

NHS ELECTRONIC STAFF RECORD

ESR-NHS0240 - GUIDE TO ESRBI WORKFORCE INFORMATION VERIFIER DASHBOARD

Information Classification: PUBLIC

Owner:	Development and Operations Team
Author:	Matt Madya
Creation Date:	May 2016
Last Updated:	October 2023
Version:	6.0

Approvals:

Name	Lee Pacey
Title	Director of Development & Operations

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

REVIEWERS

Name	Position
Charlotte Hampton	Assistant Development Advisor - BI
Chris Holroyd	Development Advisor - BI
James Haddon	Senior Development Advisor - BI, Reporting & Data Analysis
Sam Wright	Development Advisor - Workforce Information & Quality
Kieron Walsh	Senior Development Advisor - Workforce Information & Quality

DISTRIBUTION

Copy No.	Name	Location
1	Library Master	Project Library
2		

CONTENTS

DOCUMENT CONTROL	2
CHANGE RECORD	2
REVIEWERS	2
DISTRIBUTION	2
CONTENTS	3
Design Assumptions.....	4
Examples	4
Workforce Information Verifier Dashboard.....	5
Job Role / Pay Band Combinations	6
Job Role / Occupation Code Combinations.....	7
Pay Band / Occupation Code Combinations	8
By Positions Tab	8
By Individual Assignments Tab.....	9

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

Prompts

Organisation

Staff Group

Job Role

Occupation Code

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.

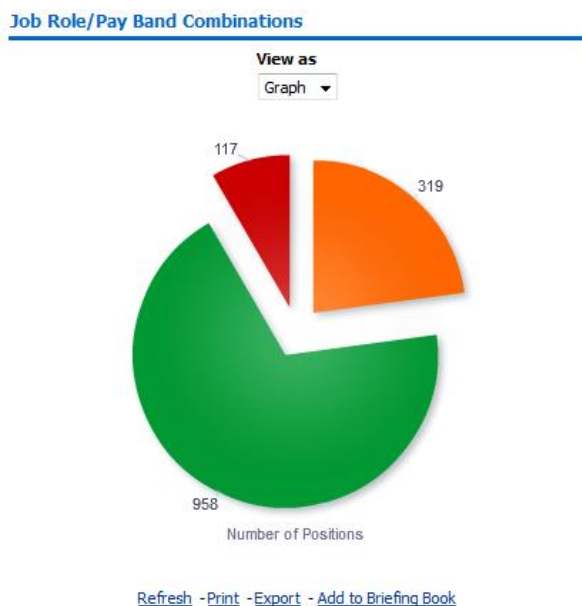
Data Items

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

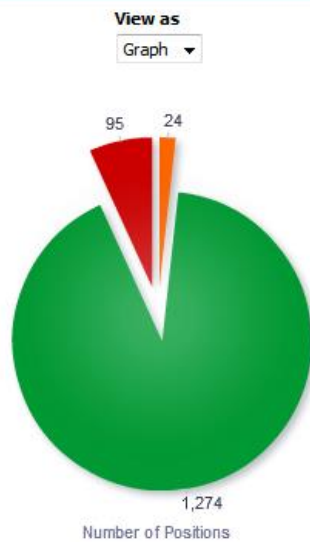
Count of Positions	
Job Role and Occupation Code Status	

View Selectors

View as Pie Graph (default) or Table

Example Screenshot

Occ Code/Job Role Combinations



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

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.

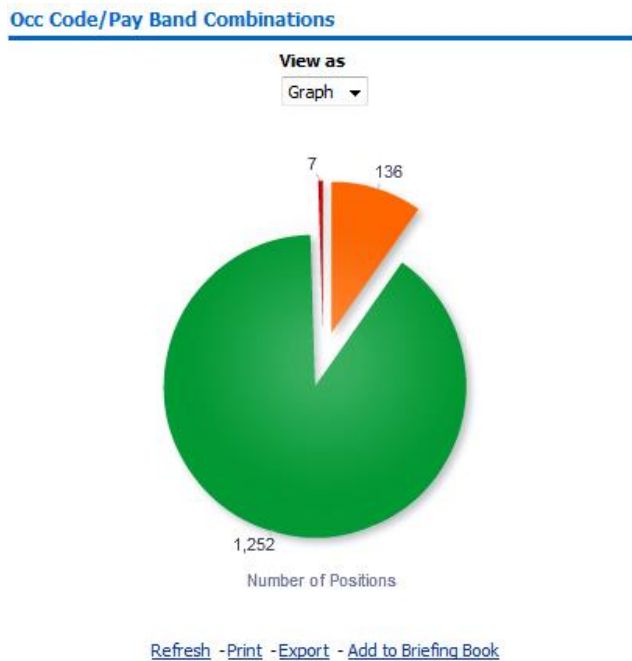
Data Items

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

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

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	CR91	A & C Grade 10	Green	Green	Green
32	236112	504 Anaesthetics	Speciality Registrar Core Training	D91	Medical and Dental	Speciality Registrar	MN39	Speciality Registrar Core training	Green	Green	Green
28	236111	504 Anaesthetics	Speciality Registrar	D91	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 B	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)
 Staff Group(s)
 Job Role(s)
 Occupation Code(s)

Analysis By Assignment

Assignment Number	Organisation	Employee Name	Staff Group	Role	Occupation Code	Position Title	Position Number	Pay Grade	Pay Grade Description	Occ. Code & Pay Band	Job Role & Occ. Code	Job Role & Pay Band
20055144	504 Psychology	Jackson05, Mr. Sam Simon	Add Prof Scientific and Technic	Clinical Psychologist	SAL	Clinical Psychologist	237250	VR09	Review Body Band 8 - Range B	Green	Green	Green
20055145	504 Human Resources	Edwards05, Mr. Samuel (Sam)	Administrative and Clerical	Senior Manager	G0A	Special Project Education Consultant	84328	WSMA	Senior Managers	Amber	Green	Amber
20055147	504 Psychology	Khan14, Mrs. Sinita	Add Prof Scientific and Technic	Clinical Psychologist	SAL	Clinical Psychologist	237242	VR09	Review Body Band 8 - Range B	Green	Green	Green
20055148	504 Ward 10	Dixon03, Mr. Simon	Nursing and Midwifery Registered	Sister/Charge Nurse	NGA	Sister/Charge Nurse G - Ward 10	84639	NP46	Nurse - Scale G	Amber	Green	Amber
20055149	504 Trust Board	Dalziel15, Dr Naureen	Administrative and Clerical	Finance Director	G0A	Director of Finance	84476	WSMA	Senior Managers	Amber	Green	Amber
20055150	504 Trust Board	Leese12, Mrs. Vivian	Nursing and Midwifery Registered	Director of Nursing	NGA	Director of Nursing	84696	AK11	ASC Scale B (Frozen Bonus)	Amber	Green	Amber
20055151	504 Ward 2	Tuller04, Mrs. Lily Tara	Nursing and Midwifery Registered	Staff Nurse	NGA	Staff Nurse Band 5	84351	VR05	Review Body Band 5	Green	Green	Green
20055152	504 Ward 7	Ayres14, Mrs. Pamela	Nursing and Midwifery Registered	Staff Nurse	NGA	Staff Nurse Band 6	84872	VR06	Review Body Band 6	Green	Green	Green
20055153	504 Ward 9	Steele07, Mrs. Kerry	Nursing and Midwifery Registered	Staff Nurse	NGA	Staff Nurse Band 5	84278	VR05	Review Body Band 5	Green	Green	Green
20055154	504 Ward 9	Steele03, Mrs. Kerry	Nursing and Midwifery Registered	Staff Nurse	NGA	Staff Nurse Band 5	84278	VR05	Review Body Band 5	Green	Green	Green
20055155-2	504 Ward 1	Craddock14, Mr. Stuart	Nursing and Midwifery Registered	Sister/Charge Nurse	NGA	Sister/Charge Nurse Band 8	84157	VR08	Review Body Band 8 - Range A	Amber	Green	Amber