nursing and Midwifery Registered	Enrolled Nurse	XR03	Review Body Band 3	Red	Green	Red
36	84696	504 Trust Board	Director of Nursing	N0A	Nursing and Midwifery Registered	Director of Nursing	CR01	A & C Grade 10	Green	Green	Green
32	236112	504 Anaesthetics	Speciality Registrar Core Training	091	Medical and Dental	Speciality Registrar	MN39	Speciality Registrar Core training	Green	Green	Green
28	236111	504 Anaesthetics	Speciality Registrar	091	Medical and Dental	Speciality Registrar	MN37	Speciality Registrar	Green	Green	Green
21	84137	504 Ward 12	Health Care Asst Band 3	N7B	Nursing and Midwifery Registered	Enrolled Nurse	XR03	Review Body Band 3	Red	Green	Red
17	237242	504 Psychology	Clinical Psychologist	SAL	Add Prof Scientific and Technic	Clinical Psychologist	XR09	Review Body Band 8 - Range 8	Green	Green	Green
17	84054	504 Ward 12	Sister/Charge Nurse Band 7	N6B	Nursing and Midwifery Registered	Sister/Charge Nurse	XR07	Review Body Band 7	Green	Green	Green
17	84184	504 Warwick Midwifery Team	Midwife Band 7	N2C	Nursing and Midwifery Registered	Midwife	XR07	Review Body Band 7	Green	Green	Green
16	84081	504 Ward 7	Health Care Asst Band 1	N9A	Additional Clinical Services	Health Care Support Worker	XR01	Review Body Band 1	Red	Green	Amber

By Individual Assignments Tab

Description

This tab is designed to provide the user with a list of assignments and whether the combination of Job Role, Pay Band and Occupation Code is likely to be compatible. The combination is given either a Red, Amber or Green status

Data Items

Assignment Number	Employee Name
Organisation	Position Title
Occupation Code	Staff Group
Role	Pay Grade
Pay Grade Description	Occ Code & Pay Band
Job Role & Occ Code	Job Role and Pay Band
Position Number	Area of Work

Conditional Formatting

RAG Status set against Occ Code & Pay Band, Job Role & Occ Code and Job Role & Pay Band fields.

Example Screenshot

Organisation(s)

(All Column Values)

Staff Group(s)

(All Column Values)

Job Role(s)

(All Column Values)

Occupation Code(s)

(All Column Values)

Next

Apply

Reset